



**WALL STREET FOR KIDS**  
**Viswise Academy K12 Programs**  
**2021 Spring-Summer**

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## ABOUT VISWISE ACADEMY

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### Bring Wall Street into K12 Classroom

The mission of Viswise Academy is to provide high-quality finance and investment education, career training, as well as a variety of skills and vocational education services with unbeatable price.

Faculty of Viswise Academy are all seasoned wall street experts with good reputation and years of educational experience. We are also partnered with many well-known organizations and companies both in finance and technology industries.

Our **“Wall Street For Kids” programs** are fun, challenging, and a good supplement for the school curriculum. We educate students of all ages on the basic understanding of money-management fundamentals and helps them develop necessary the financial-literacy skillset for success.

# K12 Programs

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## Youth Investment Series

- Youth Investment 101 and Stock Game(Level 1)( Grade 6 and above) : \$449
- Youth Stock Fundamental Analysis(Level 2) (Grade 6 and above) : \$499
- Youth Advanced Equity Analysis and Modeling(Level 3) (Grade 8 and above) : \$699
- Wharton KWHS Investment Portfolio Management (Level 4)(Grade 8 and above) : \$899
- Wharton KWHS Investment Competition Acceleration Camp (5 weeks daily class/combine 1-4 level)(Grade 8 and Above) : \$2499
- Financial Modeling with Python (Required for all Wharton KWHS team members)( Grade 8 and above) : \$299
- Wharton KWHS Investment Competition Free Advisory (Only for Qualified Teams) (2021 Sep-Dec)(Grade 9-12)
- Future Star Investor Club (FSIC)

## Youth Financial Intelligence Series

- Kids Money Talk 1 (Grade 3-5) : \$349
- Kids Money Talk 2 (Grade 3-7) : \$399
- Youth Personal Finance and Career Inspiration (Grade 8 and above) : \$499

## Youth Entrepreneur & Leadership

- Meet Wall Street Experts for Finance Career (High School and College Students) : \$599
- Young Entrepreneur Bootcamp (Grade 8 and above) : \$699
- Road to the White House-Young Political Leadership Development Program (Grade 6 and above) : \$599

# Youth Investment and Wharton Competition Series

## Youth Investment and Wharton Competition Series

### Spring Regular Session(Weekly)

Date	Course	Grade	Sessions	Schedule	Time
4/27-6/29	Youth Investment 101 and Stock Game(Level 1)	Grade 6 and above	10	1 Class/week (Tue)	7-8PM(EST) 4-5PM (PST)
4/28-6/30	Youth Stock Fundemantal Analysis (Level 2)	Grade 6 and above	10	1 Class/week (Wed)	7:30-8:30PM (EST) 4:30-5:30PM (PST)
5/1-7/3	Youth Advanced Equity Analysis and Modeling (Level 3)	Grade 8 and above	10	1 Class/week (Sat)	7:30-9:00PM(EST) 4:30-5:30PM (PST)
6/1-7/9	Wharton KWHS Investment Portfolio Management (Level 4)	Grade 8 and above	12	2 Class/Week (Tue and Fri)	4:30-6:00PM(EST) 1-3PM (PST)

### Summer Camps Session 1 (Daily Class+ Sat Q&A)

7/12-7/23	Youth Investment 101 and Stock Game(Level 1)	Grade 6 and above	10	1 Classes/Day 10 Days	7:30-8:30PM (EST) 4:30-5:30PM(PST)
7/12-7/23	Youth Stock Fundemantal Analysis (Level 2)	Grade 6 and above	10	1 Classes/Day 10 Days	7:30-8:30PM (EST) 4:30-5:30PM(PST)
7/12-7/23	Youth Advanced Equity Analysis and Modeling (Level 3)	Grade 8 and above	10	1 Classes/Day 10 Days	3-4:30PM (EST) 12-1:30PM(PST)
7/12-7/23	Wharton KWHS Investment Portfolio Management (Level 4)	Grade 8 and above	12	1 Classes/Day 12 Days	5-6:30PM (EST) 2-3:30PM(PST)

### Summer Camps Session 2 (Daily Class+ Sat Q&A)

8/9-8/20	Youth Investment 101 and Stock Game (Level 1)	Grade 6 and above	10	1 Classes/Day 10 Days	7-8PM (EST) 4-5PM(PST)
8/9-8/20	Youth Stock Fundemantal Analysis (Level 2)	Grade 6 and above	10	1 Classes/Day 10 Days	7-8PM (EST) 4-5PM(PST)
8/9-8/20	Youth Advanced Equity Analysis and Modeling (Level 3)	Grade 8 and above	10	1 Classes/Day 10 Days	8:30-10PM (EST) 5:30-7PM(PST)
8/9-8/20	Wharton KWHS Investment Portfolio Management (Level 4)	Grade 8 and above	12	1 Classes/Day 12 Days	8:30-10PM (EST) 5:30-7PM (PST)

### Wharton KWHS Investment Competition Acceleration Camp (Daily Class+ Weekly 2 Q&A Sessions )

5/31-7/2	Wharton KWHS Investment Competition Acceleration Camp	Grade 8 and above	25	1 Classes/Day 25 Days	9-10:30PM (EST) 6-7:30PM (PST) 9-10:30AM(Beijing)
7/5-8/6	Wharton KWHS Investment Competition Acceleration Camp	Grade 8 and above	25	1 Classes/Day 25 Days	8:30-10PM (EST) 5:30-7PM (PST) 8:30-10AM( Beijing)
7/19-8/20	Wharton KWHS Investment Competition Acceleration Camp	Grade 8 and above	25	1 Classes/Day 25 Days	9-10:30AM (EST) 6-7:30AM (PST) 9-10:30PM(Beijing)
8/21	Financial Modeling with Python (Suggested for Wharton Competition)	Grade 8 and above	1	4 hours 1Day	1-5PM (EST) 10AM-2PM(PST)

## Youth Financial Intelligence Series

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Youth Financial Intelligence Series						
Spring Regular Session(Weekly)						
Date	Course	Grade	Sessions	Schedule	Time	
4/28-6/30	Kids Money Talk 1	Grade 3-5	10	1 Class/week (Wed)	7-8PM (EST) 4-5PM (PST)	
4/27-6/29	Kids Money Talk 2	Grade 3-7	10	1 Class/week (Tue)	7-8PM (EST) 4-5PM (PST)	
Summer Camps Session 1 (Daily)						
7/12-7/23	Kids Money Talk 1	Grade 3-5	10	1 Classes/Day 10 Days	7:30-8:30PM (EST) 4:30-5:30PM(PST)	
7/12-7/23	Kids Money Talk 2	Grade 3-7	10	1 Classes/Day 10 Days	7:30-8:30PM (EST) 4:30-5:30PM(PST)	
Summer Camps Session 2 (Daily)						
8/9-8/20	Kids Money Talk 1	Grade 3-5	10	1 Class/Day 10 Days	7:30-8:30PM (EST) 4:30-5:30PM(PST)	
8/9-8/20	Kids Money Talk 2	Grade 3-7	10	1 Class/Day 10 Days	6-7PM (EST) 3-4PM(PST)	
8/9-8/20	Youth Personal Finance and Career Inspiration	Grade 8 and above	10	1 Class/Day 10 Days	7:30-8:30PM (EST) 4:30-5:30PM(PST)	

## Youth Entrepreneur, Career & Leadership Series

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Youth Entrepreneur, Career & Leadership						
Date	Course	Grade	Sessions	Schedule	Time	
7/6-7/10	Road to the White House- Young Political Leadership	Grade 6 and above	5	1 Class/Day 5 Days	7:30-9PM (EST) 4:30-6PM (PST) 7:30-9PM (Beijing)	
7/12-7/23	Meet Wall Street Experts for Finance Career	High School &College Students	10	1 Class/Day 10 Days	8:45-9:45PM (EST) 5:45-6:45PM (PST) 8:45-9:45PM (Beijing)	
8/9-8/20	Young Entrepreneur Bootcamp	Grade 8 and above	10	1 Class/Day 10 Days	4-5:30PM (EST) 1-2:30PM(PST)	

# Youth Investment 101 and Stock Game(Level 1)

Youth Investment Series

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## Class Overview

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This course offers an introduction to fundamental economic concepts, investing, how businesses work, and how they contribute to the broader economy. You'll also discover various ways to invest in businesses, and the value of a business' future profits.



### Program Faculty

## Alexander Veytsman

- Chief Investment Officer & Portfolio Manager
- 18 years of Wall Street and finance experience
- Held Senior Positions at Barclays, Alliamce Bernstein, and American Express
- Held a policy internship position at the White House's National Economic Council
- Served as the Chief Financial Officer of Yale Economic Review.
- Yale MBA & Harvard B.A, Economics

## For Students Who

Grade 6 Above

Class Taught in English

# Youth Investment 101 and Stock Game(Level 1)

## Youth Investment Series

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## Learning Outcomes

- ✓ Define and apply key economics concepts and principles in financial decision-Making
- ✓ Introduce to fundamental investing concepts and how businesses work
- ✓ Define money and how you interact with it in different ways
- ✓ Articulate why people invest and how to develop smart investing strategies
- ✓ Use #1 virtual trading platform Stocktrak, which is used by 80% of the top U.S. business schools

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## Class Syllabus

1. Money & Currency
2. Time Value of Money
3. Financial Market Introduction
4. Stock Trading Basic Terms and Rules
5. Investment Types
6. Basic Accounting
7. Basic Economics and Macroeconomic Cycles
8. Business Lifecycle and Investment Opportunities
9. Investment Historical Events
10. Successful and Inspiring Investors



# Youth Stock Fundamental Analysis(Level 2)

## Youth Investment Series

### Class Overview

Learn how the stock market works, and how to pick stocks by understanding their underlying value. This class introduces basic fundamental analysis techniques used by Wall Street professionals. You'll employ these methods to build a simulated stock portfolio and compete with other students to have the best investment performance. Each student will run a portfolio and trading simulation on "StockTrak". A class wide investment competition will select the winners.

### Program Faculty

## Raymond Mathis



- Private Equity Manager at Tati NY, Inc
- Portfolio Manager for Spirit of America Investment Funds
- "Leading Portfolio Manager" by NAREIT's "REIT Magazine"
- "Best Performing Real Estate Fund" by Zacks Equity Research
- Wall Street Journal "Category Kings" Awards Winner
- Appeared in Print and on Television with CNBC, Bloomberg, The Wall Street Journal, Financial Times, CNN, Business Week, BBC and more.

### For Students

Grade 6 Above or completed "Youth Investment 101 and Stock Game"



# Youth Stock Fundamental Analysis(Level 2)

## Youth Investment Series

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### Learning Outcomes



- ✓ Introduction to Stocktrak.com
- ✓ Basic Stock Market Functions
- ✓ Learn how to buy and sell stock & how to pick stocks
- ✓ Basic Fundamental Analysis
- ✓ Valuation Concepts
- ✓ Risk and Return Concepts
- ✓ Investment Products and Diversification
- ✓ Stock competition winner announced

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### Class Syllabus

1. What is the Stock Market
2. Introduce Sectors & Industries
3. Macroeconomics Analysis
4. Financial Statements
5. Relative Valuation Introduction
6. Intrinsic Valuation Introduction
7. Indexing and Benchmarks
8. Investment Tradeoff - Risk and Return
9. Market Impact and Current Events
10. Student Presentation



# Youth Advanced Equity Analysis and Modeling(Level 3)

## Youth Investment Series

### Class Overview

Learn how to pick stocks by understanding their underlying value. This class introduces advanced fundamental and technical analysis techniques used by Wall Street professionals to select investments. You'll employ these methods to build a simulated stock portfolio and attempt to beat the Street. Each student will run a portfolio and trading simulation "Stock-Trak". A class wide investment competition will select the winners.

### Program Faculty



## Raymond Mathis

- Private Equity Manager at Tati NY, Inc
- Portfolio Manager for Spirit of America Investment Funds
- "Leading Portfolio Manager" by NAREIT's "REIT Magazine"
- "Best Performing Real Estate Fund" by Zacks Equity Research
- Wall Street Journal "Category Kings" Awards Winner
- Appeared in Print and on Television with CNBC, Bloomberg, The Wall Street Journal, Financial Times, CNN, Business Week, BBC and more.

### For Students

Students who completed "Youth Stock Fundamental Analysis "

# Youth Advanced Equity Analysis and Modeling(Level 3)

## Youth Investment Series

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### Learning Outcomes



- ✓ Analysis of Financial Statements
- ✓ Financial Modeling
- ✓ Cost of Capital
- ✓ Advanced Relative Valuation
- ✓ Advanced Intrinsic Valuation
- ✓ Asset Allocation Concepts
- ✓ Advanced Risk & Return Analysis

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### Class Syllabus

1. Advanced Financial Statements Analysis
2. Financial Modeling Methods
3. Correlation & Beta
4. Cost of Capital - CAPM & WACC
5. Relative Valuation - EV/EBITDA
6. Intrinsic Valuation - DCF
7. Sector Analysis and Sector Rotation
8. Asset Allocation - Efficient Frontier
9. Risk & Return Analysis - Sharpe Ratio
10. Student Presentation



# Wharton KWHS Investment Portfolio Management(Level 4)

## Youth Investment Series

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### Class Overview

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This course is designed based on Wharton Global High School Investment Competition Curriculum guidelines, and to prepare students to competition. will employ the fundamental, technical, investment analysis techniques learned in the prior two classes to build a portfolio in conjunction with a team. Quantitative methods such as portfolio optimization and risk management techniques are introduced. After this class, students should be prepared to compete in the Wharton Global High School Investment Competition.

Each student will run a portfolio and trading simulation on a licensed high-quality simulator “StockTrak”, same as what Wharton competition uses. Students will review the previous year’s competition case.

**High School Students (9-12 grade) in this class are qualified for free advisory of Wharton Global Investment Competition during Sep-Dec 2021.**

### For Students

For students who completed Level 1-Level 3  
Youth Investment Series

# Wharton KWHS Investment Portfolio Management(Level 4)

## Youth Investment Series

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### Program Faculty



### Raymond Mathis

- Private Equity Manager at Tati NY, Inc
- Portfolio Manager for Spirit of America Investment Funds
- “Leading Portfolio Manager” by NAREIT’s “REIT Magazine”
- “Best Performing Real Estate Fund” by Zacks Equity Research
- Wall Street Journal “Category Kings” Awards Winner
- Appeared in Print and on Television with CNBC, Bloomberg, The Wall Street Journal, Financial Times, CNN, Business Week, BBC and more.

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### Program Faculty



### Alexander Veytsman

- Chief Investment Officer & Portfolio Manager
- 18 years of Wall Street and finance experience
- Held Senior Positions at Barclays, Alliamce Bernstein, and American Express
- Held a policy internship position at the White House’s National Economic Council
- Served as the Chief Financial Officer of Yale Economic Review.
- Yale MBA & Harvard B.A, Economics

# Wharton KWHS Investment Portfolio Management(Level 4)

## Youth Investment Series

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### Learning Outcomes

- ✓ Client Analysis
  - ✓ Financial Modeling and Forecasting
  - ✓ Industry Analysis
  - ✓ Portfolio Management Concepts
  - ✓ Portfolio Optimization
  - ✓ Technical Analysis
  - ✓ Risk Management
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### Class Syllabus

1. Know your client and setup investment principal
2. Wharton KWHS competition rules and information sources
3. Macroeconomics and Market Dynamics
4. Industry Vertical Research
5. Portfolio Construction and Risk Management
6. Stock Valuation and Quant Modeling
7. Bottom-up Equity Research
8. Top-down Equity Research
9. Technical Analysis and Quantitative Analysis
10. Use of derivative for risk management and return enhancement
11. Wharton Report Structure Review
12. Wharton Case Mock Presentation by Team

# Financial Modeling with Python

## Youth Investment Series

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### Class Overview

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This course is a great way to learn about Python, finance whether you are new to each or have experience. All of the code reads live real-time data and each lesson is no more than 8-10 lines of Python, making the learning fun, quick and meaningful. The bootcamp consists of three parts: An explanation of the necessary financial concepts, walk-through the intuition and steps required to build the exercise code and a review of the Python solution.

**All students who signed up for Wharton KWHS Investment Competition are required to take this class.**



### Program Faculty

## Jamieel Sheikh

- Founder & CEO of Chainhaus
- Adjunct professor at Columbia Business School, NYU and CUNY teaching graduate-level blockchain, AI and data science subjects.
- Author of Amazon 100 bestselling book “Mastering Corda”
- Mentor for startups in the IBM / Columbia LAUNCH accelerator program

## For Students

Grade 8 and Above

Wharton KWHS Investment Competition Participants

# Financial Modeling with Python

## Youth Investment Series

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## Learning Outcomes

**No prior finance or Python skills or experience required. This workshop is an opportunity to learn about finance and Python and combine the two together. Progressively learn financial concepts and basic Python in this fun and useful way.**

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## Class Syllabus

- 1. Learn the basics of equities trade and use Python to manage an Excel equities trading journal**
- 2. Learn how to generate a timeseries graph of GameStop using Yahoo! data**
- 3. Understanding the fundamentals of debt ratings and use Python and the TradingEconomics API to get sovereign debt ratings**
- 4. Understanding shorting and short ratios by using Python to compare short positions with Tesla vs. GameStop**
- 5. Learn the basics of Bitcoin and use Python to visually chart a price time series with data from Coinbase**
- 6. Use the Messari API to plot a time series for Zcash**
- 7. Understand the basics of options trading, implied volatility and how to chart the “volatility smile” curve for the Zoom stock**
- 8. Evaluate cryptocurrencies like Ripple and Dogecoin by plotting and 30 day rolling volatility line graph and learn about moving averages**
- 9. Understand candlestick charts and simple moving averages and plot a candlestick chart of the Wilshire 5000 index**
- 10. Get an overview of the decentralized finance (DeFi) market using the CoinGecko API to grab and display TLV and market capitalization metrics**



# Wharton KWHS Investment Competition Acceleration Camp

(Level 1–4 combined, Daily M–F/5 weeks)  
(Grade 9–12)

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<b>Module 1: Market and Economics</b>	Class 1: Money & Currency, Time value of money Class 2: Microeconomics and Macroeconomics Class 3: Financial market introduction and investment types Class 4: Stock trading basic terms and rules, Information resources, Successful investors Class 5: Market dynamic and investment historical events
<b>Module 2: Industry Analysis &amp; Stock Research</b>	Class 6: Industry research and sector analysis Class 7: Qualitative valuation for business cycles Class 8: Bottom-up equity research Class 9: Top-down equity research Class 10: Multiple strategies for investment
<b>Module 3: Stock Valuation</b>	Class 11: Financial statement analysis Class 12: Company analysis - Cost of Capital Class 13: Financial quantitative modeling overview Class 14: Relative Valuation - EV/EBITDA Class 15: Intrinsic Valuation - DCF
<b>Module 4: Portfolio Management</b>	Class 16: Portfolio construction and risk management Class 17: Portfolio Correlation & Beta Class 18: Asset Allocation - Efficient Frontier Class 19: Risk & Return analysis - Sharpe Ratio Class 20: ETF, Indexing and benchmarks
<b>Module 5: Wharton KWHS Competition Preparation</b>	Class 21: Wharton KWHS case introduction and client analysis Class 22: Wharton KWHS competition rules and team assignment rules Class 23: Stock technical analysis and use of derivative instruments Class 24: Wharton report structure review Class 25: Wharton case mock presentation by team

# Wharton KWHS Investment Competition Acceleration Camp

(Level 1–4 combined, M–F/5 weeks)  
(Grade 9–12)

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## Program Faculty



### Raymond Mathis

- Private Equity Manager at Tati NY, Inc
  - Portfolio Manager for Spirit of America Investment Funds
  - “Leading Portfolio Manager” by NAREIT’s “REIT Magazine”
  - “Best Performing Real Estate Fund” by Zacks Equity Research
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## Program Faculty



### Alexander Veytsman

- Chief Investment Officer & Portfolio Manager
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- Held Senior Positions at Barclays, Alliamce Bernstein, and American Express
- Held a policy internship position at the White House’s National Economic Council
- Served as the Chief Financial Officer of Yale Economic Review
- Yale MBA & Harvard B.A, Economics

# Wharton KWHS Investment Competition Free Team Advisory

Qualified teams will be guided by Wall Street experts  
organized by **ViseWise Academy**

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**KWHS**

Investment Competition

## Competition Introduction

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The Wharton Global High School Investment Competition is a free, online investment simulation for high school students (9th to 12th grade) and teachers. Participants compete with students from around the world and learn about finance, teamwork, strategy-building and communication. Over the course of 10 weeks, teams are responsible for managing a portfolio of \$100,000 in virtual cash using the Wharton Investment Simulator (WInS).

Find additional information, please click here:

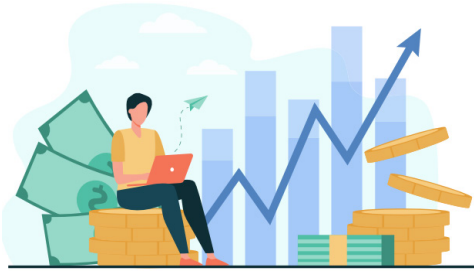
<https://globalyouth.wharton.upenn.edu/academic-year-programs/investment-competition/>

## Learning Outcomes

- ✓ Learn about risk, diversification, company analysis, industry analysis and investing
- ✓ Learn skills relevant to all professions and educational tracks
- ✓ Develop teamwork, leadership and communication skills
- ✓ Develop and apply critical thinking and reading skills
- ✓ Enhance your college and scholarship applications by building your resume
- ✓ Improve financial literacy while also having fun
- ✓ Earn a certificate issued by Wharton Business School

# Future Star Investor Club (FSIC)

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*Viswise Future Star Investor Club (FSIC) is dedicated to preparing the next generation of investors, inspire youth to be outstanding investors, and help them to build career track record as early as possible.*

## Unique Benefits

- Invitation only, 10-20 excellent students/year
- Run a student mock fund with supervision, build track record for college application and career
- Monthly stock picking meeting, semi-annual career group mentoring by seasoned Wall Street professionals
- Can form teams with club members to participate in other top-level investment competitions
- Annual membership also includes an annual mock trading system license, semi-annual finance career seminars

## Eligibility

Students who participate in Viswise Wharton KWHS program

# Kids Money Talk 1

## Youth Financial Intelligence Series

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### Class Overview

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Raising a financially savvy child involves teaching them a variety of aspects from budgeting to planning, earning and saving. Besides giving them an understanding of the value of a dollar, teaching children about fiscal responsibility helps prepare them for life in the real world.

Money Talk Level 1 will teach your kids basic concept of money and finance. Our class will be taught over 10 lessons, each lesson we will cover an interesting topic that is keen to kids heart. From lemonade stand to piggy bank, kid will learn through interesting activities.



### Program Faculty

## Jaimie Rush

- Senior Level Executive and Certified Project Management Professional (PMP)
- Successful Marketing Consultant for a diverse range of multi-million dollar initiatives including consumer products, financial, high education etc
- Senior Director of Extended Learning in marketing and business development at the University of La Verne
- Brigham Young University MBA

# Kids Money Talk 1

## Youth Financial Intelligence Series

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### Learning Outcomes

- ✓ **The Ability of Money Management and Planning**
  - ✓ **Establish a Correct Concept of Consumption and Money**
  - ✓ **Purchasing Power and Monetary Exchange**
  - ✓ **Better Prepared to Earn, Spend, and Save Money**
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### Class Syllabus

- 1. Money History and Currency Exchange**
- 2. Needs, Wants and Opportunity Cost**
- 3. Price, Supply and Demand**
- 4. Income, Labor and Career**
- 5. Why to be an Entrepreneur?**
- 6. Saving and Interest**
- 7. Budget and Planning**
- 8. Charity and Fundraising**
- 9. Borrowing and Lending**
- 10. VisWise Kids Shark Tank**

### For Students Who

**Grade 3-5**

**Class Taught in English**

# Kids Money Talk 2

## Youth Financial Intelligence Series

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### Class Overview

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Start from personal financial intelligence, Money Talk Level 2 gives kids a series of fundamental knowledge in credit and debit, digital currency, compound interest, inflation, taxes, mortgage, and insurance that will be used in personal finance. Kids will learn about why they should be financial independent after they grow up or even how to plan for their life-time investment goals.

Each lesson we will cover an interesting topic that inspires kids learn more about money and finance deeper. We wish they can develop good saving habits and healthy spending



### Program Faculty

## Angelene Huang

- Founder of VisWise Academy
- Founder of Chinese Coffee Club, a New York 501c3 nonprofit organization
- Former Head of Treasury at a Global Leading Hedgefund
- Former Foreign Currency Trader
- Yale MBA in Finance, Tsinghua B.A.

# Kids Money Talk 2

## Youth Financial Intelligence Series

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### Learning Outcomes

- ✓ Learn About Credit, Payment, Interest Rate and Tax
  - ✓ Concept of Price Level, Inflation, Mortgage and Insurance
  - ✓ Understanding on Earning, Spending, Saving and Investing
  - ✓ Develop a Conscious on Personal Finance and Life-long Investment
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### Class Syllabus

1. Importance of Personal Finance Intelligence (FQ)
2. Credit card, Debit Card and Digital Currency
3. Interest Rate and Compound Interest
4. Price and Inflation
5. Spending Smart and Debt Management
6. Insurance and Emergency Fund
7. Career and Entrepreneurship
8. Income Tax and Sales Tax
9. Investment Income and Risk of Return
10. "Saving for the Future" Student Presentation

### For Students Who

Grade 3-7

Class Taught in English



# Youth Personal Finance and Career Inspiration

## Youth Financial Intelligence Series

### Class Overview

Start with income and career choices, you will learn about how to be financial independent, how to plan for your future life and how to be financially secure if you don't make a lot of money when you are young, or even how to invest in the stock market with manageable risk during the class. Personal finance is a life-long learning and life-long practice, we wish you can spend, save and invest money wisely after you learned from the class when you grow up.



### Program Faculty

## Frank Lin

- Principal/MD Ancilla Capital Advisors - Alternative Investment Advisory (PE/HF)
- Visiting Faculty at a Selective Private University
- Principal Ancilla Advisors Alpha (Admissions Consulting) - 95% 1st choice Ivy/top tier
- Providence Equity Partners, Head of Quant Analytics
- Morgan Stanley Real Estate PE
- Wharton School, MBA, MSE Engineering U-Wisconsin/U Mich

# Youth Personal Finance and Career Inspiration

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## Youth Financial Intelligence Series



### Learning Outcomes

- ✓ Learn about credit, payment, interest rate calculations
- ✓ Concept of price level, inflation, mortgage, tax and insurance
- ✓ Deeper understanding on earning, spending, saving and investing
- ✓ Develop a conscious on personal finance and life-long investment
- ✓ Develop a mindset on career planning, time management for future success

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### Class Syllabus

1. Money History, Currency Exchange Rate, and Digital Currency
2. Price, Supply and Demand, and Smart shoppers
3. Trade-Off, Opportunity Cost, and Decision Making Process
4. Saving, Budgeting and Planning
5. Interest Rate, Inflation and Deflation
6. Borrowing, Mortgage, and Amortization Calculations
7. Tax, Insurance, Charity, and Fundraising
8. Capital Market and Investment Type
9. College, Career Planning, and Entrepreneurship
10. Student Project Presentation “ When I am 30 ...”

### For Students Who

Grade 8 and Above

Class Taught in English

# Meet Wall Street Experts for Finance Career

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Youth Entrepreneur, Career & Leadership Series

## Class Overview

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This course is designed to give high school students career inspiration in Finance. Through multiple sections of in-depth interviews with elite professionals in top financial institutions, the students can gain first-hand information about each popular job function in finance, including its daily work, main responsibilities, required skill set, preferred personalities, and potential career path.

## Program Faculty

Wall Street professionals from variety of roles in the finance industry



# Meet Wall Street Experts for Finance Career

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Youth Entrepreneur, Career & Leadership Series



## Learning Outcomes

- ✓ Gain career inspiration in Finance
- ✓ Understand daily life and main responsibilities of each job function
- ✓ Preparation for choosing a career direction based on individual's personality and expectation
- ✓ Networking with elite professionals in top financial institutions

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## Class Syllabus

1. The Financial Services Industry Career Introduction
2. Commercial Bank and Corporate Banking
3. Investment Banking - Merge and Acquisition
4. Investment Banking – Sales and Trading
5. Investor Relationship
6. Risk Management
7. CFO, Controllers, and CPAs
8. Asset Management and Equity Research
9. Private Equity and Venture Capital
10. Hedge Fund and Fintech

## For Students Who

High School and College Students

# Young Entrepreneur Bootcamp

Youth Entrepreneur, Career & Leadership Series



## Class Overview

This class is designed to bridge the gap between textbook learning and practical exercises for students to learn to be an entrepreneur. It is to prepare the students for success in building and running a successful business. The class also teaches the skills that help students to excel in the workplace and in life.

Youth Entrepreneur Bootcamp (YEB) teaches young people with the ethics and code of conduct that embrace the values and vision to pursue their dreams. Our goal is to change the mindsets of young people and encourage them to be creative and proactive, so they are confident to pursue their big dreams. Our instructors are industry experts and successful entrepreneurs. We inspire students to overcome their own weaknesses and enhance other skills to catch the opportunities for good.

***The students from this class can request advisory to participate in DECA High School National Virtual Business Challenge (VBC), FBLA NLC (National Leadership Conference) and The Diamond Challenge (A Global High School Entrepreneurship Competition)***

# Young Entrepreneur Bootcamp

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## Youth Entrepreneur, Career & Leadership Series



### Program Faculty

#### Frank Lin

- Principal/MD Ancilla Capital Advisors - Alternative Investment Advisory (PE/HF)
- Visiting Faculty at a Selective Private University
- Principal Ancilla Advisors Alpha (Admissions consulting) - 95% 1st choice Ivy/top tier
- Providence Equity Partners, Head of Quant Analytics
- Morgan Stanley Real Estate PE
- Wharton School, MBA, MSE Engineering



### Program Faculty

#### Jaimie Rush

- Senior Level Executive and Certified Project Management Professional (PMP)
- Successful Marketing Consultant for a diverse range of multi-million dollar initiatives including consumer products, financial, high education etc
- Senior Director of Extended Learning in marketing and business development at the University of La Verne
- Brigham Young University MBA

# Young Entrepreneur Bootcamp

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## Youth Entrepreneur, Career & Leadership Series



### Learning Outcomes

- ✓ Define entrepreneurship, identify what is your passion, and build up your business
- ✓ Learn how to design your own product interface and build your own marketing system
- ✓ Utilize the business model canvas and other steps provided in class to assess your dream business, with a particular focus on “who you are” and “what you do”
- ✓ Learn the business finance and business accounting, taxes and ownership
- ✓ Analyze the challenges and assumptions in growing a startup and scaling impact in a niche market

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### Class Syllabus

1. Build up entrepreneur mindset
2. Break your business idea from 0 to 1
3. Design your product with vision and innovation
4. Increase your business brand awareness
5. Achieve your business goal via 4 types of marketing
6. Business accounting and math for entrepreneurs
7. Business financing
8. Seven Step to write a business plan
9. Be an outstanding storyteller
10. VisWise “Youth entrepreneur club” shark Tank

### For Students Who

Grade 8 and Above

# Road to the White House Young Political Leadership Development Program

## Youth Entrepreneur, Career & Leadership Series

### Class Overview

#### This class has three main goals:

- To inspire the young generation to engage in community activities
- To teach marketing skills and campaign strategies
- To encourage Asian Americans to speak up for themselves

## Class Syllabus

### Class 1: How to choose leaders/mentors in your life

#### Speaker: Don Sun

API Director for Andrew Yang at Yang2020

Campaign Fund Development

Former President of Cupertino Historical Society

Chairperson of Cupertino Planning Commissioner



### Class 2: How to Start Your political Business as Career

#### Speaker: Brian Parvizshahi

Campaign manager for Ro Khanna, volunteer for Obama

Corporate communication manager for many firms

### Class 3: How to Run Your Own Podcast and Build Your Influence in Society When You are Young

#### Speaker: Katherine Simpson

Co-author of Asian American Forward Podcast with Don Sun



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### Asian American Forward Podcast

By: Asian American Forward

Listen for free





## **Class 4: How to Run Social Media and Measurement of Success of Campaign on Any Subject**

**Speaker: Henry Finn Kim**

Full-stack marketer and content expert. Designed branding and content marketing campaigns for large fortune 500 companies globally, including Facebook, Google and Samsung

## **Class 5: How Police/Criminal System Works in US and How to be a Public Defender and Advocate**

**Speaker: Eliza Orlins**

A Manhattan public defender and outspoken advocate for our city's most vulnerable. For more than a decade, she has represented over 3,000 New Yorkers who otherwise would not have been able to afford a lawyer. During this time, Eliza has developed a reputation as a relentless champion for the underdog



***Bonus: A Special guest speaker will come to join us in one of class. She is a leader, innovator, and change-maker with a successful track record of tackling tough problems through effective teamwork. She draws on extensive experience as a U.S. diplomat, including work at the White House and highest levels of the State Department, in her current work to advance solutions to challenges we face in our communities at home.***

## **Unique Benefit**

**Outstanding students will have opportunities to do internships with Sun Don in running political campaigns or for other political and community leaders**

## **For Students Who**

**Grade 6 and Above**

Viswise Academy

Making financial literacy  
the foundation of the  
next generation's future.

