

May 8, 2019

Peggy Simmons
President & COO

Public Service Company of Oklahoma

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 on-line: [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



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

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

2018-2019
Finance Excellence Fund

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

Leadership

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**®

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.

	<u>SIF</u>	<u>S&P500</u>
Since 4/13/98	6.64%	6.48%
10 Years	16.58%	15.92%
5 Years	10.64%	10.91%
3 Years	13.27%	13.51%
1 Year	10.84%	9.49%
YTD	15.07%	13.64%

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:

