

CBFS Executive Advisory Board

Platinum Level Member



Gold Level Members



Silver Level Member



Bronze Level Members



2020 San José State University Economic Summit



CBFS hosted the SJSU Economic Summit on Wednesday, May 27, 2020. The panel included: **Ms. Kim Walesh**, Director of Economic Development and Deputy City Manager, City of San Jose, **Dr. Christopher Thornberg**, Founding Partner of Beacon Economics, and **Mr. Jay Ross**, Member of Hopkins & Carley’s Litigation Department.

The event’s tenth edition was hosted virtually for the first time and attended by more than a thousand 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 complementary 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), *BPM* (affiliate sponsor), *SVO* (affiliate sponsor), and *Silicon Valley Business Journal* (media sponsor).

The next SJSU Economic Summit is tentatively scheduled for **Thursday, June 3, 2021**. Confirmed panelists include **Dr. Christopher Thornberg**. For additional information (including past summits, panelists, and sponsors), please visit the [SJSU Economic Summit webpage](#).

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.

New Tenure-Track Faculty—Accounting and Finance Department

Dr. Danielle Lazerson



Danielle Lazerson is a new faculty member in the LCoB's accounting and finance department. Danielle recently graduated with her Ph.D. in Accounting from Louisiana State University. Previously, she earned her

bachelor's degree and MBA from Chapman University. Prior to pursuing her Ph.D., Danielle was an external auditor for Ernst & Young, LLP. Her research interests are in the areas of auditing and financial accounting.

Outside of teaching and research, Danielle enjoys surfing, practicing yoga, traveling, and watching football. She is looking forward to being a part of the accounting and finance department at SJSU. Danielle is excited for the opportunity to mentor and learn from her students.

Dr. Emmanuel Sequeira



Emmanuel Sequeira earned his PhD in Business Administration with a concentration in Finance from the University of Texas at El Paso in May 2020, and will begin serving as an

Assistant Professor of Finance this Fall. His teaching interests include courses in corporate finance and international finance. His research interests also fall within these fields, with his current research examining the spillover effects of whistleblowing on various firm outcomes. His hobbies include flying, golfing, and reading.

Dr. Luke Weiler



Luke Weiler earned his PhD in Accounting from Michigan State University in 2019. His research focuses on performance measure-

ment, firm structure, strategy, and control systems using both experimental and archival methods. Prior to his doctoral studies, Luke worked as an auditor for the Department of Defense. Luke enjoys many different hobbies. Since Covid-19 has limited live sports, music, plays, and travel, he focuses his current downtime on reading and listening to vinyl records.

Upcoming Events and Other Activities—Fall 2020

BIA Schedule

(Banking and Investment Association)

- September 2: *Orientation*
- September 9: *Commercial Real Estate Women (CREW) SV*
- September 23: *Avidbank*
- September 30: *CFA Society of San Francisco*
- October 7: *Meriwest*
- October 14: *Capital Club Mixer*
- October 21: *OCC*
- October 28: *Star One Credit Union*
- November 4: *Bridge Bank*
- November 11: *AXA Advisors*
- November 18: *US Secret Service*
- November 25: *Tech CU*

Bank Tours

- September 25: *KeyPoint Credit Union*
- October 16: *PremierOne Credit Union*
- November 2: *City National Bank*

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.

Student Managed Investment Funds

	Start Value	End Value (7/31/20)	Return
Large Cap Fund (Inception Date 3/13/14)	\$50,100.26	\$84,736.07	69%
Small Cap Fund (Inception Date 3/31/17)	\$30,100.26	\$36,056.74	20%
Combined Portfolio	\$80,200.52	\$120,792.81	51%

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*, Assistant Professor and Assistant Director of the Center for Banking and Financial Services.