Carla Harris is a Managing Director and heads the Emerging Manager Platform at Morgan Stanley Investment Management where she also provides investment advice to corporations, public pension plans, foundations and endowments. She formerly headed the equity capital markets effort for the consumer and retail industries and was responsible for Equity Private Placements. Ms. Harris has extensive industry experiences in the technology, media, retail, telecommunications, transportation, industrial, and healthcare sectors.

For more than a decade, Ms. Harris was a senior member of the equity syndicate desk and executed such transactions as initial public offerings for UPS, Martha Stewart Living Omnimedia, Ariba, Redback, the General Motors sub-IPO of Delphi Automotive, and the $3.2 billion common stock transaction for Immunex Corporation, one of the largest biotechnology common stock transactions in U.S. history.

Reservations are required. You may register on-line at: https://collinssecure.utulsa.edu/fof/Meetings.aspx or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until August 16, 2011.

Meeting Sponsor
MorganStanley
SmithBarney

We extend our thanks and appreciation to Morgan Stanley Smith Barney for serving as our Luncheon Sponsor.

Geoffrey C. Orsak, PhD has been called one of this nation’s key leaders in engineering research and education and its impact on economic development and global competitiveness. The editors of EDN – a leading international design publication wrote that Dr. Orsak is “one of the brightest minds in the world in engineering education.” And in 2006, the editors of EE Times magazine called him a “true pioneer and visionary” and named him their first ever Educator of the Year in engineering and science.

In addition to his professional role leading the University of Tulsa, Dr. Orsak has been a recognized leader in STEM education. He founded and created a number of nationally recognized programs, including the award winning Infinity Project which today provides K-12 students across forty states and eight nations innovative engineering and technology curricula and teacher training.

Reservations are required. You may register on-line at: https://collinssecure.utulsa.edu/fof/Meetings.aspx or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until September 28, 2011.

Meeting Sponsor
Keith and Pat Bailey

We extend our thanks and appreciation to Keith & Pat Bailey for serving as our Luncheon Sponsor.
### Upcoming Executive Luncheons:

<table>
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<th>Date</th>
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<td>Carla Harris</td>
<td>Managing Director</td>
<td>Morgan Stanley</td>
<td>Morgan Stanley Smith Barney</td>
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<tr>
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<td>Geoffrey Orsak</td>
<td>President</td>
<td>University of Tulsa</td>
<td>Keith &amp; Pat Bailey</td>
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<td>12/06/2012</td>
<td>Norm Szydlowski</td>
<td>President &amp; CEO</td>
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<tr>
<td>01/16/2013</td>
<td>Ryan Lance</td>
<td>Chairman &amp; CEO</td>
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<tr>
<td>02/21/2013</td>
<td>Stephen Van Arsdel</td>
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<td>Deloitte &amp; Touche, LLP</td>
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<td>Meredith Siegfried</td>
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<tr>
<td>May 2013</td>
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### Membership

Last year we had membership of 429. 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://collinssecure.utulsa.edu/fof/Application.aspx](https://collinssecure.utulsa.edu/fof/Application.aspx). 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 (150) are:

- Judy Adair
- Linda Adlaf
- Joe Adwon
- Diane Affeldt-Eckstein
- Barbara Allen
- Nick Allen
- Kent Allingham
- Chris Amburgy
- Russ Arnold
- Keith Bailey
- Allen Barrow
- Ray Batchelor
- Roger Bey
- Terry Biehl
- Jim Bishop
- Neyle Cable
- Brian Cantrell
- Steve Care
- John Chandler
- Jim Coles
- Jim Colgan
- Mark Collins
- Trey Cooper
- Megan Cordle
- Suzanne Costin
- Jeff Couch
- Joseph Craft
- Breton Crane
- Jeff Cullison
- Dan Cunningham
- Barry Davis
- Jeff Davis
- Kevin DeVault
- Keith Diekelman
- Mike Dill
- Bob Dupree
- Chris DuVall
- Abe El-Raheb
- Bill Fader
- Ed Fariss
- Ted Feldmeier
- Joe Fink
- Bob Fitzgerald
- David Fleske
- Colby Forrester
- Bob Fouch
- Caroline Franklin
- Tom Franz
- Jordan Friesen
- Phil Frohlich
- Steve Ganzkow
- James Gifford
- Bill Gottfried
- Rodger Graham
- David Hays
- Hans Helmerich
- Ralph Hill
- Eugene Hodel
- Jim Holloman
- Jeff Holman
- Greg Hopeman
- Rick Huck
- Carl Hudgins
- Bruce Humphrey
- Russell Iorio
- Ted Jacobs
- Basil James
- Jeff James
- Robert S. James
- Michael Johnson
- Chris Kelly
- Jeff Kendall
- Joe Kidwell
- David King
- Mary Korthase
- Kevin Lackner
- RJ Lasek
- Dave Lawson
- Sandy Leeks
- Bob Lorton
- Kelly Luelf
- James Maddux
- Kieran Major
- Joel Mattson
- Jim McGill
- Mike McMahon
- Mike Mott
- Kevin Munter
- Frank Murphy
- Kevin Murray
- Mike Neal
- Linda Nichols
- Gordon Nielsen
- Chris Odom
- Tom Owens
- Jody Parker
- Mike Payne
- Dick Pittenger
- Bob Portiss
- Don Quint
- Britt Radford
- Joe Ragsdale
- Lisa Rambo
- Ali Rathore
- Tom Redman
- Peggy Rice
- Rose Rice
- Tom Ritchie
- Harvie Roe
- Brad Rollins
- Vicki Rose
- Sheri Rosson
- Don Rubottom
- Ed Schermerhorn
- Jeff Schmuhl
- Alex Schneider
- Jana Shoulders
- Bill Snow
- Stuart Solomon
- Charlie Strauser
- Ross Swimmer
- Hugh Taylor
- Bill Thomas
- Robert Thomas
- Baxter Thorman
- Jeff Tommerup
- Stuart Turner
- Robyn Undieme
- Kent Van Valkenburgh
- Doug Vincent
- Cal Vogt
- Robert Wagner
- Chuck Walton
- Jean Walton
- Tom Warburton
- Cindy Webb
- Suzanne Wheeler
- Chad White
- David Whitney
- Scot Williams
- Jim Wilson
- Daryl Woodard
- Isabelle Zimmermann
Leadership

Our officers and directors for 2011-2012 are:

**Officers**
- President: Jim Arens, Trust Company of Oklahoma
- VP Programs: Sam Combs, ComStar Advisors
- Treasurer: David Dunham, Unit Corp.
- Secretary: Kieran Major

**Directors**
- J. Markham Collins, TU
- Janet Duffy, Samson Investment Company
- Don Quint, Don P. Quint & Associates
- Phil Reedy, Cherokee Nation Businesses
- Derek Reiners, ONEOK, Inc.
- Frank Rhoades, Rhoades Oil Company
- Rod Sailor, Williams

Alumni News

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.

Fees

Fees for the 2011-2012 year are unchanged:
- $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)
- $2,100 (One reserved table at each luncheon)
  Members may bring a first time attendee as a guest at the member rate.

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.

FOF Web Site

The FOF website www.utulsa.edu/fof/ includes a number of services as listed below.

New Membership
https://collinssecure.utulsa.edu/fof/Application.aspx

Meeting Registration
https://collinssecure.utulsa.edu/fof/Meetings.aspx

Members Services
https://collinssecure.utulsa.edu/fof/Members/
(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.

Job Postings
Corporate job openings are posted on the web site by members. View job description of openings after logging in to Member Services.

Friends of Finance Accomplishments

Friends of Finance (FOF)
- Has existed and thrived for 27 years
- Had 429 dues paying members in 2011-2012
- Has had almost 200 speakers address the group
- Leading executives including Jamie Dimon, Richard Fuld, Kenneth Lewis, Ed Whitacre; Roger Staubach, and John Wooden have spoken at FOF
- Approximately 400 people attend every luncheon
- 40,000+ people have attended the luncheons
- Executive speaker series is the most active in the Southwest
- Students have an exclusive one hour Q&A with the speakers. No other university in the U.S. is known to provide students with the opportunity to visit with a major executive every month.
- No other Finance Department in the U.S. is known to have an equivalent speaker series
- Has been a major force in developing business relationships for TU
Thanks to the amazing support of FOF members and friends, 139 donors contributed $176,925. 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!

Finance Excellence Fund Honor Members for 2011-2012 are:

**Finance Founder**

| Michael & Kathi Colby |
| Bob & Sharon Prince |

**Finance Partner**

| Joe Craft |

**Finance Benefactors**

| Keith Bailey  | David Dunham  |
| Arnold Brown | Helmerich & Payne |
| & Laurie Brown Purser | Jim Holloman |
| Tom Campbell | Greg Hopeman |
| John Chandler | JP Morgan Chase |
| Don Chappel | Marc Maun |
| ConocoPhillips | Samson Investments |
| Susan Cravens | Bill Thomas |
| Jeff Davis |

**Finance Patrons**

| Ellen Adelson | Pete Meinig |
| Joe Adwon | Frank Murphy |
| Randy Foutch | Derek Reiners |
| Steve Hildebrand | Frank Rhoades |
| Jim Hill | Dick Williamson |
| Michael Krimbill | Steve Zenthoefer |
| Tammie Maloney |

**Finance Associates**

| Nick & Barbara Allen | Patti Kastl |
| Jim Arens | Beryl McElhinney |
| Sharon Bell | Craig Owens |
| Chad Brumley | Jody Parker |
| Markham & Becky Collins | Mike Payne |
| Sam & Rita Combs | Pam Peck |
| Jake Dollarhide | Don Quint |
| Janet Duffy | Bill Snow |
| Bob Fitzgerald | Lee Swarthout |
| Bob Fredrickson | Zarrow Foundation |

**Finance Friends**

| Adams Hall Wealth Mgmt. | Mary Korthase |
| Kent Allingham | Sandy Leeds |
| Ryan Andrews | Pete Leininger |
| Allen Atwood | W. R. Lissau |
| Tory Baker | Lindsey & Tim Madden |
| Mike Bartlett | Max Mason |
| Ray Batchelor | Jim McGill |
| Roger Bey | Joe McGraw |
| Bob Boyd | Johnson Moore |
| BUDCO, Inc. | Sue Morris |
| Bobby Burnett | Linda Nichols |
| Jim Cameron | Greg Oliphant |
| John Cary | Suzanne Penni |
| Matthew Clifton | Steve Poleman |
| Jim Colgan | Joe Ragsdale |
| Andrew Comstock | Tom Redman |
| Megan Cordle | Peggy Rice |
| Mike Dill | Patsy Savage |
| Bob Dupree | Kelly Schneider |
| Rebecca Edmiston | Chris Shannan |
| Bill Fader | Brooke Snyder |
| Tally Ferguson | Cherl Snyder |
| Kelley Fitter | Tom Stees |
| Bob Fries | Bruce Stoesser |
| Steve Ganzkow | Gale Sullenberger |
| Bob Geweniger | Ross Swimmer |
| Keith Goddard | Hugh Taylor |
| Eugene Hodel | Bob Traband |
| Jeff Holman | Kent VanValkenburgh |
| Russell Iorio | Dudley Viles |
| Basil James | Tom Warburton |
| Robert James | Lauren Williams |
| Bob Jennings | Chris Wolking |
| James Kimbrough | Daryl Woodward |
| Jack Koehle | Weidong Zhou |

**Finance Donors**

| Andrew Aguirre | David Hays |
| Gina Briggs | Michael Lissau |
| Ron Brown | Charlie Myers |
| Denie Buchanan | Britt Radford |
| Mike Evanson | Joe Redman |
| Jane Faulkenberry | Dennis Reecher |
| Irving Fenster | Sandy Siegfried |
| Theresa Gillock | Barry Woods |
| John Hartman | |
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.

Corporate Sponsors make a $3,800 commitment to Friends of Finance. 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:
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.

Energy Management Center

EARLY BIRD BONUS: As a benefit of your membership, all Friends of Finance members who renew before August 15 are eligible at no cost for a special bonus, the Energy Update Luncheon, August 27, 2012. C. Michael Ming, Okla. Secretary of Energy will present the update. This program is offered by the Collins College of Business Career Center and its Energy Management Center. It is not one of our eight Friends of Finance executive luncheons. To register for the bonus Energy Update Luncheon, please go to their website at https://collins.utulsa.edu/emcfofreg or contact Terry Saunders at 918-631-3587 or terry-saunders@utulsa.edu.

TU Executive & Professional Development

The Center for Executive & Professional Development (CEPD) in the Collins College of Business can help you brush up your business acumen or prepare for new professional credential.

- Accounting and Finance for Non-Financial Managers
  - Manufacturing Version
    - September 18-19, 2012
  - Service Version
    - October 2-3, 2012
- Fall 2012 – “Show Me the Money” (Oct. 4-Nov. 8)
  The beginning of a new, multi-level Finance program jointly sponsored by Collins College CEPD and Friends of Finance. Watch for more information in the coming newsletters.

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

NAIC

Greater Tulsa Area Chapter, BetterInvesting
4th Thursday Free Education Classes
6:45 p.m. – 7:30 p.m.
Hardesty Library, 8316 E. 93rd

NAIC Contact:
Tami deangelistami@hotmail.com or 747-9303
or Barbara wollmersh@aol.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/

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.