

Friends of Finance

March, 2009

March 13, 2009 Nancy Buese SVP & CFO MarkWest Energy



Nancy K. Buese was appointed Chief Financial Officer of MarkWest general partner in October She previously served as Chief Accounting Officer of MarkWest. Prior joining MarkWest, Ms. Buese was CFO for Experimental and

Applied Sciences, Vice President with TransMontaigne Inc., and as a partner with Ernst & Young.

Reservations are required. You may register on-line at: https://bus.collins.utulsa.edu/fof/reg.asp or contact Judy Adair at 631-2588 or judy-adair@utulsa.edu. Friends of Finance members will have preference until February 27, 2009.

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.

April 13, 2009 Michael Cawley CEO & President The Noble Foundation

Mr. Cawley has served as President and Chief Executive Officer of The Samuel Roberts Noble Foundation, Inc., a notfor-profit corporation (the "Noble Foundation"), since February 1992, after serving as Executive Vice President of the



Noble Foundation since January 1991. Mr. Cawley has served as a trustee of the Noble Foundation since 1988. The Noble Foundation is a not-for-profit corporation, and it is engaged agricultural research, education, demonstration and consultation; plant biology and applied biotechnology; and assistance through granting to selected nonprofit organizations.

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Meeting Sponsor

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

Upcoming Executive Luncheons:				
Date	Speaker	Position and Company	Sponsor	
03/13/09	Nancy Buese	SVP & CFO, Mark West Energy		
04/13/09	Michael Cawley	CEO & President, The Noble Foundation	Keith & Pat Bailey	
05/12/09	Stanley Lybarger	President & CEO, BOK Financial Corporation	Williams	

Membership

This year's membership committee under the leadership of Mike Payne has established the challenging goal of 500 members for 2008-09. To renew your membership or join, go to

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

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. To date, we have 385 members. Membership dues for the remainder of the 2008-09 year are only \$45. Members since our last newsletter are listed below. For a complete membership listing, go to Member Services; Directory.

Ana Avila	Greg Horne
Scott Bennett	Melissa Mize
Ted Cowan	Tom Ritchie
Bretton Crane	Tim Roberts
Brett Crane	Michael Siegle
Dan Cunningham	Jana Smith
Jane Faulkenberry	Cory Wilson
John Hassell	Noah Zikmund

Fees

Fees as of 01/01/09:

\$95	(Membership plus remaining luncheon fees)
\$45	(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)
\$185	(Membership plus remaining luncheon fees
	for yourself and one guest)
\$250	One reserved table (8 seats)

Luncheon fees:

Members \$20 Non-members \$30

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

Alumni / Student Notes

If you have been promoted, changed companies, earned another degree or have personal information (marriage, etc.) please send it to us (judyadair@utulsa.edu) and we will include it in our newsletter.



Thomas Segner (BS '02, MSF '08) completed his MSF degree in December 2008. He is currently employed at ONEOK Energy Services as a Natural Gas Trader. He has been employed with ONEOK since 2002. "I enjoyed my time in

the MSF program and found the curriculum to be challenging and in line with my current profession."

Kui Cheng-Gugliotta (MSF '08) completed here MSF degree in December 2008. She is currently employed by Texas Department of Insurance as an IS Financial Examiner and performs statutory audits/examinations and reports on the financial condition and



regulatory compliance by insurance companies. She is also responsible for examining the investment cycle of the insurance companies to ascertain financial stability, solvency and compliance.



Matt Hazelwood (BS '01, MSF'04) recently passed the Financial Risk Management (FRM) certification exam. FRM holders are recognized across the globe as leaders in financial risk management: market risk, credit risk, operational risk, and risk management in investment

management. Matt is employed as a Quantitative Analyst with ONEOK, Inc.

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

Finance Excellence Fund

You should have recently received a letter from this year's finance Excellence Fund Chairman, Aaron Clark. As Aaron indicated, the FOF Board has set a goal of \$200,000 from 175 donors. We are confident that you will help us surpass our goal.

To date, we have had 85 donors and \$97,495 in gifts. You may contribute on-line at https://bus.collins.utulsa.edu/fof/excellencepledge.asp.

To date, honor roll members for 2008-09 are:

Finance Founder

Mike & Caryn Hess

Finance Partner

Mike & Cathi Colby

Joe Craft

Finance Benefactors

Bank of Oklahoma

Roger Bey

Tom Campbell

Don Chappel

Collins Foundation

Susan Cravens

Greg Hopeman

Marc Maun

JP Morgan

Finance Patron

Joe Adwon

Keith Bailey

David Enke

Kerry Freeman

Walt Helmerich

Steve Hildebrand

Beryl McElhiney

Pete Meinig

Frank Robson

John Steele Zink Fnd.

Finance Associates

Jim Arens

Sharon Bell

Bob Fitzgerald

Bob Fredrickson

Jim Hill

Craig Loseke

Mike Payne

Mahlon Pitt

Zarrow Family Foundation

Finance Friends

Gary Belitz
Wade Biswell
Arnold Brown
Chad Brumley
Jim Colgan
Becky Collins

Dee McDugle Jim McGill Joe McGraw Bob McGrew

Max Mason

William Lissau

Lindsey Madden

Megan Cordle Lee Crawley Mike Dill

Wayne Middleton H. Johnson Moore Craig Owens

Pat Donica Janet Duffy Bill Fader

Suzanne Penni Tom Redman Jeffrey Rudd Patsy Savage

Tally Ferguson Bob Gaddis Richard Gajan

Bill Snow Susan Solenberger

Matt Garrett Bob Geweniger Carlynne Holmes Russell Iorio

Tom Stees Bruce Stoesser Bob Traband

Wilfrido Jatem

Kent Van Valkenburgh

Jack Koehle Mary Korthase Sanford Leeds

Dudley Viles Bill Wilke Daryl Woodard

Pete Leiniger

Finance Donors

Patrick Engelmann Jane Faulkenberry Skilly Forsman EJ Hammond Graydon Luthey Barry Woods

Judy Adair Endowment Established

As recognition for Judy Adair's outstanding service to Friends of Finance, a very generous donor has pledged \$375,000, up to \$75,000 per year for each of the next five years, as a challenge grant to establish the Judy Adair Endowment.

The rules for contributing to the Adair Endowment are very simple. All gifts above the amount you gave during the 2007-08 Finance Excellence fund drive will be matched by the challenge gift. For example, if you gave \$500 last year and \$750 this year, \$250 would be matched by the challenge gift to make \$500 that would be placed in the Adair Endowment. The first \$500 would be placed in the Student Investment Fund for scholarships just as it has been in the past.

You may show your appreciation for Judy's service by donating on-line at:

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

or sending a check to made payable to the University of Tulsa, Finance Excellence Fund

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

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 (restricted to FOF members) 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.

Update Member Information

You may update any of your membership information on-line. This will help to make sure that you don't lose contact with us.

Job Postings

Corporate job openings will be posted. E-mails will be sent to advise you that a new job opening has been posted. You will then go to the web site to see the job description.

Resume Posting

FOF members may post their resume on the FOF web site when they are seeking employment.

Leadership

Our officers and directors for 2008-09 are:

Officers

President Jim Arens, Trust Company of Oklahoma VP Programs Greg Hopeman, UBS Financial

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Treasurer Jeff Holman, Magellan Midstream
Secretary Geordie Matson, BancFirst

Membership Mike Payne, Eide Bailly FEF Campaign Aaron Clark, JP Morgan Chase

Directors

Keith Bailey, Williams (Retired) Roger Bey, University of Tulsa

Shane Goodwin, Goldman Sachs

Michael Krimbill, Energy Transfer Partners (Retired)

Don Chappel, Williams

Janet Duffy, Samson Investment Company

Resume Posting

FOF members who are seeking employment may now post their resume on the FOF web site. An e-mail will be sent as new resumes are posted. The e-mail 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 (judy-adair@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.

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.

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 <u>University of Tulsa Parking Map</u> for a campus parking map. Please let us know if you have questions.

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

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. 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 University of Tulsa, Center for Executive & Professional Development has a variety of upcoming programs. For a complete listing, for more information or to register online, go to:

http://bus.collins.utulsa.edu/CEPD/Default.asp or call 918.631.2215

Energy Advocates

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

NAIC

4th Thursday Free Education Classes 6:15 p.m. – 7:00 p.m. Schusterman-Benson Library, 3333 E. 32nd Pl

EDUFEST 2009

March 7, 2009, 9:00 a.m. – 4:30 p.m., Lunch Included Martin Regional Library, 2601 S. Garnett, Tulsa Contact: Anita <u>ajgreiner@sbcglobal.net</u> (918) 492-7108

NAIC Contact:

Tami <u>deangelistami@hotmail.com</u> or 747-9303 or Barbara wollmersh@aol.com

Links

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

March: https://bus.collins.utulsa.edu/fof/docs/20090313registrationform.doc

April: https://bus.collins.utulsa.edu/fof/docs/20090413registrationform.doc

 $May: \underline{https://bus.collins.utulsa.edu/fof/docs/20090512 registration form.doc}$

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

Membership Form

Pledge Card