

*April 1, 2004*

***Jamie Dimon***

*Chairman & CEO*

*Bank One Corporation*



The recent announced merger of Bank One, a super-regional bank with some 1,800 branches, with J. P. Morgan will create the second largest bank in the U.S. Dimon joined Bank One in 2000 as Chairman and CEO. Upon completion of the merger, Dimon will be

COO. In 2006, he will become CEO of J. P. Morgan. Dimon is known for shrewd acquisitions and tight operations. He is expected to lead the \$2.2 billion cost-cutting operations of the merged banks.

Ticket demand is running very high. We already have more than 700 reservations. If you want to attend, you should register today. If we reach capacity, members will be given priority. Hence if you aren't a member, join today to obtain reservation priority.

**NOTE:**

**Due to the high demand, the luncheon will be held at the Adam's Mark Hotel rather than on TU's campus. All reservations must be paid in advance. Tickets for admission will be mailed to you on March 12.**

*May 5, 2004*

***Patrick G. Ryan***

*Chairman & CEO*

*Aon Corporation*

Patrick G. Ryan formed Ryan Insurance Group in 1964 which merged with combined International Group in 1982. In 1987, the company was renamed Aon Corporation. Aon, which means "oneness" in Gaelic, is the world's #2 insurance brokerage and consulting company with more than 55,000 employees and offices in more than 150 countries.

*May 24, 2004*

***Jim Wilburn***

*President & CEO*

*Winnercomm*

In 1981, Jim Wilburn and Chris Lincoln, the top sales executive and sports director at KTUL-TV formed Winner communcions to develop, sell, produce, and distribute syndicated telecasts of major American Quarter Horse stakes races. Since then Winnercomm (its name was changed) has grown into one of the largest privately owned production companies in the industry. Winnercomm produces more than 1,000 hours per year of TV programs for your home. Wilburn is a graduate of the University of Tulsa.

***January 20, 2005***  
***Douglas E. Hill***  
***Managing Partner***  
***Edward D. Jones***

Doug Hill opened an Edward D. Jones office in 1968 in Dodge City, Kansas. In January 2004, Hill became managing partner, the head of Edward D. Jones.

***March 10, 2005***  
***Gary Forsee***  
***Chairman & CEO***  
***Sprint Corporation***

Gary Forsee, Chairman and CEO of Sprint Corporation has more than 30 years experience in the telecommunications industry. Prior to being named CEO of Sprint in March, 2003, he was Vice Chairman of Bell South.

### ***Shuttle Service***

Bill White Shuttle Service will again be providing a continuous shuttle service from the parking lot north of the Reynolds Center (8<sup>th</sup> & 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.

### ***Employment Opportunities***

If your firm has an employment opening and would like to make this available to our members, please e-mail a job description to [judy-miller@utulsa.edu](mailto:judy-miller@utulsa.edu). Please write your job description, including all contact information exactly as you want to have it posted.

### ***E-Mail HELP!***

We are attempting to move to electronic distribution as much as possible. Therefore, even if you don't plan to join, send us your e-mail address so that we can continue to communicate with you. It is an easy way to support FOF by reducing both our costs and our effort. Contact Judy Miller at (918) 631-2588 or [judy-miller@utulsa.edu](mailto:judy-miller@utulsa.edu). Our electronic format takes you to the newsletter on our website. We do not send it as an attachment.

### ***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 Miller at 631-2588 or [judy-miller@utulsa.edu](mailto:judy-miller@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.

### ***Membership***

The membership committee (Lindsey Barrows, MaryBeth DeWitt Dan Doyle, Rick Martich, and Joe Redman) is working hard and is having a great deal of success in meeting our ambitious goal of 400 members. To date, we have 297 members. Please encourage at least one friend to join. A [membership form](#) is attached. Membership gives you priority seating at capacity luncheons. Progress is being made on creating our on-line directory. Members who have joined since our last newsletter are:

Terry Argue  
John Beasley  
David Krueger  
Rodney Nevins  
Ryan Rex  
Sherry Strong  
Mark Wilmoth

## 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.

The annual cost of a Corporate Sponsorship is \$2,500. If you are interested in having your corporation join, contact Judy Miller at 631-2588 or [judy-miller@utulsa.edu](mailto:judy-miller@utulsa.edu) for details. She will add you to our waiting list.

Corporate Sponsors for this year are:



THE WILLIAMS COMPANIES  
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## ***Finance Excellence Fund***

One hundred and six donors already have given \$77,600+ to this year's Finance Excellence Fund. If you haven't contributed, your support would be greatly appreciated. Gifts of any size \$25, \$50, \$100 or more are welcome. As a donor you are a member of the Finance Excellence Fund Honor Roll. In addition, all gifts to the Finance Excellence Fund are credited toward membership in the President's Council, a University-wide recognition group. Council levels are \$1,500, \$5,000, and \$10,000 of individual gifts. Click on [Finance Excellence Fund Pledge Card](#) for a pledge card. Please give today to help us reach our \$115,000 goal. Honor roll members for 2003-04 are.

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### **Friends**

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Michael Burton  
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Tami DeAngelis  
John Doak  
Patrick Donica  
Dan Doyle  
Rebecca Edmiston  
Bill Fader  
Tally Ferguson  
Skilly Forsman (in memory  
of Elaine Rearden)  
Phil Franczyk  
Francis Gajan  
Steve Ganzkow  
Bob Geweniger  
Lori Gibson  
Keith Goddard  
GTAC - NAIC  
Jim Hill  
Russ Iorio  
Jack Kauth  
Mike Kent  
Karl Knight  
Jack Koehle  
Sandy Leeds  
Pete Leininger  
Kieran Major  
Max Mason

### **Friends** (cont'd.)

Marc Maun  
Dee McDugle  
Jim McGill  
Wayne Middleton  
David Page  
Pam Peck  
John Pilkington  
Jim Pinkerton  
Steve Poleman  
Keith Preddy  
Don Quint  
James Redman  
Thomas Redman  
Ellen Sembe  
Cherl Snyder  
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Steven Zenthoefter  
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Wynn Wozobski

## Upcoming Executive Luncheons:

Date	Speaker	Title	Company
April 1, 2004	Jamie Dimon	Chairman & CEO	BankOne Corporation
May 5, 2004	Patrick G. Ryan	Chairman & CEO	Aon Corporation
May 24, 2004	Jim Wilburn	President & CEO	Winnercomm

### ***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.

#### **Energy Advocates**

For more information: 599-7767  
[info@energyadvocates.org](mailto:info@energyadvocates.org)

#### **Oklahoma Investment Forum**

Oklahoma Private Enterprise Luncheon  
 11:45 a.m., Petroleum Club, 15<sup>th</sup> Floor  
[April 6, 2004](#) Stan Clark, CEO of Stan Clark  
 Companies and Eskimo Joe's

For details or reservations: (918) 584-8884  
 For more info [www.oifonline.org](http://www.oifonline.org)

#### **COEITT**

See [www.coeitt.net](http://www.coeitt.net) for details.  
 Go to 'Partner Events'  
[coeitt@osu-tulsa.okstate.edu](mailto:coeitt@osu-tulsa.okstate.edu) for more information

#### **NAIC**

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

Date	Class
03/27/04	Club Leadership Day

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

#### **Aon Risk Services**

2004 Business Forum  
 7:30 am to 9:00 am.  
 This is a free series and complimentary breakfast  
 will be included.

Wednesday, April 7, 2004

D&O & CORPORATE GOVERNANCE  
*Presented by Robert Smith, Aon Financial Services*

Contact Jeannette Oravec  
[Jeannette\\_oravec@ars.aon.com](mailto:Jeannette_oravec@ars.aon.com)  
 (918) 496-6932

#### **Friends of Risk**

FOR is devoted to providing discussions on a very  
 wide range of risk management topics.

April 9 Presenter: Glenn Koller  
 "Using holistic risk assessment to estimate a project's  
 expected value of success and its expected value to a  
 portfolio"  
 Contact Judy Miller at [judy-miller@tulsa.edu](mailto:judy-miller@tulsa.edu) or  
 (918) 631-2588

## Links

<http://www.cba.utulsa.edu/organizations/FOF>

[Registration Form](#)

[Membership Form](#)

[Pledge Card](#)

NOTE: When you open a link, you will need to use your “back” button to return to the Newsletter.