



Friends of Finance

September 15, 2016

Tim Mahoney
Chief Marketing Officer
Global Chevrolet



Timothy J. Mahoney serves as Chief Marketing Officer Global Chevrolet and Global GM Marketing Operations Leader General Motors Company. With more than 30 years of automotive industry marketing experience, Mahoney has successfully managed

and led teams in nearly every aspect of the category—from Research and Planning to Product Management and from Marketing Communications to Customer Dealer Service.

Prior to joining Chevrolet, Tim Mahoney was the Chief Product and Marketing Officer for Volkswagen. Tim ranked #3 on the list of the world's 50 most influential CMOs, as determined by Forbes Magazine, Nov 2014. He was appointed Chief Marketing Officer Global Chevrolet and Global GM Marketing Operations Leader in April 2013.

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 September 1, 2016.

Meeting Sponsors
Burt B. Holmes
and
Mary Lee Townsend

We extend our thanks and appreciation to **Burt B. Holmes and Mary Lee Townsend** for serving as our Luncheon Sponsors.

October 16, 2016

Maynard Holt
Co-President
Tudor, Pickering, Holt & Co.



Maynard Holt serves as Co-President of Tudor, Pickering, Holt and Company and leads the firm's upstream advisory business. Mr. Holt was previously a Managing Director with Goldman, Sachs & Co. where he worked in Leveraged and Structured Finance and Energy & Power / Natural Resources.

Holt holds a BA in Economics and Russian from Rice University and an MBA in Public Policy from the John F. Kennedy School of Government at Harvard University.

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 October 4, 2016

Meeting Sponsor
WPXENERGY

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

University of Tulsa Friends of Finance

2016-2017

Executive Speaker Series Luncheons



Tim Mahoney
Chief Marketing Officer
Global Chevrolet
September 15, 2016
Sponsored by:
**Burt B. Holmes &
Mary Lee Townsend**



Maynard Holt
Co-President
Tudor, Pickering, Holt & Co.
October 18, 2016
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WPXENERGY



Michael Skelly
President
Clean Line Energy
November 16, 2016



Craig Jones
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Oklahoma Hospital Assn.
January 20, 2017
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Bob Zapfel
President
Xerox Services
February 16, 2017

TBA

March 2017

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April 2017

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May 2017

Finance Faculty News



Matthew Crook and Brian Walkup, Assistant Professors of Finance, recently had an article accepted for publication in the *Journal of Financial Research*. The article is titled “Rankings and Trends in Finance Publishing: An Iterative Approach.”

In the article, Dr. Crook and Dr. Walkup develop a new method for ranking academic journals, universities, and doctoral programs using an iterative loop ranking system. The system updates internally requiring less dependence on outside inputs, thus improving on prior ranking methods. They base the rankings on a large, hand-collected dataset consisting of information on all articles published in 20 finance journals over a 30 year period.



In addition to the ranking system developed in the paper, Dr. Crook and Dr. Walkup explore trends that have occurred in the finance publishing environment across the 30 years in the dataset. They document a number of shifts including an increase in internationalization and an increase in co-authorship. Across time, the number of international universities in the Top 50 rankings has increased substantially. Improvements in technology allow greater access to co-authors at a distance, resulting in increases in the number of authors per paper and the probability that co-authors are located at different universities.

The extensive dataset was collected by a series of graduate research assistants; Dr. Crook and Dr. Walkup plan to use their unique dataset for a number of other projects in the future.

Welcome New Faculty Member

Svetlana Orlova received her Ph.D. in Business Administration with a concentration in Finance at Oklahoma State University in December of 2014. Prior to joining the University of Tulsa she worked as a Visiting Assistant Professor at Ohio University. Svetlana received a MBA degree with a concentration in Finance in 2005 from Northern Arizona University, and accepted an offer from Intel Corporation for the position of a Senior Finance Analyst in a division that manages the majority of Intel’s commercial contracts with suppliers. However, because of her strong desire for teaching and research, Svetlana decided to pursue a Ph.D. degree. Prior to working at Intel, Svetlana also worked several years for Chevron-Kazakhstan JV “Tengizchevroil” in Tengiz, Kazakhstan.

Her research interests include corporate, behavioral, and international finance with primary focus on capital structure and corporate cash holdings topics.

Roger P. Bey Scholarship Recipient Profile



Evan Brugger is currently a MS in Finance student at TU, graduating in 2017. Evan graduated as a Finance major in 2014 and went to work for Mariner Wealth Advisors. “After spending a few years at Mariner, the experience opened up other paths I wanted to pursue in Finance. As an MSF student, you are able to define your degree through your choice of program tracks that best suit your goals.”

With a goal towards entering the private equity or venture capital areas, Evan has developed an interest in valuation, but also corporate policy. “Dr. Walkup’s class deepened my knowledge of corporate policy and incentives involved with corporate decisions. In addition, a deeper study of portfolio theory has been the highlight of the program thus far. Both have helped me develop critical thinking skills that will help me throughout my career.”

“The Bey Finance Scholarship made my pursuit of a graduate degree at TU an accessible reality. I know I will receive a great return on the investment of going back to school, and my graduate scholarship made this a deal I could not pass up.”

2015-2016
Finance Excellence Fund

Thanks to the amazing support of FOF members and friends, we raised \$151,955 from 110 donors. 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!

2015-2016 Finance Excellence Fund Honor Members are:

Finance Excellence Fund Honor Members are:

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Andrew Aguirre	John Hartman
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Membership

Last year we had membership of 388. 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 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. Members since our last newsletter are below. Members to date (194) are:

Judy Adair	Carl Daugherty	Allen Humbolt	Garrett Mills	Mark Smith
Joe Adwon	Jeff Davis	Jeff Husen	Jerry Morris	Bill Snow
Nick Allen	Keith Diekelman	Robert Hutton	Rick Muncrief	Stuart Solomon
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Patrick Bardsley	Bill Fader	Natalie Killingsworth	David Page	Richard Sullivan
Allen Barrow	Ed Fariss	Amanda Troxell	Crystal Parrett	Hugh Taylor
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Paul Bauman	Tally Ferguson	Debbie King	Bob Paulsen	Bill Thomas
Doug Beineman	Bob Fitzgerald	Kyle King	Gavin Pearson	Baxter Thorman
Roger Bey	Debbie Fleming	Jim Kiser	Brian Pillmore	Tim Tolin
Patty Bick	David Fleske	Jack Koehle	Roberta Preston	Bob Traband
Terry Biehl	Greg Ford	Angela Kouplen	Britt Radford	Kelly Tronzo
Jill Bond	Bob Fouch	Marvin Krueger	Kyle Radtke	Stuart Turner
Phi Boyle	Randy Foutch	Deborah Lackey	Joe Ragsdale	Tim Urban
Donald Burdick	Tom Franz	Caron Lawhorn	Robert Rainey	Kent VanValkenburgh
Richard Burgess	Bob Fredrickson	Sandy Leeds	Joe Redman	James Vaughn
Rick Buterbaugh	Curtis French	Barbarae Limbrick	Tom Redman	David Veitch
Brian Cantrell	Steve Ganzkow	John Lindsay	Phil Reedy	Cal Vogt
Steve Care	Jessica George	Ann Lowry	Derek Reiners	Jon Vrooman
Wen Chiang	James Gifford	Andy MacKay	Robert Reins	Brian Walkup
Mike Clark	Curtis Gimlin	Marcia MacLeod	Harvie Roe	Bob West
Andrew Coffey	Ashley Griffin	Anila Madhan	Jim Rogers	Stan White
Joshua Cole	William Grimm	Tammie Maloney	Brad Rollins	Meg Whitney Gentry
Trey Cooper	Joel Harper	Tyler Maness	Patrick Rooney	Steve Wilkerson
Megan Cordle	Scott Hastings	Adam Marshall	Lori Rowan	Tom Wilkins
Jeff Couch	Hans Helmerich	Geordie Matson	Bob Russell	Scot Williams
Joseph Craft	Jim Hicks	Marc Maun	Hal Salisbury	Tanya Wilson
Bretton Crane	Ralph Hill	Jim McAuley	Robert Sartin	Joe Wolking
Susan Cravens	Brian Hodge	Stan McCabe	Alex Schneider	Chris Wolking
Shawn Crisp	Jim Holloman	David McCollum	Charles Secrest	Daryl Woodard
Matt Crook	Greg Hopeman	Bob McCormick	Kala Sharp	Clayton Woodrum
Patrick Curth	Rick Huck	Jason McGlynn	Julie Skye	Claire Zhang
Harry Dandelles	Dan Hughes	Nick McVey	Julie Smith	Andrew Ziola

Fees

Fees for the 2016-2017 year

- \$250 (Membership + all remaining luncheon fees)
- \$75 (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)
- \$525 (Membership plus all remaining luncheon fees for yourself and one guest)
- \$2,500 One reserved table (8 seats) at each luncheon

Leadership

Our Friends of Finance officers and directors for 2015-2016 are:

Officers

- President Marcia MacLeod
- VP Programs Andrew Ziola, ONE Gas
- Treasurer Roberta Preston, Girl Scouts of Eastern Oklahoma
- Secretary Phil Reedy
- FEF Chair Don Quint, Quint & Associates
- Membership Megan Cordle, Alliance Resource

Directors

- Shawn Crisp, Trust Company of Oklahoma
- Joel Harper, University of Tulsa
- Marc Maun, BOK Financial
- Greg Oliphant, Ceja Corporation
- Mike Osborne
- Kala Sharp, ONEOK, Inc.
- Frank Rhoades, Rhoades Oil Company
- Gale Sullenberger, University of Tulsa

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 Membership Committee

Many thanks to the following members for volunteering to be a part of the 2015-2016 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)
Brad Beeson, J.P. Morgan
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, Hogan Taylor
Gavin Pearson, Bank of Oklahoma
Kysa Rowe, WPX Energy
Charles Secrest, Key Personnel
Julie Skye, Mariner Wealth Advisors
Philip Viles, Jr., University of Tulsa

FOF Web Site

The FOF website 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>

(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.



Chet Cadieux speaks with TU students during pre-luncheon Meet and Greet

Like us on Facebook!



We are also on **Linked in**



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/>

NAIC

Greater Tulsa Area Chapter, BetterInvesting

Educational Classes

Better Investing Member's Day Out

9/10/2016, 10:00 am - 12:30 pm

Herman & Kate Kaiser Library

5202 Hudson Ave

Tulsa, Oklahoma

NAIC Contact:

contact@tulsa.betterinvesting.net

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:

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PETROLEUM, INC.

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WPXENERGY

JPMorganChase 

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GRIMM**

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