February 21, 2018

Rusty Braziel
President
RBN Energy

Rusty Braziel is President & Principal Energy Markets Consultant for RBN Energy. RBN provides energy market advisory services specializing in strategy, acquisitions and divestures. The company works with companies engaged in trading, marketing or purchasing of energy commodities, purchase and sale of energy related assets and E&P for oil and gas.

Rusty Braziel is one of the most respected authorities in the field of energy information and markets, with an extensive background in energy marketing, trading and data services. Over the past 20 years he has worked in an executive level capacity with a major producer (Texaco), a major pipeline (Williams), a leading software company (Altra Energy), and a leading energy analytics and information company (BENTEK Energy).

Reservations are required. You may register online: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until February 7, 2018.

Meeting Sponsors

Keith & Pat Bailey

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

March 13, 2018

Warren Ross
Chairman & President
Ross Group

Warren Ross is the Chairman & President of Ross Group providing development, engineering, and construction services to Commercial, Energy and Industrial, and Federal customers nationwide. He has been involved with and directed the completion of more than $2 billion in projects. Mr. Ross has worked on over $250MM in historical restoration projects directly for the Federal government and applied those lessons learned in the development of over $70MM in rehabilitation projects deploying the US National Park Service and State of Oklahoma historical tax credits in Tulsa. Additionally, Mr. Ross owns the Oklahoma State Regional Center which works via the US Customs & Immigration Service’s EB-5 program to deploy international investment in the United States. Warren is actively involved in the Tulsa community, consistently serving his hometown through entrepreneurial and philanthropic efforts including as a Trustee of the University of Tulsa and Board Member of the College of Business Administration Advisory Board.

Reservations are required. You may register online: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until February 27, 2018.
University of Tulsa
Friends of Finance
2017-2018
Executive Speaker Series Luncheons

Sheryl Chinowth
CEO
Chinowth & Cohen Realtors
September 14, 2017

Gerard Clancy
President
The University of Tulsa
October 17, 2017

A.H. “Chip” McElroy II
President & CEO
McElroy Manufacturing, Inc.
November 28, 2017

Thomas Kennedy
Chief Financial Officer
The Hertz Corporation
January 18, 2018

Rusty Braziel
President
RBN Energy
February 21, 2018

Warren Ross
Chairman & President
Ross Group
March 13, 2018

Jeff Pontius
President & CEO
ZebcoBrands
April 19, 2018

Claudia San Pedro
Chief Financial Officer
Sonic Corporation
May 17, 2018

Sponsored by:
Keith & Pat Bailey
**Student Investment Fund**

The Student Investment Fund reported the following return performance as of the end of the year:

<table>
<thead>
<tr>
<th>Annual Returns as of 12/29/17</th>
<th>SIF</th>
<th>S&amp;P500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Since 4/13/98</td>
<td>6.48%</td>
<td>6.46%</td>
</tr>
<tr>
<td>10 Years</td>
<td>8.58%</td>
<td>8.50%</td>
</tr>
<tr>
<td>5 Years</td>
<td>14.37%</td>
<td>15.79%</td>
</tr>
<tr>
<td>3 Years</td>
<td>10.25%</td>
<td>11.41%</td>
</tr>
<tr>
<td>1 Year</td>
<td>21.30%</td>
<td>21.83%</td>
</tr>
<tr>
<td>YTD</td>
<td>21.30%</td>
<td>21.83%</td>
</tr>
</tbody>
</table>

The Spring semester class will be making their new securities presentations on April 4th and April 11th. Please save the dates in your calendar and make plans to attend.

**CFA Research Challenge**

Hoàng Đinh, Ksenia Laskutova, Madeline Soukup & Aleks Rapp are representing TU in the CFA Research Challenge this year. They will compete in the US Southwest Region against 25 other universities from Texas, Oklahoma, and Louisiana. All universities will be producing an analyst report on Andeavor (ANDV), with the best 10 teams making an oral presentation to a group of analysts and the company.

**Graduate Programs**

We are actively recruiting for our graduate programs for the fall semester. In addition to the MS in Finance, we have two new degree programs that are available. The Collins College of Business has launched a MS in Business Analytics. This program focuses on the analysis, interpretation, and prediction capabilities of large sets of data. In addition, the School of Finance has developed a MS in Quantitative Finance, which combines the grounding of financial analysis with the analytical tools of mathematics and data analytics. Both of the new programs will equip students to take advantage of new analytical techniques in Finance and other disciplines.

**Internships and Mentoring**

Your support of the Finance department through contributions to the Finance Excellence Fund is very much appreciated. It helps build the endowment for future scholarships for finance students and supports the resources our finance students and faculty need to succeed in their classes and careers.

Another way to support the finance students is through internships and mentoring. While our students receive a world-class education at the University of Tulsa, adding experience to the education helps develop these students by putting into practice what they have learned, and gaining the guidance and experience of area professionals as they begin and continue to advance in their careers.

If you have an internship opportunity for a finance student, whether it is a summer internship or one that occurs during the academic year, please contact Joel Harper (joel-harper@utulsa.edu, 918-631-3426) in the School of Finance and he will be happy to help find the right student for your internship.

Another way to have a substantial impact on a student is to serve as a mentor to a student as they complete their education and begin their career. Providing career advice, discussing next steps, letting students know about your experiences and successes provides a real connection to students that will help them advance now and in the future.

**CFA Scholarship Recipients**

Amina Bibi, Mahitha Dadireddy, Thomas Kerwin and Jie Sheng have received scholarships to take the Level I CFA exam in June. The globally recognized Chartered Financial Analyst designation represents expertise in the field of investment and portfolio management. These four students will be committing additional hours of study on top of their coursework to prepare for the exam. Congratulations to these students and Best wishes on their exam preparation.
2017-2018 Finance Excellence Fund

The 2017-18 Finance Excellence Fund Campaign is well underway. Last year 88 donors contributed to the Finance Excellence Fund. Our goal is to have at least half of our non-student members contribute to the Finance Excellence Fund. The Fund supports student scholarships, resources for students in the Risk Management Center, and activities of the School of Finance, Operations Management and International Business. Contributions also help grow the Student Investment Fund that awarded over $150,000 in scholarships and provided almost $100,000 in support for the Risk Management Center. Contributions of any size significantly impacts the education of Finance majors and provide opportunities to students they would not have otherwise.

You may contributing on-line at: Finance Excellence Fund Online Gift 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

To date 54 members (21%) have donated to the 2017-2018 Finance Excellence Fund. Honor Members are:

Finance Founder
Sharon & Bob Prince

Finance Partner
Keith & Pat Bailey
Al Walker/Anadarko

Finance Benefactors
Joe Adwon          Marcia MacLeod
Tom & Karla Campbell Tammie Maloney
Nathan Lovelle     William & Susan Thomas

Finance Patrons
Allen Barrow       Michael Osborne
Richard & Ellen Burgess Don Quint
David Eastin       Derek Reiners
Joel Harper        Kala Sharp
Steve Hildebrand   Andrew Ziola
Amanda King

Finance Associates
Jake Dollarhide    Scott Filstrup
Guylene Dooman     Tom Redman
Bill Fader         Richard Williamson

Finance Friends
Kent Allingham     Marc Maun
Mike Bartlett      John Neas
Roger Bey          Greg Oliphant
Bria Colgan        Bob Paulsen
Jim Colgan         Roberta Preston
Megan Cordle       Phil Reedy
Dave Enke          Nicole Simmons
Steve Ganzkow      Bill Snow
Russell Iorio      Bruce Stoesser
R.S. James         Gale Sullenberger
Jack Koehle        Richard Sullivan
Ram Makkena        Baxter Thorman
Sanjeev Makkena    Steve Wilkerson

Finance Donors
Andrew Aguirre
John Buxton

2017-18 Membership

We have 260 professional and 51 student members to date. Members since our last newsletter are listed below:

Shahad Al Rahbi          Olivia Mathews          Brian Vogt
Leah Ashrafi              Rodney Mott            Tanya Wilson
Zac Grusendorf           David Randolph
**Membership**

Last year we had membership of 354. This year our membership goal is 500. Membership fees support all of the expenses associated with Friends of Finance. To renew your membership or join, go to [Membership Application](#). Encourage your friends and colleagues to do the same. Friends of Finance is the largest and strongest finance group in Oklahoma and the Southwest. 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 Dues**

Fees for the 2017-2018 academic year (reduced 0/18/2018)

- $150 (Membership + all remaining 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 student or TU graduate within the last year)
- $290 (Membership plus all remaining luncheon fees for yourself and one guest)
- $1,300 One reserved table (8 seats) at each luncheon

**Leadership**

Our Friends of Finance officers and directors for 2017-2018 are:

**Officers**
- President: Andrew Ziola, ONEOK
- VP Programs: Kala Sharp, ONEOK
- Treasurer: Roberta Preston, Girl Scouts of Eastern Oklahoma
- Secretary: Phil Reedy
- FEF Chair: Marcia MacLeod
- Membership: Megan Cordle, Alliance Resource Partners

**Directors**
- Joel Harper, University of Tulsa
- Marc Maun, BOK Financial
- Mike Neal, Tulsa Regional Chamber
- Greg Oliphant, Ceja Corporation
- Mike Osborne, Ernst & Young
- Frank Rhoades, Rhoades Oil Company
- Gale Sullenberger, University of Tulsa
- Lane Wilson, Williams

**FOF Membership Committee**

The following members are the 2017-2018 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)
- 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, Bank of Oklahoma
- Gavin Pearson, Bank of Oklahoma
- Mahlon Pitt, Pitt & Associates
- Tanya Wilson, First Financial Services

**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**
- [Membership](#)

**Meeting Registration**
- [Meeting Registration](#)

**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 Directory**

A listing of all FOF members is provided. Contact information is available only if members agree to have it posted.
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.

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.

Affiliate Programs

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/

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.

Like us on Facebook! We are also on LinkedIn®
Corporate Sponsors

A Corporate Sponsorhip 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. 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: