

Newsletter

Issue XII,
Summer 2022

CBFS Executive Advisory
Board

Platinum Level Member



Gold Level Members



Silver Level Member



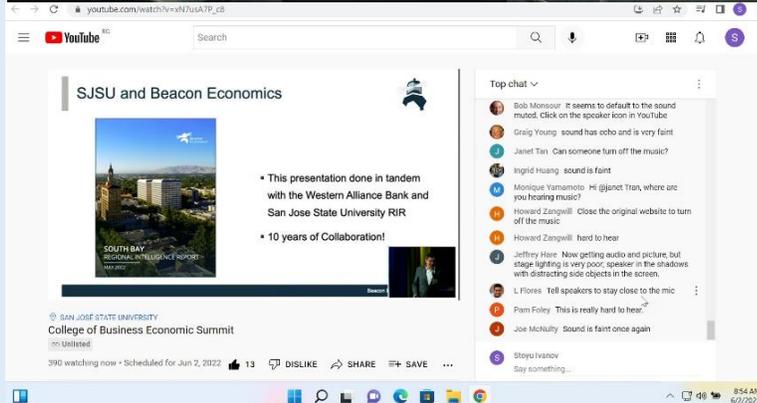
Bronze Level Members



2022 San José State University Economic Summit



In-person,
SJSU
Student
Union
Theater



Online

CBFS hosted the SJSU Economic Summit on Thursday, June 2, 2022. The panel included: **Alan Cohen**, Partner, DCVC, and **Dr. Christopher Thornberg**, Founding Partner of Beacon Economics. The event's twelfth edition was hosted both virtually and in-person and attended by about six hundred guests. The guests included representatives of small and mid-size Bay Area businesses, and members of the SJSU community. The event recording and presentation slides are available on the webpage www.sjsu.edu/economicssummit. You can also download the complimentary copy of the [Santa Clara Regional Intelligence Report](#) prepared by Beacon Economics.

The SJSU Economic Summit was made possible by the generous financial support of sponsors: Bridge Bank (presenting sponsor), Hopkins & Carley (associate sponsor), San José Chamber of Commerce (affiliate sponsor) and Silicon Valley Business Journal (media sponsor). For additional information (including past summits, panelists, sponsors and presentations), please visit the [SJSU Economic Summit](#) webpage.

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.

Union Bank Increased Sponsorship



We are very proud to announce that Union Bank has increased their contribution for SJSU student scholarships and CBFS activities and now is a Silver Level Partner of the CBFS. Union Bank has been a valued partner of the CBFS ever since the center's inception in 2008.

Financial Navigator Student Managed Investment Fund Pitches

09/01/2022	Pitch 125
09/06/2022	Pitch 126
09/15/2022	Pitch 127
09/20/2022	Pitch 128
11/08/2022	Pitch 129
11/10/2022	Pitch 130
11/29/2022	Pitch 131
12/06/2022	Pitch 132

Note: the pitches will be held at 1:30pm in BBC302D, Finance Lab.

BIA Schedule Fall 2022

09/07	Orientation
09/14	FactSet
09/21	CFA Society of SF
09/28	AvidBank
10/05	CBFS Mixer
10/12	Star One Credit Union
10/19	Republic Urban Properties
10/26	Bridge Bank
11/02	MeriWest
11/09	Phocas Financial Corp
11/16	Tech CU

2022 Heritage Bank of Commerce CBFS Credit Analyst Certificate

CBFS in association with Heritage Bank offers a non-credit program that exposes students to financial and credit analysis, loan underwriting and approval. The Certificate is taught by Heritage Bank's managers and executives and is organized in four 90-minute sessions, with a final team-competition where the two best performing teams are rewarded with scholarships. In addition to the technical skills acquired in the program, students learn about careers in banking and benefit from valuable networking opportunities. Additional details, including the application process, meeting times, scholarship amounts, and photos from past programs, are available on the CBFS webpage.

Bank Tours Fall 2022

Friday, 9/23; 10:00AM – 1:30PM	KeyPoint CU
Friday, 10/14; 10:00AM – 1:30PM	PremierOne CU
Friday, 11/04; 10:00AM – 1:30PM	Star One CU

Please note that the schedules in this newsletter are tentative and subject to change.

Student Managed Investment Funds

		7/31/2022	
	Start Value	End Value	Return
Large Cap Fund (Inception Date 3/13/14)	\$50,100.26	\$103,916.22	107%
Small Cap Fund (Inception Date 3/31/17)	\$30,100.26	\$45,891.30	52%
Combined Portfolio	\$80,200.52	\$149,807.52	87%

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

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