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

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://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 January 6, 2015.

Meeting Sponsors

ALLIANCE RESOURCE PARTNERS, L.P.

Keith & Pat Bailey

We extend our thanks and appreciation to Keith and Pat Bailey and Alliance Resource Partners for serving as our Luncheon Sponsors.

February 18, 2015
Michael Hagedorn
President & CEO, UMB Bank
Vice Chairman, UMB Financial Corp.

Michael Hagedorn is president and chief executive officer of UMB Bank and vice chairman of UMB Financial Corporation. He is responsible for commercial banking, business banking, small business banking, private wealth management, institutional asset management, correspondent banking, consumer banking and UMB Financial Corporation’s investment portfolio.

Prior to this role, Hagedorn served as chief financial officer and chief administrative officer of UMB Financial Corporation with responsibility for corporate and regional finance, corporate treasury, audit, compliance, regulatory reporting, strategic planning, investor and government relations, mergers and acquisitions, management reporting, corporate development, corporate security, properties, enterprise project management, corporate legal, management information systems and the operations technology group. He joined UMB in 2005.

Registered on Nasdaq UMB Financial shares have appreciated by 220 percent over the past 10 years. UMB Bank, headquartered in Kansas City, MO has operations in eight states including Oklahoma.

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 February 4, 2015.

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
Sponsored by:

Mike Dubose
Global VP
W. W. Grainger
March 11, 2015
Sponsored by:

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

John Richels
President & CEO
Devon Energy
May 28, 2015
Sponsored by:
The 2014-15 Finance Excellence Fund Campaign has been launched. To date, we have raised $113,260 from 42 donors. Our goal is $200,000 this year, and we believe we can make it.

We need everyone’s help to continue raising FOF to higher and higher levels.

You may contributing on-line at: https://collinssecure.utulsa.edu/fof/Pledge.aspx
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 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!

Finance Excellence Fund Honor Members to date are:

**Finance Sponsor**
- Mike & Kathi Colby  
- Andrew & Helen MacKay

**Finance Benefactors**
- Joe Adwon  
- J.P. Morgan Chase  
- Phillips 66  
- Bill Thomas

**Finance Patrons**
- Allen Barrow  
- Arnold & Pat Brown  
- David Eastin  
- David Lawson

**Finance Associates**
- Sharon Bell  
- Bob Fredrickson  
- Beryl McElhiney  
- Tom Redman  
- Lori Rowan  
- Bill Snow

**Finance Friends**
- Kent Allingham  
- Michael Balp  
- Mike Bartlett  
- Kui Cheng-Gugliotta  
- Jim Colgan  
- Mike Dill  
- Frederick Drummond  
- Tally Ferguson  
- Bob Fitzgerald  
- Debbie Fleming  
- Bob Geweniger  
- R. S. James  
- Kent Allingham  
- Michael Balp  
- Mike Bartlett  
- Kui Cheng-Gugliotta  
- Jim Colgan  
- Mike Dill  
- Frederick Drummond  
- Tally Ferguson  
- Bob Fitzgerald  
- Debbie Fleming  
- Bob Geweniger  
- R. S. James

**Finance Donors**
- Andrew Aguirre  
- Carlynne Holmes  
- Bob Jennings
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 (400 total) are:

Orgil Batsaikhan  David Merrill
Kendall Beaver  Garrett Mills
Pat Donica  Ben Moyer
Pat Engelmann  John Neas
Greg Gallant  Chris Odom
Jason Hughes  Sondra Perdue
Austin Hunt  Stacy Roberts
Jeff Husen  Mark Roberts
Nathan Lovelle  Kelly Schneider
Andy MacKay  Kolton Taylor
Joel Mattson  Rachel Winn

Fees

Fees for the 2014-2015 year have been reduced as of December 1, 2014:

$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)

$325 (Membership plus all luncheon fees for yourself and one guest)

$1,350 One reserved table (8 seats)

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

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

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
“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. We had 45 members attend.

“Members Only” continue December 2nd and 3rd with “Tour and Taste” at Marshall’s Brewery. This event was so popular, the 45 spaces filled the first morning, and we had to ask Marshall’s for a second night.

Eric Marshall, TU graduate and friend of the School, gave Members a tour of the brewery and explained the beer making process. We had over 90 members attend the two night event.

Members tasted up to four fresh beers and experienced how different hops influence the taste and experience. Marshall’s imports malt and hops from Germany with other hops coming from a variety of countries.

The mix of member participants included new members who joined within the past month and others who have been members for over 20 years. Participants had the opportunity to network with Finance faculty members, undergrad and graduate students, and professionals along with a few retirees.

Become a member today to be sure you can join us for the next “Members Only” event.
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 918-631-2588 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 Resource Partners and Keith & Pat Bailey are sponsoring our January 20th program featuring Colin Marshall, President & CEO of Cloud Peak Energy. 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/)

**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](mailto: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**