Friends of Finance

November/December, 2008

December 3, 2008

Cary Evert

President & CEO
Hilti Western Hemisphere

Cary Evert leads Hilti's Western Hemisphere operations as president and chief executive officer. He assumed the role that covers Hilti's businesses in the United States, Canada, Latin America and the Caribbean in 2005.

Before his current role, he served as president of Hilti Latin America with responsibility for growing the company's operations in eight countries in addition to working with distributors in another 20-plus countries in Latin America and the Caribbean.

The international Hilti Group supplies the worldwide construction industry with technologically leading products, systems and services that provide construction professionals with innovative solutions and superior added values. Hilti employs more than 18,000 people in over 120 countries who passionately create enthusiastic customers and build a better future. Hilti's Western Hemisphere operations cover more than 3,400 employees in eight countries.

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 November 19, 2008.

December Luncheon Sponsor

REGENT FINANCIAL SERVICES, INC.

Giving You Wings to Land Safely in Retirement

We extend our thanks and appreciation to Regent Financial for serving as our Luncheon Sponsor.

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, BancFirst
Membership	Mike Payne, World Travel Service
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

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.

Upcoming Executive Luncheons:			
Date	**Speaker**	**Position and Company**	**Sponsor**
12/03/08	Cary Evert	President, North American Operations, Hilti, Inc.	Regent Financial
January 2009	TBA	TBA	
02/10/09	Clayton Bennett	Chairman, Dorchester Capital, LLC	
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

Last year we had membership of 471. 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 336 members.

Members since our last newsletter are listed below. For a complete membership listing, go to Member Services; Directory.

Denise Adams
Lisa Anderson
Doug Applegate
Dolin Argo
Rick Arrington
Patrick Bardsley
Steve Barnes
M. Cody Bezanson
Dwight Bottomley
Arnold Brown
Bobby Burnett
Jana Burton
Anju Chandra
Michael Chapman
Aaron Clark
Steve Cochran
Jim Colgan
Susan Cravens
Jeff Davis
Jake Dollarhide
Tally Ferguson
Caroline Franklin
Brian Frere
Bob Fries
Steve Ganzkow
Chris Guglielmo
Brad Haig
Eugene Hodel
Stacey James
Judith Land
Bill Lissau
Bob Lorton
Marcia MacLeod
Max L Mason
Melinda McKinney
Joe McGraw
Bill Meyer
Gail Morris
Jerry Morris
Kimberly Nation
David Page
William Poole
Bob Portiss
Bob Prince
Sharon Prince
Denise Reid
David Reynolds
Vicki Rose
Mark Smith
Bill Snow
Jia Song
Steve Soule
Ryan Staebell
Hugh Thompson
Cherrie Turner
Chuck Walton
Jean Walton
Leon Warner
Angela West
Neal Zahn
Fan Zhang

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 to add over $200,000 in new contributions this year from 175 donors. We are confident that you will help us surpass our goal.

This year we have had 18 donors and $10,440 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 Benefactors
Bank of Oklahoma
Don Chappel
Marc Maun

Finance Patron
Joe Adwon
Keith Bailey
David Enke

Finance Associates
Mike Payne
Mahlon Pitt

Finance Friends
Gary Belitz
Megan Cordle
Pat Donica
Janet Duffy
Bob Gaddis
Sanford Leeds
Dee McDugle
Jim McGill
Bob Traband
Susan Solenberger

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 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.

Fees

Fees for this year are:

$210 (Membership plus all luncheon fees)
$75 (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)
$450 (Membership plus all luncheon fees for yourself and one guest)
$250 One reserved table (8 seats)
$2,000 (One reserved table of eight at each Luncheon)

Luncheons:

Members	$20
Non-members	$30

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

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.

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.

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.

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.

Sponsorships area available for the following meetings:

02/10/09	Clayton Bennett	Chairman Dorchester Capital, LLC
03/13/09	Nancy Buese	SVP & CFO Mark West Energy

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:

THE TRUST COMPANY OF OKLAHOMA

JPMorganChase

NORDAM

ONEOK

Samson

SMITH BARNEY citigroup

BANK OF OKLAHOMA N.A.

MAGELLAN MIDSTREAM PARTNERS, L.P.

Northwestern Mutual FINANCIAL NETWORK®

MIDFIRST BANK

Williams

EideBailly SM

CPAs & BUSINESS ADVISORS

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 the following upcoming programs:

Developing Project Management
12/8/2008 – 12/10/2008

Accounting & Finance for Non-Financials
12/11/2008 – 12/12/2008

PMP Prep.
12/15/2008 – 12/19/2008

For a complete listing, for more information
or to register online:
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
6:45 p.m. – 7:30 p.m.
Hardesty Library, 8316 E. 93rd

NAIC Contact:
Tami deangelistami@hotmail.com or 747-9303
or Barbara wollmersh@aol.com

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.

Links

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

November/December: https://bus.collins.utulsa.edu/fof/docs/20081203registrationform.doc

February: https://bus.collins.utulsa.edu/fof/docs/20090210registrationform.doc

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

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

May: https://bus.collins.utulsa.edu/fof/docs/20090512registrationform.doc

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

Membership Form

Pledge Card