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Summer Stock
Market Experience
PROGRAM REPORT

CLIMB USA
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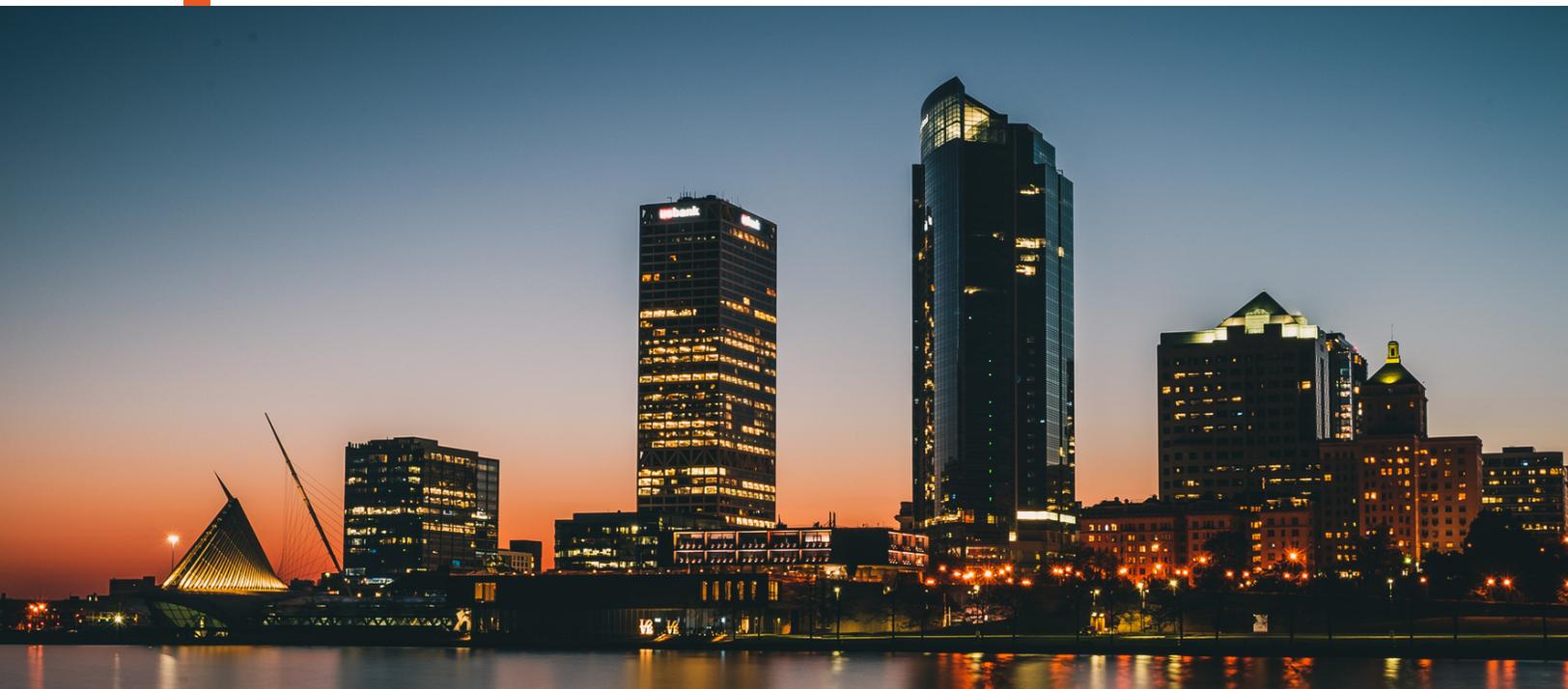
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About CLIMB USA

CLIMB USA is a 501c3 non-profit organization that is developing a community of youth and families that are all learning the economic way of thinking and living within a strategically organized ecosystem. The key elements of our economic empowerment framework include youth development, building wealth through investment clubs, entrepreneurial training, and thought leadership.



CLIMB MISSION AND VISION

Mission: CLIMB's mission is to create and coordinate an economic empowerment ecosystem in which underserved youth, families, and communities can learn, grow, and thrive.

Vision: CLIMB envisions a fair and inclusive economic framework in which all citizens have an equitable opportunity to succeed and thrive.

Our programs and services are focused on 'opportunity youth,' families, and communities that have historically been underserved. While our activities are available to all, we strive to connect our programs to organizations that serve the low and moderate-income demographic and people of color. Our programs are accessible nationwide.



Statement from our President

Dear Colleagues:

It is with a great deal of pride and appreciation that we share a summary of our 2022 Summer Stock Market Experience Program. We are proud because we have brought the Stock Market Game to more students by enabling families and youth serving organizations to include investment education as part of their schedule of summer activities.

Robert Wynn



We are appreciative because this novel experiential investment education platform would not have been available through CLIMB USA without our collaborating partners. In fact, the Summer Stock Market Experience was born out of a Collective Impact Initiative to provide more robust and sustainable financial education for underserved youth and families. The premise of the Collective Impact Initiative is that transformative impact requires like-minded organizations to combine forces to address intractable challenges. The economic education and empowerment of underserved communities presents such a challenge. In that vein, we thank Economics Wisconsin and the Securities Industry and Financial Markets Association Foundation (SIFMA) for their ideation and implementation support, and we thank the African-American Credit Union Coalition (AACUC) and CUNA Mutual Foundation for their critical financial support.

Statement From Our President cont...

For the third year in a row, we have reached hundreds of students, parents and adult advisors who have all advanced their level of knowledge and confidence with regard to the economic aspects in their lives. It is always validating and rewarding to hear the heartfelt testimonials from students and advisors who describe how they have changed their outlook and even their behavior when it comes to incorporating long-term investing as a component of their wealth building.

Congratulations to the first-place team winners who were advised by their father, Semaj Kinney, a single parent of three sons from Dallas TX. We are also particularly proud of Twinkle Billingsley of Milwaukee, WI, another parent advisor who kept her five children actively engaged in the game throughout the summer.

There were many other breakthroughs and points of pride to highlight in the 2022 edition of the CLIMB USA Summer Stock Market Experience. You will learn more about the specialness of this year's program, including our collaboration with the Milwaukee Fellows and the Lead Generation summer program at Cardinal Stritch University and the incredible speakers from the SIFMA Invest It Forward Volunteer Program that were part of our Summer Speaker Series.

As noted above, the SSME would not exist without our trove of collaborators, volunteers and supporters. This is where we want to especially acknowledge and thank our growing cadre of youth serving community based organizations such as Running Rebels, SOHL Academy, CCYFS and Mentoring Positives, among others.

The SSME is the first ripple in the CLIMB Wave. We hope that you will stay engaged with CLIMB USA and be part of our inter-community economic empowerment ecosystem.

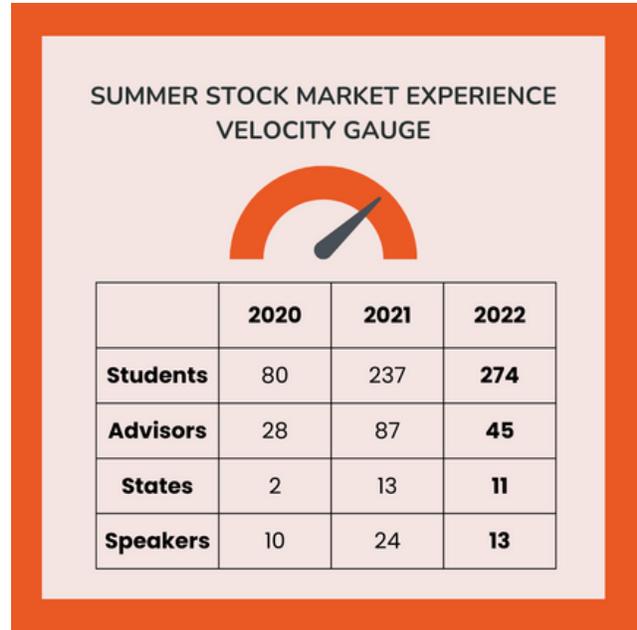
Thank you, and always remember that by working together, we can do more and we can do better.

-Robert Wynn

Program Report

The 2022 SSME Program saw a 15% increase in participants over 2021.

Of those who completed the program, an overwhelming majority of 68.66% intend to return next summer. The hands-on experience gained while investing on the Stock Market Game platform provided by SIFMA was reported to be a valuable piece of the program. Additional value was found in the Speaker Series sessions, attended by over 80% of program participants. Guest speakers such as Darius Feaster, Jeffrey Abalos, and NFL player Alec Ingold were among those reported to be the most enjoyed. Our Capstone event featured first-hand testimonials from participating students and advisors, some of which are highlighted in this report.



Program Highlights

- 10-Week** Experiential Investment Education Program
- 274** students; **45** Adult Advisors; **75** Teams
- 27** Organizations
- 11** States represented plus Washington, DC
- 22** Video Segments
- 12** Speakers Series Sessions
- 6** Interns
- 2** Roving Reporters!

National Team Winners' Portfolios

1st Place:

Team BI Dallas Chapter \$124,830.09

2nd Place:

SOLH Academy-Team 2 \$123,682.03

3rd Place:

SOLH Academy-Team 1 \$116,752.50

4th Place: Impact - \$116,175.18

5th Place: Jackpot - \$114,718.89

6th Place: Billingsley - \$112,106.68

7th Place: Millionaires Club - \$111,561.87

8th Place: Story School, Team 1 - \$110,908.04

9th Place: CCYFS, Team 1 - \$107,746.60

10th Place: Cobb - \$107,234.32

Program Report cont...

The majority of participating students joined us through their involvement with Community Organizations as part of their summer programming. Returning Organizations included Better Investing, CCYFS, Choice Nation Academy, Running Rebels, SOLH Academy, SSP Story School and Empress & Pearls. Many organizations, such as Mentoring Positives, joined us this year for the first time and we hope to see them return next summer.

Lead Generation is a new summer youth enrichment program which was initiated by the highly touted Milwaukee Fellows Program. T-Labs, an academic intensive college prep program from Michigan, was retained as the program coordinator. Luckily T-Labs was already familiar with the Stock Market Game, and their managers embraced our suggestion to incorporate the Summer Stock Market Experience as part of the Lead Generation Summer Curriculum. This allowed the SSME to serve an additional 45 students, and we were able to demonstrate how CLIMB USA IS “the Intel inside” existing youth development programs.

Special Recognition Awards

Speak Up Award: Augustine Gaye

Family Affair Award: Billingsley Family

Community Organization Award:

SOLH Academy

Student Engagement Award:

17 outstanding students awarded

Our CLIMB USA Speaker Series has grown in popularity and importance over a very short period of time. While the lineup of speakers in the first years of this series have been top notch, we added a new dimension for sourcing speakers through SIFMA and their Invest It Forward Volunteer Network. This new collaboration allowed us to tap into national experts from the likes of Deloitte, Charles Schwab, as well as additional SIFMA industry experts. These new connections yielded unexpected benefits. For example, one of our CLIMB youth leaders who happened to be interning in New York over the summer had a chance to visit SIFMA’s offices while he was in New York.

Finally, we would be extremely remiss if we did not recognize and thank our 2022 Roving Reporters tag team, Cornel and Zora Davidson. These two veteran CLIMB Youth Leaders took to their roles as though they were seasoned journalists. Writing their own scripts, they wowed the audience with their heady command of curriculum, economic news and investment topics. The empowerment and confidence that these two, and all the other participants have gained by their Summer Stock Market Experience is incalculable.

The success of this year's Summer Stock Market Experience leaves us excited for next summer as we hope to increase Community Organization participation to reach even more youth. We look forward to seeing the growth in future student leaders through SSME 2023.

Intern Summaries



This summer, I was an intern for CLIMB USA. During this time, I worked as one of the roving reporters. Every week, I wrote a news story from the financial world, summarized the week's curriculum videos, reviewed how the stock market indexes were doing, announced the week's winner and presented this information every Tuesday at 4pm. I also attended the CLIMB Interns meetings at 12pm every Tuesday where I was the Vice President. Additionally, I wrote a newsletter article about the graduating CLIMB Youth Leaders and worked with Cornel on a project detailing the US cities who have promised to hand out reparations. Finally, I filmed a commercial for CLIMB USA at Cardinal Stritch University. By completing this job, I was able to learn how to write a newsletter article, what to look for when researching stocks and how filming a commercial works. Additionally, I strengthened my public speaking skills and my research skills while I completed the roving reporters review and the reparations project. These skills and many more that I learned this summer will definitely be ones that I will need for the rest of my life. **-Zora Penager-Davidson**

My CLIMB intern experience was great. I was the portfolio manager for the team which called for me to manage our stock market game portfolio, study the markets, perform research on varying topics, and engage with SSME participants. Our team would meet weekly to discuss the agendas for SSME and what stocks we should buy. Each intern would bring a stock to pitch to the group and then we'd decide which stock to purchase from there. Two of the stocks we bought were Disney & Tyson Foods Inc. We also practiced parliamentary procedures during our meetings to encourage efficiency.

I did 2 and a half research projects during my intern experience. My first project was on the "Scope and Scale of Philanthropy in the United States." I researched the amount of funding that non-profits received, who donated the money, and what sectors received the most funding. In my second research project, I found all of the major cities that had an African-American mayor and found their contact info. I then furthered my research by finding the African-American city council members under those African-American mayors. This research project was meant to allow CLIMB's purpose to spread across the nation through the leaders in the country.

I really enjoyed my intern experience, from engaging with the SSME speakers to finding stocks that would rise in the short run. I appreciate all of the interns and the leadership and would recommend this experience to everyone. **-Dallas Lucy**

I joined CLIMB to build necessary and foundational knowledge about investing. During that time, I understood how compound interest was an investor's BEST FRIEND, how CONSISTENTLY investing can build GENERATIONAL WEALTH, and even help investors like you and me BEAT inflation and SO MUCH MORE. All from fantastic guest speakers, weekly, who'd teach us something new.

I continue to build upon my knowledge by being present in the meetings and keeping my ears open because there's always something to learn. Joining CLIMB USA as a youth leader is a way to go because financial and human developmental topics are addressed weekly and will further develop "your economic way of thinking and living." WHICH PROMOTES SUCCESS. SEE YOU AT THE TOP!

-NaKoryia Koko Jones

Testimonials



Thank you for your financial literacy lessons and for enrolling the Lead Generation Program students into the summer Stock Market Game. I really enjoyed playing the Stock Market Game even though it was a roller coaster of highs and lows. I wasn't really interested in this side of finance before this program began but now I want to learn all about the stock market and how I can benefit myself and the community.

-Brandon G., Student

My oldest son and I had been learning about investing over the last couple of years and were looking for seminars and programs that would help us better our financial knowledge and include my two younger sons as well. We found the Better Investing Seminar and while there, we met Mr Wynn who told us about SSME. We got signed up and really enjoyed the experience. We divided our roles on the team: my oldest son (21) did fundamental analysis, looking into a company's financials, income statements, balance sheets, cash flow, etc. My 10 yr old researched companies on an upward trend and also told us which ones to avoid. My 16 yr old researched companies' earnings. This was the first time we all did something together having to do with financial literacy and investing. We really enjoyed it and want to continue doing things like this.

-Semaj Kinney, Advisor for Team BI Dallas Chapter, 2022 SSME 1st Place Winners



**Kinney Family,
2022 SSME 1st Place Winners**

My favorite parts of this summer program were learning about how to use yahoo finance and investopedia, understanding how to research stocks and the thinking process behind these, and learning about the basic concept of compound interest while applying this to our investing. The most impactful thing I learned this summer was the importance of investing and saving as early as possible as well as the consequence of opportunity cost and unutilized time.

-Madai B., Student



Organization Profile

Location: Milwaukee & Madison, WI

Mission: To create and coordinate a regenerative economic empowerment ecosystem in which underserved youth, families, and communities can learn, grow, and thrive.

Vision: CLIMB envisions a fair and inclusive economic framework in which all citizens have an equitable opportunity to succeed.

Leadership

Robert Wynn, J.D.
Founder / President

Board of Directors

Donald Dantzler, Board Chair
Madison Public Schools

Mark Schug, Ph.D., Vice Chair
Mark Schug Consulting

Salli Martyniak, Treasurer
Community Matters

Anthony Cobb, Secretary
GAP

Carla Cross
Cross Management

Jamar Jones
Fouereva Media

Jeremy Tardy
Tardy Entertainment!

Contact

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Program Overview

The CLIMB Summer Stock Market Experience is a nine-week simulated investment education program which is presented in collaboration with the Securities Industry And Financial Markets Association Foundation. The SSME provides important exposure, education and practical platform where middle and high school students develop investment knowledge and skills that will serve them for a lifetime. CLIMB hosts this inter-agency educational opportunity for youth of color and others who traditionally do not receive investment education, even if they are lucky enough to have had a personal finance class.

The CLIMB Stock Market Experience includes enhancements such as guiding students to open a credit union savings account, opening and funding an IRA Account. Students also learn important principles and concepts relating to investing such as the power of compounding and the rule of 72. In addition, the SSME Speakers Series introduces students to a variety of professionals and experts in the finance industry. Some students literally decide to pursue a finance career based on what they learn through their stock market experience.

Why is this important?

The SSME affords youth a solid understanding of the function and benefits of the capital markets and the program orients students to the economic way of thinking and living.

In other words, the SSME “levels the playing field of life”.

Who should participate?

Community-based organizations, educators and parents are encouraged to register their youth, in teams of five (multiple teams are encouraged). Adult advisors, volunteers, and supporters should register as well.

Thank you

To the CLIMB USA 2022 SSME Team

Staff

Kevin Torrence
Janeane Leese
Andrea Finley
Janel Johnson

Interns

Victor Barnett Jr
Dallas Lucy
Zora Penegar Davidson
Cornel Penegar Davidson
NaKoryia Koko Jones
Jemima Pierre



Our Sponsors



Thanks to our sponsors for making the 2022 SSME successful!