

Finance & Investment Committee

The Tower Foundation of San Jose State University
February 25, 2026 at 1:00 PM - 3:00 PM
Via Zoom

Agenda

I. Call to Order

II. Public Comment

III. Old Business

A. Approval of Finance and Investment Committee Minutes - November 12, 2025

IV. New Business

A. Beacon Pointe

- 1. Macro Market Review**
- 2. Quarterly Investment Update**
- 3. ESG Portfolio Review**
 - a. Rebalance**
 - b. Manager Change**
- 4. Fixed Income Allocation**

B. Financial Custodian Review

C. Operating Budget Update

D. Endowment Distribution Proposal

V. Next Meeting - Tuesday, May 19, 2026 @ 1:00 - 3:00 PM

VI. Adjournment