

CBFS Executive Advisory Board

Platinum Level Member



Gold Level Members



Silver Level Member



Bronze Level Members



CBFS Hosts 16th Annual SJSU Economic Summit



The Center for Banking and Financial Services (CBFS) hosted the 16th annual SJSU Economic Summit on Tuesday, June 18, 2025, at the Morris Dailey Auditorium. The event featured a distinguished panel of speakers, including:

- Ahmad Thomas, CEO, Silicon Valley Leadership Group (SVLG)
- Dr. Christopher Thornberg, Founding Partner, Beacon Economics
- Jay Ross, Partner, Lathrop GPM
- Dr. Priya Kannan, Dean, Lucas College and Graduate School of Business, SJSU

This year's Summit welcomed nearly 400 attendees, including leaders from small and mid-sized Bay Area businesses and members of the SJSU community.

Event materials—including the [full recording](#), [presentation slides](#), and a complimentary copy of the [Santa Clara Regional Intelligence Report](#) prepared by Beacon Economics—are available on the [SJSU Economic Summit webpage](#). The 2026 Summit was made possible thanks to the generous support of our sponsors, Western Alliance Bank (Presenting Sponsor), Lathrop GPM (Associate Sponsor), San José Chamber of Commerce (Affiliate Sponsor) and Silicon Valley Business Journal (Media Sponsor).

To learn more about the Economic Summit, including past events, panelists, and sponsor details, please visit the [SJSU Economic Summit webpage](#).

2026 Citizens Business Bank Credit Analyst Certificate

CBFS, in association with Citizens Business Bank offers a non-credit program that exposes students to financial and credit analysis, loan underwriting and approval.

The Certificate is taught by Citizens Business 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](#).

2026 MeriWest CU Equity Competition

The MeriWest CU Equity Competition is a new program organized by the CBFS, MeriWest CU, the Banking and Investment Association and the Silicon Valley Aggressive Growth Fund at SJSU. The Equity Competition is a (non-credit) program that exposes participants to equity research, valuation and decision making (buy, hold or sell). The equity competition participants are mentored for up to 2 hours by wealth management, investments and valuation professionals, with a final team-competition where the best performing team is awarded a trophy and a scholarship. In addition to the technical skills acquired in the program, participants learn about careers in investments through valuable networking opportunities. Additional details, including the application process and meeting times, are available on the [CBFS webpage](#).

Student Managed Investment Funds

	07/31/2025		
	Start Value	End Value	Return
Forest Systems SMIF (Inception Date 3/13/14)	\$50,100.26	\$129,026.55	158%
SV Aggressive Growth Fund (Inception Date 3/31/17)	\$30,100.26	\$55,843.41	86%
Spartan SM Real Estate Fund (Inception Date 06/22/23)	\$75,000.00	\$80,176.90	7%
Combined Portfolio	\$155,200.52	\$265,046.86	71%
S&P 500 Index	1,869.06	6,339.39	239%

Fall 2026 BIA Schedule

September 1	Orientation
September 8	MeriWest CU
September 15	Tower Foundation
September 22	Western Alliance Bank
September 29	CFA Society of SF
October 6	Morgan Stanley
October 13	CBFS Mixer
October 20	Tech CU
October 27	Forest Systems Inc.
November 3	MeriWest CU Equity Competition
November 10	AvidBank
November 17	Alts Custodian

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SV Fund: #sjsusiliconvalleyaggressivegrowthfund

Real Estate Fund: #sjsuspartanstudentmanagedrealestatefund

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

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.