



2023

STOCK MARKET EXPERIENCE
REPORT

www.climbusa.org



CLIMB[®] 2023 STOCK MARKET EXPERIENCE

Experiential Stock Market Education
designed for students in middle & high school,
as well as adults.



FUN SUMMER EXPERIENCE
8 week simulated investment
game - perfect combination of
fun, networking, friendly
competition and skill building!



REAL-LIFE WEALTH BUILDING SKILLS
Each participant managed a
fictional \$100k stock portfolio
while learning stock analysis and
investing fundamentals.



TURN KEY PROGRAM
We provided weekly activities,
engaging speakers & financial
literacy curriculum that was
ready to go! Perfect for youth
and community groups.



SPEAKER SERIES
Engaging industry experts
presented every Tuesday.
4pm CST | 5pm EST

INCREASED PARTICIPANTS

UPGRADED SIMULATION PLATFORM

UPDATED CURRICULUM

NEW ROVING REPORTER

STOCK MARKET EXPERIENCE 2023

We are delighted to share the exciting developments and achievements of the 2023 CLIMB USA Stock Market Experience, a year marked by innovation and inclusivity.

One of the significant changes to the 2023 SME involved opening participation to adults, who not only joined but also had the opportunity to compete for prizes. This groundbreaking move allowed families to engage in the program together, fostering a unique learning environment where parents could learn side by side with their children. The response to this change was overwhelmingly positive, significantly increasing our participation numbers and creating a sense of unity and shared learning experiences among participants of all ages.

In addition to expanding our participant demographic, we made a pivotal shift in our investment simulation platform. The new platform introduced direct communication channels between CLIMB and participants, facilitating seamless interaction. Participants could now view their rankings in real-time, adding a dynamic and competitive element to the program. Furthermore, we incorporated an interactive and engaging "Question of the Week" series, featuring investment trivia questions that participants eagerly embraced. These enhancements were met with enthusiasm, providing a more immersive and enjoyable experience for all involved.

The success of these changes reflects the dedication of our team to continuously improve and adapt the Stock Market Experience to meet the evolving needs of our participants. As we look back on the accomplishments of the 2023 SME, we express our gratitude to everyone who contributed to its success: the CLIMB USA staff and consultants, CLIMB interns (made possible by the AACUC), Guest Speakers (many of whom were provided by Madison Investments), sponsors and collaborators, and the many participating community organizations. The empowerment and knowledge gained by participants, both young and adult, underscore the positive impact of our collective efforts.

It is with immense gratitude that we acknowledge Josiah Faucette, our 2023 Roving Reporter, who not only learned extensively throughout the program but also demonstrated a seasoned journalistic flair by the end. He truly impressed the audience. The behind-the-scenes preparation with his mentors and coaches was evident in the empowerment and confidence he showed throughout the 2023 SME.

We eagerly anticipate the upcoming 2024 SME, building upon the lessons learned and embracing further innovations to continue providing a dynamic and enriching experience for our community.

-The CLIMB USA Team

JUNE

JUNE 20

The Wonders of the Capital Markets

JUNE 27

Exploring Investment Ideas through Research

JULY

JULY 5*

The Big 3: Stocks Bonds & Mutual Funds

*Event is Wednesday this week due to July 4 holiday.

JULY 11

Transforming the Future through Compounding

JULY 18

Get your Money Working for YOU: Depositories, Brokerages & Wealth Managers

JULY 25

ESG: Doing Good while Doing Well

AUGUST

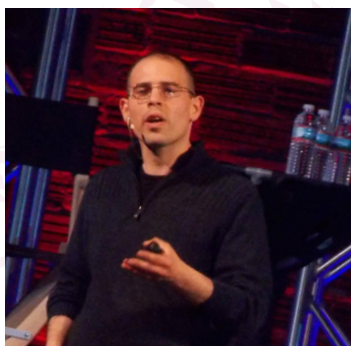
AUGUST 1

Careers in Finance

AUGUST 8

Culminating Capstone: SME Showcase

SPEAKERS



Daniel Guerra Jr
AltusLearn Network



Martin Powell
TruStage



Brian Hellmer
Mendota Financial Group



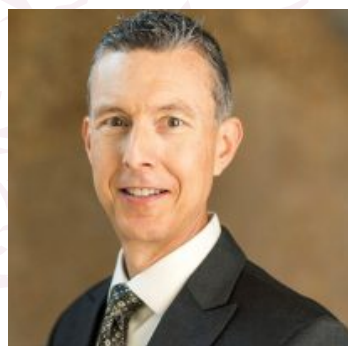
Dave Geisler
Madison Investments



Maya Bittar
Madison Investments



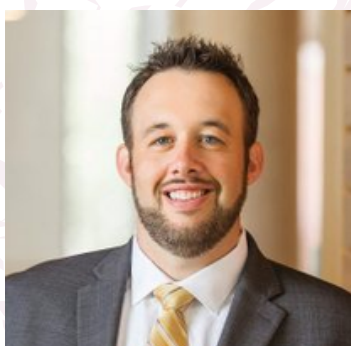
Jill Friedow
Madison Investments



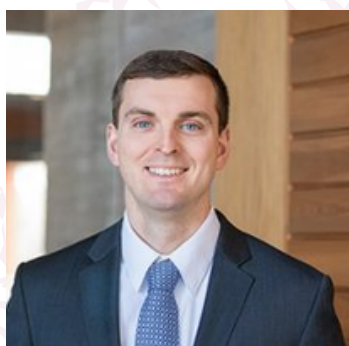
Jeff Matthias
Madison Investments



Nick Ott
Edward Jones



Mike Sanders
Madison Investments



Joe Maginot
Madison Investments



Callan Patel
AltusLearn Network



Alec Ingold
Ingold Family Foundation



AACUC
AFRICAN-AMERICAN
CREDIT UNION COALITION

summit
CREDIT UNION
Equity in Money™



TruStage™

PLATO  Participatory
Learning
And
Teaching
Organization

Where love of learning never gets old

OSCAR
RENNEBOHM
FOUNDATION

Madison
INVESTMENTS

 Madison Black
Chamber of Commerce

CLIMB 2023

STOCK MARKET EXPERIENCE



490
Participants

308 male
179 female
3 not reported

210 youth
280 adult



60
Advisors



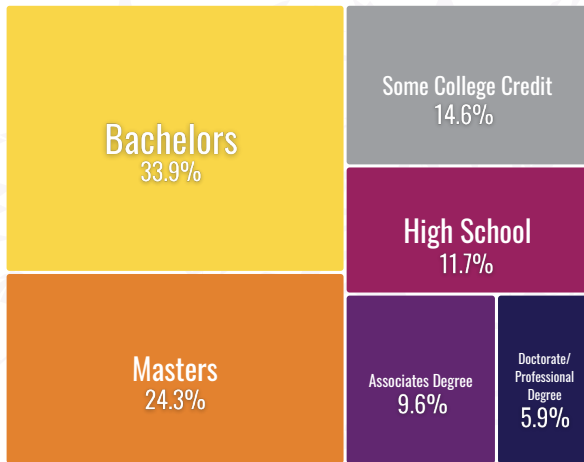
26
Speakers



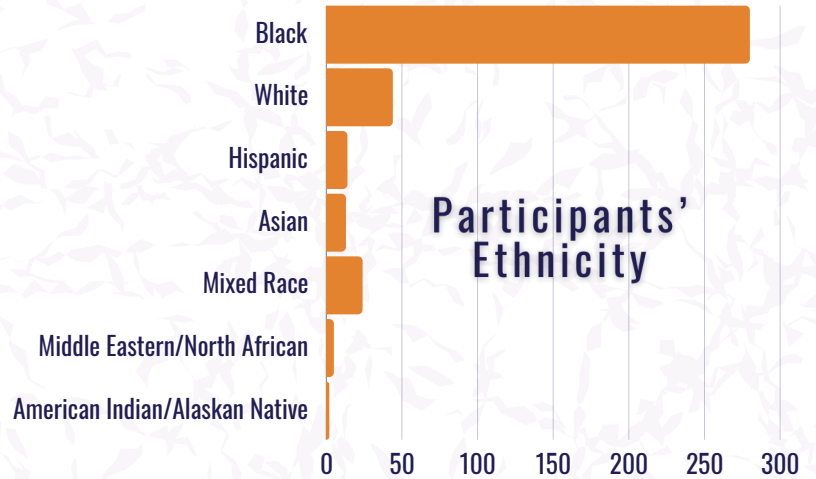
21
States



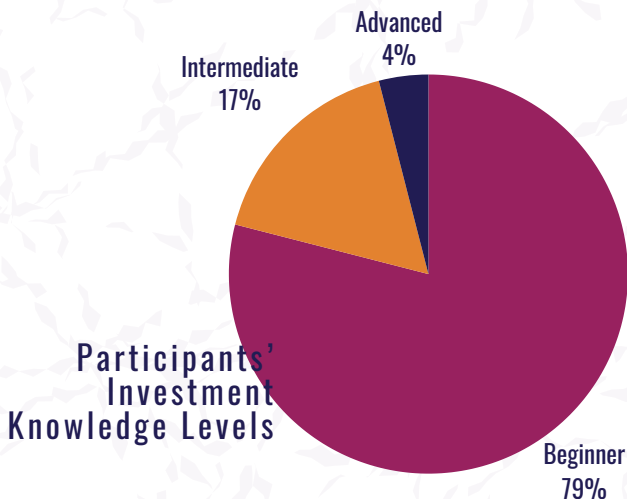
3
Countries



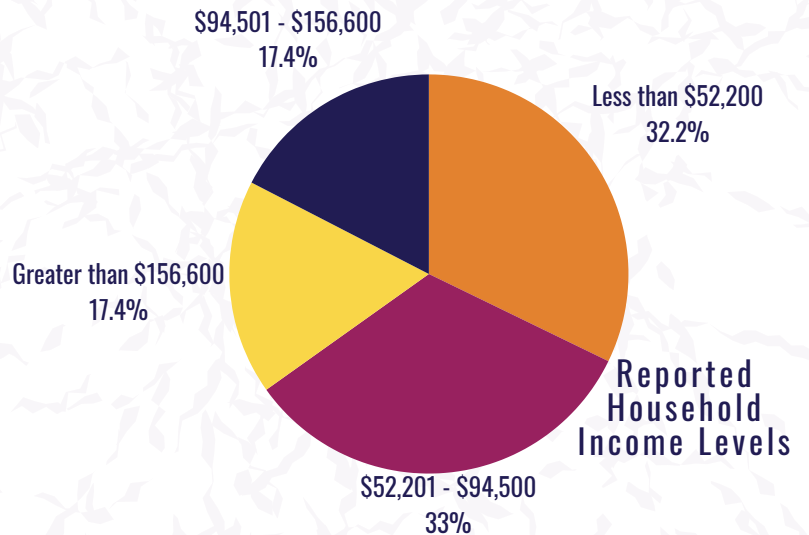
Reported Education Level of Parents of Youth Participants



Participants' Ethnicity



Participants' Investment Knowledge Levels



Reported Household Income Levels

TEAMS

- 1** MMG
- 2** Teaching & Learning
Leading Change Africa,
3 Team 2
- 4** Team West
- 5** 100 Black
Men of Madison

YOUTH

- 1** **Abhinav P.**
Money Printers
- 2** **Anushri V.**
Team West
- 3** **Ishaan S.**
Money Printers
- 4** **Paxton R.**
Durham Diamonds
- 5** **Khalil M.**
Cash Money Brothers

ADULTS

- 1** **Dace B.**
MMG
- 2** **Sidbewendein B.**
Leading Change Africa, #2
- 3** **Aaron Y.**
Independent
- 4** **Charlotte T.**
Team Thomas
- 5** **Kyle W.**
MMG



"This was my first time participating in the SME... I learned more than I ever have about the Stock Market...and plan on participating again next year."



"I really enjoyed being a part of SME! I learned a lot about investment strategies, using research, various resources, and online tools. It was such a valuable experience."



"It was such a great experience! I plan on recommending this to more people in the community!"



"CLIMB, is a terrific organization dedicated to the education and advancement of individuals who want to be better informed about the financial world we live in."

MEET OUR TEAM



Bob Wynn
President/CEO



Janeane Lease
Operations Manager



Janel Johnson
SME Program Manager



Koko Jones
CLIMB Youth Leader



Karon Sims
CLIMB Youth Leader



Brandon Gorton
CLIMB Youth Leader



Dallas Lucy
CLIMB Youth Leader



Donovan Clark
CLIMB Youth Leader

Victor Barnett, Jr
CLIMB Youth Leader

Demetrius Barnes
CLIMB Youth Leader

CLIMB[®] 2023 Stock Market Experience



**Thank
You**



Communities Learning to Invest and
Mobilize for Business



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