

Newsletter

Issue XVII, Spring 2024

www.sjsu.edu/cob/cbfs

[CBFS Executive Advisory Board](#)

Platinum Level Member



Gold Level Members



Silver Level Member



Bronze Level Members



2024 CFA Investment Research Challenge (IRC)

SJSU CFA IRC Team Gold – (from left to right, first picture) Ivette Lipets, Grant Cozzi, Dylan Lofaro, Srinidhi Senthil and Nien Yu Yu brought home the silver. University of Nevada, Reno won first place. The students presented their research in San Francisco and were judged by CFA Charterholders.



2024 NAIOP Silicon Valley Case Study Competition

(from left to right, first picture) Serena Recinos (Finance), Mariana Castanon (Finance), Aminah Manning (Finance) and Jimmy Chen (Civil Engineering) represented SJSU at the NAIOP Silicon Valley 3rd Annual University Case Study Challenge at Santa Clara University. The NAIOP Silicon Valley Challenge is an intercollegiate competition between full-time undergraduate students from Menlo College, San José State University, Santa Clara University, Stanford and UC Berkeley.



Bridge Bank Tour

AvidBank Game and Tour



[SJSU Center for Banking and Financial Services \(CBFS\)](#)

Founded in 2008, the purpose of the Center for Banking and Financial Services (CBFS) is to establish valuable partnerships between San José State University's Lucas College and Graduate School of Business and local financial institutions. The focus of the Center's efforts is to create links between talented SJSU students and the banking and financial services industry in order to enhance student knowledge through curricular and extra-curricular activities. This is especially important because 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 Advisory Board.

TechCU Tour 03/15/2024



MeriWest CU Tour 4/26/2024



Fund Pitches Fall 2024

09/05/2024	Pitch 157
09/07/2024	Pitch 158
09/17/2024	Pitch 159
09/19/2024	Pitch 160
11/07/2024	Pitch 161
11/12/2024	Pitch 162
12/03/2024	Pitch 163
12/05/2024	Pitch 164

**2024 Networking Success from the Executive Suite/
Spartan Success Series**



2024 CBFS Scholarship Ceremony



Student Managed Investment Funds

	As of:	3/31/2024	
	Start Value	End Value	Return
Forest Systems SMIF (Inception Date 3/13/14)	\$50,100.26	\$122,544.72	145%
SV Aggressive Growth Fund (Inception Date 3/31/17)	\$30,100.26	\$53,268.47	77%
Spartan SM Real Estate Fund	\$75,000.00	\$78,215.56	4%
Combined Portfolio	\$80,200.52	\$254,028.75	64%

SJSU Economic Summit

Thursday, June 13, 2024

9:00am-11am | Morris Dailey Auditorium, SJSU Campus [#sjsueconsummit](https://twitter.com/sjsueconsummit)

Confirmed Panelists:

Dinesh Nirmal

Senior Vice President, Products, IBM Software

Dr. Christopher Thornberg

Beacon Economics

REGISTER NOW:

www.sjsu.edu/economicsummit

This Newsletter was prepared at San José State University by: *Dr. Stoyu I. Ivanov*, Professor of Finance and Director of the Center for Banking and Financial Services.

SJSU Center for Banking and Financial Services (CBFS)

Founded in 2008, the purpose of the Center for Banking and Financial Services (CBFS) is to establish valuable partnerships between San José State University's Lucas College and Graduate School of Business and local financial institutions. The focus of the Center's efforts is to create links between talented SJSU students and the banking and financial services industry in order to enhance student knowledge through curricular and extra-curricular activities. This is especially important because 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 Advisory Board.