

CBFS
Executive
Advisory Board

Platinum Level Member



Gold Level Members



Silver Level Member



Bronze Level Members



BRAND NEW
Meriwest Credit Union Equity Competition



The Meriwest Credit Union 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.

Winners (from left-to-right) William Guzman, Sukhmanrup Singh and Roman Nayabkhil holding trophy – “the sledge-hammer that forges skills and molds careers.”

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](#).



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 and Activities

CBFS Mixer



2025 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. Additional details, including the application process, meeting times, scholarship amounts, and photos from past programs, are available on the [CBFS webpage](#).

KeyPoint Credit Union Tour



PremierOne Credit Union Tour



Upcoming Events and Activities

Spring 2026 BIA Schedule

February 3 - Orientation
February 10 - StarOne CU
February 17 - Davidson Family Foundation
February 24 - KeyPoint CU
March 3 - Heritage Bank of Commerce
March 10 - CBFS Credit Union M&A Competition
March 17 - *CBFS Scholarship Ceremony*
March 25 - *Networking Success from the Executive Suite*
April 14 - Republic Urban Properties
April 21 - PremierOne CU
April 28 - Potentia Wealth

2026 Star One CU 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.

2026 SJSU Economic Summit

An annual event focusing on the analysis and forecast of economic activity at the local, state, and national level. Presented by Western Alliance Bank in association with Lathrop GPM.

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