



# *Friends of Finance*

25<sup>th</sup> Anniversary Year

January 2010

“Bringing the Best to the Best”

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



Steve Feilmeier, Vice President and CFO of KOCH Industries, presentation will address the threats to the USA economy that are driven by rising federal budget deficits, rising current account deficits, and the massive amount of liquidity injected by

Central Banks, and the threat that these three factors pose to the economy (inflation, devaluation, higher real rates of interest) if they converge without some form of restraint or correction by the Public Sector (e.g. federal, state and local governments). He also will present KOCH's view that in the long run the Free Market is the best way to create prosperity

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 company in the US. 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.

**February 16, 2010**  
**John Schlifske**  
President  
Northwestern Mutual



John Schlifske was named President of Northwestern Mutual in March 2009. He most recently served as president and CEO of Russell Investments, the Tacoma-based Northwestern Mutual subsidiary that provides global investment management services with more than \$150 billion in assets under management. Prior to this role, he led Northwestern Mutual's investment products and services business, after having served in a variety of positions of increasing authority in the company's investment departments. He joined the company in 1987 as an investment specialist. Schlifske received a B.A. degree in economics in 1981 from Carleton College, and a Masters degree in finance and accounting in 1983 from the Kellogg Graduate School of Management at Northwestern University.

*Friends of Finance 25<sup>th</sup> 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*

*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](mailto:judy-adair@utulsa.edu) for details. Thus far, Corporate Sponsors for this year are:



CPAs & BUSINESS ADVISORS



## *Graduate Finance Education*

To be competitive in the increasingly complex world of finance requires an intensive graduate finance program. TU offers an MS in Finance and three dual degree graduate finance programs which meet the foregoing criterion. A brief description of the programs follows:

**MSF** – The MSF is an intensive program that integrates financial theory, mathematics, computer science, and statistics to provide finance professionals with the skills necessary to excel in a complex global financial world. Investment banks, hedge funds, mutual funds, corporate treasuries, portfolio managers, and risk management departments apply these skills to corporate valuation, analysis of mergers and acquisitions, derivative securities valuation, risk management strategies, portfolio management techniques, and hedging strategies. Graduates are distinguished by a focus and depth of financial training that provides them with a skill set and understanding that is rare among financial professionals.

**MBA/MSF** - In an increasingly competitive, complex, and global world, corporations desire individuals who are not only able to manage across all dimensions of a firm but also have an in-depth knowledge in a business discipline. The MBA/MSF degree program meets this challenge by combining the broad graduate business degree (MBA) with an in-depth specialized degree in finance (MSF). MBA/MSF graduates have a unique set of skills which provide them a competitive edge for both entry level and executive leadership positions.

**MSF/MSAM** - Contemporary finance, risk management, and financial engineering are ideal environments for the integration of applied mathematics and finance. The MSF/MSAM degree program capitalizes on this environment by combining an in-depth study of financial theory and application with a study of advanced applied mathematics. Graduates will have a level of understanding of both finance and mathematics that will give them a competitive edge and prepare them to work on the very frontiers of finance.

**JD/MSF** - The increasing complexity of the financial world and the associated legal issues requires individuals who are well trained in both finance and law. The JD/MSF degree program meets this challenge by allowing students to combine the in-depth study of financial theory and application of the MSF program with the legal aspects of financial decisions of a JD program.

Graduates will have a level of understanding of finance and law that will allow them to operate at the highest levels of finance and law.

Students can concentrate in Corporate Finance, Investments and Portfolio Management, and Risk Management. Go to [MSF Program](#) for a summary of the MSF programs. More details are available at [www.utulsa.edu/graduate/finance](http://www.utulsa.edu/graduate/finance) or contact [roger-bey@utulsa.edu](mailto:roger-bey@utulsa.edu) of 918-631-2946 or [graduate-business@utulsa.edu](mailto:graduate-business@utulsa.edu) or 918-631-2242.

## *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](mailto:judy-adair@utulsa.edu)) and we will include it in our newsletter.

**Jacob Lewis** (*MSF '06*) After a year on Direct Energy's trade floor as a trading analyst on the Power Optimization Desk, Jacob has transferred to a Management position in the Wholesale Energy Finance Group. He oversees the financial and performance reporting for Direct's power station and wind farm business. He has passed levels 1 and 2 of the CFA exam and will take level 3 in June 2010.



**Jennifer Price** (*MSF '10*) has accepted a finance internship at Hilti Corporation. Located in Tulsa, her position involves special project analysis and financial reporting.

**Nathan Redman** (*BSBA '07, MBA/MSF Dec.'09*) has accepted a position as a Financial Analyst in Mergers and Acquisitions with Petroleum Development Corporation. He will be in Denver, Colorado.

**Brad Foster** (*MSF '11*) has accepted a summer internship with Koch Industries, headquartered in Wichita, KS. He will be a credit analyst intern for Flint Hills Resources, a wholly owned subsidiary of Koch Industries that specializes in petroleum refining and petrochemicals.

## ***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](mailto:roger-bey@utulsa.edu) or [judy-adair@utulsa.edu](mailto: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](mailto:judy-adair@utulsa.edu) or 631-2588) if you are interested in being a Luncheon Sponsor.

## ***FOF Mission***

The mission of Friends of Finance is to support TU's Department of Finance and Operations Management 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.

## ***Silver Anniversary Finance Excellence Fund***

One way you can help FOF reach its mission is to support the Finance Excellence Fund. This year's goal is \$250,000 – \$10,000 for each of our 25 years from 200 donors. We currently have raised \$57,500 from 65 donors. We are slightly ahead of last years' pace and with your help we will reach and exceed our goals.

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

Finance Excellence Fund Honor Members for 2009-2010 are:

**Finance Founder**

Robert & Sharon Prince

**Finance Benefactor**

Ellen & Steve Adelson

Roger Bey

Arnold Brown

Greg Hopeman

Marc Maun

JP Morgan Chase

Laredo Petroleum, Inc.

Craig Loseke

Tammie Maloney

**Finance Patron**

Joe Adwon

David Enke

Steve Hildebrand

Beryl McElhiney

Greg Oliphant

John Steele Zink Foundation

**Finance Associates**

Nick & Barbara Allen

Keith Bailey

Bob Fredrickson

W. H. Helmerich, III

Jack Koehle

James Milton

Pam Peck

**Finance Friends**

Mike Bartlett

Gary Belitz

Chad Brumley

Kui Cheng-Gugliotta

Jim Colgan

Andrew Comstock

Megan Cordle

Bob Gaddis

Steve Ganzkow

Keith Goddard

Bill Gottfried

Eugene Hodel

Bruce Humphrey

John Kauth

Sandy Leeds

Dee McDugle

Craig Owens

Jody Parker

Suzanne Penni

Tom Redman

Peggy Rice

Bill Snow

Cherl Snyder

Tom Stees

Bob Traband

Tom Warburton

Bill Wilke

Dick Williamson

Daryl Woodard

Terry Wright

Weidong Zhou

**Finance Donors**

Andrew Aguirre

Meg Brimmer

Uldene Buchanan

Lee Crawley

Jane Faulkenberry

Irving Fenster

## *Double Your Giving and Thank Judy*

A generous donor has made it possible for you to double the effective amount of your gift. That is, all gifts, including corporate matches, above the amount you contributed during the 2007-08 Campaign will be matched and placed in the Judy Adair Endowment.

An example of how this works follows:

	Individual Gift	Corporate Match	Total
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*

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:

- \$135 (Membership plus all luncheon fees)
- \$50 (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)
- \$285 (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.

- |                    |                 |
|--------------------|-----------------|
| Boone Barker       | Cathy Laird     |
| John Beasley       | Bob Laird       |
| Scott Bosen        | Dave Lawson     |
| Bob Dupree         | Bob Lynch       |
| Kerry Freeman      | Lance Mann      |
| Brian Frere        | Amanda Martin   |
| Sayee Guntur       | Rocky Moore     |
| Matt Hazelwood     | Harvie Roe      |
| Frazier Henke      | Philippe Rohner |
| Andrew Hrdlicka    | Michael Siegle  |
| Bruce Humphrey     | Frauke Smith    |
| Leslie Kirkpatrick | Eric Summers    |
| Joe Kovar          | Terry Wright    |

## ***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](mailto: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.

## ***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](mailto: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.

## ***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](mailto: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, 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

## *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](mailto:info@energyadvocates.org)

### **NAIC**

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 [deangelistami@hotmail.com](mailto:deangelistami@hotmail.com) or 747-9303

or

Barbara [wollmersh@aol.com](mailto: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.asp> or call

918.631.2215



# Friends of Finance January 21, 2010 Luncheon Registration Form

**Speaker:** Steve Feilmeier, EVP & CFO  
Koch Industries, Inc.

**Date:** Thursday, January 21, 2010

**Time:** 11:30 a.m. Registration begins at 11:15 a.m.

**Place:** Great Hall, Allen Chapman Activity Center  
440 S. Gary Ave. on the TU campus

**Parking:** You may park in any lot marked for visitors, faculty, or students. If you receive a parking ticket, just fill it out as a visitor and send it back.  
**Bill White Shuttle Service will be providing a continuous shuttle service from the parking lot north of the Reynolds Center (8<sup>th</sup> & Harvard) to the Allen Chapman Activity Center between 11:00 a.m. and 2:00 p.m. .**

Please reserve the following:

\_\_\_\_\_ Seat(s) for Friends of Finance member(s) on prepayment plan  
(Please fax to 631-2037, call Judy Adair at 631-2588, or e-mail to [judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu) to confirm your attendance)

\_\_\_\_\_ Regular seat(s) for Friends of Finance member(s) only  
\$20.00

\_\_\_\_\_ Seat(s) for non-member or guest of member  
\$30.00

\_\_\_\_\_ Reserved table (eight seats)  
\$250.00 per table

\_\_\_\_\_  
Name for table sign (company or individual)

**Please provide names of attendees below and return this form with your check (payable to The University of Tulsa - Friends of Finance). Telephone reservations will be accepted (631-2588). Deadline for reservations is January 18, 2010. Members receive preference for reservations until January 7, 2010.**

Name

Company

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Register on-line at:  
<https://bus.collins.utulsa.edu/fof/reg.asp>



Or return this form to:

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

## Links

### On-line registration

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

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](#)