

Friends of Finance

February 16, 2017

Bob Zapfel

President

Xerox Services



Robert Zapfel is president of Xerox Services. He was named to this position on April 1, 2014 and appointed an executive vice president of the corporation at that time.

Zapfel brings to Xerox extensive experience in global services with an emphasis on transforming complex operations to customer focused, profitable and sustaining businesses. His deep industry knowledge will help drive and implement the Services' Five-Plank Strategy – focused on increasing customer value, improving our competitiveness and simplifying how we work.

Prior to this appointment, Zapfel spent 35 years with IBM where he helped guide the transformation of their Services business to a profitable model with a sharp focus on delivering excellence to clients.

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 February 2, 2017.

March 22, 2017

Elliot Nelson

CEO

McNellie's Group



Elliot opened James E. McNellie's Public House in downtown Tulsa in March of 2004. Since then, McNellie's Group has gone on to open nineteen restaurants and entertainment venues in Oklahoma.

Today, as CEO of the McNellie's Group, Elliot oversees strategy, finances, community relations and key day-to-day decisions for a company that includes over 900 employees.

In addition to his role as CEO of the McNellie's Group, Elliot is a real estate developer. He concentrates on urban properties and has executed numerous historic rehabilitations as well as new multi-family housing. He serves on the City of Tulsa's Economic Development Commission and is a past chair of Tulsa's Downtown Coordinating Council. He serves on the Oklahoma Restaurant Association board of directors, the YMCA of Tulsa's Metro board of directors and the Tulsa Chamber of Commerce board of directors. He is also an active YPO member.

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 March 8, 2017.

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



Mark Emmert
President
NCAA
April 19, 2017



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
Collins College of Business
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 \$70,192.50 from 62 donors. 2016-2017 Finance Excellence Fund Honor Members to date are:

Finance Sponsor

Mike & Kathi Colby

Finance Founder

Bob & Sharon Prince

Finance Partner

Al Walker/Anadarko

Finance Benefactors

Joe Adwon Tammie Maloney
Tom Campbell Bill Thomas

Finance Patrons

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

Finance Associate

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

Finance Friends

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

Finance Donors

Andrew Aguirre John Buxton

Fees

Fees for the 2016-2017 year (Reduced as of January 20, 2017)

- \$175 (Membership + all remaining 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)
- \$315 (Membership plus all remaining luncheon fees for yourself and one guest)
- \$1,275 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 (344), please go to: <https://www.collins.utulsa.edu/secure/fof/Members/>

- Ben Brown
- James Colgan
- Jinjia Lu
- Mark Rooney
- Lauren Smith
- Steve Soule'

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

CFA® University Research Challenge – This semester, two teams of students are competing in the University Research Challenge. This is a global competition involving over 865 universities. The first stage of the competition is at the regional level where each team researches, analyzes, and develops an analyst report on the same company. This year, there are 24 universities competing in Southwest Regional, including Rice, LSU, Texas, Baylor, among others. The target company is US Physical Therapy, Inc. (USPH). Analysts score the reports and the top 10 teams are invited to Dallas to present their reports to a panel of analysts and answer questions. The final stage of the challenge will be in Prague, with teams representing the Americas, Europe, and Asia regions.

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.

Faculty News



Brian Walkup, Ph.D. has been awarded tenure and promoted to Associate Professor of Finance. In addition, Brian was named as the H. Michael Krimbill Finance Fellow. Both appointments begin next fall. Walkup joined the TU faculty in 2011 and has served as the Student Finance Association faculty advisor and has taught in the undergraduate, MBA and MSF programs. His research has been published in many journals and include topics on IPO's, sports management and finance, and corporate payout policy.

Student Profiles



Haley Lucero (*BSBA Finance 2016; MS in Finance 2017*) In 2011, I decided to attend TU to pursue my education in Finance. I graduated in May of 2017 with an undergraduate degree and went straight into the MSF program. Originally from

Albuquerque, NM, I had no idea what opportunities TU would provide for my educational and career goals.

I am currently a Graduate Assistant for New Student Services and interning at Bank of Oklahoma in their Risk Management Department. I was just elected Student Executive Officer of the Student Investment fund and have hopes to pursue portfolio management after sitting for the CFA in June. I am also active in the Tulsa community planning an educational preventative health fundraiser.

None of these accomplishments would have been possible if it was not for the support, guidance, and mentorship from professors, faculty, and professionals willing to donate their time. The future is mysterious but I am confident my education will continue to provide opportunities even after graduation in May.



Matthew Marquez (*BSBA Finance 2017*) Being from Trinidad and Tobago I had not heard of Tulsa before coming here. Now, I am a few months away from graduating from the University of Tulsa with a Finance degree and a minor in Sports Administration.

I came to the University of Tulsa on a golf scholarship and like most other freshmen did not know what I wanted to study. My first two years of school I was more concerned about golf and my commitment to the University of Tulsa's Men's golf program. I finally decided to major in finance and I have thoroughly enjoyed it.

When the University of Tulsa decided to discontinue the men's golf team I decided to remain at TU to earn my degree, as I was so close to graduation. I have learned so much throughout my time here at TU and this is all due to the professors. The finance professors are genuinely interested in every student's education. Many of them have become my mentors and I am grateful for that. My time at TU has allowed me to meet many people from around the world and all from various walks of life. I am hope to stay in the US next year and work for a company that will allow my development and cherish my expertise.

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:

