



Friends of Finance

25th Anniversary Year

October, 2009

“Bringing the Best to the Best”

October 14, 2009

Donald Humphreys

*Senior VP & Treasurer
Exxon Mobil Corporation*

*"The Role of Corporate Citizenship in Meeting
World Energy Demand"*

A native of Tulsa, Oklahoma, Mr. Humphreys joined Exxon Chemical Company in 1976. Since then, he has held a number of positions in Houston, Baton Rouge, Baytown, Malaysia, and Irving. Some of his assignments include senior financial advisor, financial reporting manager, assistant general auditor, and controller. In 2006, he was elected SVP and treasurer. He has a BS in Industrial Engineering and Management from Oklahoma State University and an MBA from the Wharton School of the University of Pennsylvania.



Reservations are required. You may register on-line at: <https://bus.collins.utulsa.edu/fof/reg.asp> or contact Judy Adair at 631-2588 or judy-adair@utulsa.edu. Friends of Finance members will have preference until September 30, 2009.

Meeting Sponsor



We extend our thanks and appreciation to Laredo Petroleum, Inc. for serving as our Luncheon Sponsor.

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.



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:



*October 14, 2009
Donald Humphreys
SVP & Treasurer
Exxon Mobil Corporation*

Sponsored by:



December 3, 2009

David Moffett

*Senior Advisor - Carlyle Group
Previously served as
CEO of Freddie Mac and CFO &
Vice-Chairman of US Bancorp*

Sponsored by:



*February 16, 2010
John Schlifske
President
Northwestern Mutual*

Date TBA

Steve Feilmeier

*EVP & CFO
Koch Industries, Inc.*



*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



Speaker Fees

Two very common questions concerning FOF speakers are: (1) How do you manage to get such an outstanding line-up of national prominent speakers? And (2) How much do you have to pay to get these people to come?

The answer to question 1 is that it is the combined effort of officers, directors, and members who have contacts. Every speaker we have had is due to a personal relationship with one of our members. FOF speakers are a powerful example of what networking can do. If you aren't a FOF member, join today so that you too may enjoy the networking benefits of FOF.

The answer to question 2 is that we pay neither speaker fees nor travel costs. We endorse the First Amendment – Free Speech. Most, if not all, of our speakers implicitly or explicitly allocate a certain number of days to doing public relations for their firm. Our job is to convince them that they should spend one of these days in Tulsa, Oklahoma.

The lack of speaker fees and travel costs is why we can maintain our membership dues and luncheon fees to be so modest.

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.

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.



Yuejuan (Emily) Li is an MSF student and has a bachelor's degree in Finance from the University of Iowa. During the academic year, she serves as a graduate assistant for the Finance and OM Department.

Last summer, Emily had an internship with State Farm Insurance. Here is an excerpt from her internship report. To view the complete Internship Report, go to [Emily Li Internship Report](#).

“From May 18th to July 31st, 2009, I worked at State Farm Insurance Tulsa operation center as a summer intern. During the 11 week period I had the opportunity to work with different departments as well as other interns. I gained a good understanding of State Farm's organization structure and each department's responsibilities.

The internship experience not only landed me a job offer, but also helped me to learn and grow professionally. With the academic skills learned from my professors and the real world experience from the internship, I feel more prepared to enter the workforce after I graduate.”

New Finance Faculty Member



Kevin Krieger joined the Finance and OM Department in August 2009 as an Assistant Professor of Finance. Kevin received his Ph.D. in Finance from Florida State University. He also has earned a B.S. and M.S. in Statistics and a

B.A. in Mathematics from the University of Florida. He will be teaching in the areas of corporate finance and financial institutions. His primary research areas are corporate finance and derivatives. His article “Implications for Asset Returns in the Implied Volatility Skew” (with James Doran), has been accepted for publication in the *Financial Analysts Journal*. Kevin will be at the Friends of Finance luncheons. Please introduce yourself to him.

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.

Friends of Risk Luncheon

Friday, October 2, 2009

Speaker: Kevin Kindall

**Director of Quantitative Analysis
ConocoPhillips**

Kevin Kindall, Director of Quantitative Analysis for the Commercial Division of ConocoPhillips, will be the next Friends of Risk speaker. His topic is: “*Quantitative Analysis: A Practitioner's View*”. In his presentation he will discuss how commodity markets pose valuation and risk management challenges not found in other markets. He will illustrate the role of quantitative analysis in the commodity markets, and discuss some of the challenges commonly faced by practitioners. Examples will be taken from both the front and middle offices, as well as valuation and origination.

Dr. Kindall’s group supports both the front and the middle offices, and is responsible for derivatives pricing, trading support, risk management, and solving various quantitative problems that arise elsewhere in the company. Prior to his current role, Kevin served as a member of the Research group at Enron. He earned a Ph.D. in Physics from Clemson University and a Masters in Computational Finance from Carnegie Mellon University.

The luncheon begins at 11:30 a.m. in Room 121, Helmerich Hall on the TU campus. Reservations are required. RSVP to Linda Reins at linda-reins@utulsa.edu or 631-2949 by September 30, 2009. Cost is \$8.00 (\$5.00 for students) and you pay at the door. Go to <http://www.utulsa.edu/campusmap> for a campus map. Helmerich Hall is building 14 on the map.

Membership

Last year we had membership of 420. This year our membership goal is 500. To date, we have 309 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. Members since our last newsletter are listed below. For a complete membership listing, go to [Member Services](#); [Directory](#).

Joe Adwon	Mark Collins	Stephanie Hart	Pete Meinig	Ali Taqi
Andrew Aguirre	Sam Combs	JD Hatter	Beverly Monnet	Kyle Taraszka
Nick Allen	Ron Comeau	Steve Hildebrand	Joe Moran	Hugh Taylor
Connor Anderson	Brian Conway	Jim Hill	John Neas	Jordan Taylor
Bill Andres	Ted Cowan	Carlyne Holmes	Brady Nguyen	Jerry Taylor
Ryan Andrews	Tom Craft	Greg Hopeman	Gordon Nielsen	Brittani Teague
Loren Armstrong	Lee Crawley	Gayla Hurley	David Page	Larry Terry
Tory Baker	Geoff Curran	Robert Hutton	Terry Payne	Ken Tooman
Matthew Barnard	Dewey Daniels	Paul Iskat	Rob Pilcher	Bob Traband
Steve Barnes	Anatoli Davydov	Stacey James	Dick Pittenger	Mollie Trease
Bobbie Bearden	Kirk Di Giacomo	Anuar Janabayev	Steve Poleman	Amanda Troxell
Brandon Bell	Pat Donica	Olaf Jaroehowski	Jennifer Price	Tim Urban
Scott Bennett	Bob Duenner	Larry Johnson	Qian Chen	Kent VanValkenburgh
Denise Bibby	David Enke	James Kelley	Art Rasher	Doug Vincent
Becky Biesecker	Fenster Irving	Michael Kelly	James Redman	John Walkup
Bob Boyd	David Fleske	Greg Kichler	Linda Reins	Tim Walters
Ron Brown	Alan Ford	Tori Kornhaas	Robert Reins	Chuck Walton
Arnold Brown	Brad Foster	Kevin Krieger	Tim Roberts	Jean Walton
Ellen Burgess	Lance Franczyk	Marvin Krueger	Ramona Roberts	Guannan Wang
Eric Burkholder	Phil Franczyk	Don Lane	Lori Rowan	Ying Wang
Bobby Burnett	Bob Fredrickson	Pete Leininger	Byron Rundle	Tom Warburton
Mike Burton	Richard Gable	Julie Lewis	Bob Russell	Cindy Webb
Tom Campbell	Greg Gaither	Yue-juan	Hayden Ryan	Marty Weber
Steve Care	Richard Gajan	Chengwei Li	Patsy Savage	Lynn Wheatley
Joshua Carson	Jason Gates	Greg Lippert	Amanda Shank	Dr. Stan White
Anju Chandra	Richard Gebhart	Nathan Lovelle	Chris Shannon	Bill Wilke
Judy Chapman	Paul Gee	Max L Mason	Julie Skye	Christy Williamson
Don Chappel	Kevin Genske	Geordie Matson	Theresa Smith	Mark Wilmoth
Luis Chaves	Bob Geweniger	Shane Matson	Mark Smith	Joe Wolking
Wen Chiang	Jayne Gilsinger	Vic McClintic	Mark Smith	Steve Wyett
Mike Clark	Lexi Goldman	Jason McCoy	Ryan Staebell	Andy Yarritu
Aaron Clark	Rhonda Grundy	Dee McDugle	Kenny Stone	Neal Zahn
Tami Cobb	Chris Guglielmo	Beryl McElhiney	Gale Sullenberger	
David Cohen	Mary Haddican	Joe McGraw	Bob Swain	

2009-2010
Finance Excellence Fund

The Friends of Finance Board has set a goal of \$250,000 for the 25th anniversary of Friends of Finance -- \$10,000 for each year FOF has existed. We realize that this is a serious challenge, but are confident that we will succeed. One key to this is to make sure that we do not leave any of our \$75,000 challenge match for the Judy Adair Finance Excellence Scholarship Endowment on the table. As a reminder, all gifts above the amount a donor or organization contributed during the 2007-08 campaign will be matched. Donors to date for the 2009-2010 Finance Excellence Fund Campaign are:

Finance Founder

Robert & Sharon Prince

Finance Patron

David Enke

Finance Benefactor

JP Morgan Chase
Laredo Petroleum, Inc.

Finance Partner

Keith Bailey

Finance Friend

Bob Traband

Finance Donors

Meg Brimmer
Lee Crawley

You may contribute on-line at
<https://bus.collins.utulsa.edu/fof/excellencepledge.asp>
or mail 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

In the very near future, you will be receiving a letter from Jim Holloman, this year's Finance Excellence Fund Chair, asking you to support our campaign.

Finance Students Excel

Each year, all of our graduating business students take what is called a Major Field Test (MFT). The purpose is to determine how well our students have mastered the concepts of business in all areas: accounting, economics, management, statistics, finance, marketing, legal, information systems, and international issues. The 95th percentile is the highest that can be achieved. For the last two years, our finance students were at the 95th percentile in every area of business. This is a remarkable achievement.

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.

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.

AAPG Mid-Continent Section Meeting 2009

“Resources for the Generations”

October 13, 2009

Presented by: Tulsa Geological Society

America's Energy Heartland America's Energy Future

A distinguished panel of national experts presents this free forum at the Tulsa Southern Hills Marriott that will engage business professionals, scientists, students, and members of the general public in a discussion of energy challenges and opportunities facing the Mid-Continent region.

For more information or to register:
www.2009aapgmidcon.com

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>

October: <https://bus.collins.utulsa.edu/fof/docs/20091014RegistrationForm.doc>

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

February: <https://bus.collins.utulsa.edu/fof/docs/20100216RegistrationForm.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](#)