February 10, 2016

Burt White
Chief Investment Officer
LPL Financial

As chief investment officer for LPL Financial, the nation’s largest independent broker-dealer, Burt White provides strategic guidance for the LPL Financial Research team, ensuring alignment with the firm’s goals for maintaining the highest levels of integrity in pursuit of conflict-free, objective investment advice. He directs a team of analysts and investment professionals, providing in-depth research on the global economy and markets, mutual funds, separate accounts, fixed income, alternative investment strategies, and portfolio construction and optimization. White has over 25 years in financial analysis and research.

Reservations are required. You may register on-line:
http://www.collins.utulsa.edu/secure/fof/Meetings.aspx or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until January 27, 2016.

March 23, 2016

Scott Prochazka
President & CEO
CenterPoint Energy

Scott Prochazka is president and chief executive officer of CenterPoint Energy, a Fortune 500 electric and natural gas utility serving parts of Arkansas, Louisiana, Minnesota, Mississippi, Texas, and Oklahoma. CenterPoint Energy has over $20B in assets and 5.5 million customers across the six state area and owns the majority of Enable Midstream Partners. Prior to his current role, Prochazka served in several other roles, including chief operating officer with responsibility for all business units and several key functions, division president of Houston Electric and as senior division vice president of Gas Operations.

Reservations are required. You may register on-line:
http://www.collins.utulsa.edu/secure/fof/Meetings.aspx or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until March 9, 2016.

Meeting Sponsor

Putnam Investments

We extend our thanks and appreciation to Putnam Investments for serving as our Luncheon Sponsor.

Shuttle Service

918 Shuttle Service will provide shuttle service from the parking lots along Gary Place to the Allen Chapman Student 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.
University of Tulsa
Friends of Finance
2015-2016
Executive Speaker Series Luncheons

Rick Muncie
President & CEO
WPX Energy
September 18, 2015
Sponsored by:

Joseph Gorder
President & CEO
Valero Energy Corporation
October 13, 2015
Sponsored by:

Chris Haroun
Partner
Artis Ventures
November 18, 2015
Sponsored by:

Chet Cadieux
Chairman & CEO
Quik Trip Corporation
December 10, 2015
Sponsored by:

Stu Crum
President
Bridgestone Retail Operations
January 20, 2016
Sponsored by:

Burt White
Chief Investment Officer
LPL Financial
February 10, 2016
Sponsored by:

Scott Prochazka
President & CEO
CenterPoint Energy
March 23, 2016
Sponsored by:

David Dillon
Former CEO
The Kroger Co.
April 27, 2016
Sponsored by:
Membership

Last year we had membership of 433. 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 http://www.collins.utulsa.edu/secure/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. Members since our last newsletter are below. For a complete list of members to date (371), please go to:

https://www.collins.utulsa.edu/secure/fof/Members/

Kiran Ali  Sanford Roberds
Bobby Burnett  Xiaonan Shang
Elizabeth Carson  Brian Sulley
Jane Faulkenberry  Hugh Taylor
Rodney Mott  Steve Wilkerson
Xuan Nguyen

FOF Membership Committee

Many thanks to the following members for volunteering to be a part of the 2015-2016 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
Kysa Rowe, WPX Energy
Charles Secrest, Key Personnel
Julie Skye, Mariner Wealth Advisors
Philip Viles, Jr., University of Tulsa

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) and we will include it in our newsletter.

Fees

Fees for the 2015-2016 year have been reduced as of January 20, 2016

$125  (Membership + all remaining luncheon fees)
$50  (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)
$230  (Membership plus all remaining luncheon fees for yourself and one guest)
$1,000  One reserved table (8 seats) at each of the remaining luncheons

Leadership

Our Friends of Finance officers and directors for 2015-2016 are:

Officers
President  Don Quint, Quint & Associates
VP Programs  Marcia MacLeod, WPX Energy
Treasurer  Andrew Ziola, ONE Gas
Secretary  Roberta Preston, Girl Scouts of Eastern Oklahoma

Directors
J. Markham Collins, TU
Richard Burgess, TU
Shawn Crisp, Trust Company of Oklahoma
Mike Osborne
Phil Reedy
Derek Reiners, ONEOK, Inc.
Frank Rhoades, Rhoades Oil Company
Paul Samuels, Morgan Stanley
2015-2016

Finance Excellence Fund

The 2015-16 Finance Excellence Fund Campaign has been launched. To date, we have received $96,180 from 83 donors. Our goal is $250,000 from 150 donors this year, and we believe we can make it. We hope every member will make a contribution. We need everyone’s help to continue raising FOF to higher and higher levels.

You may contributing on-line at:
https://collinssecure.utulsa.edu/fof/Pledge.aspx
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!

Finance Excellence Fund Honor Members to date are:

**Finance Sponsor**
- Mike & Kathi Colby

**Finance Partner**
- Al Walker/Anadarko

**Finance Benefactors**
- Joe Adwon
- Tom Campbell
- Sam & Rita Combs
- Michael Krimbill
- Marcia MacLeod
- Phillips 66
- Bill Thomas

**Finance Patrons**
- Keith Bailey
- Allen Barrow
- Arnold Brown
- Markham & Becky Collins
- David Eastin
- Bob Fredrickson
- Joel Harper
- Steven & Debra Hildebrand
- Craig Owens
- Jody Parker
- Don Quint

**Finance Associates**
- Ben Abney
- Sharon Bell
- Laurie Brown-Purser
- Jeff Davis
- Jake Dollarhide
- Keith Goddard
- RS James
- Pam Peck
- Phil Reedy
- George Schnetter
- Richard Sullivan
- Tom Warburton
- Richard Williamson
- Chris Wolking
- Andrew Ziola

**Finance Friends**
- Kent Allingham
- Michael Balp
- Mike Bartlett
- Roger Bey
- Denie Buchanan
- BUDCO, Inc.
- Jim Colgan
- Andrew Comstock
- Megan Cordle
- Frederick Drummond
- Bill Fader
- Tally Ferguson
- Scott Filstrup
- Steve Ganzkow
- Bob Geweniger
- Chris Guglielmo
- Mike Huckaby
- Russell Iorio
- Bob Jennings
- Jack Koehle
- Robert & Cathy Laird
- Sandy Leeds
- Louis Luo
- Max Mason
- Marc Maun
- Joe McGraw
- John Moore
- Greg Oliphant
- Bob Paulsen
- Alisa Perkins
- Steve Poleman
- Patsy Savage
- Nicole Simmons
- Cherl Snyder
- Tom Stees
- Bruce Stoesser
- Gale Sullenberger
- Brian Sulley
- Baxter Thorman
- Dudley Viles
- Steve Wilkerson
- Daryl Woodard
- Weidong Zhou

**Finance Donors**
- Andrew Aguirre
- Theron Bowling
- John Buxton
- John Hartman
- Meg Whitney
Members Only Events

Our first “Members Only” event of the 2015-2016 year was held on December 1st with “Tour and Taste” at Marshall’s Brewery.

Eric Marshall, TU graduate and friend of the School, gave Members a tour of the brewery and explained the beer making process. Members received the inside information that the Marshall’s tap room will be expanding in 2016.

Members tasted up to four fresh beers and experienced how different hops influence the taste and experience. Marshall’s imports malt and hops from Germany with other hops coming from a variety of countries.

The mix of member participants included new members who joined within the past month and others who have been members for over 20 years. Participants had the opportunity to network with Finance faculty members, undergrad and graduate students, and professionals along with a few retirees.

Become a member today to be sure you can join us for the next “Members Only” event.

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
http://www.collins.utulsa.edu/secure/fof/Application.aspx

Meeting Registration
http://www.collins.utulsa.edu/secure/fof/Meetings.aspx

Members Services
http://www.collins.utulsa.edu/secure/fof/Members/login.aspx
(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.
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/](http://www.typros.org/)

**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/](http://bus.collins.utulsa.edu/CEPD/) or contact Center Director Linda Adlof at linda-adlof@utulsa.edu.

**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

**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.

Like us on Facebook! 

We are also on [LinkedIn](https://www.linkedin.com)