Kim Lubel serves as Chairman, President & CEO of CST Brands, Inc. (NYSE: CST), one of the largest independent retailers of motor fuels and convenience merchandise in North America. Based in San Antonio, Texas, CST employs nearly 12,000 team members at nearly 1,900 retail locations throughout the Southwestern United States and Eastern Canada. Kim joined CST Brands after over 15 years of service with Valero Energy Corporation, having served most recently as its Executive Vice President and General Counsel since 2007 until accepting her current position in January 2013. Kim also serves on the Board of Directors of Tulsa-based WPX Energy, Inc., an NYSE-listed exploration and production company.

Reservations are required. You may register on-line: [https://collinsecure.utulsa.edu/fof/Meetings.aspx](https://collinsecure.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 November 4, 2014.

President and CEO Colin Marshall is responsible for the operations of Cloud Peak Energy. The company operates three Powder River Basin coal mines in Wyoming and Montana. Cloud Peak has over 1,700 employees, shipped 86 million tons in 2013, and supplies the fuel for approximately four percent of the nation’s electricity. The firm is headquartered in Wyoming and its shares are traded on the NYSE.

Before his appointment as head of Cloud Peak Energy, Mr. Marshall was President and CEO of Rio Tinto Energy America (RTEA) prior to the company’s public offering as Cloud Peak Energy (CLD). Preceding RTEA, Mr. Marshall was the General Manager of Rio Tinto’s West Pilbara iron ore operations. He was located in Tom Price, West Australia, where he managed four iron ore mines.

Reservations are required. You may register on-line: [https://collinsecure.utulsa.edu/fof/Meetings.aspx](https://collinsecure.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 January 6, 2015.

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

We extend our thanks and appreciation to Keith and Pat Bailey and Alliance Resource Partners for serving as our Luncheon Sponsors.
2014-2015
Executive Speaker Series Luncheons

Mark Casady
Chairman & CEO
LPL Financial
September 11, 2014
Sponsored by:

Steve Bradshaw
President & CEO
Bank of Oklahoma
October 16, 2014
Sponsored by:

Kimberly Lubel
President & CEO
CST Brands
November 18, 2014
Sponsored by:

Colin Marshall
President & CEO
Cloud Peak Energy
January 20, 2015
Sponsored by:

Michael Hagedorn
Vice Chairman
UMB Financial Corp.
February 18, 2015

Mike Dubose
Global VP
W. W. Grainger
March 11, 2015

Pete Delaney
Chairman, Pres. & CEO
OG&E Energy Corp.
April 23, 2015

John Richels
President & CEO
Devon Energy
May 28, 2015
Sponsored by:
**2014-2015**

**Finance Excellence Fund**

The 2014-15 Finance Excellence Fund Campaign is about to be launched. Last year, we raised $188,210 from 119 donors. We need everyone’s help to continue raising FOF to higher and higher levels.

You may contributing on-line at: https://bus.collins.utulsa.edu/fof/excellencepledge.asp

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 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!

**Follow the Zodiak**

The Collins College of Business Center for Executive and Professional Development program, Accounting & Finance for Non-Financial Managers, is offered November 11 and 12 on campus. Led by Professors J. Markham Collins and J. Michael McCrary, the program uses the Zodiak board game to simulate a manufacturing firm. The Zodiak business simulation quickly immerses participants in the world of business. As the new owners of a struggling 40-million-dollar company, participants engage in selling products and services, collecting receivables, tackling quality problems, investing in R&D to upgrade or improve products, and fielding shareholders’ questions. If members of your firm need better understanding of accounting and finance or how daily decisions affect the firm’s bottom line, this class is the one. Contact Center Director Linda Adllof at linda-adllof@utulsa.edu or go to: http://bus.collins.utulsa.edu/CEPD.

**Membership**

Last year our membership was 405. This year the 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. Regular membership is $75 and supports 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. New members to date (378 total) are:

Arnold Brown  
Laurie Brown Purser  
Tim Cargile  
Lee Crawley  
Bob Duenner  
Michael Dupree  
T.D. Eureste  
Mitchell Harding  
Gayla Hurley  
Peter Janzen  
Harold Kalich  
Matthew Kirby  
Laura Law  
Mary Lhevine  
Jennifer Mitcho  
Jacob Norse  
Greg Oliphant  
Ira Phillips  
Jaelyn Presnal  
George Schnetzer  
Gann Swan  
Bill Thomas  
Duane Wilson  
Paul Wilson  
Travis Woodard
Graduate Business Programs

Graduate Business Programs in TU’s Collins College of Business include a Master of Science of Finance program, both a Full Time MBA program (Partnering with Business) and an MBA program for Working Professionals. In addition, we offer a Master of Accountancy program and an on-line Master of Energy Business program.

These programs are designed to help our business graduates become leaders in their professions, organizations, and communities. We emphasize academic rigor, practical problem solving, hands-on experience and teamwork. Graduate Assistantships, Scholarships, and financial aid are available to our students, and TU offers payment plans for students expecting tuition reimbursement from their companies. TU’s graduate programs are accredited by AACSB International, The Association to Advance Collegiate Schools of Business. Contact us for more information: 918-631-2242 or graduate-business@utulsa.edu.

Leadership

Our Friends of Finance officers and directors for 2014-2015 are:

**Officers**
- President: Sam Combs, ComStar Advisors
- VP Programs: Don Quint, Quint & Associates
- Treasurer: Shawn Crisp, Trust Company of Oklahoma
- Secretary: Roberta Preston, Girl Scouts of Eastern Oklahoma

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

Fees

**Fees for the 2014-2015 year are unchanged:**
- $175 (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)
- $355 (Membership plus all luncheon fees for yourself and one guest)
- $1,600 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 29 years
- Had 405 dues paying members in 2013-2014
- 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
For Members Only

“Members Only” opened in August with TU Athletic Director, Derrick Gragg and three TU head coaches: men’s basketball coach, Coach Frank Haith, women’s basketball coach, Coach Matilda Mossman and women’s golf coach, Coach Emilee Klein-Gille. The coaches mixed and mingled with the membership in the President’s Suite at the Reynolds Center. The after work event allowed for networking and conversation in a casual atmosphere.

Dr. Gragg briefed us on the challenges and opportunities of moving to the American Athletic Conference and Coach Haith really seemed excited as he explained how talented our new league is. With last year’s NCAA Champions in both men’s and women’s basketball, University of Connecticut, he expects interest and excitement to be up this year.

The second Members Only event is planned for early December. A “Tour and Taste” event at Marshall’s Brewery should be fun. Watch for the announcement. Remember, only members may register and space is limited, so it will be on a first come basis.

The University of Tulsa Student Investment Fund

Cordially invites members to the

Fall 2014 New Security Presentations

Wednesday, November 12th
Consumer Staples, Consumer Discretionary Sectors

Wednesday, November 19th
Energy, Healthcare, Telecommunications, Info Technology Sectors

University of Tulsa
Collins College of Business
Helmerich Hall, Room 219

http://www.utulsa.edu/sif
**FOF Web Site**

The FOF website [www.utulsa.edu/fof/](http://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**
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. Any member may place an opening for his or her firm. 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. WPX Energy is sponsoring our November 18th program featuring Kimberly Lubel, President & CEO of CST Brands. 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. 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.

October 16, 2014 luncheon
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.

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 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/ 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 or 747-9303
Barbara wollmersh@aol.com

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We are also on LinkedIn®