



Friends of Finance

25th Anniversary Year

“Bringing the Best to the Best”

December, 2009

December 3, 2009

David Moffett

Senior Advisor, Carlyle Group

Former CEO, Freddie Mac

Former Vice Chairman, US Bancorp

Mr. Moffett serves as Senior Advisor of The Carlyle Group. Mr. Moffett served as Chief Executive Officer of Federal Home Loan Mortgage Corp. (Freddie Mac) from September 2008 to March 2009, and as a director of Freddie Mac from December 2008 to March 2009. Mr. Moffett has more than 30 years of strategic finance and operational experience in banking and payment processing. He joined Star Banc Corporation in 1993 as CFO and played integral roles as Star Banc Corporation acquired Firststar Corporation in 1998, which then acquired U.S. Bancorp in February 2001, retaining the U.S. Bancorp name. Prior to 1993, Mr. Moffett held executive level positions at some of the nation's leading financial services companies, including Bank of America and Security Pacific Corp. Mr. Moffett holds a B.S. degree in Economics from the University of Oklahoma and a Master's degree from Southern Methodist University. Mr. Moffett started his career at First National Bank in Tulsa Oklahoma.



January 21, 2010

Steve Feilmeier

EVP & CFO

Koch Industries, Inc.



Steve Feilmeier is executive vice president and chief financial officer of Koch Industries, Inc. as well as a member of the Koch Industries board of directors. Before joining Koch Industries, Steve held a variety of positions at PepsiCo, and was manager of taxation at KPMG Peat Marwick. He earned bachelors and masters degrees in accounting from Wichita State University, and is a certified public accountant.

Based in Wichita, Koch Industries is the largest private companies in the US. Koch's operations are diverse, including refining and chemicals, process and pollution control equipment, and technologies; fibers and polymers; commodity and financial trading; and forest and consumer products (led by Georgia-Pacific LLC). Its Flint Hills Resources subsidiary owns three refineries that process 800,000 barrels of crude oil daily. Koch operates crude gathering systems and pipelines across North America as well as cattle ranches with a total of 15,000 head of cattle in Kansas, Montana, and Texas. Koch companies have a presence in nearly 60 countries and employ about 70,000 people. Familiar Koch companies' brands include STAINMASTER carpet, LYCRA fiber, Quilted Northern tissue and Dixie cups and tabletop products.

Meeting Sponsor



We extend our thanks and appreciation to BancFirst for serving as our Luncheon Sponsor.

*Friends of Finance 25th Anniversary
“Bringing the Best to the Best”*

This Years’ Upcoming Best are:



*January 21, 2010
Steve Feilmeier
EVP & CFO
Koch Industries, Inc.*

*February 16, 2010
John Schlifske
President
Northwestern Mutual*



*March 9, 2011
Herman Bulls
CEO
Public Institutions
Jones Lang LaSalle*

*April 14, 2010
David Lesar
President & CEO
Halliburton*



Sponsored by:



*May 4, 2010
Tim Boyle
President & CEO
Columbia Sportswear Co.*

Corporate Sponsors

A Corporate Sponsorship provides a table for eight at each luncheon with preferential seating; recognition in each newsletter; recognition at each meeting on PowerPoint slides prior to the start of each luncheon, a listing on a display board at each luncheon, and recognition from the podium at a number of the luncheons.

To ensure that individual members have adequate seating the Board has limited the number of Corporate Sponsors.

The annual cost of a Corporate Sponsorship is \$3,500. If you are interested in having your company join, contact Judy Adair at 631-2588 or judy-adair@utulsa.edu for details. Thus far, Corporate Sponsors for this year are:



CPAs & BUSINESS ADVISORS



Alumni / Student Notes

If you have been promoted, changed companies, earned another degree or have personal information (marriage, birth of child, etc.) please send the information along with a color picture to (judy-adair@utulsa.edu) and we will include it in our newsletter.



Clint Alexander (*BSBA '98, MSF '05*) and his wife Athena welcomed their son Carter into the world on August 20, 2009. Clint is currently completing a judicial clerkship as a staff attorney with the Travis County Probate Court in

Austin, Texas and will enter private practice as an estate planning / probate attorney in 2010.

Alex Schneider (*MSF '03*) has completed the CFA examinations and is a Chartered Financial Analyst. He is employed by Wells Fargo Securities as an Associate – Fixed Income Research in the Securities & Investment Group.



Chad White (*MSF '05*) has joined Precision Capital a small index options trading group in Chicago. He is a trader in the SPX pit options on the S&P500 at the CBOE.

After telecommuting as a Vice President in Bank of Oklahoma's Risk Management department, **Lindsey Madden** (*BBA '01; MSF '03*) returned to Tulsa. She prepares financial risk management reports, develops risk monitoring procedures, and shepherds new product innovations at the bank.



Tim Madden (*MSF '03*) returned to Tulsa after earning an additional Master's Degree focused in Operations Research at Purdue University. He is a Staff Manager: Revenue Science at Dollar Thrifty Automotive Group (DTG). Tim applies data mining, forecasting, and math programming to optimize pricing and inventory controls.

Liu Liu (*MSF '06*) has passed Level III of the CFA exam. As soon as she accumulates the required number of years of professional investment experience, she will become a Chartered Financial Analyst. Liu Liu is employed by the Bank of Oklahoma as an Investment Analyst.



Matt Hazelwood (*BS '01; MSF '04*) has accepted a position as a Senior Structure and Pricing Analyst with The Energy Authority in Jacksonville, Florida.

Speaker Suggestions

If you have a personal contact with executives of the stature of our past speakers who would be good speakers, we would very much appreciate receiving their names and contact information. Just send the name of your potential speaker to roger-bey@utulsa.edu or judy-adair@utulsa.edu. We will add it to our potential speaker list. We will contact you to help when we are ready to send an invitation.

FOF Web Site

The FOF website <https://bus.collins.utulsa.edu/fof/> includes a number of services as listed below.

New Membership

<https://bus.collins.utulsa.edu/fof/memberapp.asp>

Meeting Registration

<https://bus.collins.utulsa.edu/fof/reg.asp>

Members Services

<https://bus.collins.utulsa.edu/fof/signin.asp>

(restricted to FOF members and requires a user name and password). After signing in, you go to:

Membership Renewal

All of your profile information will come up so you don't have to re-enter this information.

Membership Directory

A listing of all FOF members is provided. Contact information is available only if members agree to have it posted.

Update Member Information

You may update any of your membership information on-line. This will help to make sure that you don't lose contact with us.

Job Postings

Corporate job openings will be posted. E-mails will be sent to advise you that a new job opening has been posted. You will then go to the web site to see the job description.

Resume Posting

FOF members may post their resume on the FOF web site when they are seeking employment.

Executive Luncheon Sponsors

If your firm would like to gain some additional recognition and support FOF, it is now possible to be designated as a Friends of Finance Executive Luncheon Sponsor. A Luncheon Sponsor would receive recognition in our newsletter, recognition at the meeting on PowerPoint slides prior to the meeting, recognition from the podium, and a table for eight at one luncheon with preferential seating. One member of the sponsoring firm will be seated at the Head Table with the speaker. The Luncheon Sponsorship is for one meeting. The cost to sponsor the luncheon is \$2,500. Contact Judy Adair, (judy-adair@utulsa.edu or 631-2588) if you are interested in being a Luncheon Sponsor.

2009-2010 Finance Excellence Fund Campaign

In 1990, one person contributed \$3,000 to initiate the Finance Excellence Fund. Since then, some 2,200 gifts and more than \$1.7 million have been received. This is a fantastic achievement and illustrates the awesome support our members and friends have for FOF and TU.

This year, our Silver Anniversary, the Board of Directors has established the challenging goal of \$10,000 for each of our 25 years or \$250,000 from 200 donors. Last year, we raised \$211,000. We are confident that your loyalty and dedication to making TU's finance program gain national prominence will allow us to not only reach, but to exceed our goals.

Contributions may be made on-line at <https://bus.collins.utulsa.edu/fof/excellencepledge.asp> or send a check payable to University of Tulsa Finance Excellence Fund to:

Friends of Finance
Collins College of Business
The University of Tulsa
800 South Tucker Drive, Helm 118-G
Tulsa, OK 74104-9700

**2009-2010
Finance Excellence Fund
Honor Roll**

Finance Excellence Fund Honor Members for 2009-2010 are:

Finance Founder

Robert & Sharon Prince

Finance Partner

Keith Bailey

Beryl McElhiney

Finance Benefactor

JP Morgan Chase

Laredo Petroleum, Inc.

Finance Patron

David Enke

Greg Oliphant

John Steele Zink Foundation

Finance Associates

W. H. Helmerich, III

Jack Koehle

James Milton

Finance Friends

Mike Bartlett

Chad Brumley

Bob Gaddis

Keith Goddard

John Kauth

Tom Redman

Tom Stees

Bob Traband

Bill Wilke

Finance Donors

Meg Brimmer

Lee Crawley

Irving Fenster

**Judy Adair Endowment
“A Way to Say Thank-You”**

If you think, and to the best we can tell, everyone does, that Judy Adair does a fantastic job for Friends of Finance, you can show your appreciation by contributing to the Judy Adair Endowment. The endowment was established by an anonymous donor who agreed with the previous sentence and pledged a challenge grant of \$75,000 per year for 5 years. This is our second year of the challenge grant. The terms of the grant are relatively simple. All contributions to the Finance Excellence Fund above the amount of your individual contribution during the 2007-2008 Excellence Fund Campaign will be matched dollar for dollar. This includes matching gifts from corporations. An example of how this works follows:

	<u>Individual Gift</u>	<u>Corporate Match</u>	<u>Total</u>
2007-08	\$500	\$500	\$1,000
2009-10	<u>\$1,000</u>	<u>\$1,000</u>	<u>\$2,000</u>
Increase	\$500	\$500	\$1,000

Hence, the Challenge Grant contributes \$1,000 and your \$500 contribution becomes \$3,000. If you did not contribute in 2007-08 your \$1,000 2009-2010 contribution with a corporate match becomes \$4,000. If you consider the after tax cost of your contribution, the story gets even better. We know of no other charity which provides such tremendous leverage. Maximize the value of your giving by contributing to the Finance Excellence Fund. The \$75,000 needed to use the entire challenge grant is part of our Finance Excellence Fund goal.

Contribute to the Judy Adair Endowment now by contributing above your 2007-08 gift.

Contributions may be made on-line at <https://bus.collins.utulsa.edu/fof/excellencepledge.asp> or send a check payable to University of Tulsa Finance Excellence Fund to:

Friends of Finance
Collins College of Business
The University of Tulsa
800 South Tucker Drive, Helm 118-G
Tulsa, OK 74104-9700

Membership

Last year we had membership of 421. This year our membership goal is 500. To date, we have 344 members. We will be working very hard to meet this ambitious goal by encouraging everyone who was a member last year to renew their membership and all former members who were not members last year to once again become members. If you are a TU graduate within the last twelve months, your membership fee is only \$10. If you live outside of the Tulsa area (more than 50 miles) your membership fee is only \$10. Membership fees support all of the expenses associated with Friends of Finance. Show your support for FOF, The Collins College of Business, and TU by joining today.

To renew your membership or join, go to <https://bus.collins.utulsa.edu/fof/memberapp.asp>. Encourage your friends and colleagues to do the same. Friends of Finance is the largest and strongest finance group in Oklahoma and the Southwest. Your membership will help us maintain our leadership position.

For a complete membership listing, go to [Member Services](#); [Directory](#).

Members since our last newsletter are listed below.

