March 13, 2018
Warren Ross
Chairman & President
Ross Group

Warren Ross is the 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. 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.

Meeting Sponsors
Keith & Pat Bailey

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

April 19, 2018
Jeff Pontius
President & CEO
Zebco Brands

Mr. Jeff Pontius serves as the President and CEO of Zebco Brands at W.C. Bradley Co. Inc. Mr. Pontius served as Chief Operating Officer of Zebco Sales Company, LLC. Mr. Pontius serves as Vice Chairman of the American Sportfishing Association. He served as the Chairman of Recreational Boating and Fishing Foundation and served as its Director.

ZebcoBrands, worldwide operations for a leading fishing tackle and outdoor products company. Operations in the USA, Canada, Germany, England and China is owned by W. C. Bradley, Co. of Columbus, GA. Brands include Zebco, Quantum, Preston Innovations, Fin-Nor, Van Staal, Rhino, Badlands, Browning, Black Cat, Sonubait, Korum, Avid Carp, Cajun, William Joseph, Martin.

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 April 12, 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
Sponsored by:
Keith & Pat Bailey

Warren Ross
Chairman & President
Ross Group
March 13, 2018
Sponsored by:
Keith & Pat Bailey

Jeff Pontius
President & CEO
ZebcoBrands
April 19, 2018

Claudia San Pedro
Chief Financial Officer
Sonic Corporation
May 17, 2018
**CFA Research Challenge Update**

Congratulations to TU’s CFA Research Challenge team: Hoàng Định, Madeline Soukup & Aleks Rapp! In only the second year to compete in the US Southwest Region, they were one of 10 teams to be invited to the presentation stage in a region of 27 universities from Texas, Oklahoma, and Louisiana. All universities produced an analyst report on Andeavor (ANDV). They presented their report in front of a panelist of judges in Dallas on SMU’s campus on February 17th. Job well done!

**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.

**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 01/31/2018</th>
<th>SIF</th>
<th>S&amp;P500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Since 4/13/98</td>
<td>6.71%</td>
<td>6.72%</td>
</tr>
<tr>
<td>10 Years</td>
<td>9.87%</td>
<td>9.78%</td>
</tr>
<tr>
<td>5 Years</td>
<td>14.36%</td>
<td>15.91%</td>
</tr>
<tr>
<td>3 Years</td>
<td>13.01%</td>
<td>14.66%</td>
</tr>
<tr>
<td>1 Year</td>
<td>24.62%</td>
<td>26.55%</td>
</tr>
<tr>
<td>YTD</td>
<td>5.07%</td>
<td>5.73%</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.

**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 students 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. Congratulation to these students and Best wishes on their exam preparation.
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 56 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
- Tom & Karla Campbell
- Nathan Lovelle

**Finance Patrons**
- Allen Barrow
- Richard & Ellen Burgess
- David Eastin
- Joel Harper
- Steve Hildebrand
- Amanda King

**Finance Associates**
- Jake Dollarhide
- Guylene Dooman
- Bill Fader

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<tr>
<th>Finance Founder</th>
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<tr>
<td>Sharon &amp; Bob Prince</td>
<td>Kent Allingham</td>
<td>Sanjeev Makkena</td>
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<td></td>
<td>Mike Bartlett</td>
<td>Marc Maun</td>
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<td>Roger Bey</td>
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<td>Bria Colgan</td>
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<td>Megan Cordle</td>
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<td>Russell Iorio</td>
<td>Bruce Stoesser</td>
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<td>R.S. James</td>
<td>Gale Sullenberger</td>
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<td>Bob Jennings</td>
<td>Richard Sullivan</td>
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<td>Jack Koehle</td>
<td>Baxter Thornman</td>
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<td>Ram Makkena</td>
<td>Steve Wilkerson</td>
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**Finance Donors**
- Andrew Aguirre
- John Buxton

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2017-2018 Membership

We have 260 professional and 58 student members to date. Members since our last newsletter are listed below:

<table>
<thead>
<tr>
<th>Ian Betty</th>
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<th>Patrick Wong</th>
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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 02/21/2018)

$120 (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)
$225 (Membership plus all remaining luncheon fees for yourself and one guest)
$1,000 One reserved table (8 seats) at each remaining 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

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/ 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
Meeting Registration
Members Services
http://www.collins.utulsa.edu/secure/fof/Members/login.aspx

Meeting Registration

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.
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. 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: