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Bank of America Merrill Lynch

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Dorsey & Company, Inc.

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DST Market Services

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Edwards Family Fund

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Investment Placement Group

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Liquidnet, Inc.

Lombard Risk

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Owl Rock Capital Corporation

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Perella Weinberg

Performance Trust Capital Partners, LLC

Pershing, a BNY Mellon Company

Piper Jaffray & Co.

PNC Financial Services

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Promontory Financial Group

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Raymond James Financial

RBC Wealth Management

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Rosenblatt Securities

S&P Dow Jones Indices

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Wells Fargo Foundation

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Wiley Bros - Aintree Capital, LLC

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Randy Williams

William Blair & Company

Wunderlich Securities, Inc.



sifma FOUNDATION



The SIFMA Foundation is dedicated to fostering knowledge and understanding of the financial markets for individuals of all backgrounds with a focus on youth. Drawing on the support and expertise of the financial industry, the SIFMA Foundation provides financial education programs and tools that strengthen economic opportunity across communities and increase individuals' awareness of and access to the benefits of the global marketplace.

www.sifma.org/foundation

sifma FOUNDATION Advancing Financial Capability & Capital Markets Literacy



“Helping our children to become financially literate will ensure that they are well prepared to make smart financial decisions as they come of age. Programs like the Stock Market Game™ provide a foundation for the youth of today to be the vital contributors to society of tomorrow. ”



About Us

The SIFMA Foundation is dedicated to fostering knowledge and understanding of the financial markets for individuals of all backgrounds with a focus on youth. Drawing on the support and expertise of the financial industry, the SIFMA Foundation provides financial education programs and tools that strengthen economic opportunity across communities and increase individuals’ awareness of and access to the benefits of the global marketplace.

The Stock Market Game™ program is an online simulation of the global capital markets that engages students grades 4-12 in the world of economics, investing and personal finance, and prepares them for financially independent futures. More than 600,000 students take part every school year across all 50 states. The Stock Market Game has reached 17 million students since its inception in 1977.

The Capitol Hill Challenge™ is the nation’s only financial education program supported by 100% of Congress. This special edition of The Stock Market Game™ presented by the Charles Schwab Foundation and offered each spring matches Members of Congress with middle and high schools nationwide. Since its inception in 2004, Capitol Hill Challenge has engaged over 116,000 students. The top 10 teams win a trip to Washington, DC for a ceremony on Capitol Hill, to learn about fiscal policymaking, and to tour financial landmarks.

InvestWrite® national essay competition is a culminating activity generously underwritten by the Wells Fargo Foundation for Stock Market Game students, extending what they have learned in SMG by challenging them to analyze, think critically and problem solve. Students address real world financial issues and situations by answering a question about long-term saving and investing. Thousands of industry experts volunteer as essay judges each year.

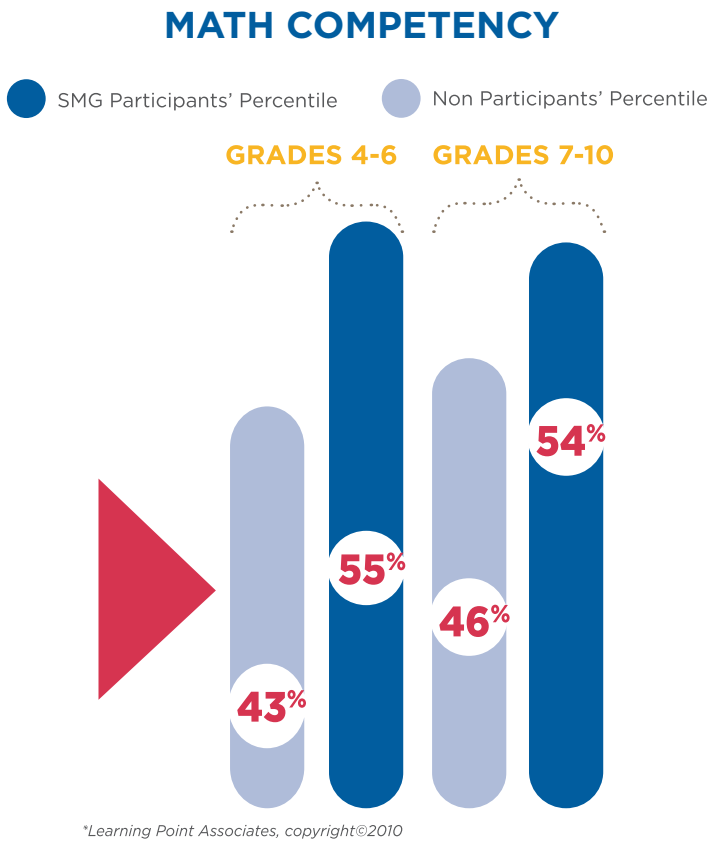
Invest It Forward™ is an industry-wide financial education and capital markets literacy campaign convening hundreds of financial firms that are committed to giving young Americans a solid understanding of the capital markets system and the invaluable tools to achieve their dreams. Invest It Forward is designed to connect teachers and classrooms with financial industry professionals and firms through a variety of volunteer opportunities across the country and throughout the year.



Our Impact

Recent history has taught us just how important it is to have a fundamental understanding of saving and investing. The Stock Market Game has a significant and measurable impact on student financial capability and academic achievement across all grades.

An independent study by Learning Point Associates found students who participated in the SMG program scored significantly higher on mathematics tests than their peers who did not participate. They also found that teachers who taught SMG reported the program influenced them to engage in financial planning, research, and use of investment products and services.



Teachers:
Register your students for The Stock Market Game™ program today so they have the life skills to succeed tomorrow. Visit www.stockmarketgame.org

Parents:
Encourage your child’s teacher to review The Stock Market Game™ website at www.stockmarketgame.org and register their class to participate.

Volunteer & Firm Activities

Are you a financial industry professional or a financial services firm wanting to volunteer? SIFMA Foundation offers simple ways to invest your talent and skills-based expertise to make a difference in your community.

In Person:
Guest Speaker Make a personal finance related presentation to a classroom or afterschool program (in person, with a buddy or as a team). Average duration 2-4 hours. We provide the material!

Field Trip Host Invite our schools and classrooms to your office and introduce them to the inside world of a financial firm. Average duration 1.5 – 4 hours. A perfect fit for community days or team building.

Recruiter Encourage a school to register for The Stock Market Game™ program or invite a colleague to join you in volunteering. Anytime, anywhere.

Virtual:
EMentor Answer students’ questions on portfolios, the market or the broader economy directly online in our portal. Average duration one hour.

InvestWrite Judge Judge essays in our national essay competition, occurring twice per year. Average duration 1-3 hours depending on the grade level of essays assigned.

Remote Guest Speaker Same great experience and material as in-person speaking, but via skype, google chat or a firm hosted webinar. Average duration 1 hour.

Video Volunteer Record a quick clip video (2 min) on your phone or device, answering students’ most frequently asked investing questions, exposing students to a financial professional regardless of location or technology.



Join Us

Through the generous support of SIFMA member firms, corporate partners, private foundations, and individuals, the SIFMA Foundation has provided students in grades 4-12, their teachers, and their families with a deeper understanding of the essential role that financial markets play in the global economy, while also reinforcing their knowledge of personal finance.

Grants and financial contributions support the development of new educational programs or the expansion of existing programs.

When you and your company contribute to the SIFMA Foundation, you:

- Provide first-hand access to the fundamentals of bond, mutual fund, and stock investing to audiences who might otherwise never have this exposure.
- Educate young people about the role that the securities industry and financial markets play in strengthening the nation.
- Protect and grow the economy through the creation of an informed investor public and a new generation of financially literate youth.

Join us in our mission to provide individuals access to the tools and skills they need to lead financially independent lives and to help our communities and our nation grow and prosper.

