



# Friends of Finance

25<sup>th</sup> Anniversary Year

September, 2009

“Bringing the Best to the Best”

**September 9, 2009**

**Founders Day**

**Robert P. Prince**

*Co-Chief Investment Officer  
Bridgewater Associates, Inc.*



Our kick-off speaker for this year's Friends of Finance Executive Speaker Series will be Robert P. Prince, first president and one of the founders of Friends of Finance.

Mr. Prince is a Partner, Co-Chief Investment Officer, Portfolio Manager, and Member of Management Committee at Bridgewater Associates, Inc. He joined Bridgewater in 1986 and has been a Partner for over ten years and is also a Portfolio Manager at SEI Institutional Managed Trust - Large Cap Diversified Alpha Fund. Over the past 18 years, Bridgewater's Pure Alpha fund, which has more than \$30 billion in assets, has averaged an annual return of 15% before fees and never had an annual loss of more than 2%. In 2008, Pure Alpha had a gross return of 14%. Bridgewater is the largest hedge fund in the world. Prior to joining Bridgewater, Mr. Prince oversaw asset and liability management, funding, and investment portfolio management at the First National Bank of Tulsa in Tulsa, Oklahoma. Mr. Prince is a certified CPA. He has B.S. degrees in Finance and Accounting from the University of Tulsa and also has an M.B.A. from the University of Tulsa.

Reservations are required. You may register on-line at: <https://bus.collins.utulsa.edu/fof/reg.asp> or contact Judy Adair at 631-2588 or [judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu). Friends of Finance members will have preference until August 23, 2009.

**October 14, 2009**

**Donald Humphreys**

*Senior VP & Treasurer  
Exxon Mobil Corporation*



A native of Tulsa, Oklahoma, Mr. Humphreys joined Exxon Chemical Company in 1976. Since then, he has held a number of positions in Houston, Baton Rouge, Baytown, Malaysia, and Irving. Some of his assignments include senior financial advisor, financial reporting manager, assistant general auditor, and controller. In 2006, he was elected SVP and treasurer. He has a BS in Industrial Engineering and Management from Oklahoma State University and an MBA from the Wharton School of the University of Pennsylvania.

Reservations are required. You may register on-line at: <https://bus.collins.utulsa.edu/fof/reg.asp> or contact Judy Adair at 631-2588 or [judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu). Friends of Finance members will have preference until September 30, 2009.

## *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 would receive 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. 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](mailto:judy-adair@utulsa.edu) or 631-2588) if you are interested in being a Luncheon Sponsor.

## *Friends of Finance 25<sup>th</sup> Anniversary*

### *“Bringing the Best to the Best”*

The old saying ‘From small acorns grow mighty oak trees,’ also applies to Friends of Finance. Twenty-five years ago Friends of Finance did not exist.

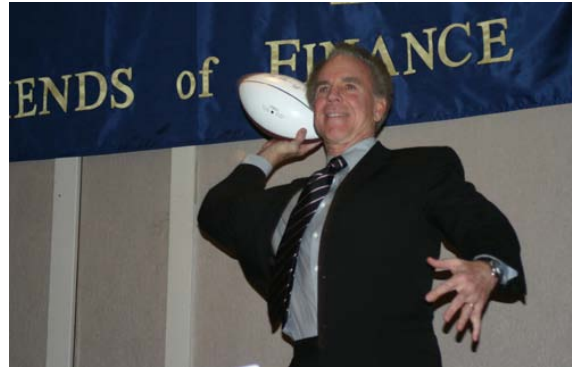
A small group of individuals were still brainstorming and attempting to determine how a support group for the Department of Finance at TU could be organized. Today FOF is a powerful organization second to none for supporting a finance department. The small acorn (the five founders) has unquestionably grown into a mighty oak with more than 400 members; a truly exceptional speaker series which has



brought almost 200 speakers and more than 37,000 guests to the TU campus; the development of a \$1.2 million endowment for the Finance and OM Department; and the granting of more than \$500,000 in scholarships. FOF has achieved much but only because FOF members and friends have been so loyal and supportive. To each of you who has supported FOF in any manner – membership; contributions to the Finance Excellence Fund; suggestions for speakers; being an officer or director, attending luncheons and many other ways, we say thank you. You are the reason Friends of Finance has excelled.

