October 21, 2004
Steadman Upham
President
The University of Tulsa

On September 1, 2004, after serving as President of Claremont Graduate University for six years, Steadman Upham became The University of Tulsa’s 17th President. Prior to serving at Claremont Graduate University, he was Vice Provost for Research and Dean of the Graduate School and Professor of Archaeology at the University of Oregon.

President Upham has written extensively on prehistory and archaeology of the American Southwest. He has received numerous awards for teaching and research.

Mr. Upham’s presentation will be titled “Challenges to the American Research University”

Please register today. To register on-line for the October 21, 2004 luncheon, click on https://bus.cba.utulsa.edu/fof/lunchreg.asp

Image Building

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.

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 on-line. Go to Membership Application to join or re-new your membership.
Leadership

Our officers and directors for 2004-05 are:

**Officers**
- **President**: Craig Loseke, Samson
- **VP Programs**: Susan Cravens, BankOne
- **Treasurer**: Tally Ferguson, BOK
- **Secretary**: Rocky Moore, Bama
- **FEF Chair**: Bob Fitzgerald, Arrow Trucking

**Directors**
- Keith Bailey, Williams (Retired)
- Roger Bey, TU
- John Chandler, Magellan Mid-Stream
- Steve Hildebrand, Dollar Thrifty
- Callie Mitchell, Williams

Fees for this year are:
- $150 Membership plus all luncheon fees
- $50 Tulsa area members - membership fee only
- $10 Out-of-area members - outside 50 mile radius of Tulsa
- $10 Current TU full-time students or 2004 TU graduates
- $300 Membership plus all luncheon fees for yourself and one guest
- $135 One reserved table (8 seats*)
- $1,325 One reserved table of eight at each luncheon, & ten for Roger Staubach*

Fees for this year are:

This year we will have nine rather than eight luncheons which are why some of the fees for the luncheons for the year are slightly increased.

**Luncheons:**
- **Members**: $15 *(12 paid in advance)
- **Non-members**: $20 *(17 paid in advance)

*The Roger Staubach meeting will be held at the Crowne Plaza and will have fees of $15 for members, $25 for non-members, and $250 for a reserved table of 10.

Comment’s from an Alum

I attended my first Friends of Finance luncheon in 1999 as a sophomore student and I have been a member ever since. Of all the organizations to which I belonged during my days as an undergraduate, the University of Tulsa’s Friends of Finance above many others has provided me with benefits that have augmented my education and enhanced my career opportunities.

The generosity of the organization’s members, through the Finance Excellence Fund, enabled me to attend TU by providing financial support through their outstanding scholarship program. Each year the organization gives exceptional young men and women access to quality education and an opportunity to realize their academic goals. To date, 97 students have received over $135,000 in scholarships.

Additionally, the investment vehicle that generates these scholarships also affords students one of the greatest academic opportunities in the nation. Through the Student Investment Fund, the school’s top students are given the chance to actively manage a real-world portfolio with a market value of $725,000. As an undergraduate student, this coursework was the most valuable component of my education. Furthermore, FOF networks and events give students access to local business professionals, internships and job opportunities. This gave me a distinct advantage over other graduates entering the workforce, and helped me to secure several job offers upon graduation.

The skill sets I developed as a finance student have given me a strong foundation that has allowed me to succeed throughout my professional career. The program provides close faculty-student interaction coupled with theoretical and practical applications that enhance decision-making. As I begin my MBA program in Chicago this year, I look forward to the advantages I know my TU education has provided.

R. J. Lasek (BSBA ’01)
**Resume Posting**

FOF members may now post their resume on the FOF web site. E-mail your resume as a Word or PDF 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.

**Job Posting**

Corporations and placement firms may now post professional job opening on the FOF web site. 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 (August 1 – July 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.

**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. Just contact Judy Miller at 631-2588 or judy-miller@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.

