

Finance & Investment Committee

The Tower Foundation of San Jose State University
May 19, 2026 at 1:00 PM - 3:00 PM
Via Zoom

Agenda

I. Call to Order - Phil Boyce

II. Public Comment

III. Old Business

A. Approval of Finance & Investment Committee Minutes - February 25, 2026

IV. New Business

A. Beacon Pointe

1. Macro Market Review

2. Quarterly Investment Update

3. Rebalance Proposal

4. Fund Manager Change Proposal

5. Private Equity Opportunity - Industry Ventures

B. Financial Custodian RFP Update

C. 2026-27 Operating Budget Proposal

V. Next Meeting - August 19, 2026 at 1:00 - 3:00 PM

VI. Adjournment