Gerard Clancy serves as the 20th President of The University of Tulsa.

Prior to assuming the presidency, Clancy served as Vice President for Health Affairs, Dean of the Oxley College of Health Sciences and held the Oxley Foundation Chair in Community Medicine, all at the University of Tulsa. He serves on numerous Boards across Oklahoma and is the 2015 Chairman of the Board of the Tulsa Area United Way. He continues to work at the Laureate Institute for Brain Research and continues to see psychiatric patients.

Dr. Clancy’s areas of expertise include health disparities, health care delivery system and health professions education transformation, severe mental illness and creative talent development, retention and recruitment for regional economic development.

Reservations are required. You may register online: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until October 3, 2017.

Since 1988, A.H. “Chip” McElroy II has led McElroy Mfg., Inc. in partnership with his two sisters, Donna McElroy Dutton and Peggy McElroy Tanner.

Since McElroy was named president and CEO in 1997, the company has experienced some of its most dynamic growth yet. Today McElroy Manufacturing remains a private, second generation family business with a growing professional leadership team supporting a dynamic range of solutions. The company maintains a sharp focus on the design, manufacture, and marketing of its specialty equipment.

McElroy is the largest and most recognized manufacturer of its kind globally. Roughly one-third of the business is export and McElroy has sales offices in the U.K., Chile, Brazil, Australia and India. McElroy employs approximately 300 people and occupies in excess of 300,000 square feet of plant and office space on 30 acres across three campuses in Tulsa.

Reservations are required. You may register online: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until November 14, 2017.
University of Tulsa
Friends of Finance
2017-2018
Executive Speaker Series Luncheons

Sheryl Chinowth
CEO
Chinowth & Cohen Realtors
September 14, 2017

Gerard Clancy
President
The University of Tulsa
October 17, 2017

A.H. “Chip” McElroy II
President & CEO
McElroy Manufacturing, Inc.
November 28, 2017

Thomas Kennedy
Chief Financial Officer
The Hertz Corporation
January 18, 2018

Rusty Braziel
President
RBN Energy
February 21, 2018
Sponsored by:
Keith & Pat Bailey

John Hewitt
President & CEO
Matrix Service Company
March 13, 2018
Sponsored by:
Keith & Pat Bailey

Jeff Pontius
President & CEO
ZebcoBrands
April 19, 2018

Claudia San Pedro
Chief Financial Officer
Sonic Corporation
May 17, 2018

Sponsored by:
Keith & Pat Bailey

Sponsored by:
Keith & Pat Bailey
**Internships and Mentoring**

Your support of the Finance department through contributions to the Finance Excellence Fund is very much appreciated. It helps build the endowment for future scholarships for finance students and supports the resources our finance students and faculty need to succeed in their classes and careers.

Another way to support the finance students is through internships and mentoring. While our students receive a world-class education at the University of Tulsa, adding experience to the education helps develop these students by putting into practice what they have learned, and gaining the guidance and experience of area professionals as they begin and continue to advance in their careers.

If you have an internship opportunity for a finance student, whether it is a summer internship or one that occurs during the academic year, please contact Joel Harper (joel-harper@utulsa.edu, 918-631-3426) in the School of Finance and he will be happy to help find the right student for your internship.

In addition, another way to have a substantial impact on a student is to serve as a mentor to a student as they complete their education and begin their career. Providing career advice, discussing next steps, letting students know about your experiences and successes provides a real connection to students that will help them advance now and in the future. Please consider mentoring a student.

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**The University of Tulsa Student Investment Fund**

Cordially invites members to the

**Fall 2017 New Securities Presentations**

**Wednesday, November 8th**

**Wednesday, November 15th**

University of Tulsa
Collins College of Business
Helmerich Hall

http://www.utulsa.edu/sif
News from the School

Masters in Business Analytics

The School of Finance has introduced a new Master’s program in Business Analytics. The Masters of Science in Business Analytics (MSBA) was approved last spring by the University and has admitted the first class of students this fall. The MSBA develops knowledge and skills in the analysis, interpretation, and prediction capabilities of large sets of data. This program will help students master the technical tools necessary to perform analysis of a variety of data but will also allow them to specialize in a discipline-specific area. Furthermore, coursework will develop the communication skills of students, a key component to employment and success in the field. The MSBA is a 30 credit hour program and can be completed in as few as 16 months. The courses are offered in the evenings to accommodate working professionals. The curriculum includes coursework in Statistics and Data Visualization, Regression and Statistical Modeling, Data Mining and Predictive Analytics, Business Decision Models, and Enterprise Data Systems.

Revisions to Masters in Finance

This fall, the University just approved changes to the MS in Finance degree program. The program was changed into two distinct programs, the MS in Finance (MSF) and the MS in Quantitative Finance (MSQF). The MSF is a 30 credit hour program that is designed for those in a degree in a business discipline and or working in a business area and wants to deepen their knowledge and skills in Finance. The courses will continue to be taught in the evenings and will allow completion in as little as 16 months. The MSQF program is a 36 hour program combining the disciplines of Finance, Mathematics and Business Analytics. It is designed for those who come from an engineering or hard science backgrounds who want to continue into a more quantitative track within the finance area. This new program is a STEM designated program. Watch for more information about the programs by going to business.utulsa.edu.

Please Take the Membership Survey

We want to hear from you! Please go to the following website and take a brief 10-question survey. We would like to know what types of speakers and topics you would like to see as well as what expertise you would like to share with our Finance students. The survey can be found at: Friends of Finance Membership Survey. Thank you for your participation and input!
The 2017-18 Finance Excellence Fund Campaign is about to be launched. Last year, we raised $122,957 from 88 donors. Our goal is to have at least half of our members contribute to the Finance Excellence Fund, which supports the Student Investment Fund. Last year, the distribution from the Student Investment Fund awarded over $150,000 in scholarships and provided almost $100,000 in support for the Risk Management Center. Contributions of any size significantly impacts the education of Finance majors.

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

To date 10 members have donated to the 2017-2018 Finance Excellence Fund. Honor Members are:

<table>
<thead>
<tr>
<th>Finance Partner</th>
<th>Finance Patrons</th>
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<tr>
<td>Keith &amp; Pat Bailey</td>
<td>Kala Sharp</td>
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<table>
<thead>
<tr>
<th>Finance Benefactors</th>
<th>Finance Patrons</th>
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<tr>
<td>Nathan Lovelle</td>
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<tr>
<td>William &amp; Susan Thomas</td>
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We have 275 members to date. Members since our last newsletter are listed below:

Debbie Bacon  Jessica Crews  Dan Hughes  Marilyn Morris  Chris Shannon
Michael Balp  Jake Crissup  James Hunter  Judi Morrow  Kala Sharp
Mike Bartlett Cory Crosier Gayla Hurley  Tara Mundell  Jessie Sheng
David Basden  Mahitha Reddy Jeff James  Mike Neal  Jana Shoulders
Juan Benalcazar Ryan Daniel  Ronnie Jobe  John Neas  Mark Smith
Mark Bender  Jeff Davis  Robbin Jones  Deanne Nunn  Bill Snow
Terry Biehl  Guylene Dooman  Harold Kalich  Michael Osborne  Amy Stutzman
John Boone  Del Dreyer  Jessica Knobbe  Daniel Owens  Ross Swimmer
Theron Bowling  Bob Duenner  Jack Koehle  Tom Owens  James Vaughn
Laurie Brown Purser  Pat Engelmann  Larry Krieg  Bob Paulsen  Drew Veitch
Mary Burchett  Bill Fader  Marvin Krueger  Gavin Pearson  David Veitch
Ellen Burgess  Kelley Fitter  Paula Kuykendall  Steve Poleman  Doug Vincent
Richard Burgess  Greg Ford  Caron Lawhorn  Dustin Pumphrey  Cal Vogt
Bobby Burnett  Bob Fries  Ann Lowry  Britt Radford  Deborah Weierbach
Jason Carini  Bob Geweniger  Haley Lucero  Joe Ragsdale  Duane Wilson
Mike Clark  Sabrina Gicaletto  Anastasia Makarova  Karen Ramsey  Chris Wolking
Joshua Cole  James Gifford  Ram Makkena  Phil Reedy  Joe Wolking
Carrie Coles  Ken Grabow  Jamie Mayes  Jerry Reeves  Barry Woods
J. Markham Collins  Ahren Gutschenritter  Jim McAuley  Derek Reiners  Yu Xiang
Jayme Cox  Dave Harris  David Merrill  Frank Rhoades  Francisco Yanez
Bretton Crane  Ben Herndon  Garrett Mills  Patrick Rooney  Steve Zenthoefer
Lee Crawley  Jim Holloman  Joel Moffitt  Keith Schroeder  Shubo Zhao
Membership

Last year we had membership of 354. This year our membership goal is 500. 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. 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 Dues

Fees for the 2017-2018 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)
- $2,300 One reserved table (8 seats) at each luncheon

Leadership

Our Friends of Finance officers and directors for 2017-2018 are:

Officers
- President: Andrew Ziola, ONEOK
- VP Programs: Kala Sharp, ONEOK
- Treasurer: Roberta Preston, Girl Scouts of Eastern Oklahoma
- Secretary: Phil Reedy
- FEF Chair: Marcia MacLeod
- Membership: Megan Cordle, Alliance Resource Partners

Directors
- Joel Harper, University of Tulsa
- Marc Maun, BOK Financial
- Mike Neal, Tulsa Regional Chamber
- Greg Oliphant, Caja Corporation
- Mike Osborne, Ernst & Young
- Frank Rhoades, Rhoades Oil Company
- Gale Sullenberger, University of Tulsa
- Lane Wilson, Williams

FOF Membership Committee

The following members are the 2017-2018 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

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
Membership
Meeting Registration
Meeting Registration
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 Directory
A listing of all FOF members is provided. Contact information is available only if members agree to have it posted.
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/

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.

Like us on Facebook!

We are also on LinkedIn®
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: