



CBFS CREDIT UNION M&A COMPETITION

The SJSU Credit Union Mergers & Acquisitions (M&A) Competition is organized by the Center for Banking and Financial Services at SJSU and the Banking and Investment Association at SJSU.

The M&A Competition is a (non-credit) program that exposes participants to M&A research, valuation and decision making. The M&A competition participants will have a final team-competition where the best performing team will be awarded scholarships.

The competition will be held in BBC 302A, Finance Lab. The competition consists of 10 minutes Presentation of a report (no PowerPoint Slides allowed, 15-page report (first page Executive Summary, followed by 4 pages report, followed by 10 pages of supplementary materials) followed by 5 minutes of Q&A. The presentation is of a M&A recommendation for two credit unions in the West Coast region of the United States only. Reports are due to the CBFS Director 48 hours before competition. All participants will receive a certificate. Students will be mentored by AI. On first page, as part of the Executive Summary, students should disclose percentage of work done by AI and which parts of work were done by AI and which parts by the team.

In addition to the technical skills acquired in the program, participants learn about careers in investments through valuable networking opportunities.

M&A COMPETITION DATE

Tuesday, March 10 at 4:30pm
BBC302A

ELIGIBILITY AND APPLICATION

Undergraduate students: Finance, Corporate Accounting & Finance, and Accounting concentrations

Graduate students: MSF, MBA and MSA
Eligible students must have already successfully completed at least one undergraduate-level finance course.

APPLICATION DEADLINE

Friday, February 6, 12:00 PM (noon)

APPLICATION PROCESS

Please email the following documents to CBFS Director Dr. Stoyu I. Ivanov at stoyu.ivanov@sjsu.edu:

- Resume
- Unofficial transcripts (for graduate students both undergraduate and graduate transcripts are required)
- (Optional) – Personal statement: How can the Equity Competition help you in achieving your educational and professional objectives? (max 350 words)

Visit the Center for Banking and Financial Services website for more information: sjsu.edu/cob/cbfs

CERTIFICATE REQUIREMENTS

In order to qualify for the M&A Competition Certificate a student and their team must present their recommendation to the judges on the day of the competition.