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.

**Meeting Sponsor**

**ONEOK**

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

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**Finance Excellence Fund (FEF) Donors Recognized**

Finance Excellence Fund donors will be recognized at the May 8th 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 2019-2020 year will be held at the May 8th luncheon which also serves as the annual meeting. If you would like to make a nomination, please contact: any member of the nominating committee: Kala Sharp, Roberta Preston or Phil Reedy. 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 4.

**Fees**

**Fees for the 2018-2019 year (Reduced as of April 16, 2019)**

$75 (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)
$100 (Membership plus all remaining luncheon fees for yourself and one guest)
$350 One reserved table (8 seats) at the remaining luncheon
University of Tulsa
Friends of Finance
2019-2020
Executive Speaker Series Events

Anne Chow
Senior Vice President
Premier Client Group
AT&T
September 10, 2019

Esther George
President
Kansas City Federal Reserve
October 3, 2019

Tim Latimer
Co-Founder
Fervo Energy
October 17, 2019

Jeanne Kwong Bickford
Senior Partner &
Managing Director
Boston Consulting Group
November 20, 2019

Gavin Manes
CEO
Avansic E-Discovery &
Digital Forensics
January 22, 2020

Randy Nelson
President
Sanguine Gas Exploration
February 18, 2020

Judy McReynolds
President & CEO
ArcBest Trucking
March 25, 2020

TBA
April 2020
Thanks to the amazing support of FOF members and friends, we raised $74,560 in 2018-2019. 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! Finance Excellence Fund donors will be recognized at the May 8th luncheon.

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
- James Holloman
- Marcia MacLeod
- William & Susan Thomas
- Williams

**Finance Patrons**
- Allen Barrow
- David Eastin
- Robert Fredrickson
- Amanda King
- Don Quint
- Derek Reiners
- Kala Sharp

**Finance Associates**
- Nick & Barbara Allen
- Jim Butler
- Jake Dollarhide
- Bill Fader
- Michael Osborne
- Roberta Preston
- Andrew Ziola
- Zarrow Foundation

**Finance Friends**
- Kent Allingham
- Roger Bey
- Markham Collins
- Megan Cordle
- Lee Crawley
- David Enke
- Debbie Fleming
- Steve Ganzkow
- Robert Geweniger
- Russell Iorio
- Robert Jennings
- Jack Koehle
- H. Johnson Moore
- David Page
- Phil Reedy
- Richard Sullivan
- Baxter Thorman
- Steve Wyett

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

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

Student Investment Fund

The Student Investment Fund reported the following returns performance as of March 31st.

<table>
<thead>
<tr>
<th>Period</th>
<th>SIF</th>
<th>S&amp;P500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Since 4/13/98</td>
<td>6.64%</td>
<td>6.48%</td>
</tr>
<tr>
<td>10 Years</td>
<td>16.58%</td>
<td>15.92%</td>
</tr>
<tr>
<td>5 Years</td>
<td>10.64%</td>
<td>10.91%</td>
</tr>
<tr>
<td>3 Years</td>
<td>13.27%</td>
<td>13.51%</td>
</tr>
<tr>
<td>1 Year</td>
<td>10.84%</td>
<td>9.49%</td>
</tr>
<tr>
<td>YTD</td>
<td>15.07%</td>
<td>13.64%</td>
</tr>
</tbody>
</table>

Like us on Facebook! University of Tulsa Friends of Finance

We are also on LinkedIn
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:

![Corporate Sponsors Logos]

- Trust Company Oklahoma
- Williams
- Laredo Petroleum, Inc.
- Alliance Resource Partners, L.P.
- JPMorgan Chase
- Barrow & Grimm
- TDW
- EY
- BancFirst
- MidFirst Bank
- ONE Gas
- Bank of Oklahoma, N.A.
- Phillips 66