

CBFS Executive Advisory Board

Platinum Level Member



Gold Level Members



Silver Level Member



Bronze Level Members



2024 Heritage Bank of Commerce Credit Analyst Certificate

The Credit Analyst Certificate is organized by Heritage Bank of Commerce and the Center for Banking and Financial Services at SJSU. The certificate is a (non-credit) program that exposes participants to financial and credit analysis, loan underwriting and approval.



2024 Star One Credit Union Mortgage Banking Certificate

The Mortgage Banking Certificate is organized by Star One Credit Union and the Center for Banking and Financial Services at SJSU. The certificate is a (non-credit) program that exposes participants to residential real estate mortgage analysis, underwriting and approval.



Fall 2024 CBFS Equity Competition

Pictured (from left to right) - Dylan Lofaro (BIA President), Shruthi Nagapuri (Equity Competition Winner), Dr. Stoyu I. Ivanov (Director CBFS), Chris Bracamonte (Equity Competition Winner) and Christopher Soto (Equity Competition Winner). Winners holding trophy – “the sledge-hammer that forges skills and molds careers”.

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.

KeyPoint CU Tour 09/20/2024



PremierOne CU Tour 09/27/2024



Fund Pitches Spring 2025

02/04/2025	Pitch 165
02/06/2025	Pitch 166
02/18/2025	Pitch 167
02/20/2025	Pitch 168
04/17/2025	Pitch 169
04/22/2025	Pitch 170
05/06/2025	Pitch 171
05/08/2025	Pitch 172

2024 CBFS Mixer



2024 CBFS Equity Conference

Tim Ome and George Hessler are Wall Street veterans who spoke to our students about their experience on Wall Street and beyond. Thank you for spending time with the students Tim and George.



Student Managed Investment Funds

	Start Value	End Value 10/31/2024	Return
Forest Systems SMIF (Inception Date 3/13/14)	\$50,100.26	\$124,370.05	148%
SV Aggressive Growth Fund (Inception Date 3/31/17)	\$30,100.26	\$52,843.68	76%
Spartan SM Real Estate Fund (Inception Date 06/22/23)	\$75,000.00	\$79,803.00	6%
Combined Portfolio	\$155,200.52	\$257,016.73	66%
S&P 500 Index	1,869.06	5,705.45	205%

BIA Schedule Spring 2025

February 11	KeyPoint CU
February 18	Colliers
February 25	Tower Foundation
March 4	Heritage Bank of Commerce
March 11	PremierOne CU
March 18	CBFS Equity Competition
March 25	CBFS Scholarship Ceremony
April 15	Federal Reserve Bank of San Francisco
April 22	2025 Networking Success from the Executive Suite
April 29	Capital Access Group

Note: Schedule subject to change.

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

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