



INVEST FOR KIDS

THE **IFK REPORT** Q1 | 2016



## WHAT WE DO

Invest For Kids organizes an investment conference featuring twelve prominent portfolio managers from around the country. These individuals present their market views and best investment ideas to an audience of portfolio managers, family office professionals, investment advisors, and private investors.

## WHY WE DO IT

We believe that the future of our city is heavily tied to providing quality education and programming to children who have less access to these important building blocks for their development. Each year, 100% of the proceeds raised from the Invest For Kids Conference are contributed to seven organizations dedicated to improving the lives of Chicago's most underserved children.

## 2015 CONFERENCE HIGHLIGHTS

- The 7th Annual Conference raised nearly \$1.5 Million, bringing the total raised since inception to \$8.5 Million.
- 12 well-known money managers presented their outlook and specific investment ideas on long/short equities, oil and gas, and foreign securities to an audience of over 1,000 attendees.
- Legendary real estate investors Barry Sternlicht and Sam Zell spoke in two fireside chats about trends in real estate, market direction, and their world views.
- Donors sponsored a pre-conference lunch and learn session at DePaul University for 75 Chicago area college students featuring hedge fund luminary Ricky Sandler.
- 175 women attended a pre-conference event featuring a discussion with Michelle Seitz, CIO of William Blair Investment Management, and Judy Greffin, CIO of Allstate Insurance.

## 2015 PRESS

“Now if you were paying attention to this conference and bought the stock, clearly you could have **made a lot of money.**”

*In reference to Ricky Sandler's stock idea that went up 75% in value one month after presenting the idea to the IFK audience. Forbes, 12.7.15*

“The audience at the charity event gets managers' **best ideas** without paying hedge fund fees...”

*Barron's, 11.7.15*

“Perhaps the most **entertaining presentation** of the conference came from Soren Aandahl ...The crowd loved the story.” *Barron's, 11.7.15*



Rupal Bhansali, Ariel Investments, speaking at the 7th Annual Conference



Michael Sacks, GCM Grosvenor, and Barry Sternlicht, Starwood Capital Group, speaking during the IFK fireside chat at the 7th Annual Conference

## IFK's IMPACT

In 2015, IFK raised nearly **\$1.5 Million** with all proceeds being donated to our seven selected grantees.

Each of the following worthy organizations received approximately **\$200,000** enabling them to grow, build, and improve on their steady foundations.

### Alain Locke Charter School

Provides superior K-8 education at East Garfield Park charter school

#### Q1 Highlight

Acquired mobile laptop carts for every grade level so the entire student body can use a laptop every day

### Bottom Line

Mentors low-income students through the college application process and beyond

#### Q1 Highlight

Working toward doubling the number of students served from 345 to 675

### Chicago Debate Commission

Runs debate programs at over 70 schools for participation in citywide tournaments

#### Q1 Highlight

Launched two new middle school debate teams, with league participation now at approximately 1,300 students competing in over 15 rounds of debate

## 2015 BENEFICIARIES



### Embarc

Motivates career success through experience-based learning opportunities

#### Q1 Highlight

Extended program to Chicago Tech Academy and now serves more than 600 students at 10 Chicago Public Schools

### Peer Health Exchange

Partners with high schools to fill the unmet need for health education

#### Q1 Highlight

Significant progress made on tech-enabled model of program

### Perspectives Charter Schools

Combines ethical skills with college-prep academics at five South Side charter schools

#### Q1 Highlight

Three Perspectives' high schools are in the top 10 list of non-selective schools for academic growth among African-American youth in Chicago

### Summer of a Lifetime

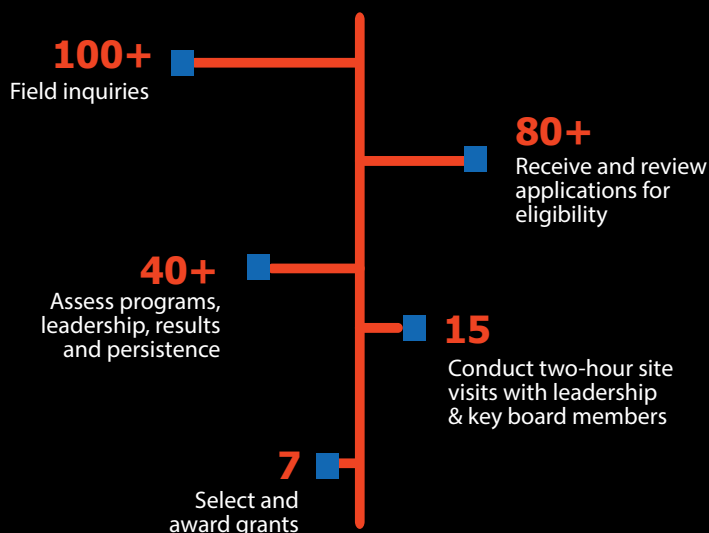
Enables low income high school students to attend college summer programs

#### Q1 Highlight

Increased the number of students participating in summer college programs from 796 in 2015 to over 850 anticipated in 2016

## HOW WE INVEST

We target smaller organizations where we believe our grant can have the highest impact. The operating budget for these organizations is typically \$1-3 Million and, as such, IFK gifts materially influence the programs and number of children being served.



## IL NETWORK OF CHARTER SCHOOLS

IFK has partnered with the Illinois Network of Charter Schools (INCS) to recognize charter school excellence. To celebrate the work of outstanding teachers and principals, IFK granted \$30,000 to three award winners and their schools. All winners were honored at a special luncheon held during the INCS conference in October 2015.



(Left to right) Andrew Broy, *President, INCS* with 2015 Award Recipients: Jayson Franklin, *Teacher, KIPP Ascend*; Richard Glass, *Principal, Urban Prep*; Tiffany Childress, *Teacher, North Lawndale College Prep*

**SAVE THE DATE: 8<sup>th</sup> Annual Conference Wednesday, October 26, 2016**

## IMPACT SPOTLIGHT

### MEET A STUDENT



Kaylen Herring  
Lindblom Math & Science  
Howard University, Class of 2020



The Chicago Debate Commission...  
showed me that my  
**EDUCATION DOES MATTER....**  
Debate allowed me to **BELIEVE** in  
myself which **CHANGED MY LIFE.**"

The IFK gift to Chicago Debate Commission helps support the activities, careers and futures of students like Kaylen Herring. Kaylen grew up in Englewood and will be graduating this June from Lindblom Math and Science Academy. Since eighth grade, Kaylen has been a participant in the Chicago Debate League and has won multiple accolades along with serving as co-captain of the school debate team and mentoring others.

### DISCOVER A PROGRAM



An IFK grant to Embarc supports its unique experience-based educational program that entails "journeys" to businesses, nonprofits, universities and cultural institutions. Part of the Embarc three-year curriculum involves preparing students for career success through programming, interview experience, and mock job fairs.

### INTRODUCING OUR DESIGNER



I believe in the power of ideas  
and the impact of design.  
...and having the opportunity to  
utilize my **TALENTS FOR A MISSION**  
– to help a program that once  
helped me – is amazing."



Kwasi Yeboah, Jr.  
Graphic Designer

Since his junior year in high school, Kwasi has received college and career leadership from Chicago Scholars, a 2014 IFK Beneficiary. Kwasi earned his BFA from UIC in Graphic Design and recently graduated with his master's in Communication and Digital Media from Loyola University Chicago. He has freelanced for the past 9 years and has spent the last 5 years working in the nonprofit sector as a designer/communications specialist. We are proud to have Kwasi as the designer of our inaugural IFK Report.

## BY THE NUMBERS

7

Invest For Kids  
Conferences

62

Investment  
Speakers

6000+

Attendees

358

Organizations  
Reviewed

43

Organizations  
Supported

\$8 Million+

Raised Since  
2009

75,000+

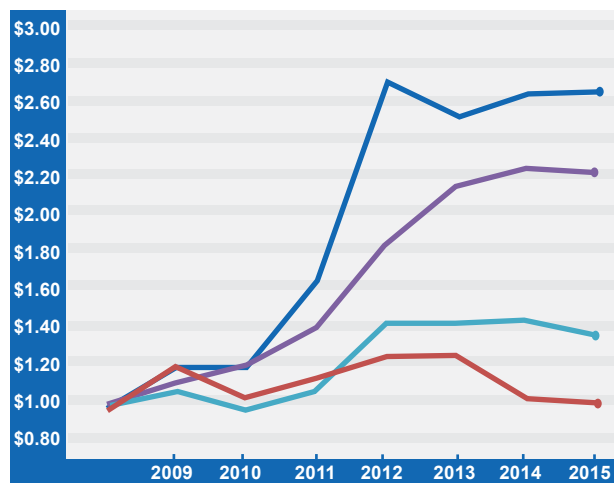
Children  
Benefited

100%

Percentage of  
Dollars Granted  
to Beneficiaries

### IDEAS THAT PERFORM

In the first 7 years, ideas presented at Invest For Kids have outperformed the S&P and MSCI. Since inception, if you had invested \$1 Million in an equally weighted basket of ideas after every conference and sold that portfolio the day of the following year conference, you would have earned over 117% on the original investment as of Q1 2016.



IFK S&P 500 Index MSCI EAFE Index MSCI EM Index

## PAST BENEFICIARIES

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Academy for Global Citizenship	Link Unlimited
Alain Locke Charter School	Marwen
Bear Necessities	Namaste Charter School
Bottom Line	Network For Teaching Entrepreneurship
Chicago Cares – Youth in Service	North Chicago Community Partners
Chicago Children's Advocacy Center	One Million Degrees
Chicago Children's Choir	OneGoal
Chicago Debate Commission	Open Books
Chicago Run	Peer Health Exchange
Chicago Scholars	Perspectives Charter Schools
Chicago Youth Programs	Polaris Charter Academy
Children's Oncology Services	Primo Center for Women and Children
Citizen Schools	Reading in Motion
Daniel Murphy Scholarship Fund	Snow City Arts
Embarc	Starlight
Genesys Works	Summer of a Lifetime
Have Dreams	The Kitchen Community
HighSight	Teen Living Programs
Horizons for Youth	Umoja
Intrinsic Schools	Year Up
Kipp: Chicago	Youth Organizations Umbrella
Learn Charter School Network	



## GET INVOLVED

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## INVEST FOR KIDS

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