THE UNIVERSITY of TULSA
Collins College of Business

April, 2014

Friends of Finance

April 23, 2014
James Hackett
Vice Chairman
Steelcase, Inc.

Jim Hackett is vice chair of the board of directors of Steelcase Inc., the global leader in the office furniture industry. Jim retired from Steelcase Inc in February, 2014 , where he was chief executive officer overseeing all operation of Steelcase Inc, including domestic and international operations.

Steelcase is a NYSE traded multinational firm with 650 dealers across the American, Asia Pacific, Europe, and Mid East/African regions

Jim had been appointed the eighth leader in the company's now 101-year history being named chief executive officer of Steelcase in 1994. Jim's career with Steelcase spanned almost a third of its history, 31 years and had spent nearly two decades in his role as CEO.

Reservations are required. You may register online: 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 April 9, 2014.

Meeting Sponsor

Leggett & Platt INCORPORATED

We extend our thanks and appreciation to **Leggett & Platt** for serving as our Luncheon Sponsor.

2013-2014
Finance Excellence Fund

Phil Reedy, Finance Excellence Fund (FEF) chair announced the 2013-2014 Campaign is still underway. Investments in the FEF become part of the endowment that is the Student Investment Fund (SIF). Currently 19 students, under the direction of SIF Coordinator/Instructor Tally Ferguson, manage $3.7 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 2013-2014 is $225,000 including $75,000 in new contributions to the Judy A. Adair Matching Grant. Make your donation now by investing online:
https://collinssecure.utulsa.edu/fof/Pledge.aspx
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

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!

SIF Update (From the Class)

The Student Investment Fund (SIF) endowment portfolio hit its all-time high in the first quarter of 2014 at just shy of $3.8 million. It closed today, March 17 at $3,736,702. With added value came an increased number of securities, challenging each class member to follow three securities and generate ideas for finding diversification with fewer securities. Our guest speakers include two well-known local business leaders: Jake Dollarhide of Longbow Asset Management and John Lindsay, President & CEO of Helmerich & Payne. While we enjoyed 2013's bull market, we have a healthy respect for pullbacks and are considering some defensive strategies. Sometimes these strategies require discipline over comfort. For example, we had to consider selling a portion of our best performing health care stock to invest in a sector with hitherto unremarkable performance. The class has a stellar line-up of new securities for presentation on April 9th and April 16th. Friends of Finance members are invited to those presentations beginning at 6:00 p.m. in Helmerich Hall, Room 219.

Shuttle Service

918 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.

We Need You

Membership is critical to our success. Last year we had membership of 404. This year our membership goal is 500. Please take time to register your membership at the reduced rate of $15. We are encouraging everyone who was a member last year to renew their membership and asking all former members who were not members last year to return to the fold. 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 the Friends of Finance organization.

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 (396), please go to: https://collinssecure.utulsa.edu/fof/Members/

Mike Mears
Calvin Moniz
Robert Nikkel
Charles Purser
Charles Secrest

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.

Upcoming Executive Luncheons:				
Date	**Speaker**	**Position**	**Company**	**Sponsor**
04/23/2014	James Hackett	CEO	Steelcase, Inc.	Leggett & Platt

Leadership

Our officers and directors for 2013-2014 are:

Officers

President Sam Combs, ComStar Advisors
VP Programs Don Quint, Don P. Quint & Associates
Treasurer Shawn Crisp, Trust Co. of Oklahoma
Secretary Kieran Major, American Airlines

Directors

J. Markham Collins, TU
David Dunham, Unit Corp.
Marcia MacLeod, WPX Energy
Phil Reedy
Derek Reiners, ONEOK, Inc.
Frank Rhoades, Rhoades Oil Company
Paul Samuels, Morgan Stanley Smith Barney

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Fees

Fees for the 2013-2014 year have been reduced as of March 11, 2014:

$15 (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)

$250 One reserved table (8 seats) at the remaining luncheon of the 2013-2014 season

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

Friends of Finance Accomplishments

Friends of Finance (FOF)

- Has existed and thrived for 28 years
- Had 404 dues paying members in 2012-2013
- Has had over 200 speakers address the group
- Leading executives including Jamie Dimon, Doug McMillon, Richard Fuld, Kenneth Lewis, Ed Whitacre; Roger Staubach, and John Wooden have spoken at FOF
- Approximately 400 people attend every luncheon
- 50,000+ 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 U.S. Business or Finance Program is known to have an equivalent speaker series
- Has been a major force in developing business relationships for TU and Tulsa

Employment Opportunities

Friends of Finance provides a position matching service for our members. Any company recruiting for an open Finance (or related) position may submit the position for posting. Simply provide a job description and contact procedures exactly as you want them posted. It will appear there for up to six weeks unless you request to remove it sooner. There is no fee for this service.

Access to the job postings area requires current Friends of Finance individual membership. This is a benefit of membership. The entire membership is notified of new postings through a membership wide email announcement. This supplies only basic information including job title and a link to the posting area.

We hope to expand participation in this Member Service, so if your firm has an open position, please consider this opportunity. We regularly have over 400 members. Members, if you or those in your network are seeking positions, consider checking the listings with Friends of finance.

Host a Student for 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 Host a Student for 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.

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.

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.

2013-2014
Finance Excellence Fund

The 2013-2014 Finance Excellence Fund Campaign is well underway. You do not want it to leave you behind. Our goal for 2013-2014 is $225,000 including $75,000 in new contributions to the Judy A. Adair Endowment. The Adair Endowment was established in 2008 and includes a challenge grant. To date, we have raised $112,000 from 94 donors. Hence, we need everyone's help to continue raising FOF to higher and higher levels. All donations go into the endowment managed by the Student Investment Fund.

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

2013-2014 Honor Roll

Finance Excellence Fund Honor Members to date are:

Finance Sponsor
Mike & Kathi Colby

Finance Founder
Bob & Sharon Prince

Finance Partner
Michael Krimbill

Finance Benefactors
Joe Adwon
Keith Bailey
Arnold Brown
Tom Campbell
George & Jennie Collins Foundation
Helmerich & Payne
J.P. Morgan Chase
Tammie Maloney

Finance Patrons
Sam & Rita Combs
Donald Chappel
J. Markham & Becky Collins
Steve Hildebrand
Pete Meinig
Craig Owens
Derek Reiners

Finance Associates
Nick & Barbara Allen
Ben Abney
Sharon Bell
Laurie Brown Purser
Jeff Davis
Jake Dollarhide
Bob Fredrickson
Jack Koehle
Kieran Major
Jody Parker
Bill Snow
Don Quint
Tom Warburton
Dick Williamson
Zarrow Foundation

Finance Friends
Kent Allingham
Loren Armstrong
Tory Baker
Mike Bartlett
Roger Bey
Dale Billam
Denie Buchanan
BUDCO
Nevyle Cable
Jim Colgan
Andrew Comstock
Megan Cordle
Lee Crawley
George Dallas
Harry Dandelles
Mike Dill
Frederick Drummond
Bill Fader
Tally Ferguson
Debbie Fleming
Steve Ganzkow
Bob Geweniger
Keith Goddard
Carlynne Holmes
Mike Huckaby
Russell Iorio
R. J. James
John Kauth
Stephen Layton
Sandy Leeds
Max Mason
Jim McGill
Joe McGraw
Johnson Moore
Greg Oliphant
Bob Paulsen
Pam Peck
Frauke Quiroga
Tom Redman
Phil Reedy
Kelly Schneider
Tom Stees
Bruce Stoesser
Gale Sullenberger
Richard Sullivan
Baxter Thorman
Bob Traband
Dudley Viles
Weidong Zhou

Finance Donors
Andrew Aguirre
Scott Bennett
John Buxton
Bob Dupree
Jane Faulkenberry
Irving Fenster
John Hartman
Bob Jennings
Mary Korthase
Dennis Reecher
Philip Viles
Meg Whitney

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. Thanks to our Corporate Sponsors this year:

JPMorganChase

HILTI

Morgan Stanley

MidFirst Bank

Trust Company of Oklahoma

Adams Hall Wealth Advisors

Laredo Petroleum, Inc.

Alliance Resource Partners, L.P.

Magellan Midstream Partners, L.P.

Don P. Quint & Associates

Williams

ONEOK

WPXENERGY

Phillips 66

Commerce Bank Member FDIC

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/

Nova Fellowship & Collins College of Business

Present: An evening with Dr. Paul Polak

Wednesday, April 16th at 7:00 p.m.
Lorton Performing Arts Center on TU Campus
Free Public Presentation

TU Executive & Professional Development

The Center for Executive and Professional Development offers a variety varied curriculum of seminars, certificate programs and conferences. A series of energy-related programs for accountants, auditors, tax professionals are scheduled in Houston: and Tulsa: through the year. In addition, a multi-level series in project management is offered this spring in Tulsa. All programs can be customized and delivered as onsite at any company. .

The TU Center for Executive and Professional Development has these courses coming up:

Advanced Project Management with Team Simulation
April 7-9, 2014
May 5-7, 2014

Building and Sustaining Project Management Best Practices
May 8-9, 2014

Virtual Green or Black Belt
Starts April 2, 2014

Healthcare Informatics
April 29-30, 2014

Petroleum Accounting: Basics to Advanced
Houston
June 25-27, 2014

Call 918.631.2215 for more information and to register.

http://bus.collins.utulsa.edu/CEPD/ or contact Center Director Linda Adlof linda-adlof@utulsa.edu.

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