

Friends of Finance

March 2011

March 8, 2011 David Lamp President Holly Corporation



Mr. Lamp joined Holly in January, 2004 as Vice President, Refinery Operations and was responsible for all aspects of the Company's refining operations. November, 2005 Mr. Lamp was named Executive Vice President. Refining and Marketing adding the

additional responsibilities of the Company's crude, light products marketing, and asphalt businesses. Mr. Lamp was then named President of Holly in November, 2007.

Mr. Lamp has more than 29 years of technical, commercial, and operational experience in the refining and chemical industry. Prior to joining Holly, Mr. Lamp was the Vice President and General Manager of El Paso Energy's Aruba refining complex; Director of Operations for KOSA, a polyester production joint venture between Koch Industries and Saba, and Executive Vice President-Refining and Chemical Operations for Koch Industries.

Reservations are required. You may register on-line at: https://bus.collins.utulsa.edu/fof/reg.asp or contact Judy Adair at 918-631-2588 or judy-adair@utulsa.edu. Friends of Finance members will have preference until March 2, 2011.

Meeting Sponsor



We extend our thanks and appreciation to Magellan Midstream Partners, L.P. for serving as our Luncheon Sponsor.

April 13, 2011 Herman Bulls CEO, Public Institutions Jones Lang LaSalle

Herman Bulls is the founder and CEO of Jones Lang LaSalle's highly acclaimed Public Institutions specialty, a practice focused on delivering integrated real estate solutions to government entities, nonprofit organizations, transportation facilities, and higher education institutions.



During over 20 years at Jones Lang LaSalle he has worked in the areas of development, investment management and business development/retention. He has developed relationships with many of the firms leading clients, including the General Services Administration, Department of Veteran Affairs, Department of the Army, Department of State, University of Pennsylvania, Duke University, Ohio State University, Georgia Tech and the Port of Oakland by providing thought leadership and strategic guidance and direction for real estate issues. Mr. Bulls earned a BS in Engineering from the United States Military Academy at West Point and a MBA from Harvard Business School. He retired as a Colonel in the U.S. Army Reserves.

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Meeting Sponsor

Sam and Rita Combs ComStar Advisors, LLC

We extend our thanks and appreciation to Sam and Rita Combs and ComStar Advisors, LLC for serving as our Luncheon Sponsors.

Membership

Current membership is 415. This year's goal is 500. With your help we will reach the 500 mark for the first time in the history of Friends of Finance. For everyone who has joined – thank you! Now help us reach our goal by getting at least one friend to join.

Friends of Finance is the largest and strongest finance group in Oklahoma and the Southwest. Your membership will help us maintain our leadership position.

If you are a TU graduate within the last twelve months or if you live outside of the Tulsa area (more than 50 miles) your membership fee is only \$10. For all other individuals, the membership fee is \$25 for the remainder of this year – June 30, 2011. Membership fees support all of the expenses associated with Friends of Finance. Show your support for FOF, 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

Members who have renewed or joined since our last newsletter are listed below. To view the entire membership directory, go to:

https://bus.collins.utulsa.edu/fof/members/directory.asp.

Leigh Brinlee

Phil Burch

Luis Chaves

Bill Clary

Brian Cleavelin

Jay Harrigill

Leslie Kirkpatrick

Tom Kivell

Pam Peck

Gustavo Pinto

Phil Reedy

Kelly Schneider

Fred Shelton

Richard Sullivan

Baxter Thorman

Jim Wilburn

Barry Woods

Shuttle Service



Bill White Shuttle Service will provide shuttle service from the parking lots along Gary Place as well as the Reynolds Center lots 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.

Social Media



FOF recently initiated a Linked-in group – University of Tulsa Friend so Finance. You can join it by going to:

http://www.linkedin.com/groups?mostPopular=&gid=3317778

The response to Linked-in has been very good – we already have more than 320 members. It will not replace our regular correspondence, but will serve as a site for members to exchange ideas. Linked-in membership is open to both FOF members and non-members. Please join and encourage your friends to do the same.

Judy Adair Endowment

The campaign to fund the Judy Adair Endowment is entering its third year. Our Adair Endowment goal is to raise \$75,000 per year for five years to match the challenge grant of an anonymous donor. All individual gifts above the amount given in 2007-08 will be matched. Corporate matches above their 2007-08 gift level also are matched. All gifts to the Adair Endowment count toward our \$250,000 Finance Excellence Fund goal. This is an exceptional opportunity to double your gift and honor Judy – the sparkplug and face of Friends of Finance.

MSF Internships

The interviewing process for MSF interns for May and August is about to begin. If you are in the need for exceptional talent, please contact Roger Bey, roger-bey@utulsa.edu or (918) 631-2946 to get the process started.

MSF Graduates

In a couple of months, a group of talented MSF students will be graduating. If you are seeking full-time finance people, please contact Roger Bey; roger-bey@utulsa.edu or 918-631-2946.

Annette Luther Receives FEI Scholarship



Annette Luther received the Tulsa Chapter of Financial Executives International Scholarship for the outstanding junior Finance student at the University of Tulsa. The award is based on scholarship and leadership. A

few of her honors include being a national merit Scholar and a TU Presidential Scholar. Her leadership activities include Hospitality Chair of the Society of Petroleum Engineers, Cofounder, Secretary, Treasurer of Improv Club at TU, Theatre House Manager and Assistant Director for Talented Drama Productions, and Conference Coordinator for Thespians. Her volunteer work includes Habitat for Humanity, Invisible Children, Food Bank, and as a translator for a six-person medical team in the Dominican Republic.

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

Friends of Risk Meeting

Friends of Risk is a group of individuals devoted to discussing a wide range of topics in the area of risk management. Real world applications are often highlighted. The size of the audience, approximately 50 people, allows for considerable discussion among the attendees. Details of the next Friends of Risk meeting follow:

Speaker: Deacon Turner, National Managing Director, Bernstein Global Wealth Management **Topic**: "Inflation: Protecting and Profiting from the Coming Environment"

When: 11:30 a.m., Friday, February 25th, 2011 (lunch begins 11:30 a.m., talk begins 12 noon)

Where: Room 105, Helmerich Hall

Deacon Turner rejoined Bernstein Global Wealth Management in 2010 as a National Managing Director. For the prior 18 months he served as global COO/Partner for a small industrial manufacturing firm. Deacon initially joined Bernstein in 1998 as a Vice President and Financial Advisor. From 1995 to 1997 he served as policy advisor to the Housing Authority of the Cherokee Nation. Prior to that he helped to found an investment-management company serving American Indian tribal governments, and was also on the staff of Oklahoma Senator David L. Boren. A graduate of Harvard University, Mr. Turner also attended Oxford University on a U.S. Rhodes Scholarship, graduating with a master's degree in Prehistoric Archaeology.

To make a reservation contact Linda Reins at <u>lindareins@utulsa.edu</u> or 918-631-2949 by Wednesday, February 23rd. Click on http://www.utulsa.edu/campusmap for a campus map (building 16 – Helmerich Hall). If you would like to be added to the Friends of Risk email distribution list, contact Linda Reins.

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

Friends of Finance 26 Years "Bringing the Best to the Best"

This Year's Upcoming Best are:



C. Douglas McMillon
President and CEO
Wal-Mart International
September 7, 2010
Sponsored by:

bergan[®]



David KemperChairman, President & CEO
Commerce Bancshares, Inc.
October 6, 2010



Charles Stanley
President & CEO
QEP Resources, Inc.
December 1, 2010
Sponsored by:

PETROLEUM, INC.



William Brodsky
Chairman & CEO
Chicago Board
Options Exchange
January 13, 2011

Sponsored by: Keith & Pat Bailey



J. Clifford Hudson Chairman & CEO Sonic Corporation February 15, 2011 Sponsored by:



David Lamp
President
Holly Corporation
March 8, 2011





Herman Bulls
CEO
Public Institutions,
Jones Lang LaSalle
April 13, 2011

Sponsored by:
Sam & Rita Combs
ComStar Advisors, LLC



Sean Connolly
President, USA
Campbell Soup Company
May 17, 2011
Sponsored by:
TRUST



2010 – 2011 Finance Excellence Fund

The 2010-11 Finance Excellence Fund Campaign is about to be launched. Our goal is \$250,000 from 200 donors. Last year, we raised \$216,161 from 179 doors. To date, we have raised \$96,605 from 99 donors. Hence, we need everyone's help to continue raising FOF to higher and higher levels. Contribute on-line at: https://bus.collins.utulsa.edu/fof/excellencepledge.asp or send a check payable to University of Tulsa Finance Excellence Fund and send to:

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

2010-2011 Honor Roll

Finance Excellence Fund Honor Members for 2010-2011 are:

Finance Partner

Michael & Kathi Colby

Finance Benefactors

Keith Bailey Helmerich & Payne Roger Bey Greg Hopeman Arnold Brown Laredo Petroleum Tom Campbell Marc Maun

Susan Cravens

Finance Patrons

Joe Adwon
Commerce Bank
David Enke
Randy Foutch
Steve Hildebrand
JP Morgan Chase

Beryl McElhinney
Peter Meinig
Samson Investments
Tom Warburton
Williams Company

Finance Associates

Nick & Barbara Allen Mike Payne
Alan Ford Pam Peck
Bob Fredrickson Don Quint
Walt Helmerich Terry Wright
Craig Loseke Zarrow Foundation

Finance Friends

Kent Allingham Mike Bartlett Pete Leininger Gary Belitz Bill Lissau Chad Brumley Robert Lorton **BUDCO** Max Mason Mike Burton Dee McDugle Jim McGill Jim Cameron Chris Cardoni Johnson Moore Kui Cheng-Gugliotta John Neas Jim Colgan Don Oden Mark & Becky Collins David Page Andrew Comstock Jody Parker Megan Cordle Suzanne Penni George Dallas Dick Pittenger Clint Dishman Steve Poleman Bob Dupree Peggy Rice Bill Fader Jeff Rudd Tally Ferguson Chris Shannon Bob Fitzgerald Nicole Simmons Robert Gaddis Bill Snow Richard Gajan Brooke Snyder Cherl Snyder Steve Ganzkow Bob Geweniger Tom Stees Keith Goddard Gale Sullenberger Eugene Hodel **Bob Traband**

Dudley Viles

Tom Warlick

Weidong Zhou

Bill Wilke Chris Wolking

Finance Donors

Russell Iorio

John Kauth

Jack Koehle Mary Korthase

Robert Jennings

Andrew Aguirre Marilyn Rains Jane Faulkenberry Barry Woods

Fees

Fees for the remainder of this year through June 30, 2011 (reduced as of 2/21/2011) are:

\$85 (Membership plus all luncheon fees)

\$25 (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)

\$175 (Membership plus all luncheon fees for

yourself and one guest)

\$250 One reserved table (8 seats)

\$750 (One reserved table at each luncheon)

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 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 (<u>judy-adair@utulsa.edu</u>) 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.

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 receives 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 \$2,500. Contact Judy Adair, adair@utulsa.edu or 631-2588) if you are interested in being a Luncheon Sponsor.

Leadership

Our officers and directors for 2010-2011 are:

Officers

President Jeff Holman, Magellan Midstream VP Programs Jim Holloman, MidFirst Bank

Treasurer Eugene Hodel, Hilti, Inc.
Secretary Lindsey Madden, BOK
Membership Chris Guglielmo

FEF Chair Tom Warburton, Warburton Capital

Directors

Roger Bey, TU
Sam Combs, ComStar Advisors
Janet Duffy, Samson Investment Company
Randy Foutch, Laredo Petroleum
Shane Goodwin, Wells Fargo
Derek Reiners, ONEOK, Inc.
Rod Sailor, Williams

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.

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.

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 corporation join, contact Judy Adair at 631-2588 or judy-adair@utulsa.edu for details. 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.

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 years' 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 Barbara wollmersh@aol.com

Tulsa's Young Professionals

Giving Tulsa's Young Professionals a voice. A voice in our 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-inhand 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.

For more information and to register online: http://bus.collins.utulsa.edu/cepd/programs.asp or call 918.631.2215

Links

On-line registration

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

March: https://bus.collins.utulsa.edu/fof/docs/20110308RegistrationForm.doc

April: https://bus.collins.utulsa.edu/fof/docs/20110413RegistrationForm.doc

May: https://bus.collins.utulsa.edu/fof/docs/20110517ReigstrationForm.doc

https:/bus.collins.utulsa.edu/FOF

Membership Form

Pledge Card