



# Friends of Finance

August 2013

**September 19, 2013**  
**Lawrence Leibowitz**  
**COO**  
**NYSE Euronext**



Lawrence Leibowitz is Chief Operating Officer of NYSE Euronext. He is also a member of the NYSE Euronext Management Committee, reporting to Duncan Niederauer, Chief Executive Officer and a Director of NYSE Euronext. Mr. Leibowitz is also responsible for NYSE Euronext's Global Cash Execution and Listings

businesses.

Prior to his current position, Mr. Leibowitz served as Head of U.S. Execution and Global Technology. In this role, he oversaw U.S. cash market listings and execution, as well as integrating technology platforms across the firm.

The company's exchanges, located in the U.S. and Europe, trade equities, futures, options, fixed-income, and exchange-traded products. With approximately 8,000 listed issues from more than 55 countries, NYSE Euronext's equities markets – the New York Stock Exchange, NYSE Euronext, NYSE MKT, NYSE Alternext and NYSE Arca – represent one-third of the world's equities trading and the most liquidity of any global exchange group. NYSE Euronext also operates NYSE Liffe, the world's second largest derivatives business by value of trading, and NYSE Liffe U.S., which is a global, multi-asset class futures exchange.

Reservations are required. You may register on-line: <https://collinssecure.utulsa.edu/fof/Meetings.aspx> or contact Judy Adair [judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu) or 918-631-2588. Friends of Finance members will have preference until April 23, 2013.

*Meeting Sponsor*



We extend our thanks and appreciation to **Laredo Petroleum** for serving as our Luncheon Sponsor.

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| <b>In this Newsletter</b>                    |
| <a href="#">Upcoming Executive Luncheons</a> |
| <a href="#">Membership</a>                   |
| <a href="#">Leadership</a>                   |
| <a href="#">Dues &amp; Registration fees</a> |
| <a href="#">Alumni News</a>                  |
| <a href="#">Departmental News</a>            |
| <a href="#">Finance Excellence Fund</a>      |
| <a href="#">Corporate Sponsors</a>           |
| <a href="#">Affiliate Programs</a>           |
| <br>   |
| <b>Other Links</b>                           |
| <a href="#">Meeting Registration</a>         |
| <a href="#">Membership</a>                   |
| <a href="#">Finance Excellence Fund</a>      |
| <a href="#">Student Investment Fund</a>      |
| <a href="#">Previous Newsletters</a>         |
| <a href="#">Previous Speakers</a>            |

## *Upcoming Executive Luncheons:*

| <b>Date</b> | <b>Speaker</b>     | <b>Position</b>             | <b>Company</b>      | <b>Sponsor</b>       |
|-------------|--------------------|-----------------------------|---------------------|----------------------|
| 09/19/2013  | Lawrence Leibowitz | COO                         | NYSE Euronext       | Laredo Petroleum     |
| 10/22/2013  | John Crum          | CEO                         | Midstates Petroleum | Acquisition Advisors |
| 11/18/2013  | Tom Bolt           | Director, Performance Mgmt. | Lloyd's of London   | Keith Bailey         |
| 12/04/2013  | Seth Masters       | CIO                         | AllianceBernstein   |                      |
| 01/23/2014  | Andrew Taylor      | Chairman & CEO              | Enterprise Holdings | ComStar Advisors     |
| 02/11/2014  | Douglas Lawler     | CEO                         | Chesapeake Energy   |                      |
| March 2014* | TBD                |                             |                     |                      |
| 04/23/2014  | James Hackett      | CEO                         | Steelcase, Inc.     |                      |
| May 2014*   | TBD                |                             |                     |                      |

**\*March or May 2014 will be the 8<sup>th</sup> Executive Luncheon of the Speaker Series**

## *Membership*

Last year we had membership of 429. This year our membership goal is 500. We will be working very hard to meet this ambitious goal by encouraging everyone who was a member last year to renew their membership and all former members who were not members last year to once again become members. 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. Show your support for FOF, The Collins College of Business, and TU by joining today.

To renew your membership or join, go to <https://collinssecure.utulsa.edu/fof/Application.aspx>. 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 to date (141) are:

|                     |                    |                     |                   |
|---------------------|--------------------|---------------------|-------------------|
| Ben Abney           | Keith Diekelman    | Russell Iorio       | Joe Redman        |
| Judy Adair          | Mike Dill          | Ted Jacobs          | Rose Rice         |
| Linda Adlof         | Jake Dollarhide    | Robert Jennings     | Frank Robson      |
| Joe Adwon           | Ken Dornblaser     | Larry Johnson       | Brad Rollins      |
| Nick Allen          | Del Dreyer         | George Kamp         | Don Rubottom      |
| Kent Allingham      | Frederick Drummond | James Kelley        | John Rupe         |
| Tory Baker          | Bob Duenner        | Jeff Kendall        | Bob Russell       |
| Michael Balp        | Bob Dupree         | Lindsey Kenyon      | Jeff Schmuhl      |
| Mike Bartlett       | Scott Eslicker     | Joe Kidwell         | Alex Schneider    |
| Ray Batchelor       | Bill Fader         | Kathy King          | Keith Schroeder   |
| Tammy Been          | Erik Feighner      | Jack Koehle         | Jana Shoulders    |
| Doug Beineman       | Kelley Fitter      | Don Lane            | Bill Snow         |
| Roger Bey           | Debbie Fleming     | Dave Lawson         | Steve Soule       |
| Patty Bick          | David Fleske       | Michael Lissau      | Ryan Staebell     |
| Terry Biehl         | Albert Flint       | Louis Chunyong Luo  | Gale Sullenberger |
| Dale Billam         | Bob Fouch          | Marcia MacLeod      | Lisa Sullivan     |
| John Boone          | Randy Foutch       | Steven Mandeville   | Ross Swimmer      |
| Theron Bowling      | Caroline Franklin  | Ralph Manis         | Robert Thomas     |
| Arnold Brown        | Tom Franz          | Marc Maun           | Baxter Thorman    |
| Laurie Brown Purser | Bob Fredrickson    | Louis Medina        | Tim Tolin         |
| Kevan Buck          | Michelle Freres    | Mary Melon          | Mike Troilo       |
| Richard Burgess     | Bob Fries          | Beverly Monnet      | Ron Turnage       |
| Eric Burkholder     | Jordan Friesen     | Danni Morris        | Tim Urban         |
| Dick Cantrell       | Phil Frohlich      | Mike Mott           | David Veitch      |
| Brian Cantrell      | Richard Gebhart    | Jaime Murguia       | Brian Walkup      |
| James Chavez        | Jessica George     | John Newell         | Tom Warburton     |
| Wen Chiang          | Bob Geweniger      | Katherine Offermann | Suzanne Wheeler   |
| Jim Coles           | David Hall         | Tom Owens           | Chase Wilson      |
| Jim Colgan          | David Hardy        | John Patterson      | Jim Wilson        |
| Mark Collins        | Ralph Hill         | Ira Phillips        | Ming Wong         |
| Trey Cooper         | Eugene Hodel       | Drew Phillips       | Kai Yu            |
| Megan Cordle        | Ginger Holley      | Sharon Prince       | David Zenthoefers |
| Jeff Couch          | Carl Hudgins       | Bob Prince          | Steve Zenthoefers |
| Joseph Craft        | Tom Hughes         | Don Quint           |                   |
| Matt Crook          | Bruce Humphrey     | Britt Radford       |                   |
| Harry Dandelles     | Robert Hutton      | Tom Redman          |                   |

## *Fees*

### **Fees for the 2013-2014 year are unchanged:**

- \$210 (Membership plus all 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)
- \$450 (Membership plus all luncheon fees for yourself and one guest)
- \$2,100 One reserved table (8 seats)

*Members may bring a first time attendee as a guest at the member rate.*

## *Leadership*

Our officers and directors for 2012-2013 are:

### **Officers**

|             |                                      |
|-------------|--------------------------------------|
| President   | Sam Combs, ComStar Advisors          |
| VP Programs | Don Quint, Don P. Quint & Associates |
| Treasurer   | Shawn Crisp, Trust Co. of Oklahoma   |
| Secretary   | Kieran Major, American Airlines      |

### **Directors**

J. Markham Collins, TU  
David Dunham, Unit Corp.  
Marcia MacLeod, WPX Energy  
Phil Reedy  
Derek Reiners, ONEOK, Inc.  
Frank Rhoades, Rhoades Oil Company  
Paul Samuels, Morgan Stanley Smith Barney

## *Friends of Finance Accomplishments*

### **Friends of Finance (FOF)**

- Has existed and thrived for 28 years
- Had 429 dues paying members in 2012-2013
- Has had over 200 speakers address the group
- Leading executives including Jamie Dimon, Richard Fuld, Kenneth Lewis, Ed Whitacre; Roger Staubach, and John Wooden have spoken at FOF
- Approximately 400 people attend every luncheon
- 50,000+ people have attended the luncheons
- Executive speaker series is the most active in the Southwest
- Students have an exclusive one hour Q&A with the speakers. No other university in the U.S. is known to provide students with the opportunity to visit with a major executive every month.
- No other Finance Program in the U.S. is known to have an equivalent speaker series
- Has been a major force in developing business relationships for TU

## *FOF Web Site*

The FOF website [www.utulsa.edu/fof/](http://www.utulsa.edu/fof/) includes a number of services as listed below.

### **New Membership**

<https://collinssecure.utulsa.edu/fof/Application.aspx>

### **Meeting Registration**

<https://collinssecure.utulsa.edu/fof/Meetings.aspx>

### **Members Services**

<https://collinssecure.utulsa.edu/fof/Members/>

(restricted to FOF members and requires a user name and password which you obtain when you join or renew your membership). After signing in, you may go to:

### **Membership Renewal**

All of your profile information will come up so you don't have to re-enter this information.

### **Membership Directory**

A listing of all FOF members is provided. Contact information is available only if members agree to have it posted.

### **Job Postings**

Corporate job openings are posted on the web site by members. View job description of openings after logging in to Member Services.

## ***Corporate Internships in the MS in Finance Program***

We are looking for more partners for our Corporate Internship Program. It has been a major factor in the outstanding success of our MS in Finance program. The students work 20 hours a week and attend classes year round. Compensation and tuition support is similar to a traditional co-op program.

Firms that have participated in the internship program have been very pleased and have hired many of their interns. BOK, Williams, NORDAM, Samson, SemGroup, Seminole, Laredo, ONEOK, and Clear Ridge Capital have all participated in the program.

The average GMAT entrance score for our MSF program is 670, which is exceeded by only 25 MBA programs in the U.S. If you would like to tap into this exceptional talent pool, contact Dr. Rick Burgess, [Richard-burgess@utulsa.edu](mailto:Richard-burgess@utulsa.edu) or 918-631-3067). As one participant says, "The internship program allows me to hire Ivy League talent at Tulsa prices." You can do the same!

## ***Alumni News***

If you have been promoted, changed companies, earned another degree or have personal information (marriage, birth of child, etc.) please send the information along with a color picture to ([judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu)) and we will include it in our newsletter.

## ***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 to sponsor the luncheon is \$2,500. Contact Judy Adair, ([judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu) or 918-631-2588) if you are interested in being a Luncheon Sponsor.

## ***Shuttle Service***



Bill White Shuttle Service will provide shuttle service from the parking lots along Gary Place 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. Please let us know if you have questions.

## ***Take-A-Student to Lunch***

One goal of Friends of Finance is to assist 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](mailto: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.

**2012-2013**  
***Finance Excellence Fund***

Thanks to the amazing support of FOF members and friends, we exceeded our goal for 2012-2013 of \$200,000. We raised \$208,100 from 119 donors. 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!

***2012-2013 Honor Roll***

Finance Excellence Fund Honor Members to date are:

**Finance Sponsor**

Phil & Jana Frohlich

**Finance Founder**

Mike & Kathi Colby  
Bob & Sharon Prince

**Finance Partner**

Abigail Dunham Family Foundation  
Michael Krimbill

**Finance Benefactors**

Joe Adwon  
Tom Campbell  
George & Jennie Collins Foundation  
Helmerich & Payne  
Jim Holloman  
Greg Hopeman  
Phillips 66  
William and Susan Thomas

**Finance Patrons**

Ellen Adelson  
Keith Bailey  
Arnold Brown & Laurie Purser  
Richard & Ellen Burgess  
J. Markham & Becky Collins  
ConocoPhillips  
Jeff & Judy Davis  
Steve Hildebrand

**Finance Associates**

Adams Hall Wealth Advisors  
Nick & Barbara Allen  
Jim Arens  
Sharon Bell  
Sam & Rita Combs  
Jake Dollarhide  
Tally Ferguson  
Bob Fitzgerald  
Bob Fredrickson  
Jack Koehle  
Gordon Nielsen

Jim Hill  
Tammie Maloney  
Pete Meinig  
Frank Murphy  
Frank Rhoades  
Rod Sailor  
Williams

Craig Owens  
Mike Payne  
Pam Peck  
Don Quint  
Philip Reedy  
Bill Snow  
Lee Swarthout  
Dick Williamson  
Chris Wolking  
Zarrow Foundation  
Steve Zenthoefer

**Finance Friends**

Kent Allingham  
Ryan Andrews  
Michael Bartlett  
Ray Batchelor  
Roger Bey  
BUDCO, Inc.  
Jim Colgan  
Andrew Comstock  
Megan Cordle  
Lee Crawley  
Harry Dandelles  
Mike Dill  
Bill Fader  
Ted Feldmeier  
Debbie Fleming  
Bob Fries  
Bob Gaddis  
Francis Gajan  
Steve Ganzkow  
Bob Geweniger  
Keith Goddard  
Mike Huckaby  
Russell Iorio  
Robert James  
James Kimbrough  
Mary Korthase

**Finance Donors**

Andrew Aguirre  
Uldene Buchanan  
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Sandy Leeds  
Pete Leininger  
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Joe McGraw  
Callie Mitchell  
Linda Nichols  
Bob Paulsen  
Steve Poleman  
Brady Pringle  
Frauke Quiroga  
Joe Ragsdale  
Tom Redman  
Patsy Savage  
Chris Shannon  
Brooke Snyder  
Cherl Snyder  
Tom Stees  
Bruce Stoesser  
Gale Sullenberger  
Ross Swimmer  
Baxter Thorman  
Bob Traband  
Dudley Viles  
Tom Warburton  
Daryl Woodard  
Terry Wright  
Weidong Zhou

Jane Faulkenberry  
John Hartman  
Bob Jennings  
Richard Sullivan

## 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.

Corporate Sponsors make a \$3,800 commitment to Friends of Finance. If you are interested in having your company participate, contact Judy Adair at 918-631-2588 or [judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu) for details. Corporate Sponsors for this year are:

**TRUST**  
COMPANY of OKLAHOMA

 **LAREDO**  
PETROLEUM, INC.

 **MAGELLAN**  
MIDSTREAM PARTNERS, L.P.

**Williams**<sup>®</sup>

**WPXENERGY**

 **Commerce Bank**  
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**JPMorganChase** 

**HILTI**

 **MIDFIRST BANK**

 **Adams Hall**  
Wealth Advisors

 **ALLIANCE RESOURCE**  
PARTNERS, L.P.

 **Q**  
DON P. QUINT & ASSOCIATES

 **ONEOK**

 **PHILLIPS**  
**66**<sup>®</sup>

## *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.

### **TU Executive & Professional Development**

The Center for Executive and Professional Development offers a variety varied curriculum of seminars, certificate programs and conferences. A series of energy-related programs for accountants, auditors, tax professionals are scheduled in Houston: and Tulsa: through the year. In addition, a multi-level series in project management is offered this spring in Tulsa. All programs can be customized and delivered as onsite at any company. Got to <http://bus.collins.utulsa.edu/CEPD/> for program descriptions and registration information. Contact Center Director Linda Adlof at [linda-adlof@utulsa.edu](mailto:linda-adlof@utulsa.edu).

### **Tulsa's Young Professionals**

Giving Tulsa's Young Professionals a voice. A voice in our community. A voice in the business community. And ultimately, a voice in our future.

Tulsa's Young Professionals is a quality group of diverse young professionals working together to showcase Tulsa as a cool place to live, work and play. TYPros provides its members with opportunities to get in front of and build relationships with local community and business leaders.

Not only does TYPros give young professionals a voice - it gives them an outlet for affecting change in the Tulsa community. TYPros seeks to work hand-in-hand with current community and business leaders to learn from their experiences and to create a young professional-friendly atmosphere. For more information, go to: <http://www.typros.org/>

### **Tulsa Global Alliance**

The 18<sup>th</sup> Annual Global Vision Awards dinner is September 24 at the Oklahoma Jazz Hall of Fame. Global Vision Awards recognize significant and lasting contributions to citizen diplomacy, global understanding, world political stability, religious accord, international trade or cooperative efforts to solve health, social or environmental challenges. It is the major fundraiser for Tulsa Global Alliance, the International Business partner of TU's Collins College of Business.

This year the dinner honors Dr. Dayal T. Meshri and the Rotary Club of Tulsa. Nancy and Raymond Feldman will be inaugural recipients of The Nancy and Raymond Feldman Lifetime Achievement Award for Citizen Diplomacy.

For more information and to register please go to <http://www.tulsaglobalalliance.org/Event.aspx?sec=1030>

### **Henry Bellmon Sustainability Awards Gala** **September 12, 2013**

The Henry Bellmon Sustainability Awards Gala will be held on September 12, 2013 at the Tulsa Convention Center. They will be awarding four distinguished winners at the Gala in the categories of Responsible Economic Growth, Quality of Life, Environmental Stewardship and the overall Bellmon Award. Sustainable Tulsa and the Rotary Club of Southside Tulsa produce the Henry Bellmon Sustainability Awards Gala with the mission to raise awareness and reward those people, agencies, organizations, communities, or companies that dedicate themselves to a balanced approach toward quality of life, responsible economic growth, and environmental stewardship (People; Profit; Planet). Since the Bellmon Award's inception in 2010, there have been over 200 entities for the Bellmon Awards with 15 winners representing state wide efforts.

A unique component of the Bellmon Awards is that a portion of the proceeds will go to a project of choice. This year the Project of Choice is Compressed Natural Gas (CNG) School Bus Education and Support. TU is a proud sponsor the Bellmon Awards for 2012 and 2013. Sponsorship is still available as well as individual seats. Please visit [bellmonawards.org](http://bellmonawards.org) for more information contact Corey Williams at [corey@sustainabletulsa.org](mailto:corey@sustainabletulsa.org).

### **NAIC**

#### **Greater Tulsa Area Chapter, BetterInvesting**

4<sup>th</sup> Thursday Free Education Classes

6:45 p.m. – 7:30 p.m.

Hardesty Library, 8316 E. 93<sup>rd</sup>

NAIC Contacts:

Tami [deangelistami@hotmail.com](mailto:deangelistami@hotmail.com) or 747-9303

Barbara [wollmersh@aol.com](mailto:wollmersh@aol.com)

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