

**CBFS**  
**Executive**  
**Advisory Board**

*Platinum Level Member*



*Gold Level Members*



*Silver Level Member*



*Bronze Level Members*



*Spartan Real Estate Student Managed Fund*

We are very proud and excited to announce the launch of the SJSU Spartan Student Managed Real Estate Fund. The fund is seeded by CBFS and donors' money and will be managed in Spring and Fall semesters by our BUS1 172D - Student Managed Fund class students and in the Summer by our BUS1 175 - Real Estate Finance students. The fund will invest in common and preferred stocks of real estate firms, real estate investment trusts (REITs), mortgage-backed securities (MBS), real estate closed-end funds (CEFs), real estate exchange-traded Funds (ETFs) and California real estate/infrastructure municipal bonds.

*Introducing the New and Improved*

*Forest Systems Student Managed Investment Fund*

Ed Van Deman and Nancie Fimbel returned to managing their company but because the company went through a transformation they renamed it to Forest Systems Inc. They requested that the Spartan Fund be renamed to reflect that new name and thus we are happy to announce that the new official name of the Spartan Fund will be from now on Forest Systems Student Managed Investment Fund. Thank you for your continued support Nancie and Ed.

*NEW Master of Science in Finance Program*

The Lucas Graduate School of Business is pleased to present our **newly launched Master of Science in Finance (MSF) graduate program**. The program emphasizes the knowledge necessary to succeed in corporate finance roles – teaches students to develop an evidence-based mindset and apply technical finance concepts to corporate financial planning & analysis. The course work is structured to combine accounting and finance knowledge, as well as provide experience with the relevant technology and prepare well-rounded professionals for **careers in corporate finance**. In addition to technical and analytical skills, the program emphasizes the development of communication skills, professional development, and career readiness.

The MSF program consists of 30 units. Classes are scheduled in eight week sessions in a **hybrid mode**, convenient for working professionals. The courses are offered year-round in the Fall, Spring, and Summer, and the students have the flexibility of pursuing the **full-time or part-time degree track**.

The MSF program offers admission once per year in Fall. Application deadline is **June 1** (April 1 for international applicants). For more information, please visit the [MSF Prospective Students page](#).

*SJSU Economic Summit*

*Thursday, June 15, 2023*

8:15am-10am | Morris Dailey Auditorium, SJSU Campus [#sjsueconsummit](#)

Confirmed Panelists: **Matt Mahan**, Mayor of San Jose

**Dr. Christopher Thornberg**, Beacon Economics

REGISTER NOW: [www.sjsu.edu/economicssummit](http://www.sjsu.edu/economicssummit)

**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 and Activities

### Networking Success from the Exec 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 22, 2023 in the SJSU Student Union Ballroom. The event included a panel featuring Elizabeth Marchu (Tech CU), and a networking workshop. Participating alumni from various fields and backgrounds, working for some of the most respected Silicon Valley firms, were at each table sharing advice and tips for networking.

### CBFS Scholarship Ceremony



On Wednesday, April 12, 2023, CBFS hosted the Scholarship Ceremony. 17 students were awarded a total of \$30,000 in scholarships from ten sponsoring financial institutions. The CBFS proudly hosts the

Scholarship Ceremony every year, and has awarded a total of 253 scholarships and \$333,000 since its inception in 2009.

### AvidBank Tour and Game Competition



Avidbank and CBFS hosted the game competition on Monday, April 24, 2023. Four teams competed to answer "bank related" questions, & networked with Avidbank managers and executives. The winning team received scholarships.

### Technology Credit Union Tour



SJSU students visited Technology Credit Union on Friday, April 21. The visit included mock interviews and Arena tour at the Tech CU Arena.

### Meriwest Credit Union Tour



Meriwest Credit Union hosted a virtual tour on Friday, April 28, where SJSU finance students learned from and networked with Meriwest CU managers and executives.

## Student Managed Investment Funds

### Forest Systems Student Managed Investment Fund Pitch Schedule

	Start Value	End Value (4/30/22)	Return
<b>Forest Systems SMIF</b> (Inception Date 3/13/14)	\$50,100.26	\$102,416.25	104%
<b>SV Aggressive Growth Fund</b> (Inception Date 3/31/17)	\$30,100.26	\$45,821.48	52%
<b>Combined Portfolio</b>	\$80,200.52	\$148,237.73	85%

Fall 2023			
Date	Pitch	Date	Pitch
August 31	Pitch 141	November 7	Pitch 145
September 5	Pitch 142	November 9	Pitch 146
September 14	Pitch 143	November 30	Pitch 147
September 19	Pitch 144	December 5	Pitch 148

The Newsletter was prepared at San Jose State University by: *Dr. Stoyu Ivanov*, Gloria and Michael Chiang Investment Fellow, Professor, and Director of the Center for Banking and Financial Services; and *Dr. Tijana Rajkovic*, Associate Professor, Interim Director of the Master of Science in Finance program, and Assistant Director of the Center for Banking and Financial Services.