**Cy Elmburg Explains Blitz**

At our September 15, 2004 luncheon, Cy Elmburg, Chairman of Blitz, USA, gave an interesting and entertaining presentation of Blitz, USA.

Cy explained how the company developed from a single product, the “jerry” can with a single customer (U.S. Military) to a multi-product company with many customers including Target, Wal-Mart, Lowe’s, and Home Depot. He is holding one of the up to 100,000 gas cans they manufacture each day. Some twenty-five lucky people were fortunate enough to have a lucky number and took a Blitz product home.

**Alumni News**

Byron Beene (BSBA ’01) passed level three of the CFA exam. Byron is working in Zurich, Switzerland.

If you have any news (promotions, new jobs, marriage, degrees, etc.) you would like to share, please e-mail to judy-miller@utulsa.edu.
Membership

Membership is running at the highest rate ever. We already have 247 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. If your name isn’t listed below, please join today by clicking on Membership Application.

Tony Adair
Linda Adlof
Joe Adwon
Clint Alexander
Barbara Allen
Nick Allen
Kent Allingham
Anne Anderson
Doug Applegate
Jim Arens
Dolin Argo
Keith Bailey
Kelli Baker
Tory Baker
A. J. Barber
Allen Barrow
Bill Beckman
Martin Belsky
Aaron Berg
Steve Berlin
Paul Bernius
Roger Bey
Gene Bishop
Larry Bitting
Bart Boatright
Bob Boyd
Bob Branson
Gina Briggs
George Brown
Ron Brown
Mark Buffington
Phil Burch
Ellen Burgess
Greg Burn
Bobby Burnett
Mike Burton
Joe Byers
Tom Campbell
Carolyn Cavins
Mark Cavins
John Chandler
David Clardy
Mike Clark
Mark Collins
Ron Comeau
Andrew Comstock
Andrew Conway
Brian Conway
John Conwell
Brendan Costello
Mal Coury
Susan Cravens
Lee Crawley
Cindy Creveling
Bruce Currie
Harry Dandelles
Dewey Daniels
Tami DeAngelis
Ankit Desai
Kevin DeVault
MaryBeth DeWitt
Elaine Dishman
Jake Dollarhide
Pat Donica
Dan Doyle
Don Dupree
Paula Etter
Bill Fader
Jane Faulkenberry
Tim Felt
Tally Ferguson
Bob Fitzgerald
John Flegler
Debbie Fleming
Keely Flynn
Alan Ford
Skilly Forsman
Tom Franz
Brian Frere
Richard Gajan
Steve Gallo
Lindsey Gann
Bob Geweniger
Jayne Gilsinger
Clinton Godwin
Shane Goodwin
Ben Gorrell
Gene Graves
Mary Hale
Sam Hampton
Sid Harris
Matt Hazelwood
Beth Heaton
Walt Helmerich
Ron Henderson
Steve Hildebrand
Rebecca Holland
Todd Holman
Carlyne Holmes
Stu Hopkins
Leland Hoppe
Dean Hudgeons
Zach Ingraham
Russell Iorio
Jerry Isaacs
Brenda Jagels
Mike Jones
Julian Joy
Smriti Kansal
Patti Kastl
Jack Kauth
Ed Keller
James Kelley
Jim Kelly
Jeff Kendall
Jason Kenyon
Karl Knight
Jack Koehle
David Kollmann
Mary Korthase
Brett Kramer
Marvin Krueger
Jennifer Lamb
Ryan Langston
Angela Lawrence
Pete Leiningher
Chris Lewis
Bill Lissau
Miyai Littlejohn
Jerry Look
Craig Loseke
James Maddux
Kristin Major
Kieran Major
Tammie Maloney
Rick Martich
G. G. Robinson
Frank Martich
Geordie Matson
Marc Maun
Vic McClintic
Sterling McDonald
Dee McDugle
Beryl McElhinney
Jim McGill
Joe McGraw
Bob McGrew
Tom Merrick
Judy Miller
James Milligan
Nick Minden
Callie Mitchell
Ian Mitchell
Beverly Monnet
Bob Monroe
Rocky Moore
Suzie Morrel
Paul Mullen
Kimberly Nation
Ben Nebb
Pansy Nordstrom
Mary Ogle
Greg Oliphant
Ken Parker
Tina Parkhill
Denton Partridge
Mike Payne
Pam Peck
Andres Perrin
Darrel Pfeifauf
Bruce Phelps
Drew Phillips
John Pilkington
Jim Pinkerton
Dick Pittenger
Steve Poleman
Brady Pringle
Don Quit
Lisa Rambo
Tom Redman
Joe Redman
Robert Reins
Ryan Rex
David Reynolds
Frank Rhodes
Peggy Rice
Yolande Whitmore
Blanche Whitney
Barry Woods
Vicki Rose
Sheri Rosson
Don Rubottom
Patsy Savage
Bruce Winchester
Chris Wolking
Daryl Woodard
Barry Woods
Emily Young
Scott Zelisog
Steve Zenthofer
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 new web site 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:

<table>
<thead>
<tr>
<th>Date</th>
<th>Speaker</th>
<th>Position &amp; Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 21, 2004</td>
<td>Steadman Upham</td>
<td>President, The University of Tulsa</td>
</tr>
<tr>
<td>November 30, 2004</td>
<td>William E. Lobeck, Jr.</td>
<td>President &amp; CEO, Vanguard Car Rental USA</td>
</tr>
<tr>
<td>January 13, 2005</td>
<td>Roger Staubach</td>
<td>Chairman &amp; CEO, The Staubach Companies</td>
</tr>
<tr>
<td>January 20, 2005</td>
<td>Douglas E. Hill</td>
<td>Managing Partner, EdwardJones</td>
</tr>
<tr>
<td>February 2005</td>
<td>TBA</td>
<td></td>
</tr>
<tr>
<td>March 10, 2005</td>
<td>Gary Forsee</td>
<td>Chairman &amp; CEO, Sprint Corp.</td>
</tr>
<tr>
<td>April 2005</td>
<td>TBA</td>
<td></td>
</tr>
<tr>
<td>May, 2005</td>
<td>TBA</td>
<td></td>
</tr>
</tbody>
</table>

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.

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

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

Tuesday, October 5th
Keith Jossell, VP-Franchise Finance, Sonic

November 16-17, 2004
Southwest Capital Conference
Downtown Double tree
616 West 7th Street, Tulsa, OK

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/16/04</td>
<td>Finding Quality Mutual Fund($25)</td>
</tr>
<tr>
<td>10/28/04</td>
<td>Stock Study of the Month</td>
</tr>
</tbody>
</table>

INVESTOR FAIR
11/13/04 at TU Allen Chapman Activity Center

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

Aon Risk Services
2004 Business Forum—1st Wednesday of the month
7:30 am to 9:00 am.
This is a free series and complimentary breakfast is included.

Wednesday, October 6
ENERGY RISK MANAGEMENT
Presented by Joel Phipps, Aon Risk Services Natural Resources Group

Wednesday, November 3
BASICS OF PROPERTY INSURANCE
Presented by Tom O’Donovan, Aon Risk Services

Wednesday, December 1
EXECUTIVE BENEFITS
Presented by Mark McCullough & Dan Krekeler, Aon Executive Benefits

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

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

Executive & Professional Development
Nov. 1-2 Situational Leadership® II Workshop
Developed by the Ken Blanchard Co., learn how to diagnose an issue and select the right leadership style to deal with the situation.

Nov 15-17 Coaching: A Strategic Tool for Leadership
This three-day seminar will give you a variety of coaching tools, techniques and best practices.
For more information call (918) 631-2215.
Links

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

October 21, 2004 Registration form
November 30, 2004 Registration form

Membership Form

Pledge