This year in each newsletter and at our luncheons we will provide a brief historical point of interest concerning the development of FOF. The meaning of our tag line, “Bringing the Best to the Best,” is very simple – bringing the best speakers in the U.S. to the best people in the U.S., you – Friends of Finance members and friends.

### *Some of the “Best”*



Roger Staubach  
Chairman & CEO, Staubach Co.  
January 2005



Roger Jarvis  
President & CEO, Spinnaker Exploration  
September 2005



Cy Elmburg  
Chairman & CEO, Blitz, USA  
September 2004

<b>Upcoming Executive Luncheons:</b>			
<b>Date</b>	<b>Speaker</b>	<b>Position and Company</b>	<b>Sponsor</b>
09/09/09	<a href="#">Robert Prince</a>	Co-Chief Investment Officer, Bridgewater Associates	
10/14/09	<a href="#">Donald Humphreys</a>	Senior Vice President, Exxon Mobil Corporation	
12/03/09	<a href="#">David Moffett</a>	Senior Advisor, Carlyle Group; Former CEO, Freddie Mac	
TBA	<a href="#">Steve Feilmeier</a>	EVP & CFO, KOCH Industries	
Feb. 2010	TBA		
Mar. 2010	TBA		
04/14/10	<a href="#">David J. Lesar</a>	President & CEO, Halliburton, Inc.	
05/04/10	<a href="#">Timothy Boyle</a>	President & CEO, Columbia Sportswear Co.	

## *Membership*

Last year we had membership of 420. This year our membership goal is 500. We will be working very hard to meet this ambitious goal by encouraging everyone who was a member last year to renew their membership and all former members who were not members last year to once again become members. 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. Show your support for FOF, The Collins College of Business, and TU by joining today.

To renew your membership or join, go to <https://bus.collins.utulsa.edu/fof/memberapp.asp>. Encourage your friends and colleagues to do the same. Friends of Finance is the largest and strongest finance group in Oklahoma and the Southwest. Your membership will help us maintain our leadership position. Members to date (141) are:

Judy Adair	Jeff Chism	Ben Gorrell	Lindsey Madden	Doug Riess
Denise Adams	Chante' Clarkson	Bill Gottfried	James Maddux	Tom Ritchie
Barbara Allen	Jim Colgan	Rodger Graham	Kieran Major	Frank Robson
Kent Allingham	Megan Cordle	Toni Haenninen	Jim Maxwell	Mike Rothman
Jim Arens	Suzanne Costin	Roger Haglund	Bob McCormick	Alex Schneider
Ana Avila	Joe Craft	Brad Haig	Jim McGill	Jerry Schuyler
Keith Bailey	Patrick Curth	Glen Hall	Mary Melon	J.P. Szafranski
Allen Barrow	Harry Dandelles	Nelda Hall	David Merrill	Richard Shaddox
Ray Batchelor	Barry Davis	Kara Harper	Bill Meyer	Andrew Shank
Gary Belitz	Keith Diekelman	Hans Helmerich	Dale Morgan	Jana Smith
Roger Bey	Mike Dill	Walt Helmerich	Charlie Myers	Bill Snow
Chris Bird	Dell Dreyer	Eugene Hodel	Michael Noland	Dr. Tom Stees
Gene Bishop	Tom Droege	Jim Holloman	Greg Oliphant	Ross Swimmer
Lee Bowen	Janet Duffy	Jeff Holman	Bob Paulsen	Brook Tarbel
Theron Bowling	Bill Fader	Russell Iorio	Mike Payne	Skip Teel
Meg W. Brimmer	Tally Ferguson	Ted Jacobs	Pam Peck	Robert Thomas
George Brown	Norm Fisher	Basil James	Suzanne Penni	Peter Troxel
Mark Buffington	Kelley Fitter	Patti Kastl	Drew Phillips	Stuart Turner
Richard Burgess	Nick Fitzgerald	Jack Kauth	Jim Pinkerton	Cal Vogt
Peggy Burks	Skilly Forsman	Jeff Kendall	Mahlon Pitt	Jon Vrooman
Jim Butler	Bob Fouch	Joe Kidwell	Bob Portiss	Bland Williamson
Nevyle Cable	Randy Foutch	James Kimbrough	Wesley Prudom	Sonja Wilson
Chris Cable	Caroline Franklin	David King	Don Quint	Mark Womble
Brian Cantrell	Tom Franz	Jack Koehle	Tom Redman	Daryl Woodard
Dick Cantrell	Bob Gaddis	Mary Korthase	Joe Redman	Barry Woods
Nancy Cantu	Steve Ganzkow	Sandy Leeds	Lou Reynolds	Scott Zeligson
Chris Cardoni	Richard Gibbs	Craig Loseke	Peggy Rice	Steve Zenthoefter
John Chandler	James Gifford	Tim Madden	Rose Rice	Fan Zhang

**2008-2009**  
***Finance Excellence Fund***  
***2nd Best Year Ever***

The economy tanked and the financial markets crashed, but the generosity of the loyal Friends of Finance members and friends resulted in the second best year ever for the Finance Excellence Fund Campaign -- \$211,860 from 154 donors. Our best year ever was 2004-05 when \$262,295 were contributed. A special thank you to everyone who contributed.

**Finance Founder**

Mike & Caryn Hess

**Finance Partner**

Keith Bailey  
Mike & Cathi Colby  
Joe Craft

**Finance Benefactors**

Bank of Oklahoma  
Roger Bey  
Burton Foundation  
Tom Campbell  
John Chandler  
Don Chappel  
Collins Foundation  
ConocoPhillips  
Susan Cravens  
Greg Hopeman  
Marc Maun  
JP Morgan  
Genave Rogers  
Dan & Vida Schuman

**Finance Patrons**

Joe Adwon  
Jeff Davis  
David Enke  
Alan Ford  
Randy Foutch  
Kerry Freeman  
Walt Helmerich  
Steve Hildebrand  
Beryl McElhiney  
Pete Meinig  
Mike Minahan  
Don Quint  
Frank Rhoades  
Frank Robson  
Samson Investments  
John Steele Zink Fnd.

**Finance Associates**

Nick & Barbara Allen  
Jim Arens  
Sharon Bell  
Aaron Clark  
Bob Fitzgerald  
Bob Fredrickson  
Francis & Judy Gajan  
Jim Hill  
Bill Hobbs  
RJ Lasek  
Craig Loseke  
Kieran Major  
Mike Payne  
Pam Peck  
Mahlon Pitt  
Lee Swarouth  
Richard Williamson  
Zarrow Family Fnd.

**Finance Friends**

Clint Alexander  
Kent Allingham  
Allen Atwood  
Tory Baker  
Mike Bartlett  
Gary Belitz  
Gene Bishop  
Wade Biswell  
Arnold Brown  
Chad Brumley  
BUDCO, Inc.  
Jim Butler  
Jim Colgan  
Mark & Becky Collins  
Sam Combs  
Andrew Comstock  
Megan Cordle  
Mark Crawford  
Lee Crawley  
George Dallas  
MaryBeth DeWitt  
Mike Dill

**Finance Friends(cont.)**

Pat Donica  
Janet Duffy  
Bill Fader  
Tally Ferguson  
Bob Gaddis  
Richard Gajan  
Steve Ganzkow  
Matt Garrett  
Bob Geweniger  
Jayne Gilsinger  
Keith Goddard  
Linda Gunnells  
Eugene Hodel  
Jeff Holman  
Carlyne Holmes  
Bruce Humphrey  
Russell Iorio  
Wilfrido Jatem  
Robert Jennings  
Patti Kastl  
John Kauth  
Jack Koehle  
Mary Korthase  
Sanford Leeds  
Pete Leininger  
William Lissau  
Longbow Asset Mgmt.  
Lindsey Madden  
Max Mason  
Dee McDugle  
Jim McGill  
Joe McGraw  
Bob McGrew  
David Merrill  
Wayne Middleton  
H. Johnson Moore  
Jeff Oldham  
Craig Owens  
David Page  
Suzanne Penni  
Jim Pinkerton  
Dick Pittenger

**Finance Friends(cont.)**

Steve Poleman  
Joe Redman  
Tom Redman  
Ryan Rex  
Peggy Rice  
Jeffrey Rudd  
Patsy Savage  
Alex Schneider  
Chris Shannon  
Bill Snow  
Brooke Snyder  
Cherl Snyder  
Susan Solenberger  
Gary Stanislawski  
Tom Stees  
Bruce Stoesser  
Bob Traband  
Dustin Trinkle  
Kent Van Valkenburgh  
Dudley Viles  
Bill Wilke  
Daryl Woodard  
Tom Warburton  
Chris Wolking  
Terry Wright  
Steve Zenthoef  
Weidong Zhou

**Finance Donors**

Andrew Aguirre  
John Buxton  
Patrick Engelmann  
Jane Faulkenberry  
Skilly Forsman  
Ashish Gupta  
EJ Hammond  
Graydon Luthey  
George Matson  
Barry Woods

## ***2009-2010 Finance Excellence Fund***

The Friends of Finance Board has set a goal of \$250,000 for the 25<sup>th</sup> anniversary of Friends of Finance -- \$10,000 for each year FOF has existed. We realize that this is a serious challenge, but are confident that we will succeed. One key to this is to make sure that we do not leave any of our \$75,000 challenge match for the Judy Adair Finance Excellence Scholarship Endowment on the table. As a reminder, all gifts above the amount a donor or organization contributed during the 2007-08 campaign will be matched. Donors to date for the 2009-2010 Finance Excellence Fund Campaign are:

### **Finance Founder**

Robert & Sharon Prince

### **Finance Patron**

David Enke

### **Finance Partner**

Keith Bailey

You may contribute on-line at  
<https://bus.collins.utulsa.edu/fof/excellencepledge.asp>  
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 118-G  
Tulsa, OK 74104-9700

## ***Alumni / Student Notes***

If you have been promoted, changed companies, earned another degree or have personal information (marriage, birth of child, etc.) please send the information along with a color picture to ([judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu)) and we will include it in our newsletter.

## ***FOF Web Site***

The FOF website <https://bus.collins.utulsa.edu/fof/> includes a number of services as listed below.

### **New Membership**

<https://bus.collins.utulsa.edu/fof/memberapp.asp>

### **Meeting Registration**

<https://bus.collins.utulsa.edu/fof/reg.asp>

### **Members Services**

<https://bus.collins.utulsa.edu/fof/signin.asp>

(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 Renewal**

All of your profile information will come up so you don't have to re-enter this information.

### **Membership Directory**

A listing of all FOF members is provided. Contact information is available only if members agree to have it posted.

### **Update Member Information**

You may update any of your membership information on-line. This will help to make sure that you don't lose contact with us.

### **Job Postings**

Corporate job openings will be posted. E-mails will be sent to advise you that a new job opening has been posted. You will then go to the web site to see the job description.

### **Resume Posting**

FOF members may post their resume on the FOF web site when they are seeking employment.



## *Fees*

### **Fees for this year are:**

- \$210 (Membership plus all 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)
- \$450 (Membership plus all luncheon fees for yourself and one guest)
- \$250 One reserved table (8 seats)
- \$2,000 (One reserved table of eight at each Luncheon)

### **Luncheons:**

Members	\$20
Non-members	\$30

Members may bring a first time attendee as a guest at the member rate.

## *Resume Posting*

FOF members who are seeking employment may now post their resume on the FOF web site. An e-mail will be sent as new resumes are posted. The e-mail will only list the type of position sought and a link. Your user name and password will be required to access the actual posting.

E-mail your resume as a Word or PDF file to Judy Adair ([judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu)) who will post it. In your e-mail, please include a job title (financial analyst, CFO, etc.) of not more than four words. We will not edit your resume. There is no cost to members for this service.

## *Shuttle Service*



Bill White Shuttle Service will provide shuttle service from the parking lots along Gary Place to the Allen Chapman Activity 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.

## *Job Posting*

This year we will continue our web site for job postings service on a no cost basis for all members. Membership is required both to post jobs and to view job postings. Once we post a job, we will distribute an e-mail announcing the new job posting.

Firms who have used FOF to distribute job openings have found it to be a very effective recruiting tool. FOF members have been very appreciative and have told us how they passed along the job information to friends seeking employment. Hence, the distribution is far larger than our membership. We encourage you to have your firm participate in our job posting service.

To post a job opening, e-mail the job description in Word or PDF file, along with contact information to Judy Adair ([judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu)) who will post it. We will not edit the files.

## *Leadership*

Our officers and directors for 2009-2010 are:

### Officers

President	Greg Hopeman, UBS Financial
VP Programs	Jeff Holman, Magellan Midstream
Treasurer	Eugene Hodel, Hilti, Inc.
Secretary	Geordie Matson, BancFirst

### Directors

Roger Bey, TU  
Don Chappel, Williams  
Sam Combs, Retired from ONEOK  
Janet Duffy, Samson Investment Company  
Randy Foutch, Laredo Petroleum  
Shane Goodwin, Goldman Sachs

## *Take-A-Student to Lunch*

One goal of Friends of Finance is to provide assistance to our students. Assistance may be in the form of employment advice, employment opportunities, and mentoring. One way to do this is to participate in our Take-A-Student to lunch program. Just contact Judy Adair at 631-2588 or [judy-adair@utulsa.edu](mailto: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.

## 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.

The annual cost of a Corporate Sponsorship is \$3,500. If you are interested in having your corporation join, contact Judy Adair at 631-2588 or [judy-adair@utulsa.edu](mailto:judy-adair@utulsa.edu) for details. Thus far, Corporate Sponsors for this year are:



CPAs & BUSINESS ADVISORS



## *Affiliate's Programs*

Last year our partnerships with other professional groups worked very well. They helped to promote our programs and we did the same. This year, we will continue our partnerships.

### AAPG Mid-Continent Section Meeting 2009

“Resources for the Generations”

October 13, 2009

Presented by: Tulsa Geological Society

### **America's Energy Heartland America's Energy Future**

A distinguished panel of national experts presents this free forum at the Tulsa Southern Hills Marriott that will engage business professionals, scientists, students, and members of the general public in a discussion of energy challenges and opportunities facing the Mid-Continent region.

For more information or to register:

[www.2009aapgmidcon.com](http://www.2009aapgmidcon.com)

### Energy Advocates

For more information: 599-7767

[info@energyadvocates.org](mailto:info@energyadvocates.org)

The upcoming International Energy Policy Conference IEPC event will be held in Oklahoma City, OK. This year's theme is "American Leadership and Global Energy Transitions" that reflects the current market conditions. Join key energy executives, political representatives, and peers in the energy policy conference. For more information:

<http://www.energypolicyconference.com/>

### NAIC

4<sup>th</sup> Thursday Free Education Classes

6:45 p.m. – 7:30 p.m.

Hardesty Library, 8316 E. 93<sup>rd</sup>

NAIC Contact:

Tami [deangelistami@hotmail.com](mailto:deangelistami@hotmail.com) or 747-9303

or

Barbara [wollmersh@aol.com](mailto:wollmersh@aol.com)

### 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/>

### TU Executive & Professional Development

The Center for Executive & Professional Development in the Collins College of Business can help you brush up your business acumen or prepare for new professional credential. Registration is now open for these and other Fall programs:

Mini-MBA—The TU Mini-MBA is designed to make certain participants leave with knowledge and tools for application that they can actually use in the workplace.

Developing Project Management Skills—This program will help you acquire the must-have skills to successfully to deliver any project on time and within the outlined parameters.

CIA Extreme Exam Prep—This is a blended learning approach—combining the best of online review materials with the best of classroom instruction, to prepare you for testing to become an internationally recognized Certified Internal Auditor.

Oil & Gas Tax + Partnerships—Now being presented in Tulsa, the Tax program will help you understand the bottom line tax implications of exploration and drilling project; while the Partnerships program focuses upon the specific issues encountered by oil and gas partnerships.

For more information and to register online:

<http://bus.collins.utulsa.edu/cepd/programs.aspx> or call  
918.631.2215



# Links

## On-line registration

<https://bus.collins.utulsa.edu/fof/reg.asp>

September: <https://bus.collins.utulsa.edu/fof/docs/20090909RegistrationForm.doc>

October: <https://bus.collins.utulsa.edu/fof/docs/20091014RegistrationForm.doc>

December: <https://bus.collins.utulsa.edu/fof/docs/20091203RegistrationForm.doc>

April: <https://bus.collins.utulsa.edu/fof/docs/20100414RegistrationForm.doc>

May: <https://bus.collins.utulsa.edu/fof/docs/20100504ReigstrationForm.doc>

<https://bus.collins.utulsa.edu/FOF>

[Membership Form](#)

[Pledge Card](#)