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.

FEF Donors Recognized

Finance Excellence Fund donors will be recognized at the May 17th luncheon. Please plan to attend.

Election of Officers & Directors Annual Meeting

The success of Friends of Finance is dependent upon the quality of our leadership. We have been fortunate to have outstanding individuals willing to serve in the past. We are confident that our future leaders will be equally as talented.

Elections of officers and directors for the 2018-2019 year will be held at the May 17th luncheon which also serves as the annual meeting. If you would like to make a nomination, please contact: any member of the nominating committee: Andrew Ziola, Kala Sharp, or Joel Harper. Positions to be elected include: President, Vice-President and Program Chairperson, Treasurer, Secretary, and one Director. Our current Officers and Directors are listed on Page 5.

Fees

Fees for the 2017-2018 year
(Reduced as of April 19, 2018)

$65 (Membership + all remaining luncheon fees)
$40 (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)
$100 (Membership plus all remaining luncheon fees for yourself and one guest)
$350 One reserved table (8 seats) at each remaining luncheon
University of Tulsa
Friends of Finance
2018-2019
Executive Speaker Series Luncheons

Alex Lintner
President
Consumer Info Services
Experian
September 4, 2018

Colleen Taylor
EVP
Mastercard
October 17, 2018

Scott Sheffield
Chairman
Pioneer Natural Resources
November 6, 2018

John Hewitt
President & CEO
Matrix Service Company
January 17, 2019

TBA
February, 2019

TBA
March 2019

TBA
May, 2019

Steve Berberich
President & CEO
California ISO
April 23, 2019
A Friends of Finance Story
By Bruce Currie

Wet leaves skittered along in front of me as I stepped into Big Al’s Health Foods near the TU campus. On a cold November day in 1984 I was meeting with Bob Prince to hammer out the University of Tulsa Friends of Finance (FOF) Mission Statement. Armed with a fully loaded ham and cheese sub, we settled into our task. The college-ruled paper wads piled higher and higher, but our resolve did not wane. With every draft and revision, our energy and determination grew stronger.

It has been an honor and a pleasure to work with the Friends of Finance Team since its inception on that cold rainy November day at Big Al’s. As my career in banking has unfolded, it has been a terrific alumni organization for networking, learning from phenomenal speakers, and sharing ideas with TU friends and community leaders. I am now a Senior Trust Officer with MidFirst Bank. In my career I have been fortunate to be part of many areas of banking: credit analysis, treasury management, commercial banking, and trust portfolio management and administration. TU has provided me with a world class education in finance (BSBA 1981) that was crucial to my career success in banking. My background at TU also laid the foundation for me to earn the designation as a Chartered Financial Analyst (CFA 1995).

The velocity of financial business has accelerated tremendously over the years. I am thoroughly convinced that I need to be a lifelong learner; continuing to hone my business, finance and relationship skills at every turn. TU’s Friends of Finance continues to be a significant and important part of my menu for success. Just like that chilly Saturday in 1984, I am hungry for the School of Finance, Operations Management and International Business in the Collins College of Business to succeed in this fast paced global business environment.

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.

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 month of March:

<table>
<thead>
<tr>
<th>Annual Returns as of 03/29/2018</th>
<th>SIF</th>
<th>S&amp;P500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Since 4/13/98</td>
<td>6.44%</td>
<td>6.33%</td>
</tr>
<tr>
<td>10 Years</td>
<td>9.53%</td>
<td>9.50%</td>
</tr>
<tr>
<td>5 Years</td>
<td>12.57%</td>
<td>13.31%</td>
</tr>
<tr>
<td>3 Years</td>
<td>10.33%</td>
<td>10.78%</td>
</tr>
<tr>
<td>1 Year</td>
<td>15.08%</td>
<td>14.00%</td>
</tr>
<tr>
<td>YTD</td>
<td>0.84%</td>
<td>-0.76%</td>
</tr>
</tbody>
</table>

**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®
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 74 members (28%) 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**
Ellen Adelson Nathan Lovelle
Joe Adwon Marcia MacLeod
Tom & Karla Campbell Tammie Maloney
George & Jennie Collins William & Susan Thomas
Jim Holloman

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

**Finance Associates**
Nick & Barbara Allen Gordon Nielsen
Jake Dollarhide Tom Redman
Guylene Dooman Richard Williamson
Bill Fader Chris Wolking
Scott Filstrup Zarrow Foundation

**Finance Donors**
Andrew Aguirre
John Buxton

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**2017-18 Membership**

We have 263 professional and 62 student members to date. Members since our last newsletter are listed below:

Tom Butler Grant Deyoe Hoang Dinh Joel Klotz Ben Quint
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.

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

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.

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

Meeting Registration

Members Services

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.
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:

- Trust Company Oklahoma
- LAREDO PETROLEUM, INC.
- Cimarex
- MidFirst Bank
- ONE Gas
- Mariner WEALTH ADVISORS
- JPMorganChase
- Barrow & Grimm
- Williams
- TDW
- PHILLIPS 66
- Alliance Resource Partners, L.P.
- ONEOK