# Friends of Finance

**April, 2006**

## *April 17, 2006*

## Richard S. Fuld, Jr.

*CEO*

### *Lehman Brothers, Inc.*

Richard S. Fuld, Jr., has been chairman of the Board of Directors of Lehman Brothers Holdings Inc. since 1994 and chief executive officer of the Company since 1993. He was president and chief operating officer from 1993 to 1994; president and co-chief executive officer of the Lehman Brothers Division of Shearson Lehman Brothers Inc. from 1990 to 1993; and vice chairman of Shearson Lehman Brothers from 1984 until 1990. He joined Lehman Brothers in 1969.

Mr. Fuld is a director of the Federal Reserve Bank of New York and a member of the Executive Committee of the Partnership for New York City, Business Roundtable and The Business Council. He is a trustee of the Mount Sinai Medical Center and the Mount Sinai Children's Center Foundation. In addition, he serves on the Board of Directors of The Ronald McDonald House of New York and the Board of Trustees of Middlebury College.

Reservations are required by April 11, 2006. **FOF members have reservation preference until April 3rd.** To reserve your seat, please contact Judy Miller at 631-2588 or judy-miller@utulsa.edu. Register on-line at: https://bus.cba.utulsa.edu/fof/reg.asp.

### *Meeting Sponsor*

MidFirst Bank

## *May 8, 2006*

## Paul Haaga, Jr.

*Executive Vice President*

### *Capital Research & Management Company*

Paul Haaga is Executive Vice President and a Director of Capital Research and Management Company, as well as Chairman of CRMC's Executive Committee. He is Chairman of Capital International Fund, Vice Chairman of the 12 fixed-income funds in the American Funds Group and of Capital Income Builder and Capital World Growth and Income Fund.

Capital Research and Mangement is the investment adviser to the American Funds which is one of the three largest mutual fund families in the U.S. with over $700 billion in investments and more than 35 million shareholder accounts. American Funds is part of the employee-owned The Capital Companies.

Haaga earned a bachelor's degree from Princeton Unviversity, an MBA from the Wharton School and a J.D. from the Unviersity of Pennsylvania Law School. Prior to joining Capital he was a partner in the law firm Dechert Price & Rhoads and a senior attorney for the Division of Investment Management of the U.S. Securities and Exchange Commission.

Reservations are required by May 2, 2006. **FOF members have reservation preference until April 24th.** To reserve your seat, please contact Judy Miller at 631-2588 or judy-miller@utulsa.edu. Register on-line at: https://bus.cba.utulsa.edu/fof/reg.asp.

## *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 twelve.

The annual cost of a Corporate Sponsorship is $2,500. If you are interested in having your corporation join, contact Judy Miller at 631-2588 or judy-miller@utulsa.edu for details. Corporate Sponsors for this year are:

THE NORDAM GROUP

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SpiritBank

Northwestern Mutual FINANCIAL NETWORK

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## *Honors and Awards*

At the recent College of Business Administration Honros & Awards Banquet, a number of Finance majors and MS in Finance students were recognized for their academic achievements. Students receiving awards were:

**Bachelor's Degree with Honors**
*Cum Laude (GPA greater than 3.5)*
Andrew M. Conway
Michael H. Denning
Arshad Parvez
Darrel J. Pfeifauf
Ryan D. Way

*Magna Cum Laude(GPA greater than 3.8)*
Jordan A. Friesen
Zachary A. Ingraham
David Anthony Kay
Stephen J. Peterson

**Master's Degree with Distinction**
*(GPA greater than 3.7)*
Jacob A. Lewis
Liu Liu
Yingying Shao
Kien H. Tran
Dustin G. Trinkle

**Beta Gamma Sigma**
Beta Gamma Sigma is a business honorary society to recognize outstanding scholarship. Membership is restricted to juniors in the top 7 percent, seniors in the top 10 percent, and graduate students in the top 20 percent of their classes. Initiates for 2006 were:

Jordan A. Friesen
Kenneth B. Knoll
Liu Liu
Grant F. Najera

**Certificates of Merit**
Awarded to students with both an outstanding academic record and major contributions to the College of Business and The University of Tulsa.

Arshad Parvez
Stepthen J. Peterson
Darrel J. Pfeifauf

## *Honors and Awards (continued)*

**MFAT**
Each semester seniors take a major field test on their understanding of all areas of business. Last year, students with the highest MFAT scores in the College were Finance majors.

David A. Crisp (Spring 2005)
Jordan A. Friesen (Fall 2005)

**Outstanding Student Awards**
David A. Kay – Outstanding Finance Student
Zachary A. Ingraham – Outstanding Econmics student – Zach had a triple major – Finance, Economics, and MIS
Dustin G. Trinkle – Outstanding MS in Finance student

## *Fees*

**Fees for the remainder of the year (May 31, 2006)**

| | |
|---|---|
| $10 | (Tulsa area members - membership fee only) |
| $10 | (out-of-area members - outside 50 mile radius of Tulsa) |
| $10 | (current TU full-time students or December 2004 or May 2005 graduates) |
| $135 | One reserved table (8 seats) |

**Luncheons**:

| | |
|---|---|
| Members | $15 ($12 paid in advance) |
| Non-members | $20 ($17 paid in advance) |

## *Priority at Luncheons*

Since demand for luncheon seats is exceeding our seating capacity, it has become critical to be a FOF member. Members will receive advance notices for all luncheons and will have preference until about two weeks prior to the luncheon. To obtain those advantages, join FOF today at https://bus.cba.utulsa.edu/fof/memberapp.asp or by contacting Judy Miller, judy-miller@utulsa.edu or 631-2588.

## *Job Posting*

If you are seeking employment or seeking employees, try our job posting web site. Firms who have used this service have found it to be effective. Membership is required to post jobs and to view job postings. To post a job opening, e-mail the job description in Word or PDF file, along with contact information to Judy Miller (judy-miller@utulsa.edu) who will post it. We will not edit the files.

| Upcoming Executive Luncheons: | | |
|---|---|---|
| **Date** | **Speaker** | **Position & Company** |
| April 17, 2006 | Richard S. Fuld, Jr. | CEO, Lehman Brothers, Inc. |
| May 8, 2006 | Paul G. Haaga, Jr. | EVP, Capital Research & Management Company |

## *Membership*

With 462 individuals already on the membership rolls, we are well on our way to meeting our challenging goal of 475 members for this year. The demand for luncheon seats is making it critical to be a member. To join or renew your membership go to: https://bus.cba.utulsa.edu/fof/memberapp.asp. Members can check the Membership Directory at: https://bus.cba.utulsa.edu/fof/members/directory.asp. Fees for the remainder of the year (thru May 31st) are only $10!

New members since our last newsletter are:

Don Burdick
Ann Cleveland
Fulton Collins
Albert East
Marlene Flaherty
Mark Foy
Chris Odom
Jessica Parton
Sean Ridenour
Lee Swarthout
John Yeager

## *Student Resumes on Website*

Our website now contains the resumes of many of our students who are seeking either full-time employment or summer internships. FOF members may access the resumes at https://bus.cba.utulsa.edu/fof/members/resumes.asp. If you aren't a FOF member, go to https://bus.cba.utulsa.edu/fof/memberapp.asp to join and obtain your password. Then you will have access to all benefits under Member Services. Members may post their resumes on the web site at no cost. E-mail your resume as a Word or PDF file to Judy Miller (judy-miller@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.

## *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.

### TU Executive & Professional Development

The University of Tulsa, Center for Executive & Professional Development is proud to announce the following upcoming programs:

**The OZ Principle® Accountability Training®**
April 11, 2006
**Oil and Gas Taxation**
May 24 & 25, 2006
**THE EXCELLENCE EDGE: New Strategies for Creating Extraordinary Results**
April 26, 2006
**Accounting and Finance for Non-Financial Managers**
April 27 & 28, 2006
**Personal Finance 101**
May 2, 9 & 16, 2006
**Partnership Taxation**
June 21, 22 & 23, 2006

For information contact Marilyn at 631-2215

### Energy Advocates

For more information: 599-7767
info@energyadvocates.org

### NAIC

4th Thursday Free Education Classes
6:45 p.m. – 7:30 p.m.
Hardesty Library, 8316 E. 93rd

NAIC Contact:
deangelistami@hotmail.com or 747-9303

# *Finance Excellence Fund*

FEF gifts are placed in the Student Investment Fund (SIF) which is managed by our students. Earnings from the SIF are used to support scholarships. To date, 116 students have received some $169,000 in scholarships.

This year we have had 116 donors and $78,751 in gifts. Go to: https://bus.cba.utulsa.edu/fof/excellencepledge.asp to make your gift and join our Honor Roll. Your support is appreciated. Honor roll members for 2005-06 are.

***Founder***
Mike & Caryn Hess

***Partner***
Arrow Trucking

***Benefactor***
John Chandler
Susan Cravens
Frank Fisher, Jr.
Robert & Roxana Lorton
McGill Foundation

***Patrons***
Bank of Oklahoma
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James Bertelsmeyer
Roger Bey
Tom Campbell
Kerry Freeman
Steve Hildebrand
Bill Hobbs
Pete Meinig
Genave Rogers

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Nick & Barbara Allen
Steve Berlin
Bob & Annette Boyd
Arnold Brown
Roger Collins
Bob Fredrickson
Craig Loseke
Tammie Maloney
Pam Peck
John Pilkington, Jr.
Don Quint
Frank Robson
Samson Investment Company
Dan & Vida Schuman
Zarrow Family Foundation

***Friends***
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Kent Allingham
Anne Anderson
Jim Arens II
Mike Axton
Tory Baker
Mike Bartlett
Gary Belitz
Sharon Bell
Wade Biswell
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Robert Jennings
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Mike Kent
Jack Koehle
Mary Korthase
Sandy Leeds III

***Friends (Continued)***
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Bill Lissau
Kieran Major
Max Mason
Mark Maun
Dee McDugle
Jim McGill
Joe McGraw
Wayne Middleton
Beverly Monnet
Johnson Moore
Rocky Moore
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# Links

On-line registration
https://bus.cba.utulsa.edu/fof/reg.asp

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

April 17, 2006 Registration Form

May 8, 2006 Registration Form

Membership Form

Pledge Card