

**CBFS
Executive
Advisory Board**

Platinum Level Member



Gold Level Members



Silver Level Member

Bronze Level Members



CFA Investment Research Challenge

Seventeen teams competed for the Northern California CFA Investment Research Challenge Competition trophy on February 27, 2019. Only one team emerged victorious - SJSU Team Gold. The four SJSU Team Gold students - Marko Pavisic, Spriha Garg, Richa Joshi, and Luu Duong (pictured from left to right) - competed in San Francisco in front of financial industry professionals and CFA charterholder judges.



After the win, the team went to the Americas and Global Final competition in New York City in April and was judged by Wall Street professionals. While in New York City, the students and Professor Stoyu Ivanov visited the New York Stock Exchange.



CBFS PURPOSE: Founded in 2008, the purpose of the Center for Banking and Financial Services (CBFS) is to build a vital partnership between San José State University's Lucas College and Graduate School of Business and local financial institutions. In particular, the focus of the center's efforts is to create a link between talented SJSU students and the banking and financial services industry. This is especially important as there may be a discrepancy between the career opportunities in the financial sector and students' understanding of those opportunities. As a result, the partnerships built by the center benefit SJSU, its students and the companies represented on the CBFS Executive Board.

Past Events

Avidbank Game Competition

Avidbank and CBFS hosted the Avidbank game competition on Friday, March 1, 2019. Four teams of four students each competed to answer “bank related” questions, networked, and interviewed with Avidbank managers and executives. Members of the winning team (Sam Hall, Ray Jussen, Felix Martel, and Kevin Zaia) received \$500 in individual scholarships.



CBFS Scholarship Ceremony

On Wednesday, April 17, 2019, CBFS hosted the Scholarship Ceremony. 14 students were awarded a total of \$24,500 in scholarships from nine sponsoring financial institutions. The CBFS proudly hosts the Scholarship Ceremony every year, and has awarded a total of 130 scholarships and \$187,500 since its inception in 2009.

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Networking Success from the Executive Suite

CBFS, in collaboration with the SJSU Alumni Association and Technology Credit Union, hosted a networking event the “Networking Success from the Executive Suite” for all SJSU students on Wednesday, March 6, 2019 in the SJSU Student Union Ballroom. The event included a panel featuring Janikke Klem (Tech CU) and Michael Honeycutt (AAA), and a networking workshop.



Student Managed Investment Funds

	Start Value	End Value (3/31/19)	Return
Large Cap Fund (Inception Date 3/13/14)	\$50,100.26	\$77,841.55	55%
Small Cap Fund (Inception Date 3/31/17)	\$30,100.26	\$34,749.89	15%
Combined Portfolio	\$80,200.52	\$112,591.44	40%

Student Testimonial

Joining BIA was one of the best things that happened to me at San Jose State. Through BIA, I was able to network with banking professionals from all over the Bay Area, and meet top management from Bridge Bank, Heritage Bank, and many more. I was able to participate in the Heritage Credit Analyst Certificate Program, which illustrated the day-to-day activities of a Credit Analyst. I was able to tour many of the banks in the area, and ask the Presidents, CFOs, and CEOs questions that gave me great insight into the industry. There are also many great activities in BIA, such as opportunities for scholarships, as well as fun activities like Family Feud at AvidBank, with the opportunity to win \$500 dollars if you win! Because of BIA, I am now gainfully employed at AvidBank, one of our sponsors, and am gaining experience that will help me have a very successful career in the banking industry. ~ **Sam Hall**

Upcoming Events

SJSU Economic Summit

Thursday, May 30, 2019 (7:30am-10am)

Student Union Ballroom, SJSU Campus

The event will focus on the analysis and forecast of Silicon Valley's economic landscape. [#sjsueconomicsummit](https://www.sjsu.edu/economicsummit)

Confirmed Panelists:

Hon. Zoe Lofgren, Congresswoman

Dr. Christopher Thornberg, Beacon Economics

The event is free of charge but registration is required.

REGISTER NOW: www.sjsu.edu/economicsummit

Online registration closes on May 27, 2019.

A complimentary copy of the *Santa Clara Regional Intelligence Report* prepared by Beacon Economics available [HERE](#) and on the Economic Summit webpage.

The Newsletter was prepared at San Jose State University by: *Dr. Stoyu Ivanov*, Nancie Fimbel Investment Fellow, Associate Professor and Director of the Center for Banking and Financial Services; and *Dr. Tijana Rajkovic*, Assistant Professor and Assistant Director of the Center for Banking and Financial Services.