

Friends of Finance

April 19, 2017
Mark Emmert
President
NCAA



Dr. Mark A. Emmert became the fifth president of the NCAA in October 2010. As president he has championed greater support for student-athlete wellness and academic success. His commitment to the academic success of athletes is also

reflected in newly heightened academic standards for initial eligibility. Additionally, he ushered the Association into a new Division I governance structure.

A Washington native, Dr. Emmert earned his bachelor's degree in political science from the University of Washington and has both a master's degree and a Ph.D. in public administration from Syracuse University.

Reservations are required. You may register on-line: [FOF Meeting Registration](#) or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until April 5, 2017.

May 16, 2017
Stacy Pezold
Chief Operating Officer
Paycom



Stacy Pezold has served as Paycom's Chief Operating Officer since March 2015 and previously served as Paycom's Executive Vice President of Operations from September 2012 to March 2015 after joining Paycom in 2005.

In the last eight years, Mrs. Pezold has served as Paycom's Executive Vice President, Director of Corporate Training and Regional Manager. Mrs. Pezold has over 11 years of leadership and training experience. Mrs. Pezold earned her Bachelor's degree from Oklahoma State University.

Reservations are required. You may register on-line: [FOF Meeting Registration](#) or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until May 2, 2017.

Meeting Sponsors



Northwestern Mutual

Keith & Pat Bailey

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

University of Tulsa Friends of Finance 2016-2017

Executive Speaker Series Luncheons



Tim Mahoney
Chief Marketing Officer
Global Chevrolet
September 15, 2016
Sponsored by:
**Burt B. Holmes &
Mary Lee Townsend**



Maynard Holt
Co-President
Tudor, Pickering, Holt & Co.
October 18, 2016
Sponsored by:
WPXENERGY



Michael Skelly
President
Clean Line Energy
November 16, 2016



Craig Jones
President
Oklahoma Hospital Assn.
January 20, 2017
Sponsored by:
St. John
Medical Center



Bob Zapfel
President
Xerox Services
February 16, 2017



Elliot Nelson
CEO
McNellie's Group
March 22, 2017
Sponsored by:
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Mark Emmert
President
NCAA
April 19, 2017
Sponsored by:
Northwestern Mutual
Keith & Pat Bailey



Stacy Pezold
Chief Operating Officer
Paycom
May 16, 2017

2016-2017
Finance Excellence Fund

The 2016-17 Finance Excellence Fund Campaign has been launched. Last year, we raised \$199,789 from 99 donors. Our goal is \$200,000 this year, and we believe we can make it. Donations to the Finance Excellence Fund have been added as new investment to the Student Investment Fund (SIF), which has endowed scholarships for undergraduate and graduate finance students. To date, over \$950,000 has been awarded in scholarships as a result of your generous support. In addition, donations to the Finance Excellence Fund support the Risk Management Center learning environment for Finance students. These annual operating expenses includes computer equipment and software, databases used in class, and the Bloomberg terminal and are essential to maintaining the quality of education for the students. Your continued support maintains and hopefully expands these resources.

You may contributing on-line at: [Finance Excellence Fund Online Gift](#)
or mail a check payable to University of Tulsa Finance Excellence Fund to:

Friends of Finance
The University of Tulsa
800 South Tucker Drive, Helm 122-A
Tulsa, Oklahoma 74104-9700

On behalf of all future students who will benefit from scholarships and an improved School of Finance, Operations Management, and International Business as a result of your giving, thank you!

To date we have received \$81,757.50 from 70 donors. 2016-2017 Finance Excellence Fund Honor Members to date are:

Finance Sponsor

Mike & Kathi Colby

Finance Founder

Sharon & Robert Prince

Finance Partner

Al Walker/Anadarko Burt Holmes
William & Susan Thomas

Finance Benefactors

Joe Adwon Tom Campbell
Keith & Pat Bailey Tammie Maloney

Finance Patrons

Allen Barrow Bob Fredrickson
Arnold Brown Joel & Jamie Harper
Richard & D. Ellen Burgess Steve Hildebrand
George & Jennie Collins Fnd. Amanda King
Jeffrey Davis Don Quint
David Eastin Kala Sharp

Finance Friends

Kent Allingham	Steve Ganzkow
Jim Arens	Bob Geweniger
Tory Baker	Russell Iorio
Sharon Bell	R.S. James
Roger Bey	Robert Jennings
James Colgan	Jack Koehle
Markham & Becky Collins	Max Mason
Andrew Comstock	Marc Maun
Megan Cordle	H. Johnson Moore
George Dallas	Bob Paulsen
Harry Dandelles	Frauke Quiroga
Clint Dishman	Phil Reedy
Frederick Drummond	Chris & Terry Shannon
David Enke	Bruce Stoesser
Ted Feldmeier	Gale Sullenberger
Scott Filstrup	Dudley Viles
Kelly Fitter	Steve Wilkerson

Finance Donors

Andrew Aguirre John Buxton

Finance Associate

Nick & Barbara Allen	Pam Peck
Laurie Brown Purser	Roberta Preston
Jake Dollarhide	Bill Snow
Tally Ferguson	Chris Wolking
Gordon Nielsen	Zarrow Foundation
Mike Osborne	Andrew Ziola

Fees

Fees for the 2016-2017 year (Reduced as of March 22, 2017)

- \$100 (Membership + all remaining 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 student or TU graduate within the last year)
- \$170 (Membership plus all remaining luncheon fees for yourself and one guest)
- \$650 One reserved table (8 seats) at each remaining luncheon

Leadership

Our Friends of Finance officers and directors for 2016-2017 are:

Officers

- President Marcia MacLeod
- VP Programs Andrew Ziola, ONE Gas
- Treasurer Roberta Preston, Girl Scouts of Eastern Oklahoma
- Secretary Phil Reedy
- FEF Chair Don Quint, Quint & Associates
- Membership Megan Cordle, Alliance Resource

Directors

- Shawn Crisp, Trust Company of Oklahoma
- Joel Harper, University of Tulsa
- Marc Maun, BOK Financial
- Greg Oliphant, Ceja Corporation
- Mike Osborne
- Kala Sharp, ONEOK, Inc.
- Frank Rhoades, Rhoades Oil Company
- Gale Sullenberger, University of Tulsa

Shuttle Service



Shuttle Service will be provided from the parking lots along Gary Place to the Allen Chapman Student Union 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.

Membership

Our membership goal for the 2016-2017 is 500. If you are a TU graduate within the last twelve months, your membership fee is only \$10. If you live outside of the Tulsa area (more than 50 miles) your membership fee is only \$10.

Membership fees support all of the expenses associated with Friends of Finance. To renew your membership or join, go to [Membership Application](#). Encourage your friends and colleagues to do the same. Friends of Finance is the largest and strongest finance group in Oklahoma and the Southwest. Members since our last newsletter are below. For a complete list of members to date (350), please go to: <https://www.collins.utulsa.edu/secure/fof/Members/>

- Mary Burchett
- Eric Burkholder
- Marilyn Morris
- Duane Wilson

FOF Membership Committee

Many thanks to the following members for volunteering to be a part of the 2016-2017 Friends of Finance Membership Committee. The Membership Committee promotes membership, plans and runs the Members Only functions, and facilitates check-in at the Executive luncheons.

- Megan Cordle, Alliance Resource Partners (Chair)
- Brad Beeson, J.P. Morgan
- Tom Campbell, Campbell Organization
- Bruce Currie, MidFirst Bank
- TD Eureste, ONEOK
- Curtis French, Phillips 66
- Chris Guglielmo, Williams
- Jeff Husen, ONE Gas
- James Kelley, Rowland Group
- Ann Lowry, Accounting Principals
- Jason Maloney, Hogan Taylor
- Gavin Pearson, Bank of Oklahoma
- Mahlon Pitt, Pitt & Associates
- Charles Secrest, Key Personnel
- Julie Skye, Mariner Wealth Advisors
- Tanya Wilson, First Financial Services

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 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. At least 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 918-631-2588) if you are interested in being a Luncheon Sponsor.



Michael Skelly with TU students during pre-luncheon Meet and Greet on November 16, 2016

Like us on Facebook!



We are also on **Linked** 

News from the School

Mark your calendars: The Student Investment Fund (SIF) new securities presentations are scheduled for **Wednesday, April 5, 2017 and Wednesday, April 12, 2017**. Put these dates on your calendar now and make plans to attend.

Student members of the Student Investment Fund will present a 10 – 15 minute analysis and valuation of a specific stock that could potentially be included in our portfolio. Students will share their valuation approach, challenges, and recommendations.

Guests are encouraged to question students on their work as well as share their expertise for both student development and improved security selection for the Student Investment Fund.

NEW SECURITY	PRESENTER
Adv. Micro Devices	Simon Bower
Amgen	Asim Zaidi
AT&T	Sebastian Smith
BlackRock	Jonathan Jones
CA Technologies	Yuan Yang
Corning Inc.	Pradeep Pottumuthu
ENB Resources	Tyler Pleus
Footlocker	Lan Le
General Dynamics	Yiyang Cao
Medidata Solutions	Evan Brugger
Michael Kors	Cikida Gcali
Lennox Int'l.	Mat Callegari
USPH	Tyler Hudson, Haley Lucero, Tyler Moravec

Student Profile



Collin Mardis (*BSBA Finance 2017*) A senior finance student from Kansas City, Collin is also pursuing majors in Economics and Marketing, and a minor in French. He chose to come to

TU, largely due to the urging of Dr. Madhan during a campus visit. Dr. Madhan insisted that at TU he would learn to make money work for him, rather than the inverse. The contributions of generous donors allowed him to come to TU by means of scholarships.

While at TU, Collin was part of the Spring 2016 Student Investment Fund, where he found a particular interest in the investment side of finance, and plans to pursue that after graduation. The direction of Tally Ferguson and the general emphasis the course placed on qualitative analysis have inspired him to pursue the field of financial investing after school. He has studied abroad in Germany, Hungary, and Italy during his time at TU and will graduate in May of 2017.



Elliot Nelson, CEO of McNellie's Group
March 22, 2017

Internships and Mentoring

Your support of the Finance department through contributions to the Finance Excellence Fund is very much appreciated. It helps build the endowment for future scholarships for finance students and supports the resources our finance students and faculty need to succeed in their classes and careers.

Another way to support the finance students is through internships and mentoring. While our students receive a world-class education at the University of Tulsa, adding experience to the education helps develop these students by putting into practice what they have learned, and gaining the guidance and experience of area professionals as they begin and continue to advance in their careers.

If you have an internship opportunity for a finance student, whether it is a summer internship or one that occurs during the academic year, please contact either Calvin Moniz (calvin-moniz@utulsa.edu, 918-631-2072) in the Business Career Center, or Joel Harper (joel-harper@utulsa.edu, 918-631-3426) in the School of Finance and they will be happy to help find the right student for your internship.

In addition, another way to have a substantial impact on a student is to serve as a mentor to a student as they complete their education and begin their career. Providing career advice, discussing next steps, letting students know about your experiences and successes provides a real connection to students that will help them advance now and in the future. Please consider mentoring a student.

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 to fifteen. If you are interested in having your company participate, contact Judy Adair at 918-631-2588 or judy-adair@utulsa.edu for details. Corporate Sponsors for this year are:

