

October 21, 2004
Steadman Upham
President
The University of Tulsa



On September 1, 2004, after serving as President of Claremont Graduate University for six years, Steadman Upham became The University of Tulsa's 17th President. Prior to serving at Claremont Graduate University, he was Vice Provost for

Research and Dean of the Graduate School and Professor of Archaeology at the University of Oregon.

President Upham has written extensively on prehistory and archaeology of the American Southwest. He has received numerous awards for teaching and research.

Mr. Upham's presentation will be titled "Challenges to the American Research University"

[Please register today.](https://bus.cba.utulsa.edu/fof/lunchreg.asp) To register on-line for the October 21, 2004 luncheon, click on <https://bus.cba.utulsa.edu/fof/lunchreg.asp>

Image Building

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. The Luncheon Sponsorship is for one meeting. The cost is \$1,000. There will be no more than two Luncheon Sponsors at a single meeting.

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

New Member Services

New exclusive on-line serves for members include:

- Membership Directory
- Ability to update your membership profile
- Job Postings
- Resume Postings
- Membership Renewal

In addition, first time members may join on-line. Go to [Membership Application](#) to join or re-new your membership.

Leadership

Our officers and directors for 2004-05 are:

Officers

President Craig Loseke, Samson
VP Programs Susan Cravens, BankOne
Treasurer Tally Ferguson, BOK
Secretary Rocky Moore, Bama
FEF Chair Bob Fitzgerald, Arrow Trucking

Directors

Keith Bailey, Williams (Retired)
Roger Bey, TU
John Chandler, Magellan Mid-Stream
Steve Hildebrand, Dollar Thrifty
Callie Mitchell, Williams

Fees

Fees for this year are:

\$150 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 2004 TU
graduates
\$300 Membership plus all luncheon fees for
yourself and one guest
\$135 One reserved table (8 seats*)
\$1,325 One reserved table of eight at each
luncheon, & ten for Roger Staubach*

This year we will have nine rather than eight luncheons which are why some of the fees for the luncheons for the year are slightly increased.

Luncheons:

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

*The Roger Staubach meeting will be held at the Crowne Plaza and will have fees of \$15 for members, \$25 for non-members, and \$250 for a reserved table of 10.

Comment's from an Alum

I attended my first Friends of Finance luncheon in 1999 as a sophomore student and I have been a member ever since. Of all the organizations to which I belonged during my days as an undergraduate, the University of Tulsa's Friends of Finance above many others has provided me with benefits that have augmented my education and enhanced my career opportunities.

The generosity of the organization's members, through the Finance Excellence Fund, enabled me to attend TU by providing financial support through their outstanding scholarship program. Each year the organization gives exceptional young men and women access to quality education and an opportunity to realize their academic goals. To date, 97 students have received over \$135,000 in scholarships.

Additionally, the investment vehicle that generates these scholarships also affords students one of the greatest academic opportunities in the nation. Through the Student Investment Fund, the school's top students are given the chance to actively manage a real-world portfolio with a market value of \$725,000. As an undergraduate student, this coursework was the most valuable component of my education. Furthermore, FOF networks and events give students access to local business professionals, internships and job opportunities. This gave me a distinct advantage over other graduates entering the workforce, and helped me to secure several job offers upon graduation.

The skill sets I developed as a finance student have given me a strong foundation that has allowed me to succeed throughout my professional career. The program provides close faculty-student interaction coupled with theoretical and practical applications that enhance decision-making. As I begin my MBA program in Chicago this year, I look forward to the advantages I know my TU education has provided.

R. J. Lasek (BSBA '01)

Resume Posting

FOF members may now post their resume on the FOF web site. 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.

Job Posting

Corporations and placement firms may now post professional job opening on the FOF web site. 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. Once a job opening has been posted, an e-mail with the job title will be sent to everyone on our e-mail distribution list.

The cost of posting job openings for one year (August 1 – July 31) is \$500 for corporations, and \$1,000 for placement or employment agencies. Posting fees include one FOF membership for the participating firm or agency contact person. Job postings for all professional positions, any area, are welcome.

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 Miller at 631-2588 or judy-miller@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.

Cy Elmburg Explains Blitz



At our September 15, 2004 luncheon, Cy Elmburg, Chairman of Blitz, USA, gave an interesting and entertaining presentation of Blitz, USA.

Cy explained how the company developed from a single product, the “jerry” can with a single customer (U.S. Military) to a multi-product company with many customers including Target, Wal-Mart, Lowe’s, and Home Depot. He is holding one of the up to 100,000 gas cans they manufacture each day. Some twenty-five lucky people were fortunate enough to have a lucky number and took a Blitz product home.

Alumni News

Byron Beene (BSBA '01) passed level three of the CFA exam. Byron is working in Zurich, Switzerland.

If you have any news (promotions, new jobs, marriage, degrees, etc.) you would like to share, please e-mail to judy-miller@utulsa.edu.

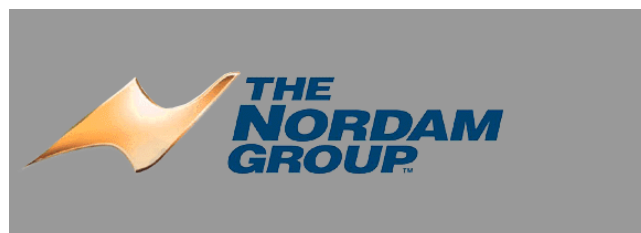
Membership

Membership is running at the highest rate ever. We already have 247 members and are well on our way to our goal of 400. Charter members who also are members this year will receive special recognition at one of our spring meetings. If your name isn't listed below, please join today by clicking on [Membership Application](#).

Tony Adair	John Conwell	Steve Hildebrand	Joe McGraw	Keith Schroeder
Linda Adlof	Brendan Costello	Rebecca Holland	Bob McGrew	George Schulz
Joe Adwon	Mal Coury	Todd Holman	Tom Merrick	Jack Scott
Clint Alexander	Susan Cravens	Carlynn Holmes	Judy Miller	Ellen Sembe
Barbara Allen	Lee Crawley	Stu Hopkins	James Milligan	Dennis Semler
Nick Allen	Ginny Creveling	Leland Hoppe	Nick Minden	Chris Shannon
Kent Allingham	Cindy Cupps	Dean Hudgeons	Callie Mitchell	Pam Short
Anne Anderson	Bruce Currie	Zach Ingraham	Ian Mitchell	Mark Smith
Doug Applegate	Harry Dandelles	Russell Iorio	Beverly Monnet	Bill Snow
Jim Arens	Dewey Daniels	Jerry Isaacs	Bob Monroe	Tina Soin Sharma
Dolin Argo	Tami DeAngelis	Brenda Jagels	Rocky Moore	Don Spaugy
Keith Bailey	Ankit Desai	Mike Jones	Suzie Morrel	Alex Stallings
Kelli Baker	Kevin DeVault	Julian Joy	Paul Mullen	Gary Stanislawski
Tory Baker	MaryBeth DeWitt	Smriti Kansal	Kimberly Nation	Dr. Tom Stees
A. J. Barber	Elaine Dishman	Patti Kastl	Ben Nebb	Sherry Strong
Allen Barrow	Jake Dollarhide	Jack Kauth	Pansy Nordstrom	Bob Swain
Lindsey Barrows	Pat Donica	Ed Keller	Mary Ogle	Dennis Tanner
Bill Beckman	Dan Doyle	James Kelley	Greg Oliphant	Tina Tappana
Martin Belsky	Don Dupree	Jim Kelly	Ken Parker	Brook Tarbel
Aaron Berg	Paula Etter	Jeff Kendall	Tina Parkhill	Jill Tarbel
Steve Berlin	Bill Fader	Jason Kennon	Denton Partridge	Larry Terry
Paul Bernius	Jane Faulkenberry	Karl Knight	Mike Payne	John Thomas
Roger Bey	Tim Felt	Jack Koehle	Pam Peck	Tim Tolin
Gene Bishop	Tally Ferguson	David Kollmann	Andres Perrin	Ken Tooman
Larry Bitting	Bob Fitzgerald	Mary Korthase	Darrel Pfeifauf	Bob Traband
Bart Boatright	John Flegler	Brett Kramer	Bruce Phelps	Steve Turnbo
Bob Boyd	Debbie Fleming	Marvin Krueger	Drew Phillips	Tim Urban
Bob Branson	Keely Flynn	Jennifer Lamb	John Pilkington	Doug Vincent
Gina Briggs	Alan Ford	Ryan Langston	Jim Pinkerton	Cal Vogt
George Brown	Skilly Forsman	Angela Lawrence	Dick Pittenger	Jon Vrooman
Ron Brown	Tom Franz	Pete Leininger	Steve Poleman	Chuck Walton
Mark Buffington	Brian Frere	Chris Lewis	Brady Pringle	Tom Warlick
Phil Burch	Bob Gaddis	Bill Lissau	Don Quint	Blake Welch
Ellen Burgess	Richard Gajan	Miya Littlejohn	Lisa Rambo	Wen Chunling
Greg Burn	Steve Gallo	Jerry Look	Tom Redman	Yolande Whitmore
Bobby Burnett	Lindsey Gann	Craig Loseke	Joe Redman	Blanche Whitney
Mike Burton	Bob Geweniger	Tim Madden	Robert Reins	David Whitney
Joe Byers	Jayne Gilsinger	James Maddux	Ryan Rex	Meg Whitney
Tom Campbell	Clinton Godwin	Kristin Major	David Reynolds	Mark Wilmoth
Carolyn Cavins	Shane Goodwin	Kieran Major	Frank Rhoades	Mark Wilson
Mark Cavins	Ben Gorrell	Tammie Maloney	Peggy Rice	Bruce Winchester
John Chandler	Gene Graves	Rick Martich	G. G. Robinson	Chris Wolking
David Clardy	Mary Hale	Geordie Matson	Frank Robson	Daryl Woodard
Mike Clark	Sam Hampton	Marc Maun	Genave Rogers	Barry Woods
Mark Collins	Sid Harris	Vic McClintic	Vicki Rose	Emily Young
Ron Comeau	Matt Hazelwood	Sterling McDonald	Sheri Rosson	Scott Zeligson
Andrew Comstock	Beth Heaton	Dee McDugle	Don Rubottom	Steve Zenthoefer
Andrew Conway	Walt Helmerich	Beryl McElhiney	Patsy Savage	
Brian Conway	Ron Henderson	Jim McGill	Tony Scheiper	

Corporate Sponsors

We thank this year's Corporate Sponsors for their support.



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. This year, Corporate Sponsors will be able to post their job openings on our new web site for no additional cost. The cost of the Corporate Sponsorship is \$2,500. Contact Judy Miller at 631-2588 or judy-miller@utulsa.edu if you would like to be added to our Corporate Sponsor waiting list.

Upcoming Executive Luncheons:

Date	Speaker	Position & Company
October 21, 2004	Steadman Upham	President, The University of Tulsa
November 30, 2004	William E. Lobeck, Jr.	President & CEO, Vanguard Car Rental USA
January 13, 2005	Roger Staubach	Chairman & CEO, The Staubach Companies
January 20, 2005	Douglas E. Hill	Managing Partner, EdwardJones
February 2005	TBA	
March 10, 2005	Gary Forsee	Chairman & CEO, Sprint Corp.
April 2005	TBA	
May, 2005	TBA	

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.

Energy Advocates

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

Oklahoma Investment Forum

Oklahoma Private Enterprise Luncheon
 11:45 a.m., Petroleum Club, 15th Floor

Tuesday, October 5th

Keith Jossell, VP-Franchise Finance, Sonic

November 16-17, 2004

Southwest Capital Conference
 Downtown Double tree
 616 West 7th Street, Tulsa, OK

For details or reservations: (918) 584-8884
 Or e-mail Carla Shwadlenak at Carla@oifonline.org

NAIC

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

Date	Class
10/16/04	Finding Quality Mutual Fund(\$25)
10/28/04	Stock Study of the Month

INVESTOR FAIR

11/13/04 at TU Allen Chapman Activity Center

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

Aon Risk Services

2004 Business Forum—1st Wednesday of the month
 7:30 am to 9:00 am.

This is a free series and complimentary breakfast is included.

Wednesday, October 6

ENERGY RISK MANAGEMENT

Presented by Joel Phipps, Aon Risk Services Natural Resources Group

Wednesday, November 3

BASICS OF PROPERTY INSURANCE

Presented by Tom O'Donovan, Aon Risk Services

Wednesday, December 1

EXECUTIVE BENEFITS

Presented by Mark McCullough & Dan Krekeler, Aon Executive Benefits

Contact Jeannette Oravec

Jeannette_oravec@ars.aon.com

(918) 496-6932

Friends of Risk

FOR is devoted to providing discussions on a very wide range of risk management topics.

Contact Judy Miller at judy-miller@utulsa.edu or (918) 631-2588

Executive & Professional Development

Nov. 1-2 Situational Leadership® II Workshop

Developed by the Ken Blanchard Co., learn how to diagnose an issue and select the right leadership style to deal with the situation.

Nov 15-17 Coaching: A Strategic Tool for Leadership

This three-day seminar will give you a variety of coaching tools, techniques and best practices.

For more information call (918) 631-2215.

Links

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

[October 21, 2004 Registration form](#)
[November 30, 2004 Registration form](#)

[Membership Form](#)

[Pledge](#)