Mark Casady is chairman of the board and chief executive officer of LPL Financial, which he has guided to become a leading financial services organization serving independent financial advisors, banks, and credit unions and providing clearing services to broker and dealers at financial services companies. LPL Financial is the largest organization of independent financial advisors in the US, with over 13,300 independent financial advisors.

Before joining LPL Financial in 2002, Mr. Casady was managing director of the mutual fund group for Deutsche Asset Management, Americas—formerly Scudder Investments. He joined Scudder in 1994 and held roles as managing director, head of the global mutual fund group, and head of defined contribution services; he was also a member of the Scudder, Stevens, and Clark board of directors and management committee. Prior to Scudder, he held roles at Concord Financial Group as institutional sales manager and at Northern Trust as vice president of investments and head of global custody operations in its London office.

Reservations are required. You may register on-line: 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 28, 2014.

Steve Bradshaw is president and CEO of BOK Financial Corp., a top 25 U.S. based financial services company. He oversees the Oklahoma based, $27 billion corporation which provides commercial and consumer banking, investment and trust services, mortgage origination and servicing, and the TransFund electronic funds transfer network. Bradshaw became the top executive at BOK Financial in January of 2014.

In his 23 years at BOK Financial, Bradshaw has served in a number of roles, ultimately having oversight of every function of the bank at some point. Most recently he was senior executive vice president, responsible for all aspects of consumer banking, corporate marketing, mortgage banking, investment securities, trust activities, treasury services, international banking, community development and Community Reinvestment Act responsibilities for all seven banks within the company.

Reservations are required. You may register on-line: 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 28, 2014.

Meeting Sponsor

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

Mark Casady
Chairman & CEO
LPL Financial
September 11, 2014

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

Kimberly Bowers
President & CEO
CST Brands
November 18, 2014

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:
Membership

Last year we had membership of 405. This year our membership 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. 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 to date (242) are:

Judy Adair
Linda Adlof
Joe Adwon
Andrew Aguirre
Nick Allen
Barbara Allen
Kent Allingham
Leila Americano
Jim Arens
Keith Bailey
Steve Baker
Michael Balp
Steve Barnes
Allen Barrow
Mike Bartlett
Ray Batchelor
Tammy Been
Brad Beeson
Doug Beineman
Roger Bey
Patty Bick
Dale Billam
Rolf Blom
Adele Blom
John Boone
Jan Broyles
Kevan Buck
Phil Burch
Richard Burgess
Rick Buterbaugh
Jason Butler
Julie Buxton
Nevyle Cable
Tom Campbell
Dick Cantrell
Brian Cantrell
Wen Chiang
Andrew Coffey
Michael Colaw
Carrie Coles
Jim Coles
Jim Colgan
Jared Collier
J. Markham Collins
Becky Collins
Trey Cooper
Nick Cordle
Megan Cordle
Suzanne Costin

Jeff Couch
Carroll Craft
Joseph Craft
Bretton Crane
Jake Crissup
Matt Crook
Harry Dandelles
Carl Daugherty
Jeff Davis
Barry Davis
Keith Diekelman
Mike Dill
Curtis Dinan
Jake Dollarhide
Ken Dornblaser
Del Dreyer
Frederick Drummond
BobDupree
David Eastin
Brian Elliott
Scott Eslicker
Bill Fader
Stephen Fater
Tally Ferguson
Scott Filstrup
Joe Fink
Bob Fitzgerald
David Fleske
Geoffrey Fonga
Greg Ford
Bob Fouch
Randy Foutch
Caroline Fox
Tom Franz
Bob Fredrickson
Michelle Freres
Bob Fries
Phil Frohlich
Saletha Fuller
Steve Ganzkov
Richard Gebhart
Jessica George
Paul Giehm
James Gifford
Terri Goodman
Rodger Graham
William Grimm
David Hall
David Hardy

David Hays
Hans Helmerich
Jerry Hensley
Jeff Holman
Greg Hopeman
Rick Huck
Marilyn Ilhoff
Russell Iorio
Jeff Jackson
Ted Jacobs
Robert Jennings
Larry Johnson
Katie Johnson
Robbin Jones
Lindsay Jordan
George Kamp
James Kelley
Jeff Kendall
Joe Kidwell
Natalie Killingsworth
Kathy King
Matt King
Jim Kiser
Kat Knapp
Jessica Hargis
Jack Koehle
Jana Krebs
Michael Krimbill
Caron Lawhorn
Dave Lawson
Sandy Leeds
Don Lehman
John Lindsay
Ann Lowry
Louis Chunyong Luo
James Maddux
Anila Madhan
Kieran Major
Tammie Maloney
Steven Mandeville
Adam Marshall
David McCollum
Bob McCormick
Jim McGill
Louis Medina
Pete Meinig
Mary Melon
Beverly Monnet
Gary Morgan
Jack Morrow
Judi Morrow
Mike Neal
Linda Nichols
Gordon Nielsen
Ashley Obana
Michael Osborne
Tom Owens
John Patterson
Bob Paulsen
Gavin Pearson
Drew Phillips
Brian Pillmore
Robert Preston
Sharon Prince
Bob Prince
Brady Pringle
Don Quint
Larry Rader
Tom Redman
Joe Redman
Derek Reiners
Robert Reins
Linda Reins
Lou Reynolds
Trish Richey
Hugh Robert
Frank Robson
Philippe Rohner
Brad Rollins
Lori Rowan
Bob Russell
Robert Sartin
Alex Schneider
Charles Secret
John Senger
Andrew Shank
Jana Shoulders
Sandy Siegfried
Julie Skye
Julie Smith
Mark Smith
Stephanie Smith
Bill Snow
Susan Burford
Stuart Solomon
Jim Sorem
Steve Soule
Michael Steffensen
Jay Still
Tyler Strathe
David Stratton
Gale Sullenger
Stuart Sullivan
Richard Sullivan
Lisa Sullivan
Ross Swimmer
Jochen Talmon
Kyle Taraszka
Robert Thomas
Baxter Thorman
Tim Tolin
Jeff Tommerrup
Mike Troilo
Ron Turnage
Stuart Turner
Skye Tylch
Tim Urban
Kent
VanValkenburgh
David Veitch
Peter Viles
Philip Viles
Doug Vincent
Cal Vogt
Jon Vrooman
Robert Wagner
Brian Walkup
John Walkup
Jean Walton
Chuck Walton
Tom Warburton
Andrew Warren
Chris Weatherl
Megan Weinkauf
Bob West
Suzanne Wheeler
David Whitney
Megan E Whitney
Tom Wilkins
Jim Wilson
Tom Wingerter
Daryl Woodard
Barry Woods
Steve Zenthofer
Andrew Ziola
Finance Excellence Fund
Honor Roll

Thanks to the amazing support of FOF members and friends, we raised $188,210 from 119 donors. 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!

2013-2014 Finance Excellence Fund Honor Members are:

**Finance Sponsor $25,000 - $99,999**
- Mike & Kathi Colby

**Finance Founder $10,000 - $24,999**
- Bob & Sharon Prince

**Finance Partner $5,000 - $9,999**
- Michael Krimbill
  - Al Walker/Anadarko Petroleum

**Finance Benefactors $1,500 - $4,999**
- Joe Adwon
- Keith Bailey
- Arnold Brown
- Tom Campbell
- Sam & Rita Combs
- George & Jennie Collins Foundation
- Helmerich & Payne
- Jim Holloman
- Greg Hopeman
- J.P. Morgan Chase
- Tammie Maloney
- Bill & Susan Thomas

**Finance Patrons $1,000 - $1,499**
- Adams Hall Wealth Mgmt.
- Richard & Ellen Burgess
- Donald Chappel
- J. Markham & Becky Collins
- Steve Hildebrand
- Pete Meinig
- Craig Owens
- Derek Reiners
- Frank Rhoades

**Finance Associates $500 - $999**
- Nick & Barbara Allen
- Jim Arens
- Ben Abney
- Sharon Bell
- Laurie Brown Purser
- Jeff Davis
- Jake Dollarhide
- Bob Fredrickson
- Jack & Joan Koehle
- Kieran Major
- Gordon Nielsen
- Jody Parker
- Don Quint
- Bill Snow
- Lee Swarthout
- Tom Warburton
- Dick Williamson
- Chris Wolking
- Zarrow Foundation
- Steve Zentheofer

**Finance Friends $100 - $499**
- Kent Allingham
- Ryan Andrews
- Loren Armstrong
- Tory Baker
- Mike Bartlett
- Roger Bey
- Dale Billam
- Denie Buchanan
- BUDCO
- Nevyale Cable
- Jim Colgan
- Andrew Comstock
- Megan Cordle
- Lee Crawley
- George Dallas
- Harry Dandelles
- Mike Dill
- Frederick Drummond
- Bill Fader
- Tally Ferguson
- Debbie Fleming
- Bob Frye
- Francis Gajan
- Steve Ganzkow
- Bob Geweniger
- Keith Goddard
- Carlynne Holmes
- Mike Huckaby
- R. S. James
- Kent Allingham
- John Kauth
- Stephen Layton
- Sandy Leeds
- Max Mason
- Jim McGill
- Joe McGraw
- Callie Mitchell
- Johnson Moore
- Linda Nichols
- Greg Oliphant
- Bob Paulsen
- Pam Peck
- Julia W. Quigley
- Tom Redman
- Phil Reedy
- Doug Riess
- Patsy Savage
- Kelly Schneider
- Nicole Simmons
- Brooke Snyder
- Cherl Snyder
- Tom Stees
- Bruce Stoesser
- Gale Sullenberger
- Richard Sullivan
- Ross Swimmer
- Baxter Thorman
- Bob Traband
- Dudley Viles
- Weidong Zhou

**Finance Donors $1-$99**
- Andrew Aguirre
- Scott Bennett
- John Buxton
- Bob Dupree
- Jane Faulkenberry
- Irving Fenster
- Jayne Gilsginer
- Andrew Aguirre
- John Hartman
- Bob Jennings
- Mary Korthase
- Dennis Reecher
- Philip Viles
- Meg Whitney
Fees

Fees for the 2014-2015 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 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

In this Newsletter

- Upcoming Executive Luncheons
- Dues & Registration fees
- Alumni News
- Departmental News
- Finance Excellence Fund
- Corporate Sponsors
- Affiliate Programs

Other Links

- Meeting Registration
- Finance Excellence Fund
- Student Investment Fund
- Previous Newsletters
- Previous Speakers

Leadership

Our 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
FOF Web Site

The FOF website 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.

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.

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. Alliance Resources is sponsoring our October 16th program featuring Steve Bradshaw, President & CEO of Bank of Oklahoma. 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.
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/](http://www.typros.org/)

**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

**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.

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