



STUDENT WELCOME PACKET



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Welcome to Young Investors Society! (YIS) We are so excited to have you join us on this Financial Literacy journey! The student welcome packet should help you as you navigate your year with YIS. As always, if you have any questions, please reach out to our Chief Operating Officer, Christine Tobin at Ctobin@yis.org

Greetings!

I am the founder of Young Investors Society ("YIS").

Young Investors Society provides quality financial literacy education and programs to students from all backgrounds and socio-economic levels. We aim to teach finance and investing skills that will last a lifetime and empower students to take control of their financial future. YIS programs **promote financial literacy, teach personal finance skills, teach sound investment fundamentals, and provide leadership and investment management experience** for high-school-age youth.

I started YIS because of a letter that I received from a young man named Edgar. After visiting his school in inner-city Los Angeles, and leading the class in an engaging discussion about the stock market and how investors pick companies to invest in, he wrote me the following:

"It's awesome to have someone give their time to teach us. Adults don't really do that anymore, especially for teenagers like me. You may think this is a joke, but your 45-minute presentation has changed my goals for my life. It has given me something to strive for."

That letter burned in my soul. Edgar's statement that "adults don't really do that anymore" became a personal challenge for me that led me to start YIS.

Why does YIS exist? Because we believe financial education in the United States and abroad is inadequate at best. It does not begin to prepare students to manage their personal finances, let alone make responsible investment decisions in adulthood. **According to JumpStart, two-thirds of U.S. high-school students fail a basic financial literacy test.**¹

YIS wants to change that. We offer a multi-pronged approach which includes school-sponsored investment clubs; beginning and advanced courses that teach personal finance & investment basics; annual stock pitch competitions; and our very popular Dollar-a-Day Challenge, as well as our CYIA® Designation. Our curriculum is written by some of the brightest minds in the industry and then packaged into engaging lesson plans and video content. We make the process **turn-key for teachers**, even those with little or no investment background. Simply put, we believe there is no other investment program out there as hands-on and as impactful to kids as YIS. We help kids **learn**, then **invest**, and then **inspire** others to do the same.

I thank you in advance, and I look forward to working with you as we invest in the future generation!

With best regards,



¹ NFEC, National Financial Literacy Test Results, February 2014.



James Fletcher, CFA

Young Investors Society is a 501(c)(3) non-profit organization, which was founded by James Fletcher, CFA, portfolio manager at APG Asset Management. It is backed by Board Members with professional experience at prestigious academic institutions and leading asset management firms, including Harvard, Pepperdine University, the CFA Institute, Fidelity, Google, and Bank of America Merrill Lynch.

Introduction to Young Investors Society

Who We Are:

Young Investors Society (YIS) is a global 501(c)(3) nonprofit organization committed to delivering high-quality financial literacy and investing education to high school students of all backgrounds. With a strong emphasis on underserved and underrepresented communities, YIS fosters lifelong habits of saving and investing as a means to break the cycle of generational poverty and promote financial independence.

To learn more, please visit our website at www.YIS.org. Watch our Overview Video: [YIS Overview Video](#)

Our Mission and Impact

Financial illiteracy remains a critical issue affecting millions of young people, often leading to long-term consequences such as debt, limited economic opportunity, and intergenerational poverty. YIS addresses this urgent need by offering free, high-quality financial education and real-world investing experiences to high school students worldwide.

Our programs are designed to be engaging, accessible, and impactful, equipping students with essential skills in budgeting, saving, investing, and financial planning. These tools empower youth to make informed decisions, establish healthy money habits, and build a path toward long-term financial well-being.

YIS offers a comprehensive curriculum of over 40 engaging, 45-minute lessons covering investing, personal finance, economics, and accounting. Each lesson includes a downloadable lesson plan, an interactive presentation, and a quiz to reinforce learning. The curriculum also features interactive online activities, peer-led discussions, and curriculum support videos. Dynamic video content accompanies each lesson and is available on our [YouTube channel](#), including this sample [support video](#).

Access Initiative: Expanding Opportunities for Underserved Students

YIS is committed to expanding opportunities by focusing on under-resourced schools and partners through our Access Initiative. This effort ensures that students from economically disadvantaged backgrounds have equal access to our financial literacy programs, with a strong emphasis on personal finance education and mentorship. Through this initiative, students receive not only the tools to manage their money but also the guidance and support of mentors to help them apply these lessons in their own lives. Currently, 20% of the students served by YIS participate through the Access Initiative. Learn more about the [Access Initiative](#).

Cost and Accessibility

YIS programs are provided at no cost to students, educators, or schools. All curriculum materials, resources, and support are 100% free, ensuring that financial education is accessible to all, regardless of socioeconomic status.

Conclusion:

Investors can change the world!



We believe that when youth are empowered by financial literacy, they can become outstanding investors in companies, societies, and themselves, thus achieving financial independence and breaking the cycle of generational poverty.

YIS Student Experience (Pathways)

School Sponsored Clubs:

Students will have the opportunity to establish a Young Investors Society (YIS) chapter at their school as part of the official school club experience. Chapters typically meet on campus during lunch or after school for 45–60 minutes each week. In a fun and supportive team environment, guided by a faculty advisor, students will build life-changing habits around saving and investing for the future.

Each YIS chapter begins with core lessons in personal finance and gradually advances to more complex topics in investing. Students will participate in hands-on activities, complete lessons using the MyYIS Portal, and engage with peers. The club experience also fosters leadership development and builds essential life skills such as discipline, patience, and collaboration.

In addition, members of school-sponsored clubs are eligible to participate in all YIS programs, including national competitions, certifications, and service opportunities.

Independent Student Learner:

Young Investors Society is open to ***all*** students; no club or school affiliation is required to get started! Whether you're homeschooled or simply prefer to learn on your own, YIS offers a flexible, self-paced learning experience that fits your schedule. The program is fully web-based and accessible anytime, anywhere in the world from your phone, tablet, or computer.

Independent students have access to all core lessons, supported by engaging YouTube videos that reinforce key financial concepts. You'll also have the opportunity to participate in our signature programs, including national competitions, certifications, and service opportunities.

YIS is designed to be turn-key and adaptable to your learning style, so you can build real-world investing skills and lifelong financial habits on your terms.

Program Pathway:

As a registered Young Investors Society (YIS) student, you're eligible to participate in all YIS programs and events, regardless of whether you're part of a school club or learning independently.

Throughout the year, YIS offers exciting opportunities to apply your knowledge, build new skills, and connect with a global network of like-minded students. Programs and events include:

- **Dollar-A-Day Challenge**
- **Fireside Chats with Industry Professionals**
- **Finance Knowledge Bowl**
- **Global Stock Pitch Competition**
- **Global Youth Investment Summit**
- **CYIA® Designation and more!**



Participation is simple; just register for the event to unlock the full experience. Whether you're passionate about investing, personal finance, or leadership, there's a YIS event for you.

Teacher-Guided Learning:

In many schools, teachers lead YIS programs by integrating lessons directly into the classroom experience. Educators can select from a range of YIS courses and use downloadable lesson plans to deliver engaging, real-world financial education during class time.

To reinforce key concepts, teachers often supplement lessons with YIS's library of short, easy-to-follow YouTube videos, perfect for visual and interactive learning.

If your teacher is guiding your YIS experience, we've developed a set of **best practices** that many schools find helpful for getting started and keeping students on track.

Whether you're learning in a classroom or on your own, YIS is designed to be flexible, engaging, and impactful for all types of learners.

Best Practices for a Successful YIS Club Experience

Young Investors Society (YIS) clubs are an exciting and empowering way to bring real-world finance and investing lessons to life! Here's how many schools structure their clubs for a fun, impactful experience:

Club Structure & Leadership

- Most YIS chapters operate as **after-school clubs**, meeting **once a week for 45–60 minutes**.
- Students take the lead! Most clubs elect a **Club President, Vice President, Secretary**, and other leadership roles to help organize and energize the meetings.
- While a teacher advisor often supports the lesson delivery, clubs are **student-led whenever possible**, encouraging leadership, teamwork, and public speaking.

Meeting Format

A typical YIS club meeting includes a mix of discussion, learning, and fun! Here's a suggested agenda:

✔ Idea of the Week (5 mins)

Students present quick takes on current market news or trends (e.g., "What does Apple's new AI strategy mean for investors?").

✔ Review Pre-Meeting Assignment (5 mins)

Discuss assigned articles, videos, or presentations to set the stage for the day's topic.

✔ Main Lesson (20 mins)

Dive into the core personal finance or investing concepts using the YIS lesson plan and videos.

✓ **Group Activity (15 mins)**

Engage in a hands-on activity to apply what you've learned; this could be a debate, game, or team challenge.

✓ **Wrap-Up (5 mins)**

Recap the key takeaways and preview what's coming next.

Assignments That Bring Concepts to Life

To make the most of your club experience, students are encouraged to complete simple tasks outside of meetings:

✦ **Pre-Meeting Assignments:**

- Watch a short video or read an article
- Prepare a short "Idea of the Week" presentation
- Research a company or market trend

✦ **Post-Meeting Assignments:**

- Complete a quick quiz or worksheet
- Apply concepts to your stock pitch project
- Reflect on what you learned

Curriculum

What You'll Learn with Young Investors Society

Young Investors Society (YIS) offers an exciting, real-world investing curriculum created by some of the **top investors in the world!** With over **45 ready-to-use lessons**, you'll build the knowledge and confidence to take control of your financial future.

Topics You'll Explore:

- Personal finance & the power of saving
- Investing & stock market basics
- Business strategy & entrepreneurship
- Economics, psychology, ethics, and more!

Each lesson includes:

- ✓ Interactive activities
- ✓ Peer-led presentations
- ✓ Short videos to reinforce concepts
- ✓ Fun challenges that connect to real-world companies

Choose Your Own Path



Whether you're just getting started or already a stock market whiz, YIS offers **self-paced courses** so you can learn at your own comfort and skill level.

You'll not only **gain valuable financial skills**, but you'll also be ready to **compete in global challenges**, take on leadership roles, and build habits that last a lifetime.

Money Skillz Bootcamp: Intro to Personal Finance

Welcome to the perfect place to start your financial journey!

Money Skillz Bootcamp is a beginner-level course created by Young Investors Society for **students in 7th–12th grade** who want to build a strong foundation in personal finance, saving, and investing.

In just **10 self-paced hours**, you'll explore:

- ✓ **The 7 Golden Rules of Investing**
- ✓ **The 5 Steps to Financial Freedom**
- ✓ **How to earn, save, and budget wisely**
- ✓ **How to bank and invest with confidence**
- ✓ **Career planning and future goals**

This **flexible online course** can be started any time and is ideal for organization partners, independent learning, homeschool settings, and in all after-school program settings. It's a great way to prepare for all the advanced lessons and competitions YIS has to offer!

Investing Curriculum Series

Take your financial knowledge to the next level!

After completing the Money Skillz Bootcamp, students are ready to dive into the Investing Curriculum Series—a powerful collection of lessons designed to build a deeper understanding of the stock market and prepare students for real-world investing.

What's Included:

7 Core Investing Units

2 Advanced Investing Units (required for the Stock Pitch Competition)

30+ total lessons to guide students from the basics to advanced stock analysis

What You'll Learn:

- How the stock market works
- Key investment principles
- How to identify a great business
- Understanding stock value and intrinsic value
- Building a strong investment thesis
- The language of finance
- How to calculate and use P/E Ratios

Real-World Application:

Students will write and record a stock pitch presentation on a company of their choice, applying what they've learned through the curriculum. Top students will be invited to compete in the YIS Global Stock Pitch Competition at the Global Youth Investment Summit in NYC.

Each Lesson Includes:

- Clear objectives and Common Core alignment
- Engaging handouts and activities
- Practice problems with answer keys
- Prezi presentations and video resources
- Links to expert content on the YIS YouTube Channel

Whether you're preparing for the Global Stock Pitch Competition or just want to understand how to invest wisely, this series is your step-by-step guide to becoming a confident investor.

LESSON PLAN OUTLINE**MONEY SKILLZ BOOTCAMP: Intro to Personal Finance–10 weeks**

- **5 STEPS TO FINANCIAL FREEDOM**
 - Lesson 1 – Earning Money
 - Lesson 2 – Saving Money
 - Lesson 3 – Developing a Financial Plan
 - Lesson 4 – Investing and The Power of Compounding
 - Lesson 5 – Avoiding Common Mistakes
- **THE SEVEN GOLDEN RULES OF INVESTING**
 - Lesson 1 – Who Are Investors? Why Invest?
 - Lesson 2 – What Does it Mean to Invest in the Stock Market?
 - Lesson 3 – Beating the Market
 - Lesson 4 – The Seven Golden Rules of Investing

INVESTING: 7 Units + 2 Advanced Investing Units: 30 weeks

- **UNIT 1 - THE SEVEN GOLDEN RULES OF INVESTING**
 - Lesson 1 – Who Are Investors? Why Invest?
 - Lesson 2 – What Does it Mean to Invest in the Stock Market?

- Lesson 3 – Beating the Market
- Lesson 4 – The Seven Golden Rules of Investing

- **UNIT 2 - THE VALUE OF A STOCK**

- Lesson 1 – Fluctuations & Market Caps
- Lesson 2 – What is the Value of a Business
- Lesson 3 – Applying the P/E Ratio

- **UNIT 3 - WHAT MAKES A GOOD BUSINESS**

- Lesson 1 – How Do I Know if a Company is a Good Business?
- Lesson 2 – Whatever Floats Your Moat
- Lesson 3 – Predicting the Future

- **UNIT 4 - FINDING STOCKS TO INVEST IN**

- Lesson 1 – Coming Up with Investment Ideas
- Lesson 2 – Using Research Reports to Evaluate Stocks
- Lesson 3 – Make a List

- **UNIT 5 - THE LANGUAGE OF FINANCE**

- Lesson 1 – Introduction to the Language of Finance
- Lesson 2 – Why Do Companies Prepare Financial Statements?
- Lesson 3 – The Income Statement
- Lesson 4 – How Do I Forecast Revenues of a Company?

- **UNIT 6 - INTRINSIC VALUE**

- Lesson 1 – Introduction to Intrinsic Value
- Lesson 2 – Let's Buy a House
- Lesson 3 – Determining the Intrinsic Value of a Company
- Lesson 4 – The Relative Valuation Method

- **UNIT 7 - THE INVESTMENT THESIS**

- Lesson 1 – Introduction to Investment Thesis
- Lesson 2 – What is an Investment Thesis?
- Lesson 3 – Case Study

- **ADVANCED INVESTING - ENVIRONMENTAL SOCIAL GOVERNANCE**

- Lesson 1 – Impact Investing, Sustainability & ESG Integration Overview

- Lesson 2 – Assessing Corporate Governance Overview
- Lesson 3 – Assessing Social & Environmental Standards Overview
- Lesson 4 – Case Study on Tesla: Assessing ESG Overview

- **ADVANCED INVESTING - FINANCIAL STATEMENT ESSENTIALS**

- Lesson 1 – Financial Statements & The Balance Sheet
- Lesson 2 – Income Statement & Statement of Cash Flows
- Lesson 3 – Financial Ratios
- Lesson 4 – Forecasting Growth

YIS CURRICULUM SAMPLE SCHEDULE – CLUB MODEL (MEETING ONCE PER WEEK e.g. Thursday)

Week	Date	Lesson Title
1	9/4/2025	YIS First Class Presentation/ Overview & Meet & Greet
2	9/11/2025	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 1: Who Are Investors?
3	9/18/2025	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 2: What Does It Means to Invest In the Stock Market?
4	9/25/2025	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 3: Beating the Market
5	10/2/2024	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 4: The Seven Golden Rules of Investing
6	10/9/2024	The Value of a Stock: Unit 2: Lesson 1: Fluctuation & Market Cap
7	10/16/2024	The Value of a Stock: Unit 2: Lesson 2: What is the Value of a Business?
8	10/23/2024	The Value of a Stock: Unit 2: Lesson 3: Applying the P/E Ratio
9	10/30/2025	What Makes a Good Business?: Unit 3: Lesson 1: Whatever Floats Your Moat
10	11/6/2025	What Makes a Good Business?: Unit 3: Lesson 2: Predicting the Future
11	11/13/2025	What Makes a Good Business?: Unit 3: Lesson 3: How Do I Know if a Company is a Good Business?
12	11/20/2025	Finding Stocks to Invest In: Unit 4: Lesson 1: Coming Up with Investment Ideas
12	11/27/2025	Finding Stocks to Invest In: Unit 4: Lesson 2: Using Research Reports to Evaluate Stocks
13	12/4/2025	Finding Stocks to Invest in: Unit 4: Lesson 3: Make a List
14	12/11/2025	Learning to Speak the Language of Finance: Unit 5: Lesson 1: Intro
15	12/18/2025	Learning to Speak the Language of Finance: Unit 5: Lesson 2: Why Do Companies Prepare Financial Statements?
16	12/25/2025	Learning to Speak the Language of Finance: Unit 5: Lesson 3: The Income Statement
17	1/1/2026	Learning to Speak the Language of Finance: Unit 5: Lesson 4: How Do I Forecast Revenues of a Company?
18	1/8/2026	Intrinsic Value: Unit 6: Lesson 1: Introduction to Intrinsic Value
19	1/15/2026	Intrinsic Value: Unit 6: Lesson 2: Let's Buy a House
20	1/22/2026	Intrinsic Value: Unit 6: Lesson 3: Determining the Intrinsic Value of a Company
21	1/29/2026	Intrinsic Value: Unit 6: Lesson 4: The Relative Valuation Method
22	2/5/2026	The Investment Thesis: Unit 7: Lesson 1: Introduction to Investment Thesis
23	2/12/2026	The Investment Thesis: Unit 7: Lesson 2: What is an Investment Thesis?
24	2/19/2026	The Investment Thesis: Unit 7: Lesson 3: Case Study
25	2/26/2026	ESG: Lesson 1: Impact Investing, Sustainability, & ESG Integration Overview
25	3/5/2026	ESG: Lesson 2: Assessing Corporate Governance Overview
26	3/12/2026	ESG: Lesson 3: Assessing Social & Environmental Standards Overview
27	3/19/2026	ESG: Lesson 4: Case Study on Tesla: Assessing ESG Overview
28	3/26/2026	Financial Statement Essentials: Lesson 1-Finance Statements & Balance Sheet
29	4/2/2026	Financial Statement Essentials: Lesson 2-Income Statement & Statement of Cash Flows
30	4/9/2026	Financial Statement Essentials: Lesson 3-Financial Ratios
31	4/16/2026	Financial Statement Essentials: Lesson 4-Forecasting Growth

Young Investors Society Programs

Young Investors Society has a variety of enrichment programs and contests outside of the courses and lessons for students to enter. These programs are designed to enrich our curriculum and give students the chance to put their investment knowledge and skills to use.

Dollar-A-Day Challenge



Young Investors Society challenges every student to start saving and investing their own money into a personal brokerage account. This program allows the students to experience the power of compound interest with real money and to create great habits that will help them secure their financial future. Students can also compete for a FREE Money Match scholarship on a monthly basis. A limited number of YIS students will receive a scholarship match for their contributions. This program helps students develop the lifetime habit of saving and investing for retirement as well as understand the value of long-term decisions. To participate in the Dollar-A-Day Challenge, students must complete the Kahoot Quiz for the month and apply for the Dollar-A-Day Challenge after completing the quiz. All info can be found on the website: <https://yis.org/programs/the-dollar-a-day-challenge/apply/>

THE MOTIVATION

The average American has just **\$148,000** saved by the time they turn 65. But Young Investors Society members aren't average—they think bigger and aim higher.

Here's an example: if you skipped just **one can of soda a day** (about \$1), you'd save **\$365** in a year. Now, imagine you invested that amount every year and earned **11% annually** (slightly above the S&P 500's historical 10% average). By age 70, you could have **over \$1.4 million**—all from a simple daily choice.

And here's the exciting part: YIS has a network of generous donors ready to invest in students who are ready to take action and build their financial future.

HOW TO REGISTER

The Dollar-A-Day Challenge will be available on a monthly basis from August 2025-May 2026.

Students will complete the Dollar-A-Day Challenge Kahoot Quiz and apply on the Dollar-A-Day Challenge page: <https://yis.org/programs/the-dollar-a-day-challenge/>

Students must enter their Zelle number or PayPal email address to receive the funds if selected to receive the scholarship match.

YIS Fireside Chats



YIS Fireside Chats are engaging virtual events where high school students get direct access to top finance professionals who share real-world career insights, personal finance tips, and investing fundamentals in a dynamic webinar-style setting. From asset management to careers on Wall Street, students gain invaluable knowledge while exploring the many paths within the world of finance. Each session includes a live Q&A, giving students the unique opportunity to connect with industry leaders and ask the questions that matter most. Whether you're curious about the stock market or dreaming of a future in finance, Fireside Chats are your front-row seat to inspiration, information, and opportunity.

HOW TO REGISTER

Fireside Chat registration will be on the YIS event page: <https://yis.org/events/> once the event is announced.

YIS Personal Finance Knowledge Bowl



The Young Investors Society Finance Knowledge Bowl is a dynamic, quiz-style virtual competition where high school students test their knowledge of personal finance, investing, and economic principles in a fun and engaging format. Participants engage in quiz-style challenges covering topics like budgeting, saving, the stock market, and current financial events, all based on the YIS curriculum. The competition fosters critical thinking and real-world application, culminating in the prestigious "Analyst for a Day" finals, where top performers showcase their financial skills in more advanced scenarios.

The **First Round** of the Knowledge Bowl will take place **January 16–23, 2026**. During this week, you must complete the **Knowledge Bowl Kahoot Quiz** to qualify for the next round.

Finalists will be selected based on:

- First-round quiz score
- Completed YIS courses & lessons
- Participation in YIS programs and events
- Availability to attend the finals

The **Final Round** will feature questions on **three selected companies** (to be announced). It will be held **Thursday, January 29, 2026 at 4:00 PM PST / 7:00 PM EST** via Zoom and uploaded on our **YIS YouTube Channel** for everyone to watch.

The **Final Round** will include specific questions on **three selected companies** (to be announced). It will take place via **Zoom** on **Thursday, January 29, 2026 at 4:00 PM PST / 7:00 PM EST**, and will be **live-streamed on the YIS YouTube Channel** for everyone to watch.

How to Prepare:

Students who wish to participate can begin studying now using these resources:

- [YIS Personal Finance Videos](#)
- [Stock Investing 101 Handbook](#)
- YIS Courses & Lessons

HOW TO REGISTER

Students can take the **Knowledge Bowl Kahoot Quiz** anytime between **January 16–23, 2026**.

Quiz details will be shared in the **weekly YIS emails** and on our **social media channels**—so stay tuned!

YIS Certified Youth Investment Analyst (CYIA®) Designation



The Certified Young Investment Analyst (CYIA®) Designation is the highest honor awarded by Young Investors Society. It recognizes students who demonstrate exceptional knowledge and commitment to finance through a combination of coursework, a rigorous exam, community service, and an interview. The CYIA®

Designation highlights a student's expertise in investment analysis and financial literacy, setting them apart as leaders in the field.

HOW IT WORKS

Students must complete the following requirements for the CYIA™ Designation:

- Complete all YIS Courses & Lessons.
- Participate in the YIS Global Stock Pitch Competition.
- Participate in the Dollar-A-Day Challenge (Open an investment account & save/invest your own money)
- High School Teacher or (YIS Advisor) Letter of Recommendation.
- Participate in a Community Service Project – 10 hrs.
- Minimum GPA of 3.0 or equivalent.
- Conduct a final interview with a YIS Board Member.
- Pass the 60-question CYIA™ exam (50% pass rate). The exam will be available quarterly.

Online Exam Information:

The CYIA™ Exam is an open-book, 60-minute timed test based on The Essays of Warren Buffett & the YIS Stock Investing 101 e-book.

The YIS Stock Investing 101 eBook:

<http://yis.org/wp-content/uploads/2016/10/Stock-Investing-101-eBook.pdf>

The Essays of Warren Buffett 3rd Edition by Lawrence Cunningham:

<https://www.amazon.com/The-Essays-Warren-Buffett-Corporate/dp/1611634091>

The exam is open Quarterly in **January, April, August, & November**.

When you are ready to take the Exam, click here: <https://www.flexiquiz.com/SC/N/YISCYFAEXAM>

Students can apply for the CYIA designation at any time during the year once all requirements are met to Ctobin@yis.org. Interviews with a YIS Board Member will be scheduled once the CYIA application is submitted. Students can download the CYIA application at: <https://yis.org/programs/cyia-designation/>
CYIA® applications are accepted (September 2025-June 2026).

Global Stock Pitch Competition



The YIS Global Stock Pitch Competition is a virtual event that challenges all YIS students to research and analyze a publicly traded company and present a buy, sell, or hold recommendation to a panel of industry



professionals. This competition helps students develop critical thinking, financial analysis, and presentation skills while gaining real-world experience in a dynamic, competitive setting.

You can review a sample of stock pitch reports and presentations at the bottom of the page here:

<https://yis.org/programs/stock-pitch-competition/stock-pitch-report/>

HOW IT WORKS

Global Stock Pitch Competition – 2026 Rules & Registration

Who Can Participate

- Open to **U.S. and International registered YIS High School Students only**.
- Entries from middle school or college students will **not** be reviewed.
- You may compete individually or in a team of up to **two students**.
- Team members can be from different schools or states, but you must choose **one state event** to register for.

How It Works

- All State/Territory events are judged via **YouTube video submission** of your stock pitch presentation.
- Event dates and details will be listed in the **MYIIS Event Calendar**.
- If your U.S. state is not listed, register for the **U.S. OPEN Stock Pitch Competition**.
- If your country is not listed, register for the **International OPEN Stock Pitch Competition**.
- **State/Territory Top 100 teams** will be invited to attend the **Global Youth Investment Summit**—a 2-day in-person event in May 2026 featuring workshops, speakers, finance games, a case study competition, and more!

How to Register (*Opens December 8, 2025*)

1. Log into the **MYIIS Portal** (create an account if you don't have one).
2. Click the **calendar** at the top of the page.
3. Find your state/territory competition and click **Participate**.
4. Each team member must register **individually**.
5. Registration fee: **\$25 per person** for U.S. events (no refunds for non-submissions or withdrawals).
6. Payment is due at the time of registration—unpaid registrations will not be valid.
7. Registration closes **February 20, 2026** for all competitions.

Stock Pitch Registration opens **in December 8, 2025** on the MYIIS Portal.

Registration closes for all competitions on February 20, 2026.

All stock pitch reports & presentations are DUE February 20, 2026.

Important Dates

- Deadline to register for State Stock Pitch Competitions: **February 20, 2026**

- Deadline to submit Stock Pitch Report & Presentation Report: **February 20, 2026**
- State Competition Judging: **February 20th-March 30th**.
- Top 100 Teams announced on **March 30, 2026**

STOCK PITCH REPORT GUIDELINES

Each student or team is required to submit **BOTH** a written stock pitch report and Stock Pitch Presentation.

The written report must:

- Be no longer than 10 pages; although it may include an appendix of infinite length
- Include the following information:
 - Student Name, School, State/Region, Email Address
 - Company name
 - Exchange or Ticker symbol
 - Sector or Industry
 - Recommendation (Buy/Sell/Hold)
 - Current price (as of submission date)
 - Target price (% increase/decrease)
- Contain only publicly available information
- Be the original work of the student(s)
- Be prepared from the perspective of an independent research analyst
- Include, without limitation, the following sections:
 - Business Description
 - Industry Overview and Competitive Positioning
 - Investment Summary
 - Valuation
 - Financial Analysis
 - Investment Risks
 - ESG Considerations
 - Energy Transition
 - AI Considerations

STOCK PITCH PRESENTATION GUIDELINES

The Stock Pitch Presentation must:

- Be a summary of the Stock Pitch Report done on PowerPoint or Google Slides.
- Include the following information on the slides:

- Student Name, School, State/Region, Email Address
 - Company name
 - Exchange or Ticker symbol
 - Sector or Industry
 - Recommendation (Buy/Sell/Hold)
 - Current price (as of submission date)
 - Target price (% increase/decrease)
- Contain only publicly available information
 - Be the original work of the student(s)
 - Be prepared from the perspective of an independent research analyst
 - Include, without limitation, the following sections:
 - Business Description
 - Industry Overview and Competitive Positioning
 - Investment Summary
 - Valuation
 - Financial Analysis
 - Investment Risks
 - ESG Considerations
 - Energy Transition
 - AI Considerations

SUBMISSION GUIDELINES

Stock Pitch Reports can be saved as a PDF and may be submitted via email to: Stockpitch2026@yis.org on or before **February 20, 2026** for the 2025-2026 Global Stock Pitch Competition.

Stock Pitch Presentations can be saved as PowerPoint or PDF and may be submitted via email to: Stockpitch2026@yis.org on **February 20, 2026** for the 2025-2026 Global Stock Pitch Competition.

Both Stock Pitch Report & Stock Pitch Presentations must be submitted prior to the deadline to be eligible to compete in the Global Stock Pitch Competition. **There will be no exceptions!!**

HOW TO GET HELP

Global Stock Pitch Resources

This section of the YIS website is packed with tools to help you succeed: [Stock Pitch Competition Resources](#)

You'll find:

- Instructional videos

- Report templates
- Submission guidelines
- Tips for building a winning presentation

Be sure to also explore our [YouTube channel](#) for examples of past winning stock pitches and additional tips.

You can review previous stock pitch reports and presentations here: [Past Reports & Presentations](#)

Global Stock Pitch Competition Prep Night



YIS will host a **Stock Pitch Prep Night** on Zoom, where **Regional Advisory Board Members**, **previous stock pitch judges**, and **past winners** will share expert advice, presentation tips, and answer your questions about the event and scoring.

This is your chance to learn directly from those who've been there and won!

HOW TO REGISTER

Global Stock Pitch Prep Night registration will be on the YIS event page: <https://yis.org/events/> once the event is announced.

Global Youth Investment Summit



The Global Youth Investment Summit is an annual event where high school students from around the world come together to showcase their financial knowledge, compete in investment challenges, stock pitch competitions, and engage in hands-on workshops. The Summit fosters leadership, collaboration, and the development of real-world financial skills while offering students the opportunity to network with peers and industry professionals in an inspiring, immersive environment.

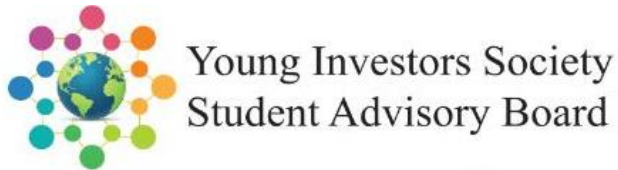
The Top 100 Teams from the Global Stock Pitch Competition will be invited to participate in the 2026 Global Youth Investment Summit in **May 2026** in NYC.

This event is OPEN to all YIS Registered Students.

HOW TO REGISTER

- Early Bird Registration for the GYIS event will open **October 15, 2025**
- Check <https://yis.org/programs/global-youth-investment-summit/> for details.

YIS Student Advisory Board



The Young Investors Society (YIS) Student Advisory Board (SAB) is a leadership council composed of high-achieving and motivated students from across the globe who are passionate about financial literacy and investment education. The SAB provides a platform for students to take an active role in shaping the future of YIS by offering feedback, leading initiatives, and promoting student engagement within their schools and communities.

Members of the SAB serve on subcommittees focused on outreach, social media, content development, and event planning. They play a key role in supporting major YIS programs such as the Global Stock Pitch Competition, the Dollar-A-Day Challenge, and the Global Youth Investment Summit.

Participation in the SAB allows students to build leadership skills, collaborate with peers who share a passion for finance, and make a lasting impact on financial education worldwide.

Nominations for the YIS Student Advisory Board are held annually in June.

Additional details can be found at: <https://yis.org/about-yis/student-advisory/>

Student MyYIS Portfolio

MyYIS Portfolio – Learn, Compete, and Grow!

The **MyYIS Portfolio** is an exciting and interactive way for students to put their financial knowledge into action in a **competitive, educational environment**—all while having fun and challenging themselves against other YIS students around the world.

Students log into the **MyYIS Portal** to access their personal portfolio, track their progress, and see how they stack up on the **Leaderboard**.

How It Works

To build your MyYIS Portfolio, you'll need two things: **Net Worth** and **Credits**.

- **Net Worth:** The “money” you earn in the simulation (MyYIS Dollars—not real currency!) by completing lesson plans and their associated quizzes.
- **Credits:** Earned by successfully completing courses and passing quizzes. These help you level up in the program.

Your Dashboard

The **Student Dashboard** gives you a snapshot of your:

- **Level** (your overall progress)
 - **Net Worth** (how much you've earned)
 - **Rank** (your position in the YIS community)
- It also shows you which **Course** you're currently working on and which **Levels** you've completed, helping you track your journey toward becoming a more skilled and confident investor.

Why It Matters

YIS Courses and Lessons are more than just assignments—they're your pathway to mastering the skills and mindset of a successful investor. Each lesson builds real-world financial knowledge in a safe, supportive learning environment, helping you develop the habits and confidence that can set you up for a lifetime of financial success.

Student Leaderboard-See Where You Stand!

The **Leaderboard** is where friendly competition comes to life. It ranks all YIS students who have been actively completing courses and lessons, giving you a real-time snapshot of how you compare to your peers across the globe.

On the Leaderboard, you can see:

- **Level** – Your overall progress in the YIS program based on completed courses, lessons, and quizzes.
- **Net Worth** – The total MyYIS Dollars you've earned through your learning and achievements.
- **Rank** – Your position compared to every other participating YIS student.



The Leaderboard is more than just numbers—it's a motivation booster. Whether you're aiming to crack the Top 10, climb a few spots each month, or just challenge friends in your own chapter, it's a fun way to track your progress, stay engaged, and celebrate your hard work.

Courses Page-Your Learning Hub

The **Courses Page** is your central destination to access everything you need to advance through the Young Investors Society program. Here, you can:

- **Complete lessons** at your own pace
- **View presentations** that break down key financial concepts clearly and engagingly
- **Take quizzes** to test your understanding and earn credits

All available courses are listed in one place for easy navigation. Plus, you can **download lessons and materials** directly from this page, so you can study anytime—even offline!

Whether you're starting a new course or reviewing past lessons, the Courses Page is designed to keep your learning organized and on track.

Lesson Quizzes-Test Your Knowledge and Earn My YIS Dollars

At the end of each lesson, you'll find a short quiz designed to reinforce what you've learned. Passing this quiz is essential because it's how you earn **MyYIS Dollars**, which contribute directly to your **Net Worth** in the MyYIS Portfolio.

The amount of MyYIS money you earn depends on how many questions you answer correctly—the better you do, the more you earn! This system encourages you to fully understand each topic and rewards your effort and knowledge as you progress through the courses.

Quizzes are a fun way to challenge yourself and see how much you've grown, while also building your simulated investment portfolio.

YIS Event Calendar

The **YIS Event Calendar** is your go-to source for all upcoming Young Investors Society events, competitions, and important deadlines. From Global Stock Pitch Competitions and Knowledge Bowl rounds to webinars and special workshops, the calendar keeps you informed so you never miss out.

Check the calendar regularly to:

- Find registration dates and event details
- Stay updated on virtual and in-person events
- Plan your participation throughout the year

Access the calendar anytime through the **MYIS Portal** and stay on track to maximize your YIS experience!

Student Resources

We want to thank you in advance for **starting or joining a Young Investors Society (YIS) Chapter** at your school. By taking this step, you're joining a global network of motivated students who are passionate about financial literacy, investing, and making a positive impact in their communities.

Our goal is to equip you with **all the resources, tools, and guidance** you need for your club to thrive—not only this year, but for years to come. Whether you're building a chapter from the ground up or helping an existing club grow, you'll have access to:

- Comprehensive YIS curriculum and lesson plans
- Leadership training and development opportunities
- Competitions and events to challenge and inspire your members
- Support from YIS staff, mentors, and our worldwide student network

Together, we can make your chapter a place where students are empowered to learn, lead, and achieve their financial goals.

VIDEOS FOR STUDENTS

We have several introductory videos on our YouTube Channel. They cover each aspect of YIS, from the Stock Pitch Competition to the Dollar-A-Day Challenge to a mock classroom experience. Please watch these videos at your convenience to help prepare you for YIS at your school. YIS Videos can be found here:

<https://www.youtube.com/channel/UCxAmBT67-w01EfmoT-pD9MQ/videos>

FOLLOW US ON SOCIAL MEDIA



Young Investors Society uses Facebook, Instagram, Twitter, LinkedIn, and YouTube to keep our teachers and students updated on new content, updates, activities, and contests. Please follow our social channels so you can stay updated with YIS!

Facebook: <https://www.facebook.com/yisorg/>

Instagram: <https://www.instagram.com/yisorg/>

LinkedIn: <https://www.linkedin.com/company/young-investors-society/>

YouTube: <https://www.youtube.com/channel/UCxAmBT67-w01EfmoT-pD9MQ/videos>

ADDITIONAL RESOURCES

- [YIS Website](#): Curriculum Courses, Lessons, & Programs
 - [YIS YouTube Channel](#): Curriculum Videos, Interviews, Stock Pitches, etc
 - [YIS Merchandise](#): YIS T-shirts, Hoodies, and other branded items
 - [YIS Stock Investing 101 E-Book](#): Student & Teacher Handbook for Courses & Lessons
 - [Finscreener.com](#): great online stock screener, earnings reports, and summaries for stock pitch reports.
 - [Morningstar.com](#): best site for company research including company ratios and financials
 - [Google Screener](#): most robust free screening tool, allows you to add many different criteria.
 - [Seekingalpha](#): online portal for company stock reports and market news
 - [Motleyfool.com](#): great online portal for news, market perspective and stock ideas.
 - [Zacks.com](#): for company research including ratios and screens
 - [Gurufocus](#): for company analysis
 - [Wallstreetsurvivor](#): for basic stock concepts and leagues to run mock portfolios.
 - [Yahoo Finance](#): for stock charts and basic company information
 - [Investopedia](#): the “Wikipedia” of Investing, great online glossary of terms
 - [Stockcharts](#): for tracking stock market performance and comparison between stocks.
- Other Resources:**
- [ClayTrader](#): a great Podcast resource featuring a Trading 101 series, which helps educate those that want to learn about the stock market and how it works, along with other series including Trading Guides, Trading Tools, Case Studies, and Chart Analysis.
 - [Annuity.org](#): a great resource for basic financial literacy topics such as budgeting, credit, planning for retirement and so much more.

Books:

- *Essays of Warren Buffett*: by Warren E. Buffett and Lawrence A. Cunningham
- *The Little Book That Beat the Market*: by Joel Greenblatt
- *The Early Investor*: by Michael Zisa

YIS MERCHANDISE

YIS offers a variety of t-shirts, hoodies, bags, mugs, and accessories available on the YIS Merchandise Store. 100% of all merchandise proceeds go to fund YIS programs. Get your YIS club merchandise here: <https://young-investors-society.myspreadshop.com/>





Young Investors Society LOGO - Sweatshirt
Cinch Bag
\$20.49



Young Investors Society LOGO - Coffee/Tea
Mug
\$14.99



Young Investors Society LOGO - Tote Bag
\$18.49



FREQUENTLY ASKED QUESTIONS

We are relying on you to help us know what additional resources you need to help YIS and your club to succeed. Please email us any questions and feedback at Contact@yis.org so we can improve YIS. As we receive questions, we will be adding to our FAQs, which we will share with you.

Q: How do I start my own YIS Club?

A: YIS has all the resources you need to start your own high school club. Please visit our website at:

<https://yis.org/join-young-investors-society/start-your-own-chapter/>

You will find information on how to register, start your club, and our First Club Meeting Presentation and Recruitment Flyer. **Each club will need 1 Teacher Advisor & at least 3 registered students to be recognized as an official YIS Chapter.**

Q: Do I need find a Business/Economics Teacher to teach YIS?

A: No, many of our teachers have no financial background. Many teach other subjects such as English, Math, Science, etc. YIS is structured as a turn-key platform that anyone can teach. Most of our clubs are student-led and the teacher is there for support.

Q: How many students should I have in the club?

A: YIS would like to see 5-10 students per club. We have found that clubs with at least 10 students per club allow for team activities and provide a social network for the students.

Q: Does YIS take donations?

A: Yes, YIS is a 501(C)3 nonprofit organization and relies on corporate sponsors and individual donations to be able to provide our financial literacy programs. All donations are tax-deductible. Visit our donation page here: <https://yis.org/donate/>

Q: I have a mix of brand new Freshman and seasoned Upper Classmen, how should I structure the club?

A: YIS Suggests having everyone meet together at the beginning of the meeting to go over Idea of the Week Presentations, pre-assignments, etc. Students can then break into groups for the lessons and work on content in their groups. One group can work on the Money Skillz Bootcamp while the other starts on the Advanced Unit lessons.

Q: How many kids can apply for the Dollar-A-Day Challenge and FREE Money Match Scholarships?

A: We would love to see ALL YIS students apply for the Dollar-A-Day Challenge and FREE Money Match Scholarships. YIS plans to triple the number of students that receive the FREE Money Match Scholarships this year.

Q: Where do I get updates on upcoming events and submission deadlines?

A: YIS will email you regularly about our upcoming program, events, and deadlines. You should also receive our Monthly Newsletter which contains all important events and deadlines for submission. You can also visit our website at www.yis.org and follow us on our social media channels for important news and events.



GENERAL QUESTIONS

If you have any questions about YIS curriculum, lessons, Programs, or just need to chat with someone about your YIS club, please contact our Chief Operating Officer, Christine Tobin at Ctobin@yis.org (805) 479-5292.