

May 19, 2008

Kenneth J. Levit

Executive Director

George Kaiser Family Foundation

Kenneth J. Levit is the Executive Director of the George Kaiser Family Foundation. Prior to taking on the leadership role at the George Kaiser Family Foundation, Mr. Levit served as President of the University of Oklahoma-Tulsa from 2001-2006. In that capacity, he also served the University of Oklahoma system as Senior Vice President.



From early 1998 through 2000, Mr. Levit was Special Counsel to George Tenet, director of the Central Intelligence Agency. In that role, he advised the Director on a variety of issues including technology policy, declassification of historical records and the Middle East peace process.

A Tulsa native and graduate of Holland Hall, Mr. Levit earned his law degree from Yale Law School in 1994. Prior to law school, he worked as Press Secretary to U.S. Senator David Boren. He received his undergraduate degree from Brown University in 1987.

Luncheon Sponsor

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

Fees

Membership dues have been reduced for the remainder of the 2007-08 year.

- \$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 TU graduate within the last year)

Luncheons:

- Members \$20 (\$15 paid in advance)
- Non-members \$30 (\$25 paid in advance)

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

- \$200 One reserved table (8 seats)

Membership Renewal

In July, we will be sending you your membership renewal notice. Members will continue to receive advance notices for all luncheons and will have seating priority. This year every luncheon was sold out. Join early to help ensure a seat at the luncheons.

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. There will also be a TU shuttle running from the parking lots on 4th Place. See [University of Tulsa Parking Map](#) for a campus parking map. Please let us know if you have questions.

Honors and Awards

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

Bachelor's Degree with Honors

Cum Laude (GPA greater than 3.5)

Levi Applegate
Jay Ross Cunningham
Kenneth Ferrell
Jacob Frank
Stephen Jackson
Megan James
Lauren Kuzniewski

Magna Cum Laude (GPA of 3.7 – 3.99)

Eric Burkholder
Nathan Harris
Kenneth Knoll

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 2007-088 were:

Eric Burkholder
Amanda Kilpatrick
David Scherer
Derek Steffen

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.

Nathan Harris
Megan James

Outstanding Finance Student Award

Eric Burkholder

Speakers Provided

The Membership Committee is working hard to introduce the Tulsa community to TU, TU's Finance programs, and Friends of Finance. One new effort is to provide a speaker to Rotary and Kiwanis clubs or other organizations who would like to learn about TU. The basic presentation is an overview of TU, a discussion of the various Finance programs, and an introduction to Friends of Finance. If your group would be interested in such a presentation, contact Mike Payne (mpayne@worldtv.com or 743-8856); or Judy Adair (judy-adair@utulsa.edu or 631-2588) to set up a day. We have done this at Southside Rotary so you can do a reference check with them.

Summer Internships

We have a number of students who are seeking summer internships. If you have the need for some highly talented and motivated summer employees, please send a job description to judy-adair@utulsa.edu and we will distribute it to all of our students. Summer internship programs are one of the best ways firms have to attract great students to become full-time employees upon graduation.

Head Table Opportunity

If you have a business or personal relationship with our speaker, please let us know. We will try to accommodate you by reserving a place at a table up front or a seat at the head table.

New Leadership

Our officers and directors for 2008-09 are:

Officers

President	Jim Arens, Trust Company of Oklahoma
VP Programs	Greg Hopeman, UBS Financial
Treasurer	Jeff Holman, Magellan Midstream
Secretary	Geordie Matson, BankFirst

Directors

Keith Bailey, Williams (Retired)
Roger Bey, TU
Shane Goodwin, Goldman Sachs
Michael Krimbill
Don Chappel, Williams
Don Spaugy, SemGroup, LP
Janet Duffy, Samson

Membership

Last year we had a record membership of 491. This year's membership committee under the leadership of Mike Payne has established the challenging goal of 525 members for 2007-08. To renew your membership or join, go to <https://bus.cba.utulsa.edu/fof/memberapp.asp>. Encourage your friends and colleagues to do the same. Membership fees for Tulsa area members have been reduced to \$10 for the remainder of this year's speaker series. 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 462 members. To view the complete directory, log on to [Member Services](#) and click on "[Directory](#)."

Members since our last newsletter are:

Kelly Bolton
Carla Covey
Janet Duffy
Chuck East
Paul Gee
Krystal Smith
Tim Suess
Cathleen Thomas

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. A number of resumes are currently posted.

Alumni / Student Notes

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

Kui Cheng-Gugliotta (*MSF '08*) has recently been selected by the nation's only Public Risk Management Association (PRIMA) to receive the Dr. John A. Beno Memorial Scholarship.



Along with the other four scholarship recipients, Kui will join top risk management practitioners from across the U.S., Canada, Great Britain and Australia to attend the PRIMA's Annual Conference for public sector risk managers in Anaheim, California.

We congratulate Kui Cheng-Gugliotta for her achievement and dedication and we are proud to have her represent TU this important event.

2008 McGowan Scholar



Christopher Lynch (*MSF '09*) will be TU's 2008–2009 McGowan Scholar, a national recognition that provides funding for one year of tuition up to \$18,000.

Lynch will use the McGowan award to finish his master's degree in finance with an emphasis in risk management. He is expected to graduate from TU in fall 2009.

The William G. McGowan Scholars Program partners with select universities with an accredited business program to honor one business undergraduate or graduate student on an annual basis. TU has awarded five consecutive scholarships since 2004 with scholars coming from Venezuela, Kenya, China and the United States. The McGowan Scholars program began in 1994 and is funded by the William G. McGowan Charitable Fund. The fund was established to commemorate the accomplishments of McGowan, who founded MCI Communications and led the company until his death in 1992.

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.

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. A number of new positions have been posted.

Take-A-Student to Lunch

One goal of Friends of Finance is to provide assistance to 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.

FOF Web Site

The FOF website <https://bus.cba.utulsa.edu/fof/> includes a number of services as listed below.

New Membership

<https://bus.cba.utulsa.edu/fof/memberapp.asp>

Meeting Registration

<https://bus.cba.utulsa.edu/fof/reg.asp>

Members Services

<https://bus.cba.utulsa.edu/fof/signin.asp>

(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.

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.

Finance Excellence Fund

FEF gifts are placed in the Student Investment Fund (SIF) which is managed by our students. The SIF has a value of \$1.5+ million and some \$285,000 in scholarships has been awarded. Most importantly the SIF experience has helped to provide a great foundation for successful careers.

This year we have had 125 donors and \$161,710 in gifts. Our goal is \$175,000. You may contribute on-line at <https://bus.cba.utulsa.edu/fof/excellencepledge.asp> or call Judy Adair at (918) 631-2588.

Honor roll members for 2007-2008 to date are:

Finance Sponsor

SemGroup, LP

Finance Founder

Shane Goodwin
Mike & Caryn Hess

Finance Partner

Michael Colby
Michael Krimbill
Charles Stephenson

Finance Benefactors

Keith Bailey
Bank of Oklahoma
Arnold Brown
Alan Ford
Burton Foundation
John Chandler
George & Jennie Collins Fnd.
Susan Cravens
Frank Fisher, Jr.
Goldman, Sachs, & Co.
Greg Hopeman
Marc Maun
Beryl McElhiney
Ralph & Frances McGill Fnd.

Finance Patron

Roger Bey
Tom Campbell
Michael Dill
Dollar Thrifty Group
Bob Fries
Steve Hildebrand
Jim Hill
JP Morgan Chase
Pete Meinig
Frank Robson
Genave Rogers
Samson
John Steele Zink Fnd.
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Finance Associates

Joe Adwon
Nick & Barbara Allen
Jim Arens
Steve Berlin
Bob Fredrickson
Walt Helmerich
Robert & Cathy Laird
Craig Loseke
Mazzio's Corporation
Mike Payne
Pam Peck
Don Quint
Don Spaugy
Zarrow Family Foundation

Finance Friends

Clint Alexander
Kent Allingham
Tory Baker
Mike Bartlett
Gary Belitz
Sharon Bell
Wade Biswell
Denie Buchanan
BUDCO, Inc.
Becky Collins
Mark Collins
Penny Colantonio
Andrew Comstock
Mark Crawford
Lee Crawley
Rebecca Edmiston
Bill Fader
Tally Ferguson
Bob Fitzgerald
Skilly Forsman
Phil Franczyk
Bob Gaddis
Francis Gajan
Richard Gajan
Steve Ganzkow
Bob Geweniger
Keith Goddard
E.J. Hammond
Linda Gunnells
Russell Iorio
Robert Jennings

Finance Friends

Jack Kauth
Jack Koehle
Mary Korthase
Sandy Leeds
Pete Leininger
Bill Lissau
Longbow Asset Management
Kieran Major
Max Mason
Dee McDugle
Jim McGill
Joe McGraw
Bob McGrew
Wayne Middleton
Callie Mitchell
Rob Morris
Jeff Oldham
Suzanne Penni
Jim Pinkerton
Steve Poleman
Tom Redman
Peggy Rice
Jeff Rudd
Patsy Savage
Chris Shannon
Bill Snow
Cherl Snyder
Gary Stanislawski
Bruce Stoesser
Gale Sullenberger
Lee Swarthout
Bob Traband
Dudley Viles
Chris Wolking
Daryl Woodard
Steve Zenthoefer
Weidong Zhou

Finance Donors

Nicole Affeldt
John Buxton
Meg Brimmer
Patrick Engelmann
Jane Faulkenberry
Joe Redman
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.

The annual cost of a Corporate Sponsorship is \$3,000. If you are interested in having your corporation join, contact Judy Adair at 631-2588 or judy-adair@utulsa.edu for details. Thus far, Corporate Sponsors for this year are:



CPAs & BUSINESS ADVISORS



Upcoming Executive Luncheons:

Date	Speaker	Position and Company	Sponsor
05/19/2008	Kenneth Levit	Executive Director George Kaiser Family Foundation	Keith & Pat Bailey

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/>

Energy Advocates

JULY 10, 2008

Bob Tippee, Editor of the Oil & Gas Journal is scheduled to give his Annual Mid-Year Forecast. This event is a not to be missed event. More details will be forthcoming.

For more information: 599-7767

info@energyadvocates.org

Tulsa Area NAIC

4th Thursday Free Education Classes

6:45 p.m. – 7:30 p.m.

Hardesty Library, 8316 E. 93rd

Tulsa Area NAIC Contact:

Tami deangelistami@hotmail.com or 747-9303 or

Barbara wollmersh@aol.com

TU Executive & Professional Development

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

For more information and to register online:

<http://bus.cba.utulsa.edu/CEPD/Default.asp>

or call 918.631.2215

Links

On-line registration

<https://bus.cba.utulsa.edu/fof/reg.asp>

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

[May 19, 2008 Registration Form](#)

[Membership Form](#)

[Pledge Card](#)