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# SJSU Economic Summit



CBFS hosted the SJSU Economic Summit on Thursday, June 13, 2024, at the Morris Dailey Auditorium. The panel featured: **Dinesh Nirmal**, Senior Vice President, Products, IBM Software; **Dr. Christopher Thornberg**, Founding Partner of Beacon Economics; **Jay Ross**, Member of Hopkins & Carley’s Litigation Department; and **Dr. Priya Kannan**, Dean, Lucas College and Graduate School of Business .

The fourteenth edition of the event was attended by 350 guests, including representatives from small and mid-size Bay Area businesses as well as members of the SJSU community. The event recording and presentation slides can be accessed on the SJSU Economic Summit webpage at [www.sjsu.edu/economicsummit](http://www.sjsu.edu/economicsummit). You can also download a complementary copy of the [Santa Clara Regional Intelligence Report](#) prepared by Beacon Economics.

The SJSU Economic Summit was made possible through the generous financial support of sponsors: *Bridge Bank* (presenting sponsor), *Hopkins & Carley* (associate sponsor), San José Chamber of Commerce (affiliate sponsor) and *Silicon Valley Business Journal* (media sponsor).

For more information, including details about 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.

## Updates and Upcoming Events & Activities—Fall 2024

### Star One Credit Union Mortgage Banking Certificate

CBFS is excited to announce the Mortgage Banking Certificate program, created in association with Star One Credit Union. The certificate is a (non-credit) program that exposes participants to residential real estate mortgage analysis, underwriting and approval.

The Mortgage Banking Certificate is taught by Star One's managers and executives and is organized in three 90-minute sessions, with a final team-competition where the best performing team is rewarded with scholarships. In addition to the technical skills acquired in the program, participants learn about careers in banking and benefit from valuable networking opportunities.

Additional details, including the application process, meeting times, and scholarship amounts, are available on the [CBFS webpage](#).

### Equity Competition and Conference

The SJSU Equity Competition and Conference is the new program organized by CBFS, 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 investments and valuation professionals, with a final team-competition where the best performing team is awarded a trophy. 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](#).

### Heritage Bank of Commerce 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.

Additional details, including the application process, meeting times, scholarship amounts, and photos from past programs, are available on the [CBFS webpage](#).

### MSF Program

We are excited to welcome the second cohort of 32 students to the [Master of Science in Financial Analytics](#) program at the Lucas Graduate School of Business for Fall 2024. Additionally, we will be celebrating the graduation of the first cohort of students enrolled in full-time study this summer.

Starting Fall 2024, the MSF program will carry the prestigious STEM (Science, Technology, Engineering, and Mathematics) designation. This recognition highlights the program's quality and analytical rigor, while also enhancing our graduates' employment prospects.

### BIA Schedule

September 3: *Orientation*  
September 10: *Star One Credit Union*  
September 17: *CFA Society of San Francisco*  
September 24: *Avidbank*  
October 1: *Forest Systems Inc*  
October 8: *Republic Urban Properties*  
October 15: *CBFS Mixer*  
October 22: *Bridge Bank*  
October 29: *Meriwest CU*  
November 5: *Vista Bay Capital*  
November 12: *Tech CU*

### Industry Tours

September 20: *KeyPoint Credit Union*  
September 27: *PremierOne Credit Union*  
November 11: *City National Bank*

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