

January 16, 2013

Ryan Lance
Chairman & CEO
ConocoPhillips

Ryan M. Lance is chairman and CEO of ConocoPhillips. A petroleum engineer, Lance has 28 years of oil and natural gas industry experience in senior management and technical positions with Conoco Phillips, predecessor Phillips Petroleum and various divisions of ARCO.



Before assuming the role of chairman and CEO in May 2012, Lance had served as senior vice president, Exploration & Production – International, since May 2009. Before that, he was president, Exploration and Production – Asia, Africa, Middle East and Russian/Caspian. He was previously senior vice president of technology beginning in 2007, and of technology and major projects beginning in 2006. Prior assignments included appointments as president of downstream strategy, integration and specialty functions in 2005 and of Asia Pacific exploration and production in 2003; and as vice president of Lower 48 in 2002, upon the merger with Conoco. Lance had previously served as general manager of Lower 48 and Canadian operations for Phillips since 2001.

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 January 2, 2013.

Meeting Sponsor



We extend our thanks and appreciation to **Unit Corporation** for serving as our Luncheon Sponsor.

Finance Excellence Fund

Phil Reedy, Finance Excellence Fund (FEF) chair announced the 2012-2013 Campaign is open. Investments in the FEF become part of the endowment that is the Student Investment Fund (SIF). Currently 23 students, under the direction of SIF Coordinator/Instructor Tally Ferguson, manage \$2.7 million. The portfolio consistently matches or exceeds the performance of the S&P 500.

Earnings from the Fund are used to support student scholarships, research and teaching requirements for SIF, and enhancements for the School of Finance, Operations Management and International Business.

Our goal for 2012-2013 is \$200,000 including \$75,000 in new contributions to the Judy A. Adair Matching Grant. Reedy says to avoid letters and phone calls, make your donation now by investing online: <https://collinssecure.utulsa.edu/fof/Pledge.aspx>

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Upcoming Executive Luncheons:

Date	Speaker	Position	Company	Sponsor
01/16/2013	Ryan Lance	Chairman & CEO	ConocoPhillips	Unit Corporation
02/21/2013	Stephen Van Arsdell	Chairman & CEO	Deloitte & Touche, LLP	Keith & Pat Bailey
03/12/2013	Meredith Siegfried	CEO	NORDAM	Cherokee Nation Businesses
04/09/2013	Esther George	President & CEO	Federal Reserve Bank of KC	
05/07/2013	Stephen Prescott	President	Oklahoma Medical Research Fnd.	

February 21, 2013 Stephen Van Arsdell *Chairman & CEO* *Deloitte & Touche, LLP*



Stephen C. Van Arsdell is chairman and chief executive officer of Deloitte & Touche LLP (Deloitte & Touche), the accounting, auditing, capital markets and risk advisory subsidiary of Deloitte LLP. He also is chief quality officer for Deloitte & Touche LLP.

From April 2009 until August 2010, Van Arsdell was deputy chief executive officer of Deloitte & Touche, and served as attest quality officer, led the professional practice network, and directed activities related to risk management, quality control and inspections, external and internal technical communications, and the development of positions on accounting and auditing matters.

Van Arsdell has more than 35 years of professional experience. He has served as the lead client service partner to some of Deloitte's most prominent clients across various sectors, including aerospace and defense, manufacturing, financial services and consumer products. Van Arsdell has served also as a member and vice-chairman of the board of directors of Deloitte LLP.

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 February 7, 2013.

Meeting Sponsor

Keith and Pat Bailey

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

Friends of Finance Corporate Finance Series

The Center for Executive and Professional Development is pleased to partner with Friends of Finance to deliver a series of financial management courses for multiple knowledge levels. The series has a course for everyone in today's business world. Instruction by TU faculty Dr. J. Markham Collins, Dr. Anila Madhan and BOK Vice President Tally Ferguson

Level 1: Show Me The Cash!

March 7-April 6, 2013 or April 26-May 30, 2013

This basic financial management stresses flow of cash through the organization. Understand connections between business decisions, financial statements, and cash flows and balances.

Level 2: Where Is The Money?

August 22-September 26, 2013

This intermediate course continues emphasis on cash flow, focusing on the future and forecasting. Equips managers with understanding and application of analytical tools and decision models.

Level 3: Is There Any Money?

Fall 2013 TBA

This decision-oriented course addresses the more advanced topics in finance that senior and seasoned financial professionals face.

Special \$95 Friends of Finance discount. See details at <http://bus.collins.utulsa.edu/CEPD/fof.asp>

Or call: 918.631.2215

Leadership

Our officers and directors for 2012-2013 are:

Officers

President Jim Arens, Trust Company of OK
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
Derek Reiners, ONEOK, Inc.
Frank Rhoades, Rhoades Oil Company
Rod Sailor, WPX Energy

Membership

Last year we had membership of 429. This year our goal is 500. Membership fees support all of the expenses associated with Friends of Finance. Please renew your membership. 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. Remember, we are developing some “members only” events. 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 since our last newsletter are below. For a complete list of members (345), please go to:

<https://collinssecure.utulsa.edu/fof/Members/>

Bob Boyd	Bob Prince
Stephen Brocks	Sharon Prince
Pat Donica	Curtis Rice
T.D. Eureste	Donald Skillern
Ryan Fair	Julie Smith
Marshall Gilbert	James Willis
Melissa Paulsen	Joseph Willis

Fees

Fees for the 2012-2013 year have been reduced as of December 7, 2012

\$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)

\$1,250 (One reserved table at each luncheon)

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

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

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.

We have a report from Marc Siebel, exchange student from the University of Siegen, Germany 1998-1999. He has recently opened his own wealth management company, Peacock Capital, GmbH, in Düsseldorf, Germany. Siebel credits his TU exchange year and participation in the Student Investment Fund with landing his first job and a fast track career leading to the launch of Peacock Capital. Former colleagues can contact him at marc.siebel@peacock-capital.com.

Four MSF students graduated from the program on December 15th. Congratulations Bobbie Bearden, Jeff Jenneman, Nick Miranda and Taylor Murphy!

Corporate Internships in the MS in Finance Program

We are looking for more partners for our Corporate Internship Program. It has been a major factor in the outstanding success of our MS in Finance program. The students work 20 hours a week and attend classes year round. Compensation and tuition support is similar to a traditional co-op program.

Firms that have participated in the internship program have been very pleased and have hired many of their interns. BOK, Williams, NORDAM, Samson, SemGroup, Seminole, Laredo, ONEOK, and Clear Ridge Capital have all participated in the program.

The average GMAT entrance score for our MSF program is 670, which is exceeded by only 25 MBA programs in the U.S. If you would like to tap into this exceptional talent pool, contact Dr. Rick Burgess, Richard-burgess@utulsa.edu or 918-631-3067). As one participant says, "The internship program allows me to hire Ivy League talent at Tulsa prices." You can do the same!

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 918-631-2588) if you are interested in being a Luncheon Sponsor.

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 assist 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.

2012-2013
Finance Excellence Fund

The 2012-2013 Finance Excellence Fund Campaign has been launched. Our goal for 2012-2013 is \$200,000 including \$75,000 in new contributions to the Judy A. Adair Endowment. The Adair Endowment was established in 2008 and includes a challenge grant. However, this will be our last opportunity to take advantage of this leveraged match, with any contribution above your 2007-2008 gift being doubled. To date, we have raised \$32,710 from 50 donors. Hence, we need everyone's help to continue raising FOF to higher and higher levels.

Contribute on-line at: <https://collinssecure.utulsa.edu/fof/Pledge.aspx> 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, Oklahoma 74104-9700

2012-2013 Honor Roll

Finance Excellence Fund Honor Members to date are:

Finance Partner

Michael Krimbill

Finance Benefactors

Joe Adwon
George & Jennie Collins Foundation

Finance Patrons

Keith Bailey
J. Markham & Becky Collins
Steve Hildebrand
Tammie Maloney
Pete Meinig
Phillips 66
Rod Sailor
Williams

Finance Associates

Sharon Bell
Jake Dollarhide
Tally Ferguson
Jack Koehle
Pam Peck
Philip Reedy
Bill Snow
Dick Williamson
Chris Wolking

Finance Friends

Ryan Andrews
Michael Bartlett
Andrew Comstock
Megan Cordle
Mike Dill
Debbie Fleming
Bob Fries
Francis Gajan
Steve Ganzkow
Mike Huckaby
Russell Iorio
James Kimbrough

Jim McGill
Joe McGraw
Callie Mitchell
Joe Ragsdale
Tom Stees
Bruce Stoesser
Gale Sullenberger
Bob Traband
Tom Warburton
Daryl Woodard
Weidong Zhou

Finance Donors

Andrew Aguirre
Brandon Diles
Bob Dupree

Jane Faulkenberry
Bob Jennings
Richard Sullivan

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.

Williams[®]

WPXENERGY


Commerce Bank
Member FDIC

JPMorganChase 


Samson
Resources

HILTI


EideBaillySM

CPAs & BUSINESS ADVISORS


MIDFIRST BANK


Adams Hall
Asset Management, LLC


PHILLIPS
66[®]


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.

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.

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

Three Part Webinar Series on Retirement

1. "Pre-Retirement Decision Making and You", 2. "How To Avoid Common Asset Mistakes During Retirement" and 3. "Is It All Downhill From Here? Spending Your Retirement Assets Efficiently"

Part 1 "Pre-Retirement Decision Making and You" on November 12, 2012 8:00 – 9:00 p.m. CT. Explore some of the most important decisions in life: when, how, where, why, who and what. Preparing for retirement resembles preparing for a trip to the moon.

Part 2 "How To Avoid Common Asset Mistakes During Retirement" on January 14, 2013 8:00 – 9:00 p.m. CT. What mistakes might we make in retirement and how can we fix them. What happens when they are not corrected.

Part 3 "Is It All Downhill From Here? Spending Your Retirement Assets Efficiently" on March 11, 2013 8:00 – 9:00 p.m. CT. Discuss what factors come into play in spending your retirement funds.

Presenter: Christi Powell is a certified financial planner and top instructor in the chapter.

You may register for the Series, which include all three webinars for \$25.00 or you may register for individual webinars \$10.00 each.

REGISTER NOW <http://retirementseries.eventbrite.com>

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Barbara wollmersh@aol.com

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We are also on **Linked in**®

