



TEACHER WELCOME PACKET



TABLE OF CONTENTS

Topic	Page
A Letter from our Founder	3
YIS Intro Letter	4
YIS Student Experience (Pathways)	5
Lesson Plans	9
Sample Curriculum Schedule	12
Dollar-A-Day Challenge & FREE Money Match Scholarships	13
Fireside Chat & Ask the Expert Series	14
Finance Knowledge Bowl	14
YIS x Webull Global Portfolio Competition	15
Certified Young Financial Literacy Scholars Award	16
Certified Young Investment Analyst Designation (CYIA®)	16
Global Stock Pitch Competition	17
Global Stock Pitch Prep Night	20
Global Youth Investment Summit	21
Student Advisory Board	21
Student MYYIS Portfolio	22
YIS Program Calendar & GYIS Schedule	24
Student Resources	27
YIS Merchandise	28
Frequently Asked Questions (FAQs)	29



We're excited to have you join us on this journey to bring financial literacy and investing education to your students. This Teacher Welcome Packet will guide you through the year and help you make the most of YIS resources and programs. If you have any questions, please reach out to our Chief Operating Officer, Christine Tobin at Ctobin@yis.org. We couldn't do this without you

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,



James Fletcher, CFA

Young Investors Society is a 501(3)(c) 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.

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

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 45 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, 17% 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 & Ask the Expert Series with Industry Professionals**
- **Finance Knowledge Bowl**
- **Global Stock Pitch Competition**
- **YIS x Webull Global Portfolio Competition**
- **Global Youth Investment Summit**
- **Certified Young Financial Literacy Scholars Award**
- **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 national 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!

Students are ready for the Certified Young Financial Literacy Scholars Exam after completion of the Money Skills Bootcamp.

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 for 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.

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 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. Monday)

Week	Date	Lesson Title
1	9/7/2026	YIS First Class Presentation/ Overview & Meet & Greet
2	9/14/2026	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 1: Who Are Investors?
3	9/21/2026	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 2: What Does It Means to Invest In the Stock Market?
4	9/28/2026	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 3: Beating the Market
5	10/5/2026	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 4: The Seven Golden Rules of Investing
6	10/12/2026	The Value of a Stock: Unit 2: Lesson 1: Fluctuation & Market Cap
7	10/19/2026	The Value of a Stock: Unit 2: Lesson 2: What is the Value of a Business?
8	10/26/2026	The Value of a Stock: Unit 2: Lesson 3: Applying the P/E Ratio
9	11/2/2026	What Makes a Good Business?: Unit 3: Lesson 1: Whatever Floats Your Moat
10	11/9/2026	What Makes a Good Business?: Unit 3: Lesson 2: Predicting the Future
11	11/16/2026	What Makes a Good Business?: Unit 3: Lesson 3: How Do I Know if a Company is a Good Business?
12	11/23/2026	Finding Stocks to Invest In: Unit 4: Lesson 1: Coming Up with Investment Ideas
12	11/30/2026	Finding Stocks to Invest In: Unit 4: Lesson 2: Using Research Reports to Evaluate Stocks
13	12/1/2026	Finding Stocks to Invest in: Unit 4: Lesson 3: Make a List
14	12/7/2026	Learning to Speak the Language of Finance: Unit 5: Lesson 1: Intro
15	12/14/2026	Learning to Speak the Language of Finance: Unit 5: Lesson 2: Why Do Companies Prepare Financial Statements?
16	12/21/2026	Learning to Speak the Language of Finance: Unit 5: Lesson 3: The Income Statement
17	12/28/2026	Learning to Speak the Language of Finance: Unit 5: Lesson 4: How Do I Forecast Revenues of a Company?
18	1/4/2027	Intrinsic Value: Unit 6: Lesson 1: Introduction to Intrinsic Value
19	1/11/2027	Intrinsic Value: Unit 6: Lesson 2: Let's Buy a House
20	1/18/2027	Intrinsic Value: Unit 6: Lesson 3: Determining the Intrinsic Value of a Company
21	1/25/2027	Intrinsic Value: Unit 6: Lesson 4: The Relative Valuation Method
22	2/1/2027	The Investment Thesis: Unit 7: Lesson 1: Introduction to Investment Thesis
23	2/8/2027	The Investment Thesis: Unit 7: Lesson 2: What is an Investment Thesis?
24	2/15/2027	The Investment Thesis: Unit 7: Lesson 3: Case Study
25	2/22/2027	ESG: Lesson 1: Impact Investing, Sustainability, & ESG Integration Overview
25	3/1/2027	ESG: Lesson 2: Assessing Corporate Governance Overview
26	3/8/2027	ESG: Lesson 3: Assessing Social & Environmental Standards Overview
27	3/15/2027	ESG: Lesson 4: Case Study on Tesla: Assessing ESG Overview
28	3/22/2027	Financial Statement Essentials: Lesson 1-Finance Statements & Balance Sheet
29	3/28/2027	Financial Statement Essentials: Lesson 2-Income Statement & Statement of Cash Flows
30	4/4/2027	Financial Statement Essentials: Lesson 3-Financial Ratios
31	4/11/2027	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 your 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 Presented by Webull



Young Investors Society challenges students to take an important first step toward financial independence by saving and investing their own money through a personal brokerage account. Sponsored by our online brokerage partner, Webull, the Dollar-A-Day Challenge gives students the opportunity to experience the power of investing and compound growth with real money while building healthy financial habits that can last a lifetime.

Students are encouraged to contribute just \$1 a day toward their investment goals, helping them develop the discipline of saving and investing consistently. Through the program, students learn firsthand how small, regular contributions

can grow over time and gain a deeper understanding of the value of long-term financial decisions.

Students also have the opportunity to compete each month for a FREE Money Match Scholarship. A limited number of eligible YIS students who open a Webull account may receive a scholarship match from Webull for their contributions.

The Dollar-A-Day Challenge is designed to help students develop lifelong habits of saving and investing, understand the importance of preparing for retirement, and gain real-world experience managing their own investments.

HOW TO REGISTER

The Dollar-A-Day Challenge will be available on a monthly basis and will start on August 1, 2026. To participate in the Dollar-A-Day Challenge, students must first pass the Certified Young Financial Literacy Scholar Exam and then apply for the challenge.

<https://yis.org/programs/the-dollar-a-day-challenge/>

U.S. students must enter their Webull account number to receive the funds if selected.

International students who do not have a Webull account in their country can submit a PayPal email address to receive funds.

Full program details and the application can be found on the YIS website: <https://yis.org/programs/the-dollar-a-day-challenge/apply/>

YIS Fireside Chats



Young Investors Society Fireside Chats are engaging virtual events that connect high school students from around the world with experienced finance professionals. Through interactive conversations and workshops, students gain real-world insights into personal finance, investing, financial careers, fintech, asset management, and the broader financial industry.

Each session gives students the opportunity to hear directly from industry experts, learn from their experiences, and ask questions during an interactive Q&A session. Fireside Chats help students expand their financial knowledge, explore potential career paths, and connect classroom learning to the real world.

YIS Ask the Expert



Young Investors Society's Ask the Expert is a series that connects students with experienced finance professionals for engaging, real-world conversations about investing, financial markets, and the decisions professionals make throughout their careers.

Each session features an expert-led discussion followed by an interactive Q&A, giving students the opportunity to ask questions, hear firsthand insights, and gain a deeper understanding of how financial concepts and investing principles are applied in the real world.

HOW TO REGISTER

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

YIS Finance Knowledge Bowl (Jan 11-22nd 2027)



YIS students will test their personal finance and investment knowledge in this virtual Finance Competition.

The first round of the competition will take place online during the week of **January 11th-22nd, 2027**

Students have one week to take the Finance Quiz that will be announced in January. Students must be registered YIS Students to compete!

Students will be invited to the Finals round of the Knowledge Bowl based on their first-round score, completed courses & lessons, participation in YIS programs & events, as well as availability to attend the finals.

The finals round will include specific questions on 3 selected companies (To Be Determined)

The Final round will take place on Zoom on **Thursday, January 28th at 4:00 pm PST/ 7:00 pm EST.**

Students who wish to participate can start to study the following:

- YIS Personal Finance Videos: <https://yis.org/videos/>
- Stock Investing 101 Handbook: <https://yis.org/wp-content/uploads/2016/10/Stock-Investing-101-eBook.pdf>
- YIS Courses & Lessons.

YIS x Webull Global Portfolio Competition (Oct-April, 2027)



The YIS x Webull Global Portfolio Competition, sponsored by Webull, is a six-month paper-trading competition designed to give high school students hands-on experience building and managing an investment portfolio. Running from October through April, students will use Webull's paper trading and portfolio management platform to make simulated investment decisions in a real-world market environment without risking actual money.

