Friends of Finance

November, 2006

November 30, 2006
Michael Morris
Chairman, President & CEO
American Electric Power

Michael G. Morris is chairman, president and chief executive officer of American Electric Power Co., Inc. Prior to joining American Electric Power he was chairman, president and CEO of Northeast Utilities System from 1997 to 2003, where he led the company during its $1.3 billion sale of the Millstone Station nuclear plant in 2001, a $679 million merger with Yankee Energy System Inc., and the acquisition of Connecticut Valley Electric Co. Before joining Northeast Utilities, Morris was president and CEO of Consumers Energy, principal subsidiary of CMS Energy, and president of CMS Marketing, Services and Trading.

Reservations are required. You may register on-line at: https://bus.cba.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 16th.

Luncheon Sponsor

ALLIANCE RESOURCE PARTNERS, L.P.

We extend our thanks and appreciation to Alliance Resource Partners, LP for serving as our November Luncheon Sponsor.

January 18, 2007
Greg Lippert
President & CEO
Mazzio's Corporation

Greg Lippert was appointed President and CEO of Tulsa based Mazzio's Corporation, operating 171 Mazzio's Italian Eateries and 15 Zio's Italian Kitchen's restaurants, in August 2005. Prior to this appointment, he was Chief Operating Officer of Fazoli's, a restaurant chain of 400 Italian restaurants.

Lippert came to Tulsa in 1984 to join the original Ken's Restaurant Systems, operator of "Ken's Pizza" and start up "Mazzio's Pizza" as its Marketing Director where he oversaw all Mazzio's and Ken's Pizza marketing and the introduction of Zio's Italian Kitchen from its conceptual stage to its current 15 locations. Greg left Mazzio's Corporation briefly for a two year period when McDonald's purchased the Fazoli's business and appointed him as their CMO.

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Shuttle Service

Bill White Shuttle Service will again be providing a continuous shuttle service form the parking lot north of the Reynolds Center (8th & Harvard) 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.

Membership

This year's membership committee under the leadership of Jake Dollarhide has established the challenging goal of 525 members. To date we have 352. 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. 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:

Denise Adams	Frazier Henke
Clint Alexander	Bruce Humphrey
Loren Armstrong	Jack Majors
Greg Burn	Shane Matson
Mike Clark	Curt McMurphy
Colin Cornell	Laura Messer
Shea Daugherty	Jason Reimbold
Jeff Davis	Vicki Rose
Mike Dodson	Brooke Snyder
Pat Donica	John Thomas
Richard Gajan	Amanda Troxell
Judy Gajan	Kevin White
August Hadwiger	David Whitney

Fees

Fees for this year are:

$165 (Membership plus all luncheon fees)
$50 (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)
$365 (Membership plus all luncheon fees for yourself and one guest)
$200 One reserved table (8 seats)
$1,700 (One reserved table of eight at each Luncheon)

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 m

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.

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.

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.

Marc Maun (*BSBA '80*) – Promoted to Chairman and CEO of Bank of Kansas City in Overland Park, Kansas. He previously was Sr. VP and Manager, Corporate Banking, Bank of Oklahoma, Tulsa. Mark was the fourth President of Friends of Finance.

Jeff Clark (*MSF '06*) has accepted a position with Leggett and Platt, LP in Carthage, Missouri as a Financial Development Program Analyst in their Mergers & Acquisitions Group. Jeff currently is serving as a Corporate Intern with the Bank of Oklahoma.

Shane Goodwin (*BSBA '93*) has accepted a position at Goldman Sachs & Co., Investment Banking Division. Shane previously served as Director, Global Mergers & Acquisitions at CitiGroup Corporate. Shane currently serves on the Friends of Finance Board of Directors.

Jeffrey Oldham (BSBA '00) a former law clerk of William H. Rehnquist, Chief Justice of the United States Supreme Court, will be the University of Tulsa Distinguished Alumni in Law and Politics for 2006. Mr. Oldham will give two lectures on Monday, November 13th at The University of Tulsa.

"Supreme Court and Federal Appeals Court Clerkships: What They're Like and How to Get Them" - at 12:15 in Room 203 of John Rogers Hall (3120 East 4th Place). For more information, contact Vicki Jordan at 631-2429 or vicki-jordan@utulsa.edu.

"From TU to Clerking on the U.S. Supreme Court" - at 7:30 in the Faculty Study of McFarlin Library. For more information, contact Jeff Hockett at 631-2796 or jeffrey-hockett@utulsa.edu

After clerking for Chief Justice Rehnquist, Mr. Oldham served as Counsel to Alberto R. Gonzales, Attorney General of the United States. Currently, Mr. Oldham is Associate Counsel at Mayer, Brown, Rowe, and Maw, LLP, Houston, Texas.

Finance Students Excel

Each semester our undergraduate seniors take a major field test covering all areas of business. The results of the Spring 2006 test show TU business students ranking at the 90th percentile of all test takers from 513 participating institutions. Finance students did even better ranking at the 95th percentile.

MS in Finance GMAT Scores

One major parameter for judging the quality of a graduate business program is the average entrance score (GMAT). The 2006-07 MS in Finance class has an average GMAT of 670 which is at the 89th percentile. When our 670 GMAT is compared to all 800+ MBA programs (there is no reporting for MSF programs) we are in the top 25.

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 is $2,000 The following luncheons are available for sponsorships:

Date	Speaker
01/18/07	Greg Lippert, Mazzio's
03/13/07	Craig Ueland, Russell Investments

Contact Judy Adair, (judy-adair@utulsa.edu or 631-2588) if you are interested in being a Luncheon Sponsor.

Favorite Professor

Anne Anderson (MBA ‘98) recently was featured in BusinessWeek On-line.

By Lindsey Gerdes
Business Week 9/21/06
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Finance professor Anne Anderson is a West Point grad and former 1st Lieutenant. That doesn't mean her classes are all drill and discipline

Assistant Professor Anne Anderson starts out the semester with a snapshot. The popular Lehigh University finance instructor takes a picture of each new student with his or her nameplate, giving herself a two-week deadline to learn every name.

She is equally committed to getting to know her students on a personal basis. "Every time I walk into the office, she asks about how I'm doing and wants to know about me and how my life is," says junior Megan Duesing. In 2005 students rewarded this dedication by presenting Anderson with the Lehigh Junior Award for Distinguished Teaching.

WINDING ROAD. Anderson came to teaching later than most. "My background is one of those winding roads," says Anderson, a West Point graduate and former U.S. Army 1st Lieutenant, of her nontraditional path into academia. Despite an interest in teaching dating back to her West Point years, it was only after four and a half years in the Army and five years as an engineer at Atlanta-based Lanier Clothes that the pieces finally fell into place.

When asked to train factory workers on new procedures in the manufacturing plant, "the teaching bug came back," says Anderson, who left Atlanta soon after to pursue an **MBA at the University of Tulsa.** This was followed by a PhD from the University of Arizona, and her most recent move to Lehigh, where she has just completed her third year of teaching.

Anderson, whose corporate financial policy course is a requirement for finance majors, tries to bring a real-world approach to the classroom. This includes regularly beginning class periods quizzing students on current events with finance components and also assigning Jim Collins' *Good to Great* as required reading. Students then apply the standards from the book to companies such as Nike [NKE] to determine whether they're good or great.

BIG-PICTURE PROJECTS. Numerous students also praise the three group projects over the semester as the highlight of the course. Throughout the semester, teams of four collaborate to provide financial ratio, capital structure, and dividend policy analysis for companies like Hershey (HSY).

Junior Eric Brandt says Anderson's ability to discuss finance in terms of broader business implications is integral to giving the project big-picture relevance and keeping students engaged. "With our projects, some of the paper was focused on the numbers," says Brandt. "But the majority of it was concerned with: Why is it the way it is, and how would you go about changing that?"

Anderson may be supportive but she's hardly a pushover. The West Point graduate also places a high priority on discipline and responsibility: She gives pop quizzes when students fail to do homework and deducts points from papers that aren't turned in at the beginning of class. "You play like you practice," says the former basketball player. "When you leave here and the boardroom meeting starts at 10 and you stroll in at 10:15 because you're in the copy room, your boss is going to wonder."

Many survey respondents expressed an appreciation for Anderson's methods. "She is very tough, but makes class so interesting," notes one survey respondent. "She makes the learning fun, while applying it to real-life situations."

EARLY RISER. Next year Anderson will add a graduate course to her teaching duties. The busy prof also has academic research under way on international companies and corporate governance, restricted shares, and socially responsible investing. And there may just be a little bit of lieutenant left in the impressive multitasker and early riser: By 5:30 a.m. Anderson is already responding to student e-mails, and she arrives in the office around 7.

By serving as a role model for students who want this kind of discipline in their own lives, and letting them know she has their best interests in mind, it's mission accomplished for Lehigh's most popular military/engineering/teaching veteran.

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, 135 students have received more than $240,000 in scholarships. The current market value of the SIF is $1.3 million.

This year we have had 40 donors and $59,945 in gifts. Our goal is $150,000. You may contribute on-line at https://bus.cba.utulsa.edu/fof/excellencepledge.asp.

Honor roll members for 2006-07 are:

Finance Sponsor
SemGroup, LP

Finance Founders
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Craig Loseke
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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 $2,500. 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

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MAGELLAN MIDSTREAM PARTNERS, L.P.

Williams

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ONEOK

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Edward Jones

BANK OF OKLAHOMA N.A.

SMITH BARNEY citigroup

Northwestern Mutual FINANCIAL NETWORK

EideBailly CPAs & BUSINESS ADVISORS

Upcoming Executive Luncheons:

Date	Speaker	Position and Company	Sponsor
11/30/2006	Michael Morris	Chairman, President & CEO, AEP	ARP, LP
01/18/2007	Greg Lippert	President & CEO, Mazzio's Corporation	
02/13/2007	Tiffany Sewell- Howard	CEO, DitchWitch	Arrow Trucking
03/13/2007	Craig Ueland	President & CEO, Russell Investment Group	
04/12/2007	Aubrey McClendon	Chairman & CEO, Chesapeake Energy	Anchor, USA
05/07/2007	Ali Moshiri	President, Chevron Latin America	SemGroup, LP

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.

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

February 17, 2007
Annual Investors Fair

NAIC Contact:
Anita Greiner 918-492-7108
ajgreiner@sbcglobal.net

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

TU Executive & Professional Development

The University of Tulsa, Center for Executive & Professional Development has the following upcoming programs:

Project Management Classes: Nov. 13 and Dec. 7
Improve performance by honing your Project Management skills. Advanced Project Management Nov. 13-15—If you manage projects every day and need advanced skills, this course is the second step for continued development. Participants should review project management principles prior to attending this course. This course is a key foundation course for the Project Management Professional (PMP®) certification. Project Risk Dec. 7-8 teaches you how to identify uncertainties that can threaten project execution and develop a plan to maximize opportunities for project success. http://bus.cba.utulsa.edu/CEPD/project_mgt.asp

Extraordinary Leader Nov. 30- Dec. 1
What separates an average leader from an extraordinary leader? Based on leadership authority Jack Zenger's work, take away some compelling answers that demystify leadership and explain five key insights that distinguish a truly extraordinary leader. Great for new managers and current managers needing to brush up on leadership skills. http://bus.cba.utulsa.edu/CEPD/extraordinary_leader.asp

Blazing Service Dec. 11-12
The best customer service blended learning we have found. This new fast-paced, interactive training program combining best practices of classroom instruction with web based reinforcement after the two-day course. Designed specifically for customer service providers in high customer-contact organizations, Blazing Service helps employees grasp and apply proven interpersonal and problem-solving techniques. More than a one-day motivational program, participants return to their jobs with relevant tools, online follow-up sessions and action plans to apply what they learned. http://bus.cba.utulsa.edu/CEPD/blazing.asp

For more information and to register online:
http://bus.cba.utulsa.edu/CEPD/Default.asp
or call 918.631.2784

Links

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

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

November 30, 2006 Registration Form

January 18, 2007 Registration Form

Membership Form

Pledge Card