Tricity Andrew	Michael Messer
Dale Billam	Mike Moore
Jim Bishop	Jerry Morris
Phil Burch	Grant Najera
Kui Cheng-Gugliotta	Sharon Prince
Renee Cui	Bob Prince
Casper den Harder	Stephanie Richardson
Dan Doyle	Don Rubottom
Aaron Edwards	Jonathan Scrocchi
Ignacio Fernandez	Steve Soule
Bob Fitzgerald	Todd Starke
John Galbraith	Jeff Stoermer
Travis Hoffstot	Bruce Stoesser
Emily Ingram	Mike Todd
Andrew Krush	Kevin Turner
Haoyang Liu	David Whitney
Yu Mao	Bill Wiles
Melody McCloud	Bryce Zedalis

Graduate Business After Hours

If you or anyone you know is even considering a graduate business degree, you should register for “Graduate Business After Hours” to learn about the opportunities that TU has to offer. Information will be available concerning our MS in Finance, MBA, and Master in Tax programs. In addition, people will be available to explain the admission process, the GMAT exam, and financial aid. For graduate business programs, go to:

www.utulsa.edu/graduate/business and for the MS in Finance program, go to: www.utulsa.edu/graduate/finance.

Our MS in Finance program is doing very well. We have great students as evidenced by their 668 average GMAT (87 percentile). Only about 25 of the 800 plus MBA programs have a higher average GMAT. Student placement has been very good.

Graduate Business After Hours will be held at the DoubleTree Downtown on November 17th from 5:30 – 7:00 p.m.

Register at:

www.utulsa.edu/grad-business-after-hours.

Hors d’oeuvres will be served. Registered guests will receive an application fee waiver and be eligible to win a Kaplan GMAT course valued at \$1,499. Parking at the Downtown Doubletree will be validated.

In the meantime, if you are interested in hiring outstanding MSF students for full-time positions or as interns, contact:

roger-bey@utulsa.edu.

Fees

Fees for this year are:

- \$210 (Membership plus all luncheon fees)
- \$75 (Tulsa area members - membership fee only)
- \$10 (out-of-area members - outside 50 mile radius of Tulsa)
- \$10 (current TU full-time student or TU graduate within the last year)
- \$450 (Membership plus all luncheon fees for yourself and one guest)
- \$250 One reserved table (8 seats)
- \$2,000 (One reserved table of eight at each Luncheon)

Luncheons:

- Members \$20
- Non-members \$30

Members may bring a first time attendee as a guest at the member rate.

Resume Posting

FOF members who are seeking employment may now post their resume on the FOF web site. An e-mail will be sent as new resumes are posted. The e-mail will only list the type of position sought and a link. Your user name and password will be required to access the actual posting.

E-mail your resume as a Word or PDF file to Judy Adair (judy-adair@utulsa.edu) who will post it. In your e-mail, please include a job title (financial analyst, CFO, etc.) of not more than four words. We will not edit your resume. There is no cost to members for this service.

Shuttle Service



Bill White Shuttle Service will provide shuttle service from the parking lots along Gary Place to the Allen Chapman Activity Center between 11:00 a.m. and 2:00 p.m. See [University of Tulsa Parking Map](#) for a campus parking map. Please let us know if you have questions.

Job Posting

This year we will continue our web site for job postings service on a no cost basis for all members. Membership is required both to post jobs and to view job postings. Once we post a job, we will distribute an e-mail announcing the new job posting.

Firms who have used FOF to distribute job openings have found it to be a very effective recruiting tool. FOF members have been very appreciative and have told us how they passed along the job information to friends seeking employment. Hence, the distribution is far larger than our membership. We encourage you to have your firm participate in our job posting service.

To post a job opening, e-mail the job description in Word or PDF file, along with contact information to Judy Adair (judy-adair@utulsa.edu) who will post it. We will not edit the files.

Leadership

Our officers and directors for 2009-2010 are:

Officers

- President Greg Hopeman, UBS Financial
- VP Programs Jeff Holman, Magellan Midstream
- Treasurer Eugene Hodel, Hilti, Inc.
- Secretary Geordie Matson, BancFirst
- Membership Chris Guglielmo
- FEF Chair Jim Holloman

Directors

- Roger Bey, TU
- Don Chappel, Williams
- Sam Combs, Retired from ONEOK
- Janet Duffy, Samson Investment Company
- Randy Foutch, Laredo Petroleum
- Shane Goodwin, Argus Capital Partners

Take-A-Student to Lunch

One goal of Friends of Finance is to provide assistance to our students. Assistance may be in the form of employment advice, employment opportunities, and mentoring. One way to do this is to participate in our Take-A-Student to lunch program. Just contact Judy Adair at 631-2588 or judy-adair@utulsa.edu and tell her how many students you would like to host. She will arrange for the student(s) to meet you at the registration desk for the luncheon. Please ask for the student(s) when you check in.

Affiliate's Programs

Last year our partnerships with other professional groups worked very well. They helped to promote our programs and we did the same. This year, we will continue our partnerships.

Energy Advocates

For more information: 599-7767

info@energyadvocates.org

The upcoming International Energy Policy Conference IEPC event will be held in Oklahoma City, OK. This year's theme is "American Leadership and Global Energy Transitions" that reflects the current market conditions. Join key energy executives, political representatives, and peers in the energy policy conference. For more information:

<http://www.energypolicyconference.com/>

NAIC

4th Thursday Free Education Classes

6:45 p.m. – 7:30 p.m.

Hardesty Library, 8316 E. 93rd

NAIC Contact:

Tami deangelistami@hotmail.com or 747-9303

or

Barbara wollmersh@aol.com

Tulsa's Young Professionals

Giving Tulsa's Young Professionals a voice. A voice in our community. A voice in the business community. And ultimately, a voice in our future.

Tulsa's Young Professionals is a quality group of diverse young professionals working together to showcase Tulsa as a cool place to live, work and play. TYPros provides its members with opportunities to get in front of and build relationships with local community and business leaders.

Not only does TYPros give young professionals a voice - it gives them an outlet for affecting change in the Tulsa community. TYPros seeks to work hand-in-hand with current community and business leaders to learn from their experiences and to create a young professional-friendly atmosphere.

For more information, go to: <http://www.typros.org/>

TU Executive & Professional Development

The Center for Executive & Professional Development in the Collins College of Business can help you brush up your business acumen or prepare for new professional credential. Registration is now open for these and other Fall programs:

Mini-MBA—The TU Mini-MBA is designed to make certain participants leave with knowledge and tools for application that they can actually use in the workplace.

Developing Project Management Skills—this program will help you acquire the must-have skills to successfully deliver any project on time and within the outlined parameters.

CIA Extreme Exam Prep—This is a blended learning approach—combining the best of online review materials with the best of classroom instruction, to prepare you for testing to become an internationally recognized Certified Internal Auditor.

Oil & Gas Tax + Partnerships—now being presented in Tulsa, the Tax program will help you understand the bottom line tax implications of exploration and drilling project; while the Partnerships program focuses upon the specific issues encountered by oil and gas partnerships.

For more information and to register online:

<http://bus.collins.utulsa.edu/cepd/programs.aspx> or call
918.631.2215

Links

On-line registration

<https://bus.collins.utulsa.edu/fof/reg.asp>

December: <https://bus.collins.utulsa.edu/fof/docs/20091203RegistrationForm.doc>

January: <https://bus.collins.utulsa.edu/fof/docs/20100121RegistrationForm.doc>

February: <https://bus.collins.utulsa.edu/fof/docs/20100216RegistrationForm.doc>

March: <https://bus.collins.utulsa.edu/fof/docs/201000309RegistrationForm.doc>

April: <https://bus.collins.utulsa.edu/fof/docs/20100414RegistrationForm.doc>

May: <https://bus.collins.utulsa.edu/fof/docs/20100504ReigstrationForm.doc>

<https://bus.collins.utulsa.edu/fof/>

[Membership Form](#)

[Pledge Card](#)