Friends of Finance

August, 2012

September 14, 2012
Carla Harris
Managing Director
Morgan Stanley

Carla Harris is a Managing Director and heads the Emerging Manager Platform at Morgan Stanley Investment Management where she also provides investment advice to corporations, public pension plans, foundations and endowments. She formerly headed the equity capital markets effort for the consumer and retail industries and was responsible for Equity Private Placements. Ms. Harris has extensive industry experiences in the technology, media, retail, telecommunications, transportation, industrial, and healthcare sectors.

For more than a decade, Ms. Harris was a senior member of the equity syndicate desk and executed such transactions as initial public offerings for UPS, Martha Stewart Living Omnimedia, Ariba, Redback, the General Motors sub-IPO of Delphi Automotive, and the $3.2 billion common stock transaction for Immunex Corporation, one of the largest biotechnology common stock transactions in U.S. history.

Reservations are required. You may register on-line at: https://collinssecure.utulsa.edu/fof/Meetings.aspx or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until August 16, 2011.

Meeting Sponsor

MorganStanley SmithBarney

We extend our thanks and appreciation to **Morgan Stanley Smith Barney** for serving as our Luncheon Sponsor.

October 23, 2012
Geoffrey Orsak
President
University of Tulsa

Geoffrey C. Orsak, PhD has been called one of this nation's key leaders in engineering research and education and its impact on economic development and global competitiveness. The editors of *EDN* – a leading international design publication wrote that Dr. Orsak is "one of the brightest minds in the world in engineering education." And in 2006, the editors of *EE Times* magazine called him a "true pioneer and visionary" and named him their first ever *Educator of the Year* in engineering and science.

In addition to his professional role leading the University of Tulsa, Dr. Orsak has been a recognized leader in STEM education. He founded and created a number of nationally recognized programs, including the award winning Infinity Project which today provides K-12 students across forty states and eight nations innovative engineering and technology curricula and teacher training.

Reservations are required. You may register on-line at: https://collinssecure.utulsa.edu/fof/Meetings.aspx or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until September 28, 2011.

Meeting Sponsor

Keith and Pat Bailey

We extend our thanks and appreciation to **Keith & Pat Bailey** for serving as our Luncheon Sponsor.

Upcoming Executive Luncheons:				
Date	**Speaker**	**Position**	**Company**	**Sponsor**
09/14/2012	Carla Harris	Managing Director	Morgan Stanley	Morgan Stanley Smith Barney
10/23/2012	Geoffrey Orsak	President	University of Tulsa	Keith & Pat Bailey
12/06/2012	Norm Szydlowski	President & CEO	SemGroup Corporation	
01/16/2013	Ryan Lance	Chairman & CEO	ConocoPhillips	
02/21/ 2013	Stephen Van Arsdell	Chairman & CEO	Deloitte & Touche, LLP	
03/12/2013	Meredith Siegfried	CEO	NORDAM	
April 2013	TBA			
May 2013	TBA			

Membership

Last year we had membership of 429. This year our membership goal is 500. 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://collinssecure.utulsa.edu/fof/Application.aspx. 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 to date (150) are:

Judy Adair
Linda Adlof
Joe Adwon
Diane Affeldt-Eckstein
Barbara Allen
Nick Allen
Kent Allingham
Chris Amburgy
Russ Arnold
Keith Bailey
Allen Barrow
Ray Batchelor
Roger Bey
Terry Biehl
Jim Bishop
Nevyle Cable
Brian Cantrell
Steve Care
John Chandler
Jim Coles
Jim Colgan
Mark Collins
Trey Cooper
Megan Cordle
Suzanne Costin
Jeff Couch
Joseph Craft
Bretton Crane
Jeff Cullison
Dan Cunningham
Barry Davis
Jeff Davis
Kevin DeVault
Keith Diekelman
Mike Dill
Bob Dupree
Chris DuVall
Abe El-Raheb
Bill Fader
Ed Fariss
Ted Feldmeier
Joe Fink
Bob Fitzgerald
David Fleske
Colby Forrester
Bob Fouch
Caroline Franklin
Tom Franz
Jordan Friesen
Phil Frohlich
Steve Ganzkow
James Gifford
Bill Gottfried
Rodger Graham
David Hays
Hans Helmerich
Ralph Hill
Eugene Hodel
Jim Holloman
Jeff Holman
Greg Hopeman
Rick Huck
Carl Hudgins
Bruce Humphrey
Russell Iorio
Ted Jacobs
Basil James
Jeff James
Robert S. James
Michael Johnson
Chris Kelly
Jeff Kendall
Lindsey Kenyon
Joe Kidwell
David King
Mary Korthase
Kevin Lackner
RJ Lasek
Dave Lawson
Sandy Leeds
Bob Lorton
Kelly Luelf
James Maddux
Kieran Major
Joel Mattson
Jim McGill
Mike McMahon
Louis Medina
Susan Meeker
Pete Meinig
Mary Melon
Dale Morgan
Danni Morris
Mike Mott
Kevin Munter
Frank Murphy
Kevin Murray
Mike Neal
Linda Nichols
Gordon Nielsen
Chris Odom
Tom Owens
Jody Parker
Mike Payne
Dick Pittenger
Bob Portiss
Don Quint
Britt Radford
Joe Ragsdale
Lisa Rambo
Ali Rathore
Tom Redman
Peggy Rice
Rose Rice
Tom Ritchie
Harvie Roe
Brad Rollins
Vicki Rose
Sheri Rosson
Don Rubottom
Ed Schermerhorn
Jeff Schmuhl
Alex Schneider
Jana Shoulders
Bill Snow
Stuart Solomon
Charlie Strauser
Ross Swimmer
Hugh Taylor
Bill Thomas
Robert Thomas
Baxter Thorman
Jeff Tommerup
Stuart Turner
Robyn Undieme
Kent VanValkenburgh
Doug Vincent
Cal Vogt
Robert Wagner
Chuck Walton
Jean Walton
Tom Warburton
Cindy Webb
Suzanne Wheeler
Chad White
David Whitney
Scot Williams
Jim Wilson
Daryl Woodard
Isabelle Zimmermann

Leadership

Our officers and directors for 2011-2012 are:

Officers

President	Jim Arens, Trust Company of Oklahoma
VP Programs	Sam Combs, ComStar Advisors
Treasurer	David Dunham, Unit Corp.
Secretary	Kieran Major

Directors

J. Markham Collins, TU
Janet Duffy, Samson Investment Company
Don Quint, Don P. Quint & Associates
Phil Reedy, Cherokee Nation Businesses
Derek Reiners, ONEOK, Inc.
Frank Rhoades, Rhoades Oil Company
Rod Sailor, Williams

Alumni News

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.

Fees

Fees for the 2011-2012 year are unchanged:

$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)
$2,100	(One reserved table at each luncheon)

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

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.

FOF Web Site

The FOF website www.utulsa.edu/fof/ includes a number of services as listed below.

New Membership
https://collinssecure.utulsa.edu/fof/Application.aspx

Meeting Registration
https://collinssecure.utulsa.edu/fof/Meetings.aspx

Members Services
https://collinssecure.utulsa.edu/fof/Members/
(restricted to FOF members and requires a user name and password which you obtain when you join or renew your membership). After signing in, you may 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.

Job Postings
Corporate job openings are posted on the web site by members. View job description of openings after logging in to Member Services.

Friends of Finance Accomplishments

Friends of Finance (FOF)

- Has existed and thrived for 27 years
- Had 429 dues paying members in 2011-2012
- Has had almost 200 speakers address the group
- Leading executives including Jamie Dimon, Richard Fuld, Kenneth Lewis, Ed Whitacre; Roger Staubach, and John Wooden have spoken at FOF
- Approximately 400 people attend every luncheon
- 40,000+ people have attended the luncheons
- Executive speaker series is the most active in the Southwest
- Students have an exclusive one hour Q&A with the speakers. No other university in the U.S. is known to provide students with the opportunity to visit with a major executive every month.
- No other Finance Department in the U.S. is known to have an equivalent speaker series
- Has been a major force in developing business relationships for TU

2011 – 2012
Finance Excellence Fund

Thanks to the amazing support of FOF members and friends, 139 donors contributed $176,925. On behalf of all future students who will benefit from scholarships and an improved School of Finance, Operations Management, and International Business as a result of your giving, thank you!

Finance Excellence Fund Honor Members for 2011-2012 are:

Finance Founder

Michael & Kathi Colby
Bob & Sharon Prince

Finance Partner

Joe Craft

Finance Benefactors

Keith Bailey
Arnold Brown
& Laurie Brown Purser
Tom Campbell
John Chandler
Don Chappel
ConocoPhillips
Susan Cravens
Jeff Davis
David Dunham
Helmerich & Payne
Jim Holloman
Greg Hopeman
JP Morgan Chase
Marc Maun
Samson Investments
Bill Thomas

Finance Patrons

Ellen Adelson
Joe Adwon
Randy Foutch
Steve Hildebrand
Jim Hill
Michael Krimbill
Tammie Maloney
Pete Meinig
Frank Murphy
Derek Reiners
Frank Rhoades
Dick Williamson
Steve Zenthoefer

Finance Associates

Nick & Barbara Allen
Jim Arens
Sharon Bell
Chad Brumley
Markham & Becky Collins
Sam & Rita Combs
Jake Dollarhide
Janet Duffy
Bob Fitzgerald
Bob Fredrickson
Patti Kastl
Beryl McElhiney
Craig Owens
Jody Parker
Mike Payne
Pam Peck
Don Quint
Bill Snow
Lee Swarthout
Zarrow Foundation

Finance Friends

Adams Hall Wealth Mgmt.
Kent Allingham
Ryan Andrews
Allen Atwood
Tory Baker
Mike Bartlett
Ray Batchelor
Roger Bey
Bob Boyd
BUDCO, Inc.
Bobby Burnett
Jim Cameron
John Cary
Matthew Clifton
Jim Colgan
Andrew Comstock
Megan Cordle
Mike Dill
Bob Dupree
Rebecca Edmiston
Bill Fader
Tally Ferguson
Kelley Fitter
Bob Fries
Steve Ganzkow
Bob Geweniger
Keith Goddard
Eugene Hodel
Jeff Holman
Russell Iorio
Basil James
Robert James
Bob Jennings
James Kimbrough
Jack Koehle
Mary Korthase
Sandy Leeds
Pete Leininger
W. R. Lissau
Lindsey & Tim Madden
Max Mason
Jim McGill
Joe McGraw
Johnson Moore
Sue Morris
Linda Nichols
Greg Oliphant
Suzanne Penni
Steve Poleman
Joe Ragsdale
Tom Redman
Peggy Rice
Patsy Savage
Kelly Schneider
Chris Shannon
Brooke Snyder
Cherl Snyder
Tom Stees
Bruce Stoesser
Gale Sullenberger
Ross Swimmer
Hugh Taylor
Bob Traband
Kent VanValkenburgh
Dudley Viles
Tom Warburton
Lauren Williams
Chris Wolking
Daryl Woodard
Weidong Zhou

Finance Donors

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Theresa Gillock
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David Hays
Michael Lissau
Charlie Myers
Britt Radford
Joe Redman
Dennis Reecher
Sandy Siegfried
Barry Woods

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 to fifteen.

Corporate Sponsors make a $3,800 commitment to Friends of Finance. If you are interested in having your company participate, contact Judy Adair at 918-631-2588 or judy-adair@utulsa.edu for details. Corporate Sponsors for this year are:

TRUST COMPANY of OKLAHOMA

LAREDO PETROLEUM, INC.

MAGELLAN MIDSTREAM PARTNERS, L.P.

WPXENERGY

Commerce Bank Member FDIC

JPMorganChase

Samson

HILTI

EideBailly CPAs & BUSINESS ADVISORS

MIDFIRST BANK

Adams Hall Asset Management, LLC

ONEOK

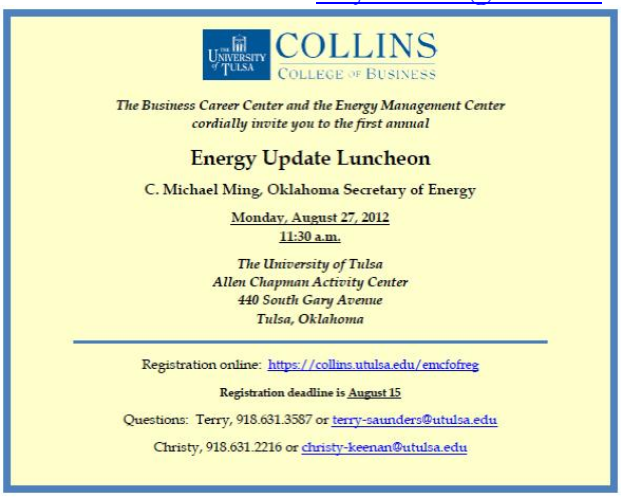
ALLIANCE RESOURCE PARTNERS, L.P.

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 Management Center

EARLY BIRD BONUS: As a benefit of your membership, all Friends of Finance members who renew before August 15 are eligible *at no cost* for a special bonus, the Energy Update Luncheon, August 27, 2012. C. Michael Ming, Okla. Secretary of Energy will present the update. This program is offered by the Collins College of Business Career Center and its Energy Management Center. It is not one of our eight Friends of Finance executive luncheons. To register for the bonus Energy Update Luncheon, please go to their website at https://collins.utulsa.edu/emcfofreg/ or contact Terry Saunders at 918-631-3587 or terry-saunders@utulsa.edu.


THE UNIVERSITY OF TULSA COLLINS COLLEGE OF BUSINESS

The Business Career Center and the Energy Management Center cordially invite you to the first annual

Energy Update Luncheon

C. Michael Ming, Oklahoma Secretary of Energy

Monday, August 27, 2012
11:30 a.m.

The University of Tulsa
Allen Chapman Activity Center
440 South Gary Avenue
Tulsa, Oklahoma

Registration online: https://collins.utulsa.edu/emcfofreg

Registration deadline is August 15

Questions: Terry, 918.631.3587 or terry-saunders@utulsa.edu

Christy, 918.631.2216 or christy-keenan@utulsa.edu

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 (CEPD) in the Collins College of Business can help you brush up your business acumen or prepare for new professional credential.

- Accounting and Finance for Non-Financial Managers
  Manufacturing Version
  September 18-19, 2012
  Service Version
  October 2-3, 2012
- Fall 2012 – "Show Me the Money" (Oct. 4-Nov. 8)
  The beginning of a new, multi-level Finance program jointly sponsored by Collins College CEPD and Friends of Finance. Watch for more information in the coming newsletters.

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

NAIC

Greater Tulsa Area Chapter, BetterInvesting
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

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.