

## Friends of Finance

# 25<sup>th</sup> Anniversary Year "Bringing the Best to the Best"

**April 2010** 

April 14, 2010 David Lesar President & CEO Halliburton, Inc.



David Lesar joined Halliburton in 1993 and has served the Company in many capacities. Since 2000, Mr. Lesar has been Chairman of the Board, President and Chief Executive Officer of Halliburton, one of the world's largest providers

of products and services to the energy industry. Halliburton operates in nearly 70 countries with more than 50,000 employees worldwide. Mr. Lesar also leads Halliburton's Executive Committee.

Mr. Lesar served as President and Chief Operating Officer of Halliburton from June 1997 to August 2000. Mr. Lesar also served as Executive Vice President and Chief Financial Officer of Halliburton. Before that, he was Executive Vice President of Finance and Administration for Halliburton Energy Services, a Halliburton business unit.

## **Meeting Sponsors**





We extend our thanks and appreciation to Samson and Williams for serving as our Luncheon Sponsors.

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

Tim Boyle has served as president and chief executive officer of Columbia Sportswear Company since 1989 and oversees operations of the active outdoor company from its Portland, Oregon headquarters.



Tim's career with Columbia Sportswear began in 1970 when, during his senior year at The University of Oregon, his father, who had been running the company since 1964, died suddenly of a heart attack. Tim's mother, Gertrude Boyle, quickly enlisted Tim's help in order to continue the aggressive expansion that her husband had initiated and that had increased the company's sales that year to \$1 million.

After struggling for two years to regain momentum, the company began to grow. By 1997 sales had grown to more than \$350 million, and the company went public in March 1998. Today global sales are approximately \$1.3 billion.

## **Meeting Sponsors**

We extend our thanks and appreciation to Keith and Pat Bailey and Cy Elmburg for serving as our Luncheon Sponsors.

## Officers and Directors

For the last twenty five years Friends of Finance has been very fortunate to have had an outstanding set of officers and directors. These individuals have been responsible for guiding and leading FOF to the prominence that we currently enjoy. If you see any of these individuals, please thank them for all of their support and effort. They have helped FOF to achieve its mission and goals as listed below.

The mission of Friends of Finance is to support TU's Department of Finance and Operations Management Department in its quest to gain national prominence for its programs, students, alumni, and faculty. Its goals include:

- Establish scholarships for undergraduate and graduate finance students to help attract the best students in the nation.
- Develop meaningful internship opportunities for finance students.
- Enhance student placement into business and finance careers.
- Promote awareness of the accomplishments and activities of TU business alumni.
- Develop a national recognized speaker series.

#### Past Officers and Directors:

Joe Adwon	Mark Daniel	Bruce Humphrey	Mike Payne
Nicole Affeldt	Jake Dollarhide	Russell Iorio	Pam Peck
Clint Alexander	Dan Doyle	Mike Kneafsey	<b>Bob Prince</b>
Nancy Allen	Janet Duffy	Jack Koehle	Don Quint
Nick Allen	Tally Ferguson	Brett Kramer	Amy Reiber
Jim Arens	Frank Fisher	Mike Krimbill	Frank Rhoades
Mike Axton	Bob Fitzgerald	Terry Lea	Dan Schuman
Keith Bailey	Jim Flaherty	John Linder	Stacy Schusterman
Tory Baker	Alan Ford	Craig Loseke	Chris Shannon
Roger Bey	Randy Foutch	Nate Lovelle	Pam Short
Larry Bitting	Kerry Freeman	Chris Ludwig	Robert Shower
Bob Boyd	Bob Geweniger	Lindsey Madden	Tray Siegfried
Gina Briggs	Jayne Gilsinger	Geordie Matson	Cherl Snyder
John Chandler	Shane Goodwin	Marc Maun	Don Spaugy
Don Chappel	Chris Guglielmo	Sterling McDonald	Burton Stacy
Aaron Clark	Robert Harrison	Mike Minahan	Jeff Stoermer
Steve Cochran	John Hartman	Callie Mitchell	Diana Thomas
Louis Coleman	John Herndon	Beverly Monnet	Tim Tolin
James Colgan	Steve Hildebrand	Debra Moore	Tom Warlick
Mark Collins	Bill Hobbs	Rocky Moore	Don Weinert
Sam Combs	Eugene Hodel	Wyatt Morgan	Donnita Weinkauf
Brett Crane	Jim Holloman	Mike Oxley	Lynne Wheatley
Susan Cravens	Jeff Holman	David Page	Chris Wolking
Bruce Currie	Greg Hopeman	Richard Pane	Joe Wolking

## Thank Judy

If you would like to show your appreciate for Judy's contribution to FOF, provide scholarships to students and have your gift doubled, you may do all of this by contributing to the Judy A. Adair Endowment. It works as follows. All gifts, including corporate matches, above the amount you contributed during the 2007-08 Finance Excellence Campaign will be matched and placed in the Judy Adair Endowment.

An example of how this works follows:

	Individual	Corporate	
	Gift	Match	Total
2007-08	\$500	\$500	\$1,000
2009-10	\$1,000	\$1,000	\$2,000
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 <a href="https://bus.collins.utulsa.edu/fof/excellencepledge.asp">https://bus.collins.utulsa.edu/fof/excellencepledge.asp</a> 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

## 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 <u>University of Tulsa Parking Map</u> for a campus parking map. Please let us know if you have questions.

## Friends of Risk April 23, 2010

Friends of Risk (FOR) is a group of individuals who share an interest in understanding risk management. Particular emphasis is placed on how firms address this issue within their own firms. Approximately forty people attend each meeting which allows time for considerable Q&A. All FOR meetings are on TU's campus over the lunch hour. There are no membership dues. The cost of attending the meeting is \$8.00 which includes a box lunch. The next FOR meeting is April 23, 2010 in Helmerich Hall on TU's campus. The speaker is Hemant Taparia from the Risk Management group at Fifth Third Bank. He previously was in the Market Risk/Interest Rate Risk group at Indy Mac Bank. Check-in begins at 11:30a.m. with the presentation beginning at 12:00p.m. Please contact Linda Reins (631-2949 or Linda-reins@utulsa.edu) to register or to be added to our e-mail distribution list.

## Speaker Suggestions

We are in the process of inviting speakers for 2010-2011. Our list of potential speakers is impressive, but we always need to keep building our list of speakers and people who can make the contact. 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 <a href="mailto:roger-bey@utulsa.edu">roger-bey@utulsa.edu</a> or <a href="mailto:judy-adair@utulsa.edu">judy-adair@utulsa.edu</a>. We will add it to our potential speaker list. We will contact you to help when we are ready to send an invitation.

## 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,

(<u>judy-adair@utulsa.edu</u> or 631-2588) if you are interested in being a Luncheon Sponsor.

## 2009-2010 Finance Excellence Fund Honor Roll

Since inception more than 2,000 gifts totaling almost \$2.0 million have been made to the Finance Excellence Fund. This year our goal is to raise \$250,000 (\$10,000 for each of our 25 years) from 200 donors. To date we have raised \$142,610 from 114 donors. We have a considerable way to go, but with your help, we can make it. Finance Excellence Fund Honor Members for 2009-2010 are:

#### Finance Founder

Robert & Sharon Prince

#### **Finance Benefactor**

Ellen & Steve Adelson

Roger Bey
Arnold Brown
Tom Campbell
John Chandler
Don Chappel
Susan Cravens
Greg Hopeman
Marc Maun
JP Morgan Chase

Laredo Petroleum, Inc.

Craig Loseke Tammie Maloney Don Quint

Genave Rogers

Samson

William Smith

Williams Companies

#### Finance Patron

Joe Adwon David Enke Randy Foutch Steve Hildebrand

Jim Hill

Beryl McElhiney Greg Oliphant Frank Rhoades

John Steele Zink Fnd.

### Finance Associates

Nick & Barbara Allen

Jim Arens Keith Bailey Sharon Bell Bob Fitzgerald Bob Fredrickson W. H. Helmerich, III Jack Koehle

Wayne Middleton James Milton Mike Payne Pam Peck Joe Wolking Zarrow Foundation

#### Finance Friends

Kent Allingham Loren Armstrong Mike Bartlett Gary Belitz Wade Biswell

Bob & Annette Boyd Chad Brumley

BUDCO, Inc.

Kui Cheng-Gugliotta Penny Colantonio Jim Colgan

Mark & Becky Collins Andrew Comstock Megan Cordle George Dallas Mike Dill

Mike Dill
Bill Fader
Tally Ferguson
Frank Fisher
Skilly Forsman
Bob Gaddis
Richard Gajan
Steve Ganzkow
Bob Geweniger
Keith Goddard
Bill Gottfried

Eugene Hodel Bruce Humphrey Russell Iorio

#### Finance Friends (cont'd.)

**Bob Jennings** John Kauth Mary Korthase Sandy Leeds Pete Leininger Max Mason Dee McDugle Jim McGill Wyatt Morgan Craig Owens David Page Jody Parker Suzanne Penni Tom Redman Peggy Rice Jeff Rudd Andrew Shank Bill Snow Brooke Snyder Cherl Snyder Tom Stees

Gale Sullenberger
Bob Traband

Kent VanValkenburgh

Dudley Viles
Tom Warburton
Bill Wilke
Dick Williamson
Chris Wolking
Daryl Woodard
Terry Wright
Weidong Zhou

#### **Finance Donors**

Andrew Aguirre
Anonymous
Meg Brimmer
Uldene Buchanan
John Buxton
Lee Crawley
Michael Evanson
Jane Faulkenberry
Irving Fenster

## Membership

One of the most effective ways for Friends of Finance to achieve its mission is by growing its membership. If you haven't joined for this year, you can do so on-line at:

https://bus.collins.utulsa.edu/fof/memberapp.asp or send a check payable to:

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

Membership fees for the remainder of this year (June 30, 2010) are:

#### \$50 (Membership plus all luncheon fees)

\$10 (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)

\$100 (Membership plus all luncheon fees for yourself and one guest)

\$250 One reserved table (8 seats)

#### Luncheon fees:

Members \$20 Non-members \$30

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

Our goal is 500 members. Please join today to help meet our goal. A complete membership listing is available at: Member Services; Directory.

Members since our last newsletter are listed below.

Joon Bae

Clayton Bellamy

James Chavez

Susan Cravens

Marty Grunst

Gary Moore

Tom Owens

Fabian Peri

**David Reynolds** 

#### 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 (<u>judy-adair@utulsa.edu</u>) who will post it. We will not edit the files.

### Alumni / Student Notes



Grant Najera (BSBA, '07) In his current role as a Scheduler **ONEOK** for Energy Marketing Company (a division of ONEOK, Inc), Grant handles natural gas nominations and scheduling for retail customers Kansas, Nebraska, and Wyoming. This includes commercial, industrial. municipal, agricultural,

residential customers. Grant previously held the role of Rates Analyst at ONEOK Partners.

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 (judyadair@utulsa.edu) and we will include it in our newsletter.

#### FOF Web Site

The FOF website <a href="https://bus.collins.utulsa.edu/fof/">https://bus.collins.utulsa.edu/fof/</a> 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.

## Resume Posting

FOF members who are seeking employment may now post their resume on the FOF web site. An email will be sent as new resumes are posted. The email 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.

#### MS in Finance

The MS in Finance program launched in 2001 continues to thrive. We have more applications for Fall 2010 than any previous year. Student quality is exceptional. On the basis of the graduate business school entrance exam, the GMAT, our current student average GMAT of 669 is at the 87<sup>th</sup> percentile and is exceeded by only 25 MBA programs in the United States. Our corporate internship program is an excellent way to have exceptional talent while the students are in school and to gain a competitive edge in hiring. If you, your colleagues, or your employees are interested in an excellent graduate program in finance, please consider our MS in Finance. Contact Roger Bey at roger-bey@utulsa.edu or 918-631-2588 or

Likewise, if you want more information on our corporate internship program, contact Roger.

## 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, MidFirst Bank

#### **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

## 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 <a href="mailto:judy-adair@utulsa.edu">judy-adair@utulsa.edu</a> for details. Thus far, Corporate Sponsors for this year are:















CPAs & BUSINESS ADVISORS











## 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.

#### **NAIC**

Greater Tulsa Area Chapter's

Model Investment Club Meeting 6:00-7:45 p.m. Thursday, April 1<sup>st</sup> (Really!) Hardesty Library – 8316 E. 93<sup>rd</sup> Street

Join GTAC for:Tulsa's Best Inve\$tFe\$t

WHEN: Saturday, May 22<sup>nd</sup>

**TIME**: 9:30 a.m. – 4:30 p.m. (lunch included) **PLACE**: Hardesty Library, 8316 E. 93rd St. Tulsa

#### **Guest Speakers:**

Doug Gerlach – President, ICLUB Julie Stackhouse – Sr.VP, Federal Reserve Bank St Louis Nancy VanMaren – Benefits Analyst, Williams Linda Rainwater – Financial Planner, Edward Jones

Cost \$40.00 pre-registration: \$45.00 after May 19<sup>th</sup> Contact: Anita Greiner(918) 492-7108 aigreiner@sbcglobal.net

4<sup>th</sup> Thursday Free Education Classes 6:45 p.m. – 7:30 p.m. Hardesty Library, 8316 E. 93<sup>rd</sup>

#### NAIC Contact:

Tami <u>deangelistami@hotmail.com</u> 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: <a href="http://www.typros.org/">http://www.typros.org/</a>

## **64**<sup>th</sup> **Annual Conference of Accountants** April 27-28, 2010

Accounting: Risky Business in a Brave New World http://bus.collins.utulsa.edu/coa

For a complete listing of speakers, please go to: <a href="http://bus.collins.utulsa.edu/coa/Speakers.htm">http://bus.collins.utulsa.edu/coa/Speakers.htm</a>

#### **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:

<u>Mini-MBA</u>—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.

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

<u>CIA Extreme Exam Prep</u>—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.asp or call 918.631.2215

#### **Energy Advocates**

For more information: 599-7767 <a href="mailto:info@energyadvocates.org">info@energyadvocates.org</a>

## Links

# On-line registration <a href="https://bus.collins.utulsa.edu/fof/reg.asp">https://bus.collins.utulsa.edu/fof/reg.asp</a>

A pril: 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