



FOUNDATION

The SIFMA Foundation is an educational non-profit organization that fosters knowledge and understanding of the financial markets for individuals of all backgrounds, with a focus on youth in underserved communities. Drawing on the support and expertise of educators and the financial industry, the SIFMA Foundation provides high-quality financial education programs that strengthen economic opportunity across communities and increase individuals' access to the benefits of the global marketplace.



The Stock Market Game™ is a curriculum-based 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 lives. SMG serves 600,000 young people each year in schools, youth-serving nonprofits, and virtual learning environments. SMG's 22 million alumni score higher on standardized tests in math, economics and personal finance. Teachers using SMG report positive impacts on their personal financial behavior.



InvestWrite® national essay competition is a culminating activity for SMG, challenging participants to apply what they've learned and develop long-term investment plans. Participants address real-world financial scenarios emphasizing asset allocation, diversification, long-term planning and analysis. Essays are judged anonymously by thousands of financial professionals. More than 260,000 students have written essays and nearly 50,000 volunteers have served as judges since 2004. Winners earn exciting national and state-level awards and recognition.



The Capitol Hill Challenge™ is the nation's only financial education program supported by 100% of Congress. This special edition of SMG, presented by the Charles Schwab Foundation and offered each spring, matches Members of Congress with public middle and high schools nationwide. The top performing teams win awards and national recognition, plus the opportunity to engage directly with government and business leaders. Since its inception, CHC has made more than 7,000 Congressional matches reaching 158,000 youth



Invest It Forward® is an industry-wide capital markets literacy and financial career exploration program connecting educators and classrooms with financial industry volunteers and firms. The program features an award-winning capital markets curriculum and a variety of skills-based volunteer opportunities for industry professionals committed to helping young Americans learn about the global capital markets. Each year, Invest It Forward engages nearly 17,000 volunteers and hundreds of firms across the nation.



<https://www.sifma.org/about/sifma-foundation/>

SIFMA Foundation programs are made possible by the generous, collective support of SIFMA member firms, corporate and private foundations, organizations, and individuals that care deeply about expanding youth financial education and advancing economic equity.

invest it ▶▶ FORWARD

Invest It Forward promotes financial education through skills-based volunteering across the US!



Did you know only 57% of adults in the United States are financially literate according to a recent Milken Institute study and 31% of families say they never talk to their children about finances?

You can make the difference? How? Get involved! It is so simple to be part of changing this reality to ensure a brighter financial future for our youth. Invest It Forward offers in-person and virtual volunteering opportunities. These are open to individuals, buddies/pairs, and teams of volunteers, as well as to all functions within your firm. BRG/ERGs groups are encouraged to join us.

| Build Financial Capability | Speak to an SMG Class | Judge Student Essays | Meet a Financial Professional | Host Field Trips |
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| <ul style="list-style-type: none"> ▪ Recruit a teacher, school or CBO in your community to our acclaimed investment education program, The Stock Market Game. ▪ Available across the school year & during the summer. ▪ Credited with 1 hour of community service time. | <ul style="list-style-type: none"> ▪ Choose from single or recurring engagements. ▪ Onsite at schools or online via video chat. ▪ FINRA-reviewed materials provided. ▪ Average duration 45 – 60 minutes. ▪ Credited with 4 hours of community service time. | <ul style="list-style-type: none"> ▪ Participate online in the Fall & Spring with InvestWrite. ▪ Complete from home or office. ▪ Rubric provided to judge brief student essays on saving & investing topics. ▪ Credited with 2.5 hours of community service. | <ul style="list-style-type: none"> ▪ Share your academic and professional journey. ▪ Informal dialogues with SMG students in person, online, or recorded on zoom with IIF staff. ▪ Discussion points provided. ▪ Credited with 4 hours of community service time. | <ul style="list-style-type: none"> ▪ Tailor-made for larger group events. ▪ At your office or school/CBO location. ▪ Scalable in size and duration. ▪ Work with an SMG classroom or CBO or with one of your own youth-serving partners. ▪ Credited with a full day of community service time. |

Join our IIF Volunteer Corps

Quick, non-obligatory registration gets you in!
<https://investitforward.sifma.org/>

Make a tax-deductible donation

No time, but still want to support? Check for a firm matching gift.
<https://secure.givelively.org/donate/sifma-foundation-for-investor-education-inc/support-financial-literacy>

Learn more.

Attend a Weekly Open Office Hour. Every Thursday at Noon ET.
<https://investitforward.sifma.org/volunteers>