Steve Berberich is the President and Chief Executive Officer of the California Independent System Operator (ISO). ISO is one of the world’s largest transmission organizations, managing the electric grid and wholesale power markets for 30 million Californians.

Mr. Berberich has been instrumental in facilitating the transformation of the power grid to lower its reliance on fossil fuels, and driving energy policy to foster new ways to produce and consume electricity. Mr. Berberich directed the deployment of the nation’s first Energy Imbalance Market, which welcomed several additional western states into the ISO’s bulk power markets.

Mr. Berberich brings more than 25 years of experience from fields such as utility leadership, business consulting, financial services, banking and finance. He holds a bachelor’s degree in finance and a Master of Business Administration from the University of Tulsa.

Peggy Simmons is president and chief operating officer of Public Service Company of Oklahoma (PSO). In this position, she has responsibility for all aspects of electric service for PSO’s more than 550,000 customers. These include distribution operations, safety, customer service, communications, external affairs and regulatory functions.

Prior to her current role, Simmons was manager of regulatory commodity sourcing for AEP Ohio. She also served as manager of renewable energy in AEP’s competitive business. Simmons joined AEP in 1999 as an energy trading scheduler in Commercial Operations.

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 24, 2019.

We extend our thanks and appreciation to ONEOK for serving as our Luncheon Sponsor.
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
Sponsored by:

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

Dana Weber
President & CEO
Webco Industries
February 20, 2019

Dean Wegner
Founder & CEO
Authentically American
March 27, 2019

Steve Berberich
President & CEO
California ISO
April 16, 2019

Peggy Simmons
President & CEO
PSO
May 8, 2019
Sponsored by:
2018-2019

Finance Excellence Fund

Thanks to the amazing support of FOF members and friends, we raised $73,290 from 86 donors in 2017-2018. 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!

2018-2019 Finance Excellence Fund Honor Members are:

**Finance Sponsor**
- Michael & Kathi Colby

**Finance Founders**
- Sharon & Robert Prince

**Finance Partners**
- Phillips 66
- Al Walker

**Finance Benefactors**
- Joe Adwon
- Richard & Ellen Burgess
- Thomas Campbell
- Marcia MacLeod
- William & Susan Thomas
- Williams

**Finance Patrons**
- Allen Barrow
- David Eastin
- Robert Fredrickson
- Amanda King

**Finance Associates**
- Nick & Barbara Allen
- Jake Dollarhide
- Bill Fader
- Mike Osborne

**Finance Friends**
- Kent Allingham
- Roger Bey
- Markham Collins
- Megan Cordle
- Lee Crawley
- David Enke
- Debbie Fleming
- Steve Ganzkow
- Robert Geweniger

**Finance Donors**
- Andrew Aguirre
- John Buxton

**Finance Sponsor**
- Roberta Preston
- Andrew Ziola
- Zarrow Foundation

2018-2019 Membership Event

Friends of Finance is pleased to announce our first social event of 2019 at Marshall Brewing Company! Please join us for a brewery tour. **RSVP’s are required as space is limited.**

You may register by contacting Judy Adair (judy-adair@utulsa.edu) or 918-631-2588.

**When:** Thursday, April 18, 2019  
**Where:** Marshall Tap Room - 1742 E 6th St Tulsa, OK  
Arrive between 5:30pm and 5:45pm – tour begins at 6:00pm

2018-2019 Membership

We have 309 members to date. **Members since our last newsletter are listed below:**

Mahitha Dadireddy  
Fred Dorwart  
Julie Skye
The 73rd annual Conference of Accountants will be held at the Lorton Performance Center on May 14-15, 2019. There will be 15 presentations addressing a variety of topics. While designed for an accounting and finance audience we are also including a focus on technology such as machine learning, digital transformation, blockchain and cybersecurity. Other topics will be leadership, ethics, diversity and local and national economic issues. The agenda and a list of speakers can be found at [www.utulsa.edu/coa](http://www.utulsa.edu/coa). Contact Jennie Dugger 918-631-3194 or [jennie-dugger@utulsa.edu](mailto:jennie-dugger@utulsa.edu) for more information.

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**Student Investment Fund New Securities Presentations**

Mark your calendars: The Student Investment Fund (SIF) new securities presentations are scheduled for **Wednesday, April 4, 2018 and Wednesday, April 11, 2018**. Presentations will be held in Helmerich Hall Room 213 from 5:00 p.m. – 6:30 p.m. Please plan 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.

[http://www.utulsa.edu/sif](http://www.utulsa.edu/sif)

<table>
<thead>
<tr>
<th>NEW SECURITY</th>
<th>PRESENTER</th>
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<tbody>
<tr>
<td>Ingersoll Rand PLC</td>
<td>Felix Gariba</td>
</tr>
<tr>
<td>Facebook</td>
<td>Chirag Patel</td>
</tr>
<tr>
<td>Canada Goose Holdings</td>
<td>Vance Dwyer</td>
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<tr>
<td>EOG Resources</td>
<td>Harry Dinh</td>
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<tr>
<td>Netflix</td>
<td>Madeline Soukup</td>
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<td>Southwest Airlines</td>
<td>Zihan Ge</td>
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<tr>
<td>Emergent BioSolutions</td>
<td>Tori Patrock</td>
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<tr>
<td>Urban Outfitters</td>
<td>Mike Monahan</td>
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The Student Investment Fund reported the following returns performance as of February 28:

<table>
<thead>
<tr>
<th>Period</th>
<th>SIF</th>
<th>S&amp;P500</th>
</tr>
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<tbody>
<tr>
<td>Since 4/13/98</td>
<td>6.54%</td>
<td>6.41%</td>
</tr>
<tr>
<td>10 Years</td>
<td>16.96%</td>
<td>16.17%</td>
</tr>
<tr>
<td>5 Years</td>
<td>10.10%</td>
<td>10.67%</td>
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<tr>
<td>3 Years</td>
<td>14.52%</td>
<td>15.28%</td>
</tr>
<tr>
<td>1 Year</td>
<td>6.41%</td>
<td>4.68%</td>
</tr>
<tr>
<td>YTD</td>
<td>12.23%</td>
<td>11.48%</td>
</tr>
</tbody>
</table>
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.

Shuttle Service

Shuttle service will be provided 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! University of Tulsa Friends of Finance
We are also on LinkedIn

Leadership

Our Friends of Finance officers and directors for 2018-2019 are:

Officers
President Kala Sharp, ONEOK
VP Programs Roberta Preston, Girl Scouts of Eastern Oklahoma
Treasurer Phil Reedy
Secretary Jeff Husen, ONE Gas
FEF Chair Andrew Ziola, ONEOK
Membership Curtis French, Phillips66

Directors
Bruce Currie, MidFirst Bank
Ryan Flugum, University of Tulsa
Marc Maun, BOK Financial
Mike Neal, Tulsa Regional Chamber
Greg Oliphant, Ceja Corporation
Mike Osborne, Ernst & Young
Lane Wilson, Williams
Larry Wofford, University of Tulsa

Membership

Last year we had membership of 327. This year our membership goal is 400. 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.

Fees

Fees for the 2018-2019 year (reduced 02/22/2019)

$125 (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)
$230  (Membership plus all remaining luncheon fees for yourself and one guest)
$1,000 One reserved table (8 seats) at each luncheon for the remainder of the 18/19 year
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: