September 9, 2009
Founders Day
Robert P. Prince
Co-Chief Investment Officer
Bridgewater Associates, Inc.

Our kick-off speaker for this year’s Friends of Finance Executive Speaker Series will be Robert P. Prince, first president and one of the founders of Friends of Finance.

Mr. Prince is a Partner, Co-Chief Investment Officer, Portfolio Manager, and Member of Management Committee at Bridgewater Associates, Inc. He joined Bridgewater in 1986 and has been a Partner for over ten years and is also a Portfolio Manager at SEI Institutional Managed Trust - Large Cap Diversified Alpha Fund. Over the past 18 years, Bridgewater’s Pure Alpha fund, which has more than $30 billion in assets, has averaged an annual return of 15% before fees and never had an annual loss of more than 2%. In 2008, Pure Alpha had a gross return of 14%. Bridgewater is the largest hedge fund in the world. Prior to joining Bridgewater, Mr. Prince oversaw asset and liability management, funding, and investment portfolio management at the First National Bank of Tulsa in Tulsa, Oklahoma. Mr. Prince is a certified CPA. He has B.S. degrees in Finance and Accounting from the University of Tulsa and also has an M.B.A. from the University of Tulsa.

Reservations are required. You may register on-line at: https://bus.collins.utulsa.edu/fof/reg.asp or contact Judy Adair at 631-2588 or judy-adair@utulsa.edu. Friends of Finance members will have preference until August 23, 2009.

October 14, 2009
Donald Humphreys
Senior VP & Treasurer
Exxon Mobil Corporation

A native of Tulsa, Oklahoma, Mr. Humphreys joined Exxon Chemical Company in 1976. Since then, he has held a number of positions in Houston, Baton Rouge, Baytown, Malaysia, and Irving. Some of his assignments include senior financial advisor, financial reporting manager, assistant general auditor, and controller. In 2006, he was elected SVP and treasurer. He has a BS in Industrial Engineering and Management from Oklahoma State University and an MBA from the Wharton School of the University of Pennsylvania.

Reservations are required. You may register on-line at: https://bus.collins.utulsa.edu/fof/reg.asp or contact Judy Adair at 631-2588 or judy-adair@utulsa.edu. Friends of Finance members will have preference until September 30, 2009.

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 would receive 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. 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 631-2588) if you are interested in being a Luncheon Sponsor.
The old saying ‘From small acorns grow mighty oak trees,” also applies to Friends of Finance. Twenty-five years ago Friends of Finance did not exist. A small group of individuals were still brainstorming and attempting to determine how a support group for the Department of Finance at TU could be organized. Today FOF is a powerful organization second to none for supporting a finance department. The small acorn (the five founders) has unquestionably grown into a mighty oak with more than 400 members; a truly exceptional speaker series which has brought almost 200 speakers and more than 37,000 guests to the TU campus; the development of a $1.2 million endowment for the Finance and OM Department; and the granting of more than $500,000 in scholarships. FOF has achieved much but only because FOF members and friends have been so loyal and supportive. To each of you who has supported FOF in any manner – membership; contributions to the Finance Excellence Fund; suggestions for speakers; being an officer or director, attending luncheons and many other ways, we say thank you. You are the reason Friends of Finance has excelled.

This year in each newsletter and at our luncheons we will provide a brief historical point of interest concerning the development of FOF. The meaning of our tag line, “Bringing the Best to the Best,” is very simple – bringing the best speakers in the U.S. to the best people in the U.S., you – Friends of Finance members and friends.

Some of the “Best”

Roger Staubach
Chairman & CEO, Staubach Co.
January 2005

Roger Jarvis
President & CEO, Spinnaker Exploration
September 2005

Cy Elmburg
Chairman & CEO, Blitz, USA
September 2004
## Upcoming Executive Luncheons:

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<td>Timothy Boyle</td>
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## Membership

Last year we had membership of 420. This year our membership goal is 500. We will be working very hard to meet this ambitious goal by encouraging everyone who was a member last year to renew their membership and all former members who were not members last year to once again become members. 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. Show your support for FOF, The Collins College of Business, and TU by joining today.

To renew your membership or join, go to [https://bus.collins.utulsa.edu/fof/memberapp.asp](https://bus.collins.utulsa.edu/fof/memberapp.asp). Encourage your friends and colleagues to do the same. Friends of Finance is the largest and strongest finance group in Oklahoma and the Southwest. Your membership will help us maintain our leadership position. Members to date (141) are:

- Judy Adair
- Denise Adams
- Barbara Allen
- Kent Allingham
- Jim Arens
- Ana Avila
- Keith Bailey
- Allen Barrow
- Ray Batchelor
- Gary Belitz
- Roger Bey
- Chris Bird
- Gene Bishop
- Lee Bowen
- Gary Bowling
- Meg W. Brimmer
- George Brown
- Mark Buffington
- Richard Burgess
- Peggy Burks
- Jim Butler
- Neyle Cable
- Chris Cable
- Brian Cantrell
- Dick Cantrell
- Nancy Cantu
- Chris Cardoni
- John Chandler

- Jeff Chism
- Chante’ Clarkson
- Jim Colgan
- Megan Cordle
- Suzanne Costin
- Joe Craft
- Patrick Curth
- Harry Dandelles
- Barry Davis
- Keith Diekelman
- Mike Dill
- Dell Dreyer
- Tom Droge
- Janet Duffy
- Bill Fader
- Tally Ferguson
- Norm Fisher
- Kelley Fitter
- Nick Fitzgerald
- Skilly Forsman
- Bob Fouch
- Randy Foutch
- Caroline Franklin
- Tom Franz
- Bob Gaddis
- Steve Ganzkow
- Richard Gibbs
- James Gifford

- Ben Gorrell
- Bill Gottfried
- Rodger Graham
- Toni Haenninen
- Roger Haglund
- Brad Haig
- Glen Hall
- Nelda Hall
- Kara Harper
- Hans Helmerich
- Walt Helmerich
- Eugene Hodel
- Jim Holman
- Jeff Holman
- Russell Iorio
- Ted Jacobs
- Basil James
- Patti Kastl
- Jack Kauff
- Jeff Kendall
- Joe Kidwell
- James Kimbrough
- David King

- Lindsey Madden
- James Maddux
- Kieran Major
- Jim Maxwell
- Bob McCormick
- Jim McGill
- Mary Melon
- David Merrill
- Bill Meyer
- Dale Morgan
- Charlie Myers
- Michael Noland
- Greg Oliphant
- Bob Paulsen
- Mike Payne
- Pam Peck
- Suzanne Penni
- Drew Phillips
- Jack Pinkerton
- Mahlon Pitt
- Bob Portiss
- Wesley Prudom
- Don Quint
- Tom Redman
- Joe Redman
- Lou Reynolds
- Peggy Rice
- Tim Madden

- Doug Riess
- Tom Ritchie
- Frank Robson
- Mike Rothman
- Alex Schneider
- Jerry Schuyler
- J.P. Szafranski
- Richard Shaddox
- Andrew Shank
- Jana Shaddox
- Bill Snow
- Dr. Tom Stees
- Ross Swimmer
- Brook Tarbel
- Mike Payne
- Robert Thomas
- Peter Troxel
- Stuart Turner
- Cal Vogt
- Jon Vrooman
- Bland Williamson
- Sonja Wilson
- Mark Womble
- Daryl Woodard
- Barry Woods
- Scott Zeligson
- Steve Zenthofer
- Fan Zhang
2008-2009
Finance Excellence Fund
2nd Best Year Ever

The economy tanked and the financial markets crashed, but the generosity of the loyal Friends of Finance members and friends resulted in the second best year ever for the Finance Excellence Fund Campaign -- $211,860 from 154 donors. Our best year ever was 2004-05 when $262,295 were contributed. A special thank you to everyone who contributed.

**Finance Founder**
Mike & Caryn Hess

**Finance Partner**
Keith Bailey
Mike & Cathi Colby
Joe Craft

**Finance Benefactors**
Bank of Oklahoma
Roger Bey
Burton Foundation
Tom Campbell
John Chandler
Don Chappel
Collins Foundation
ConocoPhillips
Susan Cravens
Greg Hopeman
Marc Maun
JP Morgan
Genave Rogers
Dan & Vida Schuman

**Finance Patrons**
Joe Adwon
Jeff Davis
David Enke
Alan Ford
Randy Foutch
Kerry Freeman
Walt Helmerich
Steve Hildebrand
Beryl McElhinney
Pete Meinig
Mike Minahan
Don Quint
Frank Rhoades
Frank Robson
Samson Investments
John Steele Zink Fnd.

**Finance Associates**
Nick & Barbara Allen
Jim Arens
Sharon Bell
Aaron Clark
Bob Fitzgerald
Bob Fredrickson
Francis & Judy Gajan
Jim Hill
Bill Hobbs
RJ Laske
Craig Loseke
Kieran Major
Mike Payne
Pam Peck
Mahlon Pitt
Lee Swarthout
Richard Williamson
Zarrow Family Fnd.

**Finance Friends**
Clint Alexander
Kent Allingham
Ken Atwood
Tory Baker
Mike Bartlett
Gary Belitz
Gene Bishop
Wade Biswel
Arnold Brown
Chad Brumley
BUDCO, Inc.
Jim Butler
Jim Colgan
Mark & Becky Collins
Sam Combs
Andrew Comstock
Megan Cordle
Mark Crawford
Lee Crawford
George Dallas
MaryBeth DeWitt
Mike Dill
Pat Donica
Janet Duffy
Bill Fader
Tally Ferguson
Bob Gaddis
Richard Gajan
Steve Ganzkow
Matt Garrett
Bob Geweniger
Jayne Gilsinger
Keith Goddard
Linda Gunnels
Eugene Hodel
Jeff Holman
Carlynnne Holmes
Bruce Humphrey
Russell Iorio
Wilfrido Jatem
Robert Jennings
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John Kauth
Jack Koehle
Mary Korthase
Sanford Leeds
Pete Leininger
William Lissau
Longbow Asset Mgmt.
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Max Mason
Dee McDugle
Jim McGill
Joe McGraw
Bob McGrew
David Merrill
Wayne Middleton
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Jeff Oldham
Craig Owens
David Page
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Jim Pinkerton
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Andrew Aguirre
John Buxton
Patrick Engelmann
Jane Faulkenberry
Skilly Forsman
Ashish Gupta
EJ Hammond
Graydon Luthey
George Matson
Barry Woods
2009-2010
Finance Excellence Fund

The Friends of Finance Board has set a goal of $250,000 for the 25th anniversary of Friends of Finance -- $10,000 for each year FOF has existed. We realize that this is a serious challenge, but are confident that we will succeed. One key to this is to make sure that we do not leave any of our $75,000 challenge match for the Judy Adair Finance Excellence Scholarship Endowment on the table. As a reminder, all gifts above the amount a donor or organization contributed during the 2007-08 campaign will be matched. Donors to date for the 2009-2010 Finance Excellence Fund Campaign are:

Finance Founder
Robert & Sharon Prince

Finance Patron
David Enke

Finance Partner
Keith Bailey

You may contribute on-line at https://bus.collins.utulsa.edu/fof/excellencepledge.asp 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 118-G
Tulsa, OK 74104-9700

Alumni / Student Notes

If you have been promoted, changed companies, earned another degree or have personal information (marriage, birth of child, etc.) please send the information along with a color picture to (judy-adair@utulsa.edu) and we will include it in our newsletter.

FOF Web Site

The FOF website https://bus.collins.utulsa.edu/fof/ includes a number of services as listed below.

New Membership
https://bus.collins.utulsa.edu/fof/memberapp.asp

Meeting Registration
https://bus.collins.utulsa.edu/fof/reg.asp

Members Services
https://bus.collins.utulsa.edu/fof/signin.asp
(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.

Update Member Information
You may update any of your membership information on-line. This will help to make sure that you don’t lose contact with us.

Job Postings
Corporate job openings will be posted. E-mails will be sent to advise you that a new job opening has been posted. You will then go to the web site to see the job description.

Resume Posting
FOF members may post their resume on the FOF web site when they are seeking employment.
Fees

Fees for this year are:
$210  (Membership plus all 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)
$450  (Membership plus all luncheon fees for yourself and one guest)
$250  One reserved table (8 seats)
$2,000 (One reserved table of eight at each Luncheon)

Luncheons:
Members $20
Non-members $30

Members may bring a first time attendee as a guest at the member rate.

Resume Posting

FOF members who are seeking employment may now post their resume on the FOF web site. An e-mail will be sent as new resumes are posted. The e-mail will only list the type of position sought and a link. Your user name and password will be required to access the actual posting.

E-mail your resume as a Word or PDF file to Judy Adair (judy-adair@utulsa.edu) who will post it. In your e-mail, please include a job title (financial analyst, CFO, etc.) of not more than four words. We will not edit your resume. There is no cost to members for this service.

Shuttle Service

Bill White Shuttle Service will provide shuttle service from the parking lots along Gary Place to the Allen Chapman Activity 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.

Job Posting

This year we will continue our web site for job postings service on a no cost basis for all members. Membership is required both to post jobs and to view job postings. Once we post a job, we will distribute an e-mail announcing the new job posting.

Firms who have used FOF to distribute job openings have found it to be a very effective recruiting tool. FOF members have been very appreciative and have told us how they passed along the job information to friends seeking employment. Hence, the distribution is far larger than our membership. We encourage you to have your firm participate in our job posting service.

To post a job opening, e-mail the job description in Word or PDF file, along with contact information to Judy Adair (judy-adair@utulsa.edu) who will post it. We will not edit the files.

Leadership

Our officers and directors for 2009-2010 are:

Officers
President    Greg Hopeman, UBS Financial
VP Programs  Jeff Holman, Magellan Midstream
Treasurer    Eugene Hodel, Hilti, Inc.
Secretary    Geordie Matson, BancFirst

Directors
Roger Bey, TU
Don Chappel, Williams
Sam Combs, Retired from ONEOK
Janet Duffy, Samson Investment Company
Randy Foutch, Laredo Petroleum
Shane Goodwin, Goldman Sachs

Take-A-Student to Lunch

One goal of Friends of Finance is to provide assistance to our students. Assistance may be in the form of employment advice, employment opportunities, and mentoring. One way to do this is to participate in 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.

The annual cost of a Corporate Sponsorship is $3,500. If you are interested in having your corporation join, contact Judy Adair at 631-2588 or judy-adair@utulsa.edu for details. Thus far, 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.

AAPG Mid-Continent Section Meeting 2009
“Resources for the Generations”
October 13, 2009
Presented by: Tulsa Geological Society

America’s Energy Heartland
America’s Energy Future

A distinguished panel of national experts presents this free forum at the Tulsa Southern Hills Marriott that will engage business professionals, scientists, students, and members of the general public in a discussion of energy challenges and opportunities facing the Mid-Continent region.

For more information or to register: www.2009aapgmidcon.com

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/

TU Executive & Professional Development

The Center for Executive & Professional Development in the Collins College of Business can help you brush up your business acumen or prepare for new professional credential. Registration is now open for these and other Fall programs:

Mini-MBA—The TU Mini-MBA is designed to make certain participants leave with knowledge and tools for application that they can actually use in the workplace.

Developing Project Management Skills—This program will help you acquire the must-have skills to successfully to deliver any project on time and within the outlined parameters.

CIA Extreme Exam Prep—This is a blended learning approach—combining the best of online review materials with the best of classroom instruction, to prepare you for testing to become an internationally recognized Certified Internal Auditor.

Oil & Gas Tax + Partnerships—Now being presented in Tulsa, the Tax program will help you understand the bottom line tax implications of exploration and drilling project; while the Partnerships program focuses upon the specific issues encountered by oil and gas partnerships.

For more information and to register online: http://bus.collins.utulsa.edu/cepd/programs.asp or call 918.631.2215
Links

On-line registration

https://bus.collins.utulsa.edu/fof/reg.asp

September: https://bus.collins.utulsa.edu/fof/docs/20090909RegistrationForm.doc

October: https://bus.collins.utulsa.edu/fof/docs/20091014RegistrationForm.doc

December: https://bus.collins.utulsa.edu/fof/docs/20091203RegistrationForm.doc

April: https://bus.collins.utulsa.edu/fof/docs/20100414RegistrationForm.doc

May: https://bus.collins.utulsa.edu/fof/docs/20100504RegistrationForm.doc

https://bus.collins.utulsa.edu/FOF

Membership Form

Pledge Card