December 4, 2013
Seth Masters
Chief Investment Officer
AllianceBernstein

Seth Masters is Chief Investment Officer of Asset Allocation and Bernstein Global Wealth Management and a partner at AllianceBernstein. The firm provides asset management firm with a global scope and has over $446 billion under management as of October 31, 2013.

Masters oversees the firm’s asset-allocation portfolios, including the Private Client, Target Date and Target Risk portfolios.

In June 2008, Masters was appointed to head AllianceBernstein’s newly formed Defined Contribution business unit. He became CIO of Blend Strategies in 2002 and launched a range of style-blended and asset-allocation services that have since become a significant portion of the firm’s assets.

Meeting Sponsor

AllianceBernstein

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

2013-2014
Finance Excellence Fund

Phil Reedy, Finance Excellence Fund (FEF) chair announced the 2013-2014 Campaign is open. Investments in the FEF become part of the endowment that is the Student Investment Fund (SIF). Currently 22 students, under the direction of SIF Coordinator/Instructor Tally Ferguson, manage $3.5 million. The portfolio consistently matches or exceeds the performance of the S&P 500.

Earnings from the Fund are used to support student scholarships, research and teaching requirements for SIF, and enhancements for the School of Finance, Operations Management and International Business.

Our goal for 2013-2014 is $225,000 including $75,000 in new contributions to the Judy A. Adair Matching Grant. Make your donation now by investing online: https://collinssecure.utulsa.edu/fof/Pledge.aspx or send a check payable to University of Tulsa Finance Excellence Fund and send to:

Friends of Finance
Collins College of Business
The University of Tulsa
800 South Tucker Drive, Helm 118-G
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!
Membership

Membership is critical to our success. 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.

To renew your membership or join, go to 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 since our last newsletter are below. For a complete list of members (359), please go to: https://collinssecure.utulsa.edu/fof/Members/

Keith Bailey
Steve Barnes
Bob Boyd
Stephen Brocks
Jeff Chism
Andrew Coffey
Ted Cowan
Darrin Crawford
Lee Crawley
Austin Elsey
Carl Daugherty
Paige Gero
Terri Goodman
Gayla Hurley
Jesse Keipp
Steve Kim
Mingxi Liu
Linda Nichols
Yavor Nikolov
Stephen Patton
Jaclyn Presnal
Larry Rader
Frank Rhoades
Peggy Rice
Kelly Schneider
Bob Swain
Xiaoxiao Wang
Bill Wiles
Duane Wilson
Paul Wilson
Jingyi Yu

Leadership

Our officers and directors for 2013-2014 are:

Officers
President Sam Combs, ComStar Advisors
VP Programs Don Quint, Don P. Quint & Associates
Treasurer Shawn Crisp, Trust Co. of Oklahoma
Secretary Kieran Major, American Airlines

Directors
J. Markham Collins, TU
David Dunham, Unit Corp.
Marcia MacLeod, WPX Energy
Phil Reedy
Derek Reiners, ONEOK, Inc.
Frank Rhoades, Rhoades Oil Company
Paul Samuels, Morgan Stanley Smith Barney

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 2013-2014 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)

$2,100 One reserved table (8 seats)

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

Friends of Finance Accomplishments

Friends of Finance (FOF)
- Has existed and thrived for 28 years
- Had 429 dues paying members in 2012-2013
- Has had over 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
- 50,000+ 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 U.S. Business or Finance Program is known to have an equivalent speaker series
- Has been a major force in developing business relationships for TU

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/](http://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.

**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 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. 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 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:

JPMorganChase

HILTI

MidFirst Bank

Adams Hall
Wealth Advisors

Trust Company of Oklahoma

Laredo Petroleum, Inc.

Magellan Midstream Partners, L.P.

Williams

Wpx Energy

Commerce Bank
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.

**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/](http://www.typros.org/)

**TU Executive & Professional Development**

The Center for Executive and Professional Development offers a variety varied curriculum of seminars, certificate programs and conferences. A series of energy-related programs for accountants, auditors, tax professionals are scheduled in Houston: and Tulsa: through the year. In addition, a multi-level series in project management is offered this spring in Tulsa. All programs can be customized and delivered as onsite at any company.

For more program descriptions, registration information or questions, please go to: [http://bus.collins.utulsa.edu/CEPD/](http://bus.collins.utulsa.edu/CEPD/) or contact Center Director Linda Adlof at linda-adlof@utulsa.edu.

**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 Contacts:
Tami [deangelistami@hotmail.com](mailto:deangelistami@hotmail.com) or 747-9303
Barbara [wollmersh@aol.com](mailto:wollmersh@aol.com)

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**We are also on LinkedIn**