Stacey Pezold has served as Paycom’s Chief Operating Officer since March 2015 and previously served as Paycom’s Executive Vice President of Operations from September 2012 to March 2015 after joining Paycom in 2005.

In the last eight years, Mrs. Pezold has served as Paycom’s Executive Vice President, Director of Corporate Training and Regional Manager. Mrs. Pezold has over 11 years of leadership and training experience. Mrs. Pezold earned her Bachelor’s degree from Oklahoma State University.

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 May 2, 2017.

**FEF Donors Recognized**

Finance Excellence Fund donors will be recognized at the May 16th luncheon. Please plan to attend.

**Election of Officers & Directors Annual Meeting**

The success of Friends of Finance is dependent upon the quality of our leadership. We have been fortunate to have outstanding individuals willing to serve in the past. We are confident that our future leaders will be equally as talented.

Elections of officers and directors for the 2017-2018 year will be held at the May 16th luncheon which also serves as the annual meeting. If you would like to make a nomination, please contact: any member of the nominating committee: Marcia MacLeod, Don Quint, Andrew Ziola, or Joel Harper. Positions to be elected include: President, Vice-President and Program Chairperson, and one Director. Our current Officer & Directors are listed on Page 4.

**Fees**

**Fees for the 2016-2017 year**

*(Reduced as of April 19, 2017)*

- $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)
- $110 (Membership plus all remaining luncheon fees for yourself and one guest)
- $350 One reserved table (8 seats) at each remaining luncheon
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:
WPX Energy

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:
Hall Estill

Mark Emmert
President
NCAA
April 19, 2017
Sponsored by:
Northwestern Mutual
Keith & Pat Bailey

Stacey Pezold
Chief Operating Officer
Paycom
May 16, 2017
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 $81,757.50 from 70 donors. 2016-2017 Finance Excellence Fund Honor Members to date are:

**Finance Sponsor**
Mike & Kathi Colby

**Finance Founder**
Sharon & Robert Prince

**Finance Partner**
Al Walker/Anadarko    Burt Holmes
William & Susan Thomas

**Finance Benefactors**
Joe Adwon      Tom Campbell
Keith & Pat Bailey    Tammie Maloney

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

**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

Laurie Brown Purser    Roberta Preston
Jake Dollarhide    Bill Snow
Tally Ferguson    Chris Wolking
Gordon Nielsen    Zarrow Foundation
Mike Osborne    Andrew Ziola
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, Zarrow Family
- 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

Executive Luncheon Sponsors

If your firm would like to gain some additional recognition and support FOIF, 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.

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 (350), please go to: https://www.collins.utulsa.edu/secure/fof/Members/

Ksenia Laskutova

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

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.
News from the School

The University of Tulsa’s Collins College of Business dedicated an evening to the honor and recognition of student, faculty, staff, and alumni accomplishments at the annual Honors and Awards Banquet on Friday, April 7th, at the Allen Chapman Student Union. The School of Finance, Operations Management, and International Business was well represented.

Timothy L. Urban, J. Bradley Oxley Professor of Operations Management received the Mayo Research Excellence Award.

Outstanding Alumni

Kala Sharp (BSBA ’99)  
Kala is Vice President and Controller, Natural Gas at ONEOK Partners and is Certified Public Accountant and is a member of the AICPA and OSCPA. Kala serves as a board member of Friends of Finance and also the Conference of Accountants.

Don Quint (BS ’78)  
Don is principal and founder of Don P. Quint & Associates and is a Chartered Life Underwriter and also a Chartered Financial Consultant. Don served two terms as president of Friends of Finance, three terms as VP and Program Chair and also served as the first chair of the Student Investment Fund.

David R. Lawson Outstanding Seniors

This award is for academic excellence, leadership and service to the Collins College of Business.

Paul Moses (Accounting and Finance)  
Paul served as an officer for Beta Alpha Psi, Student Finance Association, and the Collegian and was a University Ambassador. Paul will graduate Magna Cum Laude and will join Grant Thornton as an audit associate.

Claire Thompson (Finance, Accounting & Economics)  
After graduating Magna Cum Laude, Claire will be an Analyst at ConocoPhillips in Bartlesville. Claire was involved in Beta Alpha Psi, Reformed University Fellowship, and Kappa Alpha Theta sorority and also served as a University Ambassador.

Francisco Yanez (Finance & Mgmt.)  
Francisco has combined his studies with athletic and professional accomplishments. Francisco represented TU in Beta Gamma Sigma Leadership Summit and participated in the CFA Institute Research Challenge and will take the CFA Level I exam in June. Francisco will graduate Summa Cum Laude.

Outstanding Finance Student Award

Mariyam Khan will graduate Magna Cum Laude and currently serves as Treasury Intern at ONE Gas. Mariyam is a member of Phi Eta Sigma National Honor Society, Beta Apha Psi and Women in Business.

Certificates of Merit

Awarded to students with both an outstanding academic record and major contributions to the College of Business and The University of Tulsa. The following Finance majors received this award.

Ellis Bender  
Collin Mardis  
Matthew Marquez
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 either Calvin Moniz (calvin-moniz@utulsa.edu, 918-631-2072) in the Business Career Center, or Joel Harper (joel-harper@utulsa.edu, 918-631-3426) in the School of Finance and they 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.

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: