

**CBFS  
Executive  
Advisory Board**

*Platinum Level Member*



*Gold Level Members*



*Silver Level Member*



*Bronze Level Members*



*Star One Credit Union  
joins the CBFS Executive Advisory Board*



It is a great pleasure to announce that Star One Credit Union is a new partner institution of the Center for Banking and Financial Services (CBFS). Star One Credit Union joined the CBFS Executive Advisory Board as a Silver Level Member.

Star One credit Union offers financial services to more than 110,000 members worldwide, has over \$9 billion in assets, and is ranked 17th in total assets among credit unions nationally.



Star One Credit Union has already joined forces with us to enhance our student knowledge through curricular and extra-curricular activities. Pictured: Javier Ortega-Lopez and Rashad Wiley talking to students in the Commercial Banking class at SJSU College of Business.

**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

### CFA Investment Research Challenge

SJSU Team 'Blue' - Atom Murata, Taylor Bennett, Martin Cerna and Joshua Fontanilla brought home the silver. The students presented their analysis in front of CFA charterholder judges.



### Bloomberg Tour

A group of students again this semester toured Bloomberg offices in San Francisco.



### CBFS Scholarship Ceremony

On April 15, 2020 CBFS hosted the annual Scholarship Ceremony via Zoom. 16 students were awarded a total of \$27,500 in scholarships from ten sponsoring financial in-

stitutions. The CBFS proudly hosts the Scholarship Ceremony every year, and has awarded a total of 157 scholarships and \$223,000 since its inception in 2009.

Congratulations to the 2020 scholarship recipients: Wadiah Alabduljabbar, Taylor Bennett, Martin Cerna, Craig Conroy, Daniel De La Torre, Hunter Faughnan, Joshua Fontanilla, Vanessa Gan, Grace Koz, Victoria Mihm, Atom Murata, Thinh Phan, Nguyen Phan, Iqbal Saini, Stephen To, and Eric Yu.

### Avidbank Game Competition

Avidbank and CBFS hosted the Avidbank game competition on Friday, February 28, 2020. 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 received \$500

in individual scholarships.



Pictured: winning team: Ishan Gupta, Grace Koz, Cynthia Fernandez-Rios, and Iqbal Saini.

### Student Managed Investment Funds

|   | Start Value | End Value<br>(3/31/20) | Return |
|---|-------------|------------------------|--------|
| <b>Large Cap Fund</b><br>(Inception Date 3/13/14) | \$50,100.26 | \$72,972.98            | 46%    |
| <b>Small Cap Fund</b><br>(Inception Date 3/31/17) | \$30,100.26 | \$30,431.20            | 1%     |
| <b>Combined Portfolio</b>                         | \$80,200.52 | \$103,404.18           | 29%    |

### Student Testimonial

I joined BIA my first semester at SJSU, and since then I have grown to become the organization's President. I would strongly recommend joining as the opportunities that BIA and the CBFS offer to students are truly unmatched on campus. Throughout my time with BIA I have been fortunate enough to make meaningful connections with professionals from all sectors of the finance industry, which has resulted in great internships. In addition to networking and professional growth opportunities, the organization also provides the most generous scholarships at SJSU, which as college students we could all use more of. I also had the opportunity to compete in the Heritage Bank Credit Analyst Certificate program, which was an awesome experience that gave me real insight into the world of commercial banking as well as a \$1,000 scholarship. However, it's not always all about work, and I have also made amazing friendships that will last long after graduation with my fellow members and officers. In essence, BIA offers a truly inclusive environment that helps prepare students for life after graduation, and I hope if you're reading this you decide to join as it has sincerely been the most rewarding experience for me at SJSU. ~ Grace Koz

### Upcoming Events

### SJSU Economic Summit

Wednesday, May 27, 2020



10:15am-12pm | *Virtual Event*

The event will focus on the analysis and forecast of Silicon Valley's economic landscape.

[#sjsueconsummit](#)

Confirmed Panelist:

**Dr. Christopher Thornberg**, Beacon Economics

The event is free of charge but registration is required.

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

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*, 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.