

# CSUSB FOUNDATION

*Building a Culture of Philanthropy*

## Investment & Finance Committee Meeting

Friday, November 7, 2025

9:00 – 11:00 a.m.

Zoom: <https://csusb.zoom.us/j/84330240441>

### Agenda

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|-------|--|---|
| I.    | Welcome  | Gary McBride, Chair                                 |
| II.   | Approval of the September 5, 2025, Minutes                         | Gary McBride  |
| III.  | 3 <sup>rd</sup> Quarter Portfolio Performance and Discussion       | Karin Longhurst, Graystone<br>Andy Price, Graystone |
| IV.   | Foundation Financial Statements                                    | Maria Badulis, Controller                           |
| V.    | Short Term Investments - Cash Flow Threshold<br><b>Action Item</b> | Maria Badulis, Controller                           |
| VI.   | Foundation Report  | Ray Watts, Executive Director                       |
| VII.  | Open Discussion  | All   |
| VIII. | Adjourn  |   |

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