David Dillon is the retired Chairman and CEO of The Kroger Co., based in Cincinnati. The company is the largest full-service grocer in the US with over $108.5B in annual revenue. A top 100 firm (#24), employs 400,000 associates who serve customers in more than 3,500 supermarkets, convenience and jewelry stores under two dozen names. Kroger also operates 37 U.S. food processing plants.

Dave was appointed executive vice president of Kroger in 1990, and he was elected president and chief operating officer of the company in 1995. Dave was named CEO of Kroger in 2003. He was elected Chairman of the Board of Directors in 2004. Dave retired as CEO at the end of 2013 and as Chairman of the Board of Directors at the end of 2014.

Reservations are required. You may register online: 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 April 13, 2016.

**Student Investment Fund**

**New Security Presentations**

The Spring 2016 Student Investment Fund at the University of Tulsa cordially invites you to attend their formal new security presentations on **Wednesday, March 30, 2016 and Wednesday, April 6, 2016.**

Student members of the Student Investment Fund will be presenting a 10 – 15 minute analysis and valuation of a specific stock that could potentially be included in our portfolio. Students will share their valuation approach, challenges, and recommendations.

Guests are encouraged to question students on their work as well as share their expertise for both student development and improved security selection for the Student Investment Fund.

The SIF will kick off the evening with a brief presentation of valuation techniques.

Presentations will begin promptly at 6:00 pm and will run until approximately 8:45 pm with breaks planned. Light hors d’oeuvres and soft drinks will be served. You are welcome to attend any or all presentations as best fits your schedule.

The presentations will be held in **Room 219** of Helmerich Hall, on TU’s campus, 2900 E. 5th Street.

**Meeting Sponsor**

We extend our thanks and appreciation to **Key Personnel and Fidelity Investments** for serving as our Luncheon Sponsors.
University of Tulsa
Friends of Finance
2015-2016
Executive Speaker Series Luncheons

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

Joseph Gorder
President & CEO
Valero Energy Corporation
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LPL Financial
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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](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 (386), please go to: [https://www.collins.utulsa.edu/secure/fof/Members/](https://www.collins.utulsa.edu/secure/fof/Members/)

- Helio Alves
- Neil Dailey
- Paula Etter
- Chase Hall
- Mahlon Pitt
- Hal Salisbury
- Brent Smith

**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

**FRIENDS OF FINANCE**

**The State of the Organization**

By: J. Markham Collins, Faculty Director

We are rapidly approaching the end of year 31 for The University of Tulsa’s Friends of Finance (FOF). The first meeting was May 7, 1985 on the top floor of what was then First National Bank of Tulsa. Over 100 people were in attendance, largely due to the work of three First National employees: Bob Harrison; Bob Prince, and Bruce Currie. TU Finance Department chairman, Roger Bey, and I supplied alumni names and organizational support. Our current Director of the School of Finance, Operations Management, and International Business, Richard Burgess, provided most of the graduate school alum contacts. Even then the attendees included some non-TU grads and a number of professionals working outside of traditional Finance areas. I remember that meeting especially well. It was my birthday. Bob Prince, Bruce Currie, and a few others of my recent students produced a surprise birthday cake, complete with candles and accompanied by singing.

The organization took off. Of course, not on a steady climb, we had our ups and downs. Marc Maun, now EVP-Chief Credit Officer at Bank of Oklahoma, but then our fourth FOF President, remembers a luncheon meeting when only 13 members were present. However, with dedicated officers and directors, Roger Bey’s outstanding leadership and personal effort, and Judy Adair’s masterful organizational skills, we grew into our present state. We regularly have every seat reserved, accommodate a full house, and have incredibly interesting speakers. Our membership remains in the 400-450 range, and our fundraising for the Finance Excellence Fund has averaged over $200,000 the past five years.

Where else could you find an executive luncheon series meeting eight times a year, with quite modest prices, that has had Jamie Dimon, Doug McMillon, Sally Smith, Roger Staubach, Scott Sullivan, Esther George, and John Wooden and over 200 more? Our members often tell me the winning secret is they leave our luncheons with information they could not have obtained elsewhere. They get inside information, not the kind to beat the market, just information that yields understanding, maybe something to use in professional or personal life.

As we approach the end of our 31st year, membership and fundraising are fine but could be better, as always. However, our luncheon attendance remains strong; the Student Investment Fund is valued at over $4.4 M; and we already have six of our eight speakers committed and the others invited for 2016-2017. At the year-end business meeting, April 27th, we will vote on some minor bylaws changes and elect a new slate of officers.

What is the state of our organization? We are on a roll!
2015-2016
Finance Excellence Fund

The 2015-16 Finance Excellence Fund Campaign has been launched. To date, we have received $116,305 from 97 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 Founder**
Bob & Sharon Prince

**Finance Partner**
Al Walker/Anadarko

**Finance Benefactors**
Joe Adwon
Tom Campbell
Sam & Rita Combs
Helmerich & Payne
Jim Holloman

**Finance Patrons**
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Richard & Ellen Burgess
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Keith Goddard
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Brian Sulley
Baxter Thorman
Dudley Viles
Steve Wilkerson
Daryl Woodard
Weidong Zhou

Andrew Osborne
Andrew Ziola
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.

Fees

Fees for the 2015-2016 year have been reduced as of February 10, 2016

- $75 (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)
- $120 (Membership plus all remaining luncheon fees for yourself and one guest)
- $300 (One reserved table (8 seats) at the remaining luncheon)

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

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/

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.

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