March 22, 2017
Elliot Nelson
CEO
McNellie’s Group

Elliot opened James E. McNellie’s Public House in downtown Tulsa in March of 2004. Today, as CEO of the McNellie’s Group, Elliot oversees strategy, finances, community relations and key day-to-day decisions for a company that includes over 900 employees.

In addition to his role as CEO of the McNellie’s Group, Elliot is a real estate developer. He concentrates on urban properties and has executed numerous historic rehabilitations as well as new multi-family housing. He serves on the City of Tulsa’s Economic Development Commission and is a past chair of Tulsa’s Downtown Coordinating Council. He serves on the Oklahoma Restaurant Association board of directors, the YMCA of Tulsa’s Metro board of directors and the Tulsa Chamber of Commerce board of directors. He is also an active YPO member.

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 March 8, 2017.

Meeting Sponsor

HALL
ESTILL
ATTORNEYS AT LAW

We extend our thanks and appreciation to Hall Estill for serving as our Luncheon Sponsor.

April 19, 2017
Mark Emmert
President
NCAA

Dr. Mark A. Emmert became the fifth president of the NCAA in October 2010. As president he has championed greater support for student-athlete wellness and academic success. His commitment to the academic success of athletes is also reflected in newly heightened academic standards for initial eligibility. Additionally, he ushered the Association into a new Division I governance structure.

Prior to assuming his current role, Emmert served as president of his alma mater, the University of Washington, beginning in 2004 and has been named president emeritus.

A Washington native, Dr. Emmert earned his bachelor’s degree in political science from the University of Washington and has both a master’s degree and a Ph.D. in public administration from Syracuse 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 April 5, 2017.

Meeting Sponsor

Northwestern Mutual

We extend our thanks and appreciation to Northwestern Mutual for serving as our Luncheon Sponsor.
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:

Bob Zapfel
President
Xerox Services
February 16, 2017

Elliot Nelson
CEO
McNellie’s Group
March 22, 2017
Sponsored by:

Mark Emmert
President
NCAA
April 19, 2017
Sponsored by:

Stacy Pezold
Chief Operating Officer
Paycom
May 16, 2017
Sponsored by:

St. John Medical Center
Northwestern Mutual
The 2016-17 Finance Excellence Fund Campaign has been launched. Last year, we raised $199,789 from 99 donors. Our goal is $200,000 this year, and we believe we can make it. Donations to the Finance Excellence Fund have been added as new investment to the Student Investment Fund (SIF), which has endowed scholarships for undergraduate and graduate finance students. To date, over $950,000 has been awarded in scholarships as a result of your generous support. In addition, donations to the Finance Excellence Fund support the Risk Management Center learning environment for Finance students. These annual operating expenses includes computer equipment and software, databases used in class, and the Bloomberg terminal and are essential to maintaining the quality of education for the students. Your continued support maintains and hopefully expands these resources.

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
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!

To date we have received $76,692.50 from 69 donors. 2016-2017 Finance Excellence Fund Honor Members to date are:

**Finance Sponsor**
Mike & Kathi Colby

**Finance Founder**
Bob & Sharon Prince

**Finance Partner**
Al Walker/Anadarko Burt Holmes

**Finance Benefactors**
Joe Adwon Tammie Maloney
Tom Campbell Bill Thomas

**Finance Patrons**
Keith Bailey Bob Fredrickson
Allen Barrow Joel & Jamie Harper
Arnold Brown Steve Hildebrand
Richard & D. Ellen Burgess Amanda King
George & Jennie Collins Fnd. Don Quint
Jeffrey Davis Kala Sharp
David Eastin

**Finance Associate**
Nick & Barbara Allen Pam Peck
Laurie Brown Purser Roberta Preston
Jake Dollarhide Bill Snow
Tally Ferguson Chris Wolking
Gordon Nielsen Zarrow Foundation
Mike Osborne Andrew Ziola

**Finance Friends**
Kent Allingham Steve Ganzkow
Jim Arens Bob Geweniger
Tory Baker Russell Iorio
Sharon Bell R.S. James
Roger Bey Robert Jennings
James Colgan Jack Koehle
Markham & Becky Collins Max Mason
Andrew Comstock Marc Maun
Megan Cordle H. Johnson Moore
George Dallas Bob Paulsen
Harry Dandelles Frauke Quiroga
Clint Dishman Phil Reedy
Frederick Drummond Chris & Terry Shannon
David Enke Bruce Stoesser
Ted Feldmeier Gale Sullenberger
Scott Filstrup Dudley Viles
Kelly Fitter Steve Wilkerson

**Finance Donors**
Andrew Aguirre John Buxton
**Fees**

**Fees for the 2016-2017 year**  
(Reduced as of February 16, 2017)

- $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)
- $950  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

**Shuttle Service**

Shuttle Service will be provided from the parking lots along Gary Place to the Allen Chapman Student Union 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.

**Membership**

Our membership goal for the 2016-2017 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 (346), please go to: https://www.collins.utulsa.edu/secure/fof/Members/

- Makenna Herl
- Qiaonan Jin
- Andrew Lackey

**FOF Membership Committee**

Many thanks to the following members for volunteering to be a part of the 2016-2017 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
- Mahlon Pitt, Pitt & Associates
- Charles Secrest, Key Personnel
- Julie Skye, Mariner Wealth Advisors
- Tanya Wilson, First Financial Services
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.

News from the School

Mark your calendars: The Student Investment Fund (SIF) new securities presentations are scheduled for Wednesday, April 5, 2017 and Wednesday, April 12, 2017. Put these dates on your calendar now and make plans to attend.

Student members of the Student Investment Fund will present 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.

Membership Event

We held our second membership event for the year at the men’s final home game of the season in the Reynolds arena’s Presidential Suite. Members were able to enjoy a home victory while meeting and talking with coaches of TU’s other sports. Thanks to Megan Cordle, our membership chair, for organizing the event. If you weren’t able to attend this event, watch for announcements for future events.
Student Profiles

Francisco Yanez (BSBA Finance 2017), from Santiago, Chile, is currently an undergrad business student pursuing a double major in Finance & Management. He will be graduating next May. Francisco came to the University of Tulsa in an International Leadership and Athletic Scholarship. After his first three years competing on the Men’s Golf Team, he spent the last year interning at Northwestern Mutual as a financial representative, and at Lufthansa Technik in the Project & Processes Department.

Through several classes at TU, he has developed a strong interest in capital markets. “I really like the investment orientation the finance program offers. Last semester I had the privilege to participate in the Student Investment Fund. Being able to put all the knowledge acquired during the last 3 years into a real-world investment setting, with the mentoring of a great professional and individual as Tally Ferguson, was really unique.”

“I am very thankful for the opportunities the Collins College of Business has provided me. Last fall, I was able to represent the university at the Beta Gamma Sigma Leadership Summit, and recently received the CFA University Scholarship for the Level I exam. I enrolled in the CFA program with the goal of obtaining the highest set of credentials in the global investment management industry. As I plan to pursue the portfolio management path upon graduation, I believe all of these opportunities will have a significant impact on my career.”

Barkley Wilson (BSBA Finance 2017) Roughly 4 years ago, I began my first semester at the University of Tulsa. Before long, I had set my roots and started to make this place my new home. Much to the disappointment of my mother, I do not believe I visited my family at all that first year, despite the reasonable drive to Dallas. However, during this time I not only became enamored with Tulsa and the life I was building, I found Finance as well.

When I began as a business student, as most freshmen, I was unsure of what path I wanted to take. Despite initially studying marketing, I quickly added finance to my curriculum. Today, I near the end of my undergraduate studies, but realize there is still much to learn. I am excited for where my knowledge will take me in the future and I have many professors and mentors to thank for that.

The opportunities provided by the University of Tulsa not only sparked my interest, but allowed it grow. Experiences such as the Student Investment Fund or being in one of TU’s first 2 teams to compete in the CFA Research Challenge are a strong foundation on which I plan to build in the future. I look forward to graduation in May and the challenges that lay ahead of me.
**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: