

Friends of Finance

January 20, 2017

Craig Jones

President

Oklahoma Hospital Association



Craig W. Jones has served as president of the Oklahoma Hospital Association since November of 1998. Prior to his current position, he served as executive vice president of the Association. The Association represents and serves the interests of 136 hospitals across the state of Oklahoma.

Mr. Jones was employed as president and chief executive officer of Norman Regional Hospital (now Norman Regional Health System). Prior to this, Mr. Jones served for six years as the hospital's associate administrator. He was employed by Hillcrest Medical Center, Tulsa, where he completed his graduate work in health care administration and held various administrative positions from 1975-1979.

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 January 6, 2017.

Meeting Sponsor



We extend our thanks and appreciation to St. John Health System for serving as our Luncheon Sponsor.

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.

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. We need everyone's help to continue raising FOF to higher and higher levels.

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 \$56,852 from 37 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
Bill Thomas

Finance Patrons

Keith Bailey
Allen Barrow
Richard & D. Ellen Burgess
David Eastin
Bob Fredrickson
Joel & Jamie Harper
Amanda King
Kala Sharp

Finance Associate

Roberta Preston
Chris Wolking

Andrew Ziola

Finance Friends

Tory Baker
Sharon Bell
Roger Bey
Andrew Comstock
James Colgan
Megan Cordle
George Dallas
Frederick Drummond
David Enke
Ted Feldmeier

Steve Ganzkow
Bob Geweniger
Gale Sullenberger
Russell Iorio
R.S. James
Robert Jennings
Jack Koehle
Marc Maun
Phil Reedy

Finance Donors

Andrew Aguirre

John Buxton

Fees

Fees for the 2016-2017 year (Reduced as of November 29, 2016)

- \$200 (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)
- \$405 (Membership plus all remaining luncheon fees for yourself and one guest)
- \$1,875 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 (338), please go to: <https://www.collins.utulsa.edu/secure/fof/Members/>

- | | |
|----------------|-----------------|
| Kyle Barker | Don Lane |
| Grant Deyoe | Rodney Mott |
| Guylene Dooman | Deanne Nunn |
| Ted Feldmeier | Mike Troilo |
| Kelly Fitter | McKenzie 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

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We are also on **Linked in**®



News from the School

The school has hired two new tenure-track faculty in Finance that will join the faculty beginning Fall of 2017, Ryan Flugum and Sukwon (Thomas) Kim.

Ryan is completing his doctorate at the University of Missouri. He will be teaching in the investments and derivatives area, and is currently researching hedge fund activism and the effect on a company's decisions and stock returns. He has earned accounting and mathematics degrees from Mount Mercy University and University of Northern Iowa. Before returning to earn his doctorate, Ryan worked at AEGON as a credit analyst for a \$45 billion fixed income portfolio.

Thomas Kim will also be joining the faculty in the fall. Thomas is currently an assistant professor at University of California, Riverside. He earned his doctorate in Finance from Vanderbilt University and his MBA from the University of Texas. Thomas will also be teaching in the investments and derivatives area. His research has been published in the *Review of Finance*, *Journal of Financial Markets*, and *Financial Management*. His research has focused on financial market behavior and trading.

In addition, Wen Chiang, Professor of Operations Management, has been named as the Doris L. Flourney Professor of Business. Professor Chiang has numerous publications in the area of operations management with an emphasis on supply chain management and revenue management. Dr. Chiang is Editor of *International Journal of Revenue Management* and a Senior Editor of *Production and Operations Management*.

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:

