



# Investor Protection Trust

## Guidelines for Stock Market Simulations

Stock Market Simulations requesting funds from the Investor Education Fund must meet the following guidelines. If your program does not meet these guidelines, your LOI will not be considered. Please note that meeting these guidelines does not guarantee that you will be invited to submit a full proposal or be awarded a grant.

- The Simulation must include an accompanying student curriculum that has as its predominant purpose investor education and protection.
- The Simulation must include teacher trainings. The teacher training curriculum must have as its predominant purpose investor education and protection.
- All Simulations should include a discussion of risk, diversification, and recognizing and avoiding investment fraud.
- The student will be given a risk assessment prior to beginning the Simulation. The student will then set an investment goal, such as match the returns of the S&P 500 or other commonly used index.
- The Simulation will involve students in stock and investment research. The students will choose optimal investment opportunities based on that research and their risk profile and stated investment goal. The students will use publicly available research and tracking services via the internet, library, newspapers, etc.
- Students' success will be judged on how their portfolio met their risk profile and stated investment goal; written reports documenting their research and explanation as to why they chose the stocks in their portfolios, including history, company and industry trends, and other relevant factors; and a final essay on any element of investing covered as part of the Simulation.
- The reports and essays may be submitted in competitions and winning students, schools and teachers may be recognized and rewarded for their work.