January 20, 2016

Stu Crum
Chairman & President
Bridgestone Retail Operations

As Chairman and President of BSRO – a $4 billion business unit of Bridgestone Americas – Stu has leadership oversight of operations for 2,218 company-owned tire and automotive service centers across the United States operating under the Firestone Complete Auto Care, Tires Plus, Hibdon Tires Plus and Wheel Works brands; in the field organization; and at the corporate Store Support Center location, all of which employ more than 23,000 people. He also works to ensure collaboration, integration and strategic alignment between BSRO and the Bridgestone Americas group.

He earned a bachelor’s degree in Marketing from the University of Tulsa, where he attended on a full football scholarship before spending three years as a professional place kicker in the NFL and USFL.

Reservations are required. You may register online:
http://www.collins.utulsa.edu/secure/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, 2016.

February 10, 2016

Burt White
Chief Investment Officer
LPL Financial

As chief investment officer for LPL Financial, the nation’s largest independent broker-dealer, Burt White provides strategic guidance for the LPL Financial Research team, ensuring alignment with the firm’s goals for maintaining the highest levels of integrity in pursuit of conflict-free, objective investment advice. He directs a team of analysts and investment professionals, providing in-depth research on the global economy and markets, mutual funds, separate accounts, fixed income, alternative investment strategies, and portfolio construction and optimization.

Reservations are required. You may register online:
http://www.collins.utulsa.edu/secure/fof/Meetings.aspx or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until January 27, 2016.

Shuttle Service

918 Shuttle Service will provide shuttle service from the parking lots along Gary Place to the Allen Chapman Student Center between 11:00 a.m. and 2:00 p.m. See University of Tulsa Parking Map for a campus parking map. Please let us know if you have questions.
University of Tulsa
Friends of Finance
2015-2016
Executive Speaker Series Luncheons

Rick Muncieff
President & CEO
WPX Energy
September 18, 2015
Sponsored by:

Joseph Gorder
President & CEO
Valero Energy Corporation
October 13, 2015
Sponsored by:

Chris Haroun
Partner
Artis Ventures
November 18, 2015
Sponsored by:

Saint Francis
Health System

Chet Cadieux
Chairman & CEO
Quik Trip Corporation
December 10, 2015
Sponsored by:

Stu Crum
President
Bridgestone Retail Operations
January 20, 2016

Burt White
Chief Investment Officer
LPL Financial
February 10, 2016

Scott Prochazka
President & CEO
CenterPoint Energy
March 23, 2016

David Dillon
Former CEO
The Kroger Co.
April 27, 2016
Sponsored by:
Membership

Last year we had membership of 433. 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 http://www.collins.utulsa.edu/secure/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. Members since our last newsletter are below. For a complete list of members to date (360), please go to: https://www.collins.utulsa.edu/secure/fof/Members/

John Beasley          James Maddux
Herby Bowman          Jerry Reeves
Becky Collins         Lou Reynolds
Michael Corning       Andrew Shank
Robert Jennings       Duane Wilson
Ronnie Jobe

FOF Membership Committee

Many thanks to the following members for volunteering to be a part of the 2015-2016 Friends of Finance Membership Committee. The Membership Committee promotes membership, plans and runs the Members Only functions, and facilitates check-in at the Executive luncheons.

Megan Cordle, Alliance Resource Partners (Chair)
Brad Beeson, J.P. Morgan
Tom Campbell, Campbell Organization
Bruce Currie, MidFirst Bank
TD Eureste, ONEOK
Curtis French, Phillips 66
Chris Guglielmo, Williams
Jeff Husen, ONE Gas
James Kelley, Rowland Group
Ann Lowry, Accounting Principals
Jason Maloney, Hogan Taylor
Gavin Pearson, Bank of Oklahoma
Kysa Rowe, WPX Energy
Charles Secrest, Key Personnel
Julie Skye, Mariner Wealth Advisors
Philip Viles, Jr., University of Tulsa

Alumni News

Shane Goodwin (BSBA ’93) Managing Partner at Argus Capital recently received his Ph.D. in Business Administration with a focus in finance from Oklahoma State University. Shane graduated cum laude from TU in 1993 and was a recipient of the Jess Chouteau Outstanding Senior Award.

In January 2016, Shane will begin a Fellowship at Harvard University conducting research in corporate governance, economic and financial policy.

As a three-year letter winner in football at TU, he earned the All-American Collegiate Scholar and Student Athlete of the Year awards. Mr. Goodwin received the Outstanding Alumni Award (2005) and was inducted into the University of Tulsa Athletic Hall of Fame.

If you have been promoted, changed companies, earned another degree or have personal information (marriage, birth of child, etc.) please send the information along with a color picture to (judy-adair@utulsa.edu) and we will include it in our newsletter.

Forbes Listing

The recent Forbes listing of “The World’s Most Powerful People” (11/23/2015) included two names, in the top 32 list that should be very familiar to our members. Why you ask? Because they have spoken to our organization in the past.

Specifically Jamie Dimon at #20 and Doug McMillon at #32. Membership has its privileges and you just never know who will speak to us on their way onto a list like the World’s Most Powerful People.
The 2015-16 Finance Excellence Fund Campaign has been launched. To date, we have received $86,405 from 62 donors. Our goal is $250,000 from 150 donors this year, and we believe we can make it. We hope every member will make a contribution. 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

**Finance Partner**
- Al Walker/Anadarko

**Finance Benefactors**
- Joe Adwon
- Marcia MacLeod
- Sam & Rita Combs
- Phillips 66
- Michael Krimbill
- Bill Thomas

**Finance Patrons**
- Keith Bailey
- Joel Harper
- David Eastin
- Steven & Debra Hildebrand
- Bob Fredrickson
- Jody Parker

**Finance Associates**
- Ben Abney
- Phil Reedy
- Sharon Bell
- George Schnetzer
- Laurie Brown-Purser
- Richard Sullivan
- Jeff Davis
- Richard Williamson
- Keith Goddard
- Chris Wolking
- RS James
- Andrew Ziola

**Finance Friends**
- Michael Balp
- Sandy Leeds
- Mike Bartlett
- Louis Luo
- Roger Bey
- Joe McGraw
- BUDCO, Inc.
- John Moore
- Jim Colgan
- Greg Oliphant
- Andrew Comstock
- Alisa Perkins
- Megan Cordle
- Steve Poleman
- Frederick Drummond
- Nicole Simmons
- Tally Ferguson
- Cherl Snyder
- Steve Ganzkow
- Tom Stees
- Bob Geweniger
- Bruce Stoeser
- Chris Guglielm
- Gale Sullenger
- Russell Iorio
- Baxter Thorman
- Bob Jennings
- Steve Wilkerson
- Jack Koehle
- Daryl Woodard
- Robert & Cathy Laird
- Weidong Zhou

**Finance Donors**
- Theron Bowling
- John Hartman
- John Buxton
- Meg Whitney
Fees

Fees for the 2015-2016 year have been reduced as of December 15, 2015

$175 (Membership + all remaining 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)
$315 (Membership plus all remaining luncheon fees for yourself and one guest)
$1,300 One reserved table (8 seats) at each of the remaining luncheons

Leadership

Our Friends of Finance officers and directors for 2015-2016 are:

Officers
President Don Quint, Quint & Associates
VP Programs Marcia MacLeod, WPX Energy
Treasurer Andrew Ziola, ONE Gas
Secretary Roberta Preston, Girl Scouts of Eastern Oklahoma

Directors
J. Markham Collins, TU
Richard Burgess, TU
Shawn Crisp, Trust Company of Oklahoma
Mike Osborne
Phil Reedy
Derek Reiners, ONEOK, Inc.
Frank Rhoades, Rhoades Oil Company
Paul Samuels, Morgan Stanley

Student Investment Fund

The University of Tulsa’s Student Investment Fund (SIF) is both a class and an endowment. Boasting an annualized compound return of 5.77% since its April, 1998 beginning, the SIF topped $4.5 million at November 30, 2015. Over that time, the S&P 500 generated an annual return of 5.49%. Students, armed only with the university’s formidable finance courses, generated this 28 basis point alpha. They make individual equity selections based upon fundamental analysis and prudent sector allocation. Earnings from the portfolio are used to support the School of Finance, Operations Management, and International Business. During the Fall 2015 semester over $47,000 of those earnings were awarded as student scholarships.

TU offers the SIF class once each fall and spring semester, and between 15 and 20 students become financial analysts during this time. The Fall 2015 class was comprised of 14 undergraduates and 4 graduate students. They weathered the energy industry crisis and first Fed rate increase well, keeping losses to only 26 basis points compared with the S&P’s 33 basis point drop. We moved out of energy and into consumer discretionary. At the end of this semester, we resolved to move out of the hot consumer discretionary sector into consumer staples, while continuing to underweight financials, telecom and energy. Combined with the spring 2015 semester’s class, SIF generated a 4.29% return through November, compared with the S&P’s 3.01%. We expect to close out the year with a 5% total return.

SIF invites industry experts to fill out our experience each semester. Anyone interested in joining our speaker list should contact Judy Adair at judy-adair@utulsa.edu. Learn more about TU’s SIF at http://business.utulsa.edu/centers-institutes-programs/student-investment-fund/.
**Members Only Events**

Our first “Members Only” event of the 2015-2016 year was held on December 1st with “Tour and Taste” at Marshall’s Brewery.

Eric Marshall, TU graduate and friend of the School, gave Members a tour of the brewery and explained the beer making process. Members received the inside information that the Marshall’s tap room will be expanding in 2016.

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/](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**

[http://www.collins.utulsa.edu/secure/fof/Application.aspx](http://www.collins.utulsa.edu/secure/fof/Application.aspx)

**Meeting Registration**

[http://www.collins.utulsa.edu/secure/fof/Meetings.aspx](http://www.collins.utulsa.edu/secure/fof/Meetings.aspx)

**Members Services**

[http://www.collins.utulsa.edu/secure/fof/Members/login.aspx](http://www.collins.utulsa.edu/secure/fof/Members/login.aspx) (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.
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:

JP Morgan Chase
Barrow & Grimm
MidFirst Bank
ONE Gas
Mariner Wealth Advisors
Alliance Resource Partners, L.P.
Q
Don P. Quint & Associates
ONEOK
Phillips 66

Trust Company of Oklahoma
Laredo Petroleum, Inc.
Deloitte
Williams
WPX Energy
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

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. 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. At least 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.

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