Throughout the competition, students will research investments, build and manage their portfolios, monitor market performance, and make strategic decisions based on established competition parameters. The program emphasizes long-term investing, diversification, risk management, research, and disciplined decision-making, helping students develop practical investment skills and a stronger understanding of how successful portfolios

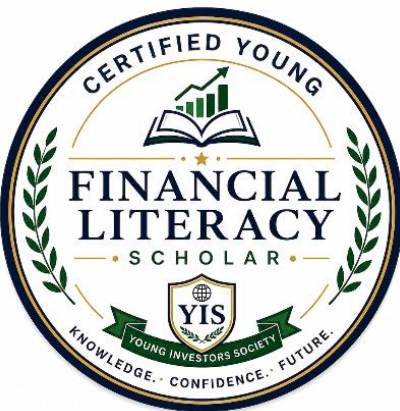
are managed over time.

HOW TO REGISTER

YIS x Webull Global Portfolio Competition Registration opens in October on the MYYIS Portal.

Log into the MyYIS Portal, Click on the calendar at the top of the page. Search for the event and click participate. Each student must register and pay individually. Be sure to click on the event to see any special instructions. The **registration fee is \$30.00 per person** for U.S. students. ***Students must create a Webull paper-trading account before registering.*** Students will need to enter their Webull paper-trading account number during registration.

YIS Certified Young Financial Literacy Scholars Award



The Certified Young Financial Literacy Scholar Exam is a year-round opportunity for YIS high school students to demonstrate their knowledge of essential personal finance concepts and earn an official Young Investors Society certificate recognizing their achievement.

Recommended after completing the YIS Money Skillz Bootcamp, the exam assesses students' understanding of key financial topics including budgeting, saving, credit, investing, taxes, insurance, and other foundational skills needed to make informed financial decisions. The exam replaces the previous Dollar-A-Day Challenge Quiz and provides students with a meaningful way to showcase their financial knowledge and commitment to building a strong financial future.

By earning the Certified Young Financial Literacy Scholar designation, students take an important step toward developing the knowledge, confidence, and lifelong financial habits needed for financial success.

Online Exam Information:

The CYFLS Exam is an open-book, 60-minute timed test based on the YIS Money Skillz Bootcamp Lessons. When you are ready to take the Exam, click here: <https://www.flexiquiz.com/SC/N/YISCYFLS>

YIS Certified Young Investment Analyst (CYIA®) Designation

The highest honor within the Young Investors Society is to be awarded a Certified Young Investment Analyst (CYIA®) Designation.

The CYIA® Designation represents a tremendous achievement. Less than 10% of those students who enter YIS end up achieving the CYIA® Designation. It is widely respected by Universities and future employers. High school students who are able to earn the CYIA® have proven that they are the best of the best. They have mastered the fundamentals of stock analysis, studied for and passed a rigorous examination that covers advanced financial concepts, maintain a stellar GPA, and are uniquely prepared to major in business, finance, or accounting.

HOW IT WORKS

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

- Be an active member of Young Investors Society
- Participate in a YIS Global Stock Pitch Competition
- Participate in the Dollar-A-Day Challenge (Open an investment account & save/invest your own money, pass the Certified Young Financial Literacy Scholars Exam)
- 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 (Any 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/YISCYIA>

Students can apply for the CYIA designation at any time during the year once all requirements are met to Ctobin@yis.org. Students can download the CYIA application at: <https://yis.org/programs/cyia-designation/>

YIS Global Stock Pitch Competition



This competition is the culmination of investment skills gained during the year and provides students with hands-on mentoring in financial analysis. Students (individually or in teams of two) create a “best stock idea” and analyze a publicly traded company. Each student/team writes a report on their chosen company with a “Buy” or “Sell” recommendation and then defends their analysis in a written report and brief to a panel of university professors and industry professionals. The winners advance through the state, regional, and global competition, where one team emerges as the Global Stock Pitch Champion. The competition rewards long-term, original business analysis and presentation skills.

HOW IT WORKS

All students are welcome to participate in the stock pitch competitions. We advise students to complete courses 4-7 and the additional 2 advanced courses in preparation for the event. Events will be listed in the MYYIS Event Calendar. Event registrations will be open **December 15th, 2026**, and the **registration fee is \$30.00 per person**. Events require students to submit their stock pitch report, PowerPoint presentation, and YouTube video link to Stockpitch2027@yis.org

State submissions will be evaluated by a panel of stock pitch judges.

Winners will be invited to participate in the Global Youth Investment Summit event on May 25-26, 2027 in New York City.

HOW TO REGISTER

Global Stock Pitch Registration opens **December 15, 2026** on the MYYIS Portal.

Log into the MyYIS Portal, Click on the calendar on the top of the page. Search for the competition in your state and click on participate. Each team member must register and pay individually. Be sure to click on the event to see any special instructions. The **registration fee is \$30.00 per person** for U.S. students.

Registration closes for all competitions on February 19th, 2027. All stock pitch reports, presentations, and YouTube Video links are DUE February 19th, 2027.

Important Dates

- Deadline to register for Global Stock Pitch Competition: **February 19th, 2027**
- Deadline to submit Stock Pitch Report, Presentation & YouTube Video Link by **February 19th, 2027**
- Top 100 Teams announced on **March 30th, 2027**
- Global Youth Investment Summit **May 25-26th, 2027**

STOCK PITCH REPORT GUIDELINES

Each student or team is required to submit **3 items**: a written stock pitch report, PowerPoint presentation, and a YouTube Video Link of themselves presenting their stock pitch.

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

All 3 items: Stock Pitch Report, Stock Pitch Presentation, & YouTube Video Link must be submitted via email to: Stockpitch2027@yis.org on or before **February 19, 2027** for the 2026-2027 Global Stock Pitch Competition. Students need to review the submission guidelines prior to submitting, as files need to be named appropriately and must be PDF or PowerPoint files only. No links to files or any other formats will be accepted. **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](#)

YIS Global Stock Pitch Prep Night (Feb. 4, 2027)



The YIS Stock Pitch Prep Night is a virtual Zoom event designed to help students prepare for the YIS Stock Pitch Competition. Students will hear directly from Regional Advisory Board members, experienced stock pitch judges, and past competition winners who will share practical advice, presentation strategies, and insights into what makes a successful stock pitch.

Students will also have the opportunity to ask questions about the competition, judging criteria, scoring, and the overall pitch process. Learn from those who have judged, competed, and won, and gain the confidence and skills you need to take your stock pitch to the next level.

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 and 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.

May 25-26, 2027

This event is OPEN to all YIS Registered Students.

Early Registration OPENS October 16th, 2026.

Additional Details at: <https://yis.org/programs/global-youth-investment-summit/>

YIS Student Advisory Board



Young Investors Society
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.

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.

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, handouts, 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 competitions and important deadlines. From the Global Stock Pitch Competition to the YIS x Webull Global Portfolio Competition, 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!

CALENDAR OF EVENTS

September 2026	October 2026	November 2026
9/1 Back to School Fundraising Campaign	10/16 Early Registration OPENS for GYIS	11/1-30 CYIA Exam Open
9/1 YIS Certified Young Financial Literacy Scholars Exam Open	10/22 Fireside Chat	11/22 Fireside Chat
	Oct-Apr YIS x Webull Global Portfolio Competition Open	
December 2026	January 2027	February 2027
12/1 Giving Tuesday	1/1-30 CYIA Exam Open	2/4 Stock Pitch Prep Night
12/2-27 25 Days of Giving Campaign	1/11-21 Knowledge Bowl Opens	2/18 Ask the Expert
12/5 Registration Opens for Global Stock Pitch Competition	1/21 Fireside Chat	2/19 Global Stock Pitch Reports/Presentations/Videos DUE
Dec-Feb Stock the Shelves Community Service Projects	1/28 Knowledge Bowl Finals	Dec-Feb Stock the Shelves Community Service Projects
	Dec-Feb Stock the Shelves Community Service Projects	
March 2027	April 2027	May 2027
3/25 Ask the Expert	4/1 YIS x Webull Global Portfolio Competition Ends	5/25-26 Global Youth Investment Summit in NYC
3/30 Global Stock Pitch 100 Teams Announced	4/1-30 CYIA Exam Open	
	4/9 GYIS Registration Closes	
	4/16 Outstanding Teacher Award Nominations Due	
	4/22 Ask the Expert	

(monthly) YIS Dollar-A-Day Challenge
 (ongoing) YIS Certified Young Financial Literacy Exam
 (ongoing) YIS CYIA Designation Applications Accepted



YOUNG
INVESTORS
SOCIETY

2026/2027 GYIS EVENT SCHEDULE

16
OCT

GYIS EARLY
REGISTRATION
OPENS

19
FEB

STOCK PITCH
SUBMISSION DUE
FOR
VIRTUAL ROUND

30
MARCH

STOCK PITCH TOP
100 TEAMS
ANNOUNCED

9
APRIL

GYIS
REGISTRATION
CLOSES

25-26
MAY

GYIS IN NYC
MAY 25-26

2026/2027

GYIS DETAILS

- * Early registration for GYIS secures your spot and grants priority access to special events and session selection
- * ANY YIS student can register for GYIS (first come first serve): Stock pitch participation not required
- * GYIS Scholarship applications due **February 27**
- * GYIS Scholarships will be awarded **March 20**

Teacher Resources

We want to sincerely thank you for starting or joining a **Young Investors Society (YIS) Chapter** at your school. By taking this step, you're becoming part of a **global community of educators and students** dedicated to advancing financial literacy, fostering investment knowledge, and inspiring leadership through service.

Our mission is to **equip you with everything you need** for your club to thrive—not just this year, but for years to come. Whether you're launching a brand-new chapter or guiding an established one, you'll have access to:

- **Comprehensive YIS Curriculum & Lesson Plans** – Ready-to-use resources that make teaching financial literacy engaging and effective.
- **Competitions & Events** – From Stock Pitch competitions to service projects, your students will have opportunities to challenge themselves and shine on a local, national, and global stage.
- **Dedicated Support** – Guidance from YIS staff, experienced mentors, and our Board of Directors to help your chapter reach its fullest potential.

Together, we can create a **dynamic learning environment** where students are empowered to think critically, lead with confidence, and pursue their financial goals with purpose.

YIS Website-Your Primary Teacher Resource

The **Young Investors Society website** is designed to be your **central hub** for all YIS-related information, tools, and updates. With your **teacher log-in**, you'll have exclusive access to:

- **Teacher Dashboard** – Manage your chapter, track student progress, and oversee participation in programs and competitions.
- **Teacher Support Page** – Access helpful guides, tips, and resources to keep your chapter running smoothly.
- **Lesson Units & Curriculum** – Download, present, and share all YIS courses and lessons with your students

Teacher Dashboard-Your Club's Engagement & Progress Tracker

The **Teacher Dashboard** is your central tool for monitoring how engaged your chapter members are and how effectively they're grasping the YIS curriculum. It's designed to make it easy for you to track participation, identify learning gaps, and celebrate student progress.

Through the dashboard, you can:

Monitor Lesson Completion – See which students have accessed and completed the online content for each lesson plan (typically a video or interactive module).

- **Track Quiz Results** – View individual grades for the end-of-lesson quizzes, helping you gauge how well students understood the material.
- **Spot Engagement Trends** – Identify students who are excelling and those who may need extra encouragement or support.
- **Recognize Achievements** – Highlight top performers or consistent participation to motivate your club members.

The dashboard is updated in real-time, giving you an at-a-glance overview of your chapter's academic engagement and learning progress. This tool ensures you have the insights needed to guide your students toward success—both in YIS programs and in building lifelong financial skills.

TEACHER INTRODUCTORY VIDEOS

To help you and your students get familiar with Young Investors Society, we've created a library of **introductory and educational videos** available on our official YouTube channel. These videos are designed to give you a clear, engaging overview of YIS programs and resources so you can confidently bring the program to life at your school.

In addition to introductory content, you'll find:

- **All lesson videos** to accompany the YIS curriculum
- **Recordings of past events** such as Fireside Chats, Knowledge Bowl competitions, and Stock Pitch presentations

Whether you're new to YIS or looking for a refresher, these videos are a great way to prepare for your role and to share with students, parents, and other educators interested in the program.

Watch the videos here: [YIS YouTube Channel](#)

Tip: Bookmark the channel for easy access—you'll find new content and updated resources posted throughout the year.

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

The [YIS Resources page](#) provides students and teachers with a collection of tools, guides, templates, and recommended resources to support stock research, financial analysis, and preparation for the YIS Stock Pitch Competition. Resources include stock pitch templates, investing guides, valuation tools, research websites, educational videos, and other materials designed to help students strengthen their investment knowledge, conduct meaningful research, and develop stronger stock pitches.

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/>



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.

QUESTIONS

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