

Friends of Finance

October 16 2014
Steve Bradshaw
President & CEO
Bank of Oklahoma



Steve Bradshaw is president and CEO of BOK Financial Corp., a top 25 U.S. based financial services company. He oversees the Oklahoma based, \$27 billion corporation which provides commercial and consumer banking, investment and trust services, mortgage origination and servicing, and the

TransFund electronic funds transfer network. Bradshaw became the top executive at BOK Financial in January of 2014.

In his 23 years at BOK Financial, Bradshaw has served in a number of roles, ultimately having oversight of every function of the bank at some point. Most recently he was senior executive vice president, responsible for all aspects of consumer banking, corporate marketing, mortgage banking, investment securities, trust activities, treasury services, international banking, community development and Community Reinvestment Act responsibilities for all seven banks within the company.

Reservations are required. You may register on-line: <https://collinssecure.utulsa.edu/fof/Meetings.aspx> or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until October 2, 2014.

Meeting Sponsor



We extend our thanks and appreciation to **Alliance Resource Partners** for serving as our Luncheon Sponsor.

November 18, 2014
Kimberly Bowers
President & CEO
CST Brands



Kim Bowers serves as the Chairman, President & CEO of CST Brands, Inc. (NYSE: CST), one of the largest independent retailers of motor fuels and convenience merchandise in North America. Based in San Antonio, Texas, CST employs nearly 12,000 Team Members at nearly 1,900 retail locations throughout

the Southwestern United States and Eastern Canada. Kim joined CST Brands after over 15 years of service with Valero Energy Corporation, having served most recently as its Executive Vice President and General Counsel since 2007 until accepting her current position in January 2013. Kim also serves on the Board of Directors of Tulsa-based WPX Energy, Inc., an NYSE-listed exploration and production company.

CST was created as an independent spinoff company from Valero on May 1, 2013 to focus on the retail network and increase shareholder profitability. The spinoff helped unlock the true value of our network and has allowed investors the ability to choose between the refining industry and retail.

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*2014-2015
Executive Speaker Series Luncheons*



Mark Casady
Chairman & CEO
LPL Financial
September 11, 2014

Sponsored by:



Steve Bradshaw
President & CEO
Bank of Oklahoma
October 16, 2014

Sponsored by:



Kimberly Bowers
President & CEO
CST Brands
November 18, 2014



Colin Marshall
President & CEO
Cloud Peak Energy
January 20, 2015

Sponsored by:



Michael Hagedorn
Vice Chairman
UMB Financial Corp.
February 18, 2015



Mike Dubose
Global VP
W. W. Grainger
March 11, 2015



Pete Delaney
Chairman, Pres. & CEO
OG&E Energy Corp.
April 23, 2015



John Richels
President & CEO
Devon Energy
May 28, 2015

Sponsored by:



Membership

Last year we had membership of 405. This year our membership goal 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 <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 (353) are:

Tony Adair	Roger Haglund	Steve Poleman
Rawan Al Zarrad	Jim Hicks	Jim Posey
Elle Andersen	David Hogan	Thomas Powell
Justin Anderson	Jim Holloman	George Prate
Brandon Bell	Sabrina Hossain	Britt Radford
Amina Bibi	John Howk	David Randolph
Jeff Bishop	Jordan Hunt	Phil Reedy
Piera Blandon	Jeff Husen	Frank Rhoades
Libby Blue	Robert Hutton	Lauren Rose
Max Boudreaux	Jeff James	Don Rubottom
Ellen Burgess	Clinton Jones	Mark Rush
Travis Burmaster	Karthik Kannappan	Tucker Ruwitch
Bobby Burnett	Joshua Klugh	Jason Sauer
Mat Callegari	Sheila Kraft	Matt Schmitz
Steve Care	Marvin Krueger	Jeff Schmuhl
Ryne Carman	Don Lane	Xiaonan Shang
James Chavez	Meredith Langenheim	Chris Shannon
Mike Clark	Ryan Leach	Jake Sizelove
Sam Combs	Pete Leininger	Dr. Tom Stees
Susan Cravens	Scott Lewis	Karen Steinman
Robbie Dean	Barbarae Limbrick	Scott Stidham
Priyank Deshmukh	Quinn Luu	Bob Swain
Jim Dilley	Marcia MacLeod	Tom Swartz
Ed Fariss	Lindsey Madden	Hugh Taylor
Erik Feighner	Parker Malone	Skip Teel
Chris Felty	Matthew Matlack	Bob Traband
Jayne Fitzgerald	Jeffrey Metcalf	Yeswanth Vattikunta
Patrick Flam	Phil Morgan	Bryce Wadley
Albert Flint	Danni Morris	Sean Webster
Carlos Flores	Michael Morrison	Ashley Weeks
Alan Ford	Logan Moss	Steve Wilkerson
Eric Gammenthaler	Ponteha Nikjou	Scot Williams
Eddie Garcia	Jamie Nunez	Claire Wood
Bob Geweniger	J. J. Parker	Aqsa Zahid
Will Gray	Crystal Parrett	Claire Zhang
Rosanne Green	Randall Pierce	Guanhui Zhao
Joe Griffin	Dick Pittenger	JY Zheng

2013-2014
Finance Excellence Fund
Honor Roll

Thanks to the amazing support of FOF members and friends, we raised \$188,210 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!

2013-2014 Finance Excellence Fund Honor Members are:

Finance Sponsor \$25,000 - \$99,999

Mike & Kathi Colby

Finance Founder \$10,000 - \$24,999

Bob & Sharon Prince

Finance Partner \$5,000 - \$9,999

Michael Krimbill

Al Walker/Anadarko Petroleum

Finance Benefactors \$1,500 - \$4,999

Joe Adwon

Keith Bailey

Arnold Brown

Tom Campbell

Sam & Rita Combs

George & Jennie Collins Foundation

Helmerich & Payne

Jim Holloman

Greg Hopeman

J.P. Morgan Chase

Tammie Maloney

Bill & Susan Thomas

Finance Patrons \$1,000 - \$1,499

Adams Hall Wealth Mgmt.

Richard & Ellen Burgess

Donald Chappel

J. Markham & Becky Collins

Steve Hildebrand

Pete Meinig

Craig Owens

Derek Reiners

Frank Rhoades

Finance Associates \$500 - \$999

Nick & Barbara Allen Gordon Nielsen

Jim Arens Jody Parker

Ben Abney Don Quint

Sharon Bell Bill Snow

Laurie Brown Purser Lee Swarthout

Jeff Davis Tom Warburton

Jake Dollarhide Dick Williamson

Bob Fredrickson Chris Wolking

Jack & Joan Koehle Zarrow Foundation

Kieran Major Steve Zenthoefer

Finance Friends \$100 - \$499

Kent Allingham

Ryan Andrews

Loren Armstrong

Tory Baker

Mike Bartlett

Roger Bey

Dale Billam

Denie Buchanan

BUDCO

Nevyle Cable

Jim Colgan

Andrew Comstock

Megan Cordle

Lee Crawley

George Dallas

Harry Dandelles

Mike Dill

Frederick Drummond

Bill Fader

Tally Ferguson

Debbie Fleming

Bob Fries

Francis Gajan

Steve Ganzkow

Bob Geweniger

Keith Goddard

Carlyne Holmes

Mike Huckaby

Russell Iorio

R. S. James

John Kauth

Stephen Layton

Sandy Leeds

Max Mason

Jim McGill

Joe McGraw

Callie Mitchell

Johnson Moore

Linda Nichols

Greg Oliphant

Bob Paulsen

Pam Peck

Frauke Quiroga

Tom Redman

Phil Reedy

Doug Riess

Patsy Savage

Kelly Schneider

Nicole Simmons

Brooke Snyder

Cherl Snyder

Tom Stees

Bruce Stoesser

Gale Sullenberger

Richard Sullivan

Ross Swimmer

Baxter Thorman

Bob Traband

Dudley Viles

Weidong Zhou

Finance Donors \$1- \$99

Andrew Aguirre

Scott Bennett

John Buxton

Bob Dupree

Jane Faulkenberry

Irving Fenster

Jayne Gilsinger

John Hartman

Bob Jennings

Mary Korthase

Dennis Reecher

Philip Viles

Meg Whitney

Fees

Fees for the 2014-2015 year are unchanged:

- \$195 (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)
- \$405 (Membership plus all luncheon fees for yourself and one guest)
- \$1,850 One reserved table (8 seats)

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

Friends of Finance Accomplishments

Friends of Finance (FOF)

- Has existed and thrived for 29 years
- Had 405 dues paying members in 2013-2014
- 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 U.S. Business or Finance Program is known to have an equivalent speaker series
- Has been a major force in developing business relationships for TU

For Members Only

Members Only opened in August with TU Athletic Director, Derrick Gragg and three TU head coaches: men's basketball coach, Coach Frank Haith, women's basketball coach, Coach Matilda Mossman and women's golf coach, Coach Emilee Klein-Gille. The coaches mixed and mingled with the membership in the President's Suite at the Reynolds Center. The after work event allowed for networking and conversation in a casual atmosphere.

Dr. Gragg briefed us on the challenges and opportunities of moving to the American Athletic Conference and Coach Haith really seemed excited as he explained how talented our new league is. With last year's NCAA Champions in both men's and women's basketball, University of Connecticut, he expects interest and excitement to be up this year.

The second Members Only event is planned for early December, a "Tour and Taste" event at Marshall's Brewery should be fun. Watch for the announcement. Remember, only members may register and space is limited, so it will be on a first come basis.

Leadership

Our officers and directors for 2014-2015 are:

Officers

President	Sam Combs, ComStar Advisors
VP Programs	Don Quint, Quint & Associates
Treasurer	Shawn Crisp, Trust Company of Oklahoma
Secretary	Roberta Preston, Girl Scouts of Eastern Oklahoma

Directors

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

FOF Web Site

The FOF website www.utulsa.edu/fof/ includes a number of services as listed below. It also has an excellent short video on the organization and the Student Investment Fund.

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. Any member may place an opening for his or her firm. View job description of openings after logging in to Member Services.

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. In support of this, members and their firms may participate through our Take-A-Student to lunch program. Just contact Judy Adair at 631-2588 or 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.

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. Alliance Resources is sponsoring our October 16th program featuring Steve Bradshaw, President & CEO of Bank of Oklahoma. 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. 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.

Accounting and Financial Women's Alliance



Kim Huey, (*BSBA Accounting, '16*) is the recipient of an academic scholarship from Tulsa-Metro area Accounting and Financial Women's Alliance (AFWA). The organization's annual event at The Summit

Club in downtown Tulsa on Tuesday, Oct. 7, 2014 at 6:00 p.m. Kevin Powers, CFO of Waterfield Energy will be speaking on business transformation through innovation and local and national academic scholarships will be presented. CPE credit will be available for this event. Diamond Sponsors for the October event include Grant Thornton LLP, Waterfield Energy LLC, Accounting Principals, ONEOK, Weinkauf Petroleum Inc. and Law Office of Roderick H. Polston, P.C. BlackFin IRS Solutions. The Academic scholarship sponsors include The Rowland Group and Stinnett & Associates.

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 for details. Corporate Sponsors for this year are:



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.

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/>

NAIC

Greater Tulsa Area Chapter, BetterInvesting

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

NAIC Contacts:

Tami deangelistami@hotmail.com or 747-9303
Barbara wollmersh@aol.com

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.

For more program descriptions, registration information or questions, please go to: <http://bus.collins.utulsa.edu/CEPD/> or contact Center Director Linda Adlof at linda-adlof@utulsa.edu.

Accounting and Financial Women's Alliance (AFWA) Tulsa Chapter Annual Dinner

The Summit Club

Tuesday, October 7, 2014

Check-in from 6:00 p.m. to 7:15 p.m.

Dinner at 7:00 p.m.

Presentation begins at 7:30 p.m.

Speaker: Kevin Powers, CFO Waterfield Energy

For more information about the Annual Celebration Dinner event please visit the Annual Event page: www.tulsaafwa.org or contact afwatulsa@gmail.com.

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We are also on **LinkedIn**®