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 5, 2018.

May 17, 2018

Claudia San Pedro
Chief Financial Officer
Sonic Corporation

Claudia San Pedro serves as executive vice president and chief financial officer for the Oklahoma City-based national headquarters of SONIC®, America’s Drive-In®. She is responsible for SONIC’s financial planning practices, as well as the brand’s relationship with lending institutions, shareholders and the financial community. She also leads public relations and external communications for the company.

San Pedro joined Sonic in 2006 as treasurer. She has also served as vice president of investor relations since 2009. In that role, she directed financial planning, procurement and investment of funds for the organization and formulated investor relations strategy and oversaw communications with the investment community.

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 May 3, 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
President
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**

**Mark your calendars:** The Student Investment Fund (SIF) new securities presentations are scheduled for **Wednesday, April 4, 2018 and Wednesday, April 11, 2018.** Put these dates on your calendar now and make plans to attend.

Student members of the Student Investment Fund will present a 10 – 15 minute analysis and valuation of a specific stock that could potentially be included in our portfolio. Students will share their valuation approach, challenges, and recommendations.

Guests are encouraged to question students on their work as well as share their expertise for both student development and improved security selection for the Student Investment Fund.

**NEW SECURITY** | **PRESENTER**
--- | ---
Royal Caribbean Cruises | Luke Monsees
Williams Sonoma | Meg Thomas
Alliance Resource Partners | Olivia Mathews
Whiting Petroleum | Will Shanhouse
II-VI Incorporated | Jacob Gooden
Visa, Inc. | Kay Duit
CGI Group, Inc. | Mahitha Dadireddy
Avery Dennison Corp. | Shuyu Tian
Lamar Advertising Co | Alex Garoffolo
Eaton Corporation plc | Rodney Mott
Iridium Communications | JAD Dilley
SBA Communications | Jerry Amsler

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

<table>
<thead>
<tr>
<th>Annual Returns as of 02/28/2018</th>
<th>SIF</th>
<th>S&amp;P500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Since 4/13/98</td>
<td>6.55%</td>
<td>6.50%</td>
</tr>
<tr>
<td>10 Years</td>
<td>9.67%</td>
<td>9.73%</td>
</tr>
<tr>
<td>5 Years</td>
<td>13.56%</td>
<td>14.73%</td>
</tr>
<tr>
<td>3 Years</td>
<td>10.00%</td>
<td>11.14%</td>
</tr>
<tr>
<td>1 Year</td>
<td>16.87%</td>
<td>17.11%</td>
</tr>
<tr>
<td>YTD</td>
<td>-2.50%</td>
<td>-3.69%</td>
</tr>
</tbody>
</table>

**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.

**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.
Meg Thomas, a senior Finance major from Tulsa. Meg arrived to TU as a transfer student from OSU. “Making the choice to come to the University of Tulsa was the best decision I have ever made for myself. I am constantly surrounded by a diverse group of incredibly intelligent students and faculty that encourage me to think outside of the box and push me out of my comfort zone. I have gotten to know so many wonderful people during my time at TU and cannot even begin to explain how much this university has enriched my life”.

After graduation in May Meg will begin working for PricewaterhouseCoopers in New York City as a Management Consultant. She will be on the Delivering Deal Value team (formerly Mergers & Acquisitions) and hopes to be placed in the Health Care & Pharmaceuticals industry.

“My time at TU has prepared me to enter the business world knowing that I have the tools and knowledge to be a successful and valuable member of the work force. Reign Cane!”

Olivia Mathews is a senior studying Finance with a minor in Art History. Olivia is from Overland Park KS. She chose to attend TU for its strong sense of connectivity for the many professional and personal opportunities for development that she saw during her initial visit.

In addition to her academic studies, Olivia has also participated in the University’s Honors Program, Greek Life, and University Ambassadors, and she is the current Macroeconomic Chair of the Student Investment Fund.

Olivia has held an internship at the Oklahoma Center for Nonprofits, and enjoyed being able to work in developing a stronger nonprofit community. Olivia hopes to pursue work in the financial field, working for a company where she can continue to learn and grow in a dynamic and challenging environment.

Luke Monsees, is senior Finance major from Kansas City. Luke has been active in student government, University Ambassadors and Beta Gamma Sigma, taking full advantage of what TU has to offer. “While at TU, I have been able to grow academically, professionally, and personally through amazing experiences in and out of the classroom,” says Monsees. “TU enabled me to study abroad through a summer program with the University of Valencia in Spain” developing a global outlook.

The Student Investment Fund (SIF) has had a tremendous impact on his senior year. “While I’ve learned from exceptional professors and enjoyed fantastic finance lectures, SIF has allowed me to put theory in action, analyzing securities and formulating recommendations with real impact on the future of the fund. I have been so proud to observe how my many foundational courses and prior finance experience have culminated in my SIF work.”

Luke plans to continue his studies and will enter TU’s MBA program in the fall.
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 58 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**
Nick & Barbara Allen
Jake Dollarhide
Guylene Dooman
Bill Fader

**Finance Friends**
Kent Allingham
Mike Bartlett
Roger Bey
Bria Colgan
Jim Colgan
Megan Cordle
Dave Enke
Steve Ganzkow
Marcia MacLeod
Tammie Maloney
William & Susan Thomas

**Finance Donors**
Andrew Aguirre
John Buxton

**Finance Friends**
Sanjeev Makkena
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Bob Paulsen
Robert A Preston
Phil Reedy
Nicole Simmons
Bill Snow
Bruce Stoesser
Gale Sullenberger

**Finance Patrons**
Bob Geweniger
Russell Iorio
R.S. James
Bob Jennings
Jack Koehle
Ram Makkena
Steve Wilkerson

**Finance Associates**
Andrew Aguirre
Bill Buxton

**2017-18 Membership**

We have 261 professional and 59 student members to date. Members since our last newsletter are listed below:

Don Lane     Will Shanhouse
**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 03/14/2018)

- $100 (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)
- $165  (Membership plus all remaining luncheon fees for yourself and one guest)
- $700  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 Partners

**Directors**
- Joel Harper, University of Tulsa
- Marc Maun, BOK Financial
- Mike Neal, Tulsa Regional Chamber
- Greg Oliphant, Ceba Corporation
- Mike Osborne, Ernst & Young
- Frank Rhoades, Rhoades Oil Company
- Gale Sullenger, 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/

Like us on Facebook! We are also on LinkedIn®

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: