



Finance & Investment Committee Meeting

Thursday, October 29, 2026

9:00 AM – 11:00 AM

Student Services Building East, 1st Floor, Room #1124

Zoom: <https://cpp.zoom.us/j/86582336353>

Committee Members: Jayson Yardley (Chair), Jose Gomez (Vice Chair), Sean Yu, Anthony Orlando, Jawaad Malik, John Resich, Katie McEvilly, Larry Gates, Frances Teves, Michelle Cardona

Guests: Enterprise Foundation: Jason DeBellis, Juan Hernandez

SMIF Faculty Advisor: Pawan Tomkoria

Goldman Sachs: Jeromie Park, Doug Austin, Sofia Bonito, Frances Joseph

Staff: Derrick Fang, Marissa Martinez, Michelle Klein

- | | |
|---|--|
| I. Call To Order | Jayson Yardley |
| II. Public Comment | Jayson Yardley |
| III. Approval of 8/28/26 Meeting Minutes
Action Item: | Jayson Yardley |
| IV. 1 st Quarter FY26-27 Financial Statement Review | Derrick Fang
Jason DeBellis
Juan Hernandez |
| V. FY26-27 Endowment Distribution
Action Item: | Jayson Yardley |
| VI. Investment Portfolio Review (Goldman Sachs) | Jeromie Park / GS Team |
| VII. Executive Dashboard and Financial Statement | Jayson Yardley
Derrick Fang |
| VIII. NACUBO Report Update | Frances Teves
Derrick Fang |
| IX. Open Discussion | |
| X. Adjournment | Jayson Yardley |

FY26-27 Finance & Investment Committee

2/4/2027 9am – 11:00am

4/15/2027 9am – 11:00am