October 18, 2016

Maynard Holt
Co-President
Tudor, Pickering, Holt & Co.

Maynard Holt serves as Co-President of Tudor, Pickering, Holt and Company and leads the firm’s upstream advisory business. Mr. Holt was previously a Managing Director with Goldman, Sachs & Co. where he worked in Leveraged and Structured Finance and Energy & Power / Natural Resources. Holt holds a BA in Economics and Russian from Rice University and an MBA in Public Policy from the John F. Kennedy School of Government at Harvard University.

Reservations are required. You may register on-line: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until October 4, 2016.

Meeting Sponsor

WPXEnergy

We extend our thanks and appreciation to WPX Energy for serving as our Luncheon Sponsor.

November 16, 2016

Michael Skelly
President
Clean Line Energy

Michael Skelly is the Founder and President of Clean Line Energy. Clean Line is developing a series of long-distance transmission lines to move renewable energy to market from the Great Plains to electric markets east and west. When built, Clean Line’s new infrastructure projects will enable billions of dollars in investment in new wind energy projects that could otherwise not be built because of congestion in the power grid.

Prior to founding Clean Line, Michael led the development of Horizon Wind Energy from a two-man company to a leadership position in the U.S. wind industry. Before Horizon, Michael developed thermal, hydroelectric, biomass and wind energy projects in Central America with Energia Global.

Michael holds a Bachelor of Arts in Economics from the University of Notre Dame. He served in the U.S. Peace Corps in Central America before obtaining an MBA from Harvard Business School. Michael speaks fluent Spanish.

Reservations are required. You may register on-line: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until November 2, 2016.
University of Tulsa
Friends of Finance
2016-2017
Executive Speaker Series Luncheons

Tim Mahoney
Chief Marketing Officer
Global Chevrolet
September 15, 2016
Sponsored by:
Burt B. Holmes & Mary Lee Townsend

Maynard Holt
Co-President
Tudor, Pickering, Holt & Co.
October 18, 2016
Sponsored by:

Michael Skelly
President
Clean Line Energy
November 16, 2016

Craig Jones
President
Oklahoma Hospital Assn.
January 20, 2017
Sponsored by:

TBA
March 2017

Bob Zapfel
President
Xerox Services
February 16, 2017

Mark Emmert
President
NCAA
April 19, 2017

Stacy Pezold
Chief Operating Officer
Paycom
May 16, 2017
Cordially invites members to the

Fall 2016
New Securities Presentations

Wednesday, November 9th

Wednesday, November 16th

University of Tulsa
Collins College of Business
Helmerich Hall, Room 219

http://www.utulsa.edu/sif

Michael Balp is a 2014 MSF graduate and currently works in Strategic Planning at Midstates Petroleum Company. When Michael graduated from TU with an undergraduate degree in Finance and Energy Management, he worked for an energy services company where he got exposure to many different types of businesses within the oil and gas industry. In an attempt to further his education and follow his career goals, he enrolled to the MSF program full-time at TU and continued to work part-time. During this time, Michael was also a graduate assistant (GA) to Dr. Crook and Dr. Walkup and aided in their research that, after several years of gathering data, was ultimately accepted for publication in 2016.

Due to his interest in Risk and Corporate Finance, Michael took on an internship with the Risk Management group at ONEOK. In order for this to be a realization, Michael would need to cease GA work. That’s where the Judy Adair Scholarship stepped in to help with the cost of the MSF program that the GA position covered.

“The Judy Adair Scholarship made my continuation in the MSF program possible and accelerated my career advancement. The impact of this scholarship to my education and career will forever be unmeasurable, but the opportunities for professional growth have expanded in ways I did not foresee.”

The generous donations and support of the Friends of Finance to the Finance Excellence fund and the investment in the Student Investment Fund allows continued support of students and programs, contributing to the success of the Finance program at TU. Thank you for your continuing support.
The 2015-16 Finance Excellence Fund Campaign is about to be launched. Last year, we raised $199,789 from 99 donors. Our goal is $200,000 this year, and we believe we can make it. We need everyone’s help to continue raising FOF to higher and higher levels.

You may contributing on-line at:
Finance Excellence Fund Online Gift
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!

2016-2017 Finance Excellence Fund Honor Members to date are:

**Finance Partner**
Al Walker/Anadarko

**Finance Benefactors**
Joe Adwon
Bill Thomas

**Finance Patrons**
Keith Bailey

**Finance Friends**
Sharon Bell
Bob Jennings
Membership

Last year we had membership of 388. 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 Membership Application. 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 (309), please go to: https://www.collins.utulsa.edu/secure/fof/Members/

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**Fees**

**Fees for the 2016-2017 year**

- $225 (Membership + all remaining 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)
- $465 (Membership plus all remaining luncheon fees for yourself and one guest)
- $2,200 One reserved table (8 seats) at each remaining luncheon

**Leadership**

Our Friends of Finance officers and directors for 2016-2017 are:

**Officers**
- President: Marcia MacLeod
- VP Programs: Andrew Ziola, ONE Gas
- Treasurer: Roberta Preston, Girl Scouts of Eastern Oklahoma
- Secretary: Phil Reedy
- FEF Chair: Don Quint, Quint & Associates
- Membership: Megan Cordle, Alliance Resource Partners

**Directors**
- Shawn Crisp, Trust Company of Oklahoma
- Joel Harper, University of Tulsa
- Marc Maun, BOK Financial
- Greg Oliphant, Ceja Corporation
- Mike Osborne
- Kala Sharp, ONEOK, Inc.
- Frank Rhoades, Rhoades Oil Company
- Gale Sullenberger, University of Tulsa

**FOF Web Site**

The FOF website [www.utulsa.edu/fof/](http://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**
[Membership](http://www.collins.utulsa.edu/secure/fof/Members/login.aspx)

**Meeting Registration**
[Meeting Registration](http://www.collins.utulsa.edu/secure/fof/Members/login.aspx)

**Members Services**
[http://www.collins.utulsa.edu/secure/fof/Members/login.aspx](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 Directory**
A listing of all FOF members is provided. Contact information is available only if members agree to have it posted.

**Shuttle Service**

Shuttle Service will be provided 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](http://www.utulsa.edu/fof/) for a campus parking map. Please let us know if you have questions.
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.

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.

Affiliate Programs

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
Educational Classes
1st Thursday Classes
Martin Regional Library: 6:00 pm
2601 S Garnett, Tulsa, OK
(4 Blocks East of US169...at exits 21st or 31st) map

NAIC Contact: contact@tulsa.betterinvesting.net
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. 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: