

VERSITY Friends of Finance

January 2007

January 18, 2007 Greg Lippert President & CEO Mazzio's Corporation



Greg Lippert was appointed President and CEO of Tulsa based Mazzio's Corporation, operating 171 Mazzio's Italian Eateries and 15 Zio's Italian Kitchen's restaurants, in August 2005. Prior to this appointment, he was

Chief Operating Officer of Fazoli's, a restaurant chain of 400 Italian restaurants.

Lippert came to Tulsa in 1984 to join the original Ken's Restaurant Systems, operator of "Ken's Pizza" and start up "Mazzio's Pizza", as its Marketing Director where he oversaw all Mazzio's and Ken's Pizza marketing and the introduction of Zio's Italian Kitchen from its conceptual stage to its current 15 locations. Greg left Mazzio's Corporation briefly for a two year period when McDonald's purchased the Fazoli's business and appointed him as their CMO.

Reservations are required. You may register on-line at: https://bus.cba.utulsa.edu/fof/reg.asp or contact Judy Adair at 631-2588 or judy-adair@utulsa.edu. Friends of Finance members will have preference until January 4, 2007.

February 13, 2007 Tiffany Sewell-Howard CEO



In December 2003, Tiffany Sewell-Howard was appointed to the position of Chief Executive Officer (CEO) for The Charles Machine Works, Inc. (CMW), manufacturer of Ditch Witch products. While employed at CMW, she



has held the positions of Chief Operating Officer (COO), Director of Information Technology, and eMarketing Manager.

Before joining CMW, Ms. Sewell-Howard served on the Board of Directors at CMW for four years while employed as Marketing Director at PRIMEDIA, Inc., a New York based publisher of more than 250 magazine titles. Ms. Sewell-Howard has started several companies including a small advertising agency, an industrial waste recycling company, and an internet marketing and web development company.

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Leadership

Our officers and directors for 2006-07 are:

Officers

President John Chandler, Magellan LP VP Programs Bob Fitzgerald, Arrow Trucking

Treasurer Beverly Monnet, ONEOK Secretary Tory Baker, Nordam

Membership Jake Dollarhide, Longbow Asset

Directors

Jim Arens, Trust Company of OK Keith Bailey, Williams (Retired) Roger Bey, TU Shane Goodwin, Citigroup Steve Hildebrand, Dollar Thrifty Callie Mitchell, Williams Don Spaugy, SemGroup, LP

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 is \$2,000 The following luncheons are available for sponsorships:

Date	Speaker
02/13/07	Tiffany Sewell-Howard, DitchWitch
03/13/07	Craig Ueland, Russell Investments

Contact Judy Adair, (<u>judy-adair@utulsa.edu</u> or 631-2588) if you are interested in being a Luncheon Sponsor.

Alumni / Student Notes

If you have been promoted, changed companies, earned another degree or have personal information (marriage, etc.) please send it to us (judy-adair@utulsa.edu) and we will include it in our newsletter.



David Page (BS '75 & MBA '82) – Appointed as board chairman to the American Red Cross Tulsa Area Chapter. David currently serves as President-Eastern Oklahoma, JP Morgan Chase. David was the 2nd president of Friends of

Finance.

Robert Boyd (MBA '92) – Appointed to serve a 2 year term on the Small Business Administration's National Advisory Council. Bob is the founder and president of Boston Street Advisors. He served as the 10th president of Friends of Finance.





Ted Feldmeier (BS '06) has accepted a position with Helmerich & Payne in Tulsa, OK as a financial analyst. He had an internship with them in the

summer of 2006.

Read Minshall (BS '06) has accepted a position in the management trainer program of National Oil in Houston, TX.



Hamsini Subramanian (*MSF* '06) has accepted a position with IndexIQ in New York as a Quantitative Analyst.

Shuttle Service

Bill White Shuttle Service will be providing a continuous shuttle service from the parking lot North of the Reynolds Center (8th & Harvard) 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.

Membership

This year's membership committee under the leadership of Jake Dollarhide has established the challenging goal of 525 members. To date we have 373. To renew your membership or join, go to https://bus.cba.utulsa.edu/fof/memberapp.asp.

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 since our last newsletter are:

Ronny Altman	Michael Krimbill
Ron Cooper	Graydon Luthey
Jeff Cope	Luke Nowlin
Brandon Diles	James Randall
Scott Eckley	Steve Rettedal
Brian Glenn	Ryan Rex
Linda Gunnells	Patsy Savage
Gene Hallman	Marc Short

Rick Holder Susan Solenberger-Burford

Chad White Neal Zahn

Suzie Morrel

Fees

Fees for this year are:

\$165 (Membership plus all luncheon fees)	\$165	(Membership	plus all	luncheon	fees)
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\$50 (Tulsa area members - membership fee only)

(out-of-area members - outside 50 mile \$10

radius of Tulsa)

\$10 (current TU full-time students or TU graduate within the last year)

(Membership plus all luncheon fees for \$365 yourself and one guest)

\$200 One reserved table (8 seats)

\$1,700 (One reserved table of eight at each Luncheon)

Luncheons:

Members \$20 (\$15 paid in advance) Non-members \$30 (\$25 paid in advance)

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

Take-A-Student to Lunch

One goal of Friends of Finance is to provide assistance to 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 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.

Job Posting

This year we will continue our web site for job postings service on a no cost basis for all members. Membership is required both to post jobs and to view job postings. Once we post a job, we will distribute an e-mail announcing the new job posting.

Firms who have used FOF to distribute job openings have found it to be a very effective recruiting tool. FOF members have been very appreciative and have told us how they passed along the job information to friends seeking employment. Hence, the distribution is far larger than our membership. We encourage you to have your firm participate in our job posting service.

To post a job opening, e-mail the job description in Word or PDF file, along with contact information to Judy Adair (judy-adair@utulsa.edu) who will post it. We will not edit the files.

Resume Posting

FOF members who are seeking employment may now post their resume on the FOF web site. An email will be sent as new resumes are posted. The email will only list the type of position sought and a link. Your user name and password will be required to access the actual posting.

E-mail your resume as a Word or PDF file to Judy Adair (judy-adair@utulsa.edu) who will post it. In your e-mail, please include a job title (financial analyst, CFO, etc.) of not more than four words. We will not edit your resume. There is no cost to members for this service.

Finance Excellence Fund

FEF gifts are placed in the Student Investment Fund (SIF) which is managed by our students. Earnings from the SIF are used to support scholarships. To date, 135 students have received more than \$240,000 in scholarships. The current market value of the SIF is \$1.37 million.

This year we have had 74 donors and \$103,975 in gifts. Our goal is \$150,000. You may contribute online at https://bus.cba.utulsa.edu/fof/excellencepledge.asp.

Honor roll members for 2006-07 are:

F	<u>'inance</u>	S	por	isor

SemGroup, LP

Finance Founders

Mike & Caryn Hess

Ralph & Frances McGill Fnd.

Finance Benefactors

Ellen Adelson Keith Bailey

George & Jennie Collins Fnd.

Frank Fisher, Jr. Shane Goodwin Beryl McElhiney NORDAM Group

Finance Patrons

Bank of Oklahoma

Roger Bey EdwardJones

Walt Helmerich, III

Jim Hill

John Pilkington Zink Foundation

Finance Associates

Joe Adwon

Nick & Barbara Allen Bob Fredrickson Bob Fries

Craig Loseke Pam Peck

Samson Investments

Finance Friends

Jim Arens
Tory Baker
Mike Bartlett
Gary Belitz
Sharon Bell
Wade Biswell
Dr. Jerry Brickner
James Colgan

Pat Donica

Irene & Irving Fenster

Andrew Comstock

Tally Ferguson
Deborah Fleming
Steve Ganzkow
Bob Geweniger
EJ Hammond
Russ Iorio
Robert Jennings
Jack Koehle
Sandy Leeds
Marc Maun
Delores McDugle

James McGill
Bob McGrew
Callie Mitchell
Beverly Monnet
Craig Owens
Suzanne Penni
Jim Pinkerton
Steve Poleman
Tom Redman
Jeff Rudd

Finance Friends (continued)

Patricia Savage Cherl Snyder Don Spaugy Tom Stees

Gale Sullenberger Bob Traband Chris Wolking Daryl Woodard Weidong Zhou

Finance Donors

Allen Atwood David Bey Michael Bey Meg Brimmer Jane Faulkenberry Maurine Thornton

Bill Wilke Barry Woods

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.

If you are interested in having your corporation join, contact Judy Adair at 631-2588 or <u>judy-adair@utulsa.edu</u> for details. Corporate Sponsors for this year are:





Dollar Thrifty Automotive Group, Inc.

















CPAs & BUSINESS ADVISORS

Upcoming Executive Luncheons:					
Date	Date Speaker Position and Company Sponsor				
01/18/2007	Greg Lippert	President & CEO, Mazzio's Corporation			
02/13/2007	Tiffany Sewell- Howard	CEO, DitchWitch			
03/13/2007	Craig Ueland	President & CEO, Russell Investment Group			
04/12/2007	Aubrey McClendon	Chairman & CEO, Chesapeake Energy	Anchor, USA		
05/07/2007	Ali Moshiri	President, Chevron Latin America	SemGroup, LP		

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.

 $\frac{\textbf{NAIC}}{4^{th} \ Thursday \ Free \ Education \ Classes}$ 6:45 p.m. – 7:30 p.m. Hardesty Library, 8316 E. 93rd

February 17, 2007 **Annual Investors Fair**

NAIC Contact: Anita Greiner 918-492-7108 ajgreiner@sbcglobal.net

Energy Advocates

For more information: 599-7767 info@energyadocates.org

TU Executive & Professional Development

The University of Tulsa, Center for Executive & Professional Development has the following upcoming programs:

Analyzing and Improving Operations

April 25-27, 2007

TU Mini-MBA

February 17 - May 14, 2007

Project Management Certificate

Developing Project Management Skills

January 17-19, 2007 April 2-4, 2007

Advanced Project Management

February 26-28, 2007

Project Risk Management

March 1-2, 2007 April 5-6, 2007

PMP® Exam Preparation Course

January 29-February 2, 2007 March 12-16, 2007 April 30-May 4, 2007

Accounting and Finance for Non-Financial Managers

New Dates to be Announced

Last Minute Individual Income Tax Update

January 9, 2007

Oil and Gas Taxation

Houston: January 23-24, 2007 May 10-11, 2007 Tulsa: February 20-21, 2007

Extraordinary Leader

New Dates to be Announced

Partnership Taxation

February 7-9, 2007

For more information and to register online: http://bus.cba.utulsa.edu/CEPD/Default.asp or call 918.631.2784

Links

On-line registration https://bus.cba.utulsa.edu/fof/reg.asp

https:/bus.cba.utulsa.edu/FOF

January 18, 2007 Registration Form

February 13, 2007 Registration Form

Membership Form

Pledge Card