January 13, 2005
Roger Staubach
Chairman & CEO
The Staubach Companies

On January 13, 2005, Roger Staubach, Heisman Trophy Winner at Navy, Dallas Cowboy star quarterback and successful real estate businessman, will be our Executive Luncheon speaker.

The high demand for seats may force us to limit the number of seats available for non-members. Therefore, if you want to guarantee a seat and are not a Friends of Finance member, please join today by completing the attached membership application. Friends of Finance members will have preference until December 10th.

Please register today. To print the meeting registration form, go to Meeting Registration.

NOTE: The meeting will be held at the Downtown DoubleTree Hotel. Tickets will be mailed to you by January 7th.

Roger Staubach
January 13, 2005
Private Reception

At 10:00 a.m., prior to the FOF Executive Luncheon, a private reception will be held. Attendees will have the opportunity to visit with Roger Staubach and have their picture taken with him. Attendance will be limited to:

- Corporate Sponsors and their table attendees
- Individuals and their guests who purchase a table for 10 for $1,000 (Each reserved table will receive one autographed football)
- Non-members of Friends of Finance who purchase individual luncheon tickets for $100
- Friends of Finance members who purchase an individual luncheon ticket for $75
- Friends of Finance members who have pre-paid for the year may purchase a reception ticket for $50

To make reception reservations, contact Judy Miller at judy-miller@utulsa.edu or 631-2588.

We have a limited amount of reception spaces, so register early to guarantee a place.

Sponsor
Trust Company of Oklahoma

Our sponsor for the Roger Staubach luncheon and reception is The Trust Company of Oklahoma. We thank them for their generous support.

Drew Pearson comes to TU

Drew Pearson (’73), one of Roger Staubach’s favorite receivers will attend the private reception and introduce Roger Staubach at the January 13th luncheon.
Our January 20, 2005 speaker is Douglas E. Hill, Managing Partner of Edward Jones. Hill has been with Edward Jones since 1968 when he graduated from Kansas State. In January 2004, Doug Hill became Edward Jones’ managing partner, becoming only the fourth person to hold this position in the firm’s 133 year history.

Edward Jones has experienced great growth over the past fifty years. The number of investment representatives has grown from 32 in 1950; to 60 in 1960; 149 in 1970; 378 in 1980; 1,644 in 1990; 5,939 in 2000; and some 9,000 today. Come and learn how they have achieved such amazing growth and what the vision for Edward Jones future is.

Please register today. A meeting registration form is at Friends of Finance.

**Avoid Parking Problems**

At every on-campus FOF meeting, Bill White Shuttle Service will provide shuttle service from the parking lot north of the Reynolds Center (8th & Harvard) to the Allen Chapman Activity Center between 11:00 a.m. and 2:00 p.m. This service is funded by FOF officers and directors. A campus map is available at [http://www.utulsa.edu/campusmap/print.html](http://www.utulsa.edu/campusmap/print.html)

**Alumni News**

**Clint Dishman** (BSBA ’92, MBA ’97) has joined BOK Financial Group as vice president and trust investment officer.

**Melissa Bitsche** (BS ’01, MSF ’03) was promoted to assistant vice president in BOK’s consumer banking and wealth management division.

**Elena Zimina** (MSF ’03) has accepted a position with the Danish Investment Fund. She is in a training program in Copenhagen for the next 1-2 years and then will transfer to Moscow.

Please send any news, personal or business, that you would like to share with FOF members to judy-miller@utulsa.edu.

**No Shows**

We have had an increasing number of individuals who make reservations, indicate they will pay at the door, but do not attend or cancel their reservation. Since we have guaranteed a place for them, we unfortunately have to pay for their meal even though we have not received any revenue.

To eliminate FOF from having to absorb theses costs, we will begin to invoice individuals who register but do not attend and do not pay.

If you have not paid for your reservation, you may avoid being invoiced by canceling your reservation three business days prior to the luncheon (that is when we must guarantee our luncheon attendance).

**Take-A-Student to Lunch**

One goal of Friends of Finance is to provide assistance to 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. Contact Judy Miller at 631-2588 or judy-miller@utulsa.edu and tell her how many students you would like to host.
New Member Services

New exclusive on-line serves for members include:
- Membership Directory
- Ability to update your membership profile
- Job Postings
- Resume Postings
- Membership Renewal

In addition, first time members may join online. Go to: https://bus.cba.utulsa.edu/fof/memberapp.asp to join or re-new your membership.

Seeking a Position

FOF members may now post their resume on the FOF web site. E-mail your resume as a Word file to Judy Miller (judy-miller@utulsa.edu) who will post it. In your e-mail, please include a job title (financial analyst, CFO, etc.) of not more than four words. We will not edit your resume. There is no cost to members for this service.

Filling Your Positions

Corporations and placement firms may now post professional job openings on the FOF web site. https://bus.cba.utulsa.edu/fof. To post a job opening, e-mail the job description in Word or PDF file, along with contact information to Judy Miller (judy-miller@utulsa.edu) who will post it. We will not edit the files. Once a job opening has been posted, an e-mail with the job title will be sent to everyone on our e-mail distribution list.

The cost of posting job openings for one year (June 1 – May 31) is $500 for corporations, and $1,000 for placement or employment agencies. Posting fees include one FOF membership for the participating firm or agency contact person. Job postings for all professional positions, any area, are welcome.

Luncheon Sponsor

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. The Luncheon Sponsorship is for one meeting. The cost is $1,000. There will be no more than two Luncheon Sponsors at a single meeting. Contact Judy Miller, (judy-miller@utulsa.edu or 631-2588) if you are interested in being a Luncheon Sponsor.

Membership

Membership is running at the highest rate ever. We already have 313 members and are well on our way to our goal of 400. Charter members who also are members this year will receive special recognition at one of our spring meetings. New members since our last newsletter are listed below. You may join online by going to Membership Application. Members may view the complete Membership Directory by visiting our web site at https://bus.cba.utulsa.edu/fof, clicking on Member Services, logging-in, and clicking on Directory.

Dr. Jerry Brickner
James Campbell
James Colgan
Mike Dodson
Michael Esmond
Francis Gajan
Wayne Hearon
Jim Hill
Stan King

Stan King
Nathan Lovelle
Wayne Middleton
Mahlon Pitt
Robert Prince
Sharon Prince
James Wilburn
Danny Williams
Finance Excellence Fund

Our 20\textsuperscript{th} anniversary Finance Excellence Fund (FEF) Campaign is having an excellent year. Our $100,000 goal is very achievable. Your support is very gratifying. To contribute on-line go to: FEF Gift & Pledge form.

FEF gifts are placed in the Student Investment Fund (SIF) which is managed by our students. Earnings from the SIF are used to support scholarships. To date, 97 students have received some $135,000 in scholarships.

This year we have had 66 donors and $50,800+. Last year YTD we had 39 donors and $33,300 in gifts. Honor roll members for 2004-05 are.

**Founder**
Mike Hess  
Ralph & Frances McGill  
Foundation

**Partner**
Beryl McElhiney

**Benefactor**
Keith Bailey

**Patrons**
Bank One  
Bank of Oklahoma  
Roger Bey  
Collins Foundation  
Frank Fisher, Jr.  
Kerry Freeman  
Steve Hildebrand  
Leggett & Platt  
Craig Loseke  
Bob & Sharon Prince  
Genave Rogers

**Friends**
Jim Arens  
Gary Belitz  
Sharon Bell  
Wade Biswell  
Arnold Brown  
Denie Buchanan  
Michael Burton  
John Buxton  
John Chandler  
Louis Coleman  
Susan Cravens  
Tally Ferguson  
Francis Gajan  
Steve Ganzkow  
Bob Geweniger  
Keith Goddard  
Jim Hill  
Bob Jennings  
John Kauth  
James Kelly  
Sanford Leeds  
William Lissau  
Dee McDugle  
Jim McGill  
Callie Mitchell  
Rocky Moore  
Pam Peck  
Jim Pinkerton  
Ryan Rex

**Friends (continued)**
Ellen Sembe  
Bill Snow  
Cherl Snyder  
Tom Stees  
Gale Sullenberger  
Brook & Jill Tarbel  
Bob Traband  
Dick Williamson  
Daryl Woodard  
Steve Zethoefer  
Weidong Zhou

**Donors**
Patrick Engelmann  
Richard Pane  
Marilyn Rains  
Joe Redman  
Don Rubottom
**Corporate Sponsors**

We thank this year’s Corporate Sponsors for their support.

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. This year, Corporate Sponsors will be able to post their job openings on our website for no additional cost. The cost of the Corporate Sponsorship is $2,500. Contact Judy Miller at 631-2588 or judy-miller@utulsa.edu if you would like to be added to our Corporate Sponsor waiting list.
Upcoming Executive Luncheons:

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<th>Date</th>
<th>Speaker</th>
<th>Position &amp; Company</th>
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<td>January 13, 2005</td>
<td>Roger Staubach</td>
<td>Chairman &amp; CEO, The Staubach Companies</td>
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<tr>
<td>January 20, 2005</td>
<td>Douglas E. Hill</td>
<td>Managing Partner, EdwardJones</td>
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<td>February 17, 2005</td>
<td>Thomas L. Kivisto</td>
<td>President &amp; CEO, SemGroup, LP</td>
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<td>March 10, 2005</td>
<td>Gary Forsee</td>
<td>Chairman &amp; CEO, Sprint Corp.</td>
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<td>April 21, 2005</td>
<td>James A. Firestone</td>
<td>President, Xerox North America</td>
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<td>May, 2005</td>
<td>TBA</td>
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Affiliate’s Programs

Our partnerships with other professional groups have worked very well. They help to promote our programs and we do the same. This year’s partnerships are:

**TU Executive & Professional Development**

For more information on any seminar, call 631-2215.

Upcoming Seminars:

**Attorneys: Ethics at Work**

- December 10, 2004

**CPA’s: Ethics at Work**

- December 10, 2004

**Accounting and Finance for Attorneys**

- December 3, 2004

**Ins and Outs of IRS Practice & Procedure & Tax Preparer Liability**

- December 6, 2004 – OKC
- December 8, 2004 – Tulsa

**Federal Estate & Gift Taxation & Estate Planning**

- December 7, 2004 – OKC
- December 9, 2004 – Tulsa

Friends of Risk

FOR is devoted to providing discussions on a very wide range of risk management topics.

Contact Judy Miller at judy-miller@utulsa.edu or (918) 631-2588

Oklahoma Investment Forum

Oklahoma Private Enterprise Luncheon
11:45 a.m., Petroleum Club, 15th Floor
January 11, 2005

Shane Goodwin, Director of Global Mergers & Acquisitions, CitiGroup

For details or reservations: (918) 584-8884
Or e-mail Carla Shwadlenak at Carla@oifonline.org

NAIC

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

NAIC Contact:
deangelistami@hotmail.com or 747-9303

Energy Advocates

For more information: 599-7767
info@energyadvocates.org

Aon Risk Services

2005 Business Forum—1st Wednesday of the month
11:30 am to 1:00 pm.
This is a free series and lunch will be included.

Contact Jeannette Oravec
Jeannette_oravec@ars.aon.com
(918) 496-6932
Links

https://bus.cba.utulsa.edu/FOF

January 13, 2005 Registration form

January 20, 2005 Registration form

Membership Form

Pledge