



Friends of Finance

January, 2014

January 23, 2014
Andrew Taylor
Chairman & CEO
Enterprise Holdings



Andy Taylor, who became involved in the automotive business more than 40 years ago, took on the role of Chief Executive Officer of Enterprise Rent-A-Car in 1991, and was named Chairman in 2001. Enterprise – founded in St. Louis in 1957 by his father Jack Taylor – is now called Enterprise Holdings.

Today, Enterprise Holdings and its affiliate Enterprise Fleet Management together offer a total transportation solution. Combined, these businesses – which include extensive car rental and car sharing services, commercial truck rental, corporate fleet management, and retail car sales – accounted for \$15.4 billion in revenue and operated 1.3 million vehicles throughout the world in fiscal 2012. Ranked by Forbes as one of America's Largest Private Companies, Enterprise Holdings' revenues also place the company near the top of the travel industry, exceeding many airlines and most cruise lines, hotels, tour operators and online travel agencies.

Meeting Sponsor

We extend our thanks and appreciation to **Sam Combs/COMSTAR Advisors and Lobeck Taylor Family Foundation** for serving as our Luncheon Sponsors.

2013-2014 *Finance Excellence Fund*

Phil Reedy, Finance Excellence Fund (FEF) chair announced the 2013-2014 Campaign is open. Investments in the FEF become part of the endowment that is the Student Investment Fund (SIF). Currently 22 students, under the direction of SIF Coordinator/Instructor Tally Ferguson, manage \$3.5 million. The portfolio consistently matches or exceeds the performance of the S&P 500.

Earnings from the Fund are used to support student scholarships, research and teaching requirements for SIF, and enhancements for the School of Finance, Operations Management and International Business.

Our goal for 2013-2014 is \$225,000 including \$75,000 in new contributions to the Judy A. Adair Matching Grant. Make your donation now by investing online:

<https://collinssecure.utulsa.edu/fof/Pledge.aspx>
or send a check payable to University of Tulsa Finance Excellence Fund and send to:

Friends of Finance
Collins College of Business
The University of Tulsa
800 South Tucker Drive, Helm 118-G
Tulsa, Oklahoma 74104-9700

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!

February 11, 2014
Douglas Lawler
CEO
Chesapeake Energy



Robert D. Lawler joined Chesapeake as Chief Executive Officer in June 2013. Mr. Lawler served as Senior Vice President, International and Deepwater Operations at Anadarko Petroleum Corporation and as a member of Anadarko's Executive Committee from July 2012 to June 2013. Prior to that, Mr. Lawler served as Anadarko's

Vice President, International Operations from December 2011 to July 2012, Vice President, Operations for the Southern and Appalachia Region in the U.S. onshore from March 2009 to July 2012 and Vice President, Corporate Planning from August 2008 to March 2009. Mr. Lawler held a variety of positions with increasing responsibility within Anadarko following its acquisition of Kerr-McGee Corporation in August 2006. Mr. Lawler began his career in 1988 with Kerr-McGee. He is a proven oil and gas executive with significant expertise in asset development, operations management and engineering as well as experience in corporate and strategic planning.

Meeting Sponsors



We extend our thanks and appreciation to **SemGroup Corporation and Anchor Drilling** for serving as our Luncheon Sponsor.

We Need You

Membership is critical to our success. Last year we had membership of 404. This year our membership goal is 500. Please take time to register your membership before year end. We are encouraging everyone who was a member last year to renew their membership and asking all former members who were not members last year to return to the fold. 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 the Friends of Finance organization.

To renew your membership or join, go to <https://collinssecure.utulsa.edu/fof/Application.aspx>. 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 since our last newsletter are below. For a complete list of members (368), please go to: <https://collinssecure.utulsa.edu/fof/Members/>

- Loren Armstrong
- Ken Boykin
- Bretton Crane
- Joe Custer
- Carter Glidewell
- Sarthak Jain
- Valerie Kerr
- Don Lehman

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.

Upcoming Executive Luncheons:

Date	Speaker	Position	Company	Sponsor
01/23/2014	Andrew Taylor	Chairman & CEO	Enterprise Holdings	Sam Combs/ COMSTAR Advisors
02/11/2014	Douglas Lawler	CEO	Chesapeake Energy	SemGroup/Anchor Drilling
03/10/2014	Thomas Jorden	President & CEO	Cimarex Energy Co.	Helmerich & Payne
04/23/2014	James Hackett	CEO	Steelcase, Inc.	Leggett & Platt

Leadership

Our officers and directors for 2013-2014 are:

Officers

President Sam Combs, ComStar Advisors
 VP Programs Don Quint, Don P. Quint & Associates
 Treasurer Shawn Crisp, Trust Co. of Oklahoma
 Secretary Kieran Major, American Airlines

Directors

J. Markham Collins, TU
 David Dunham, Unit Corp.
 Marcia MacLeod, WPX Energy
 Phil Reedy
 Derek Reiners, ONEOK, Inc.
 Frank Rhoades, Rhoades Oil Company
 Paul Samuels, Morgan Stanley Smith Barney

Fees

Fees for the 2013-2014 year have been reduced as of December 11, 2013:

\$130 (Membership plus all 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)
 \$250 (Membership plus all luncheon fees for yourself and one guest)
 \$1,000 One reserved table (8 seats)

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

Friends of Finance Accomplishments

Friends of Finance (FOF)

- Has existed and thrived for 28 years
- Had 404 dues paying members in 2012-2013
- Has had over 200 speakers address the group
- Leading executives including Jamie Dimon, Richard Fuld, Kenneth Lewis, Ed Whitacre; Roger Staubach, and John Wooden have spoken at FOF
- Approximately 400 people attend every luncheon
- 50,000+ people have attended the luncheons
- Executive speaker series is the most active in the Southwest
- Students have an exclusive one hour Q&A with the speakers. No other university in the U.S. is known to provide students with the opportunity to visit with a major executive every month.
- No other U.S. Business or Finance Program is known to have an equivalent speaker series
- Has been a major force in developing business relationships for TU

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Employment Opportunities

Friends of Finance provides a position matching service for our members. Any company recruiting for an open Finance (or related) position may submit the position for posting. Simply provide a job description and contact procedures exactly as you want them posted. It will appear there for up to six weeks unless you request to remove it sooner. There is no fee for this service.

Access to the job postings area requires current Friends of Finance individual membership. This is a benefit of membership. The entire membership is notified of new postings through a membership wide email announcement. This supplies only basic information including job title and a link to the posting area.

We hope to expand participation in this [Member Service](#), so if your firm has an open position, please consider this opportunity. We regularly have over 400 members. Members, if you or those in your network are seeking positions, consider checking the listings with Friends of finance.

FOF Web Site

The FOF website www.utulsa.edu/fof/ includes a number of services as listed below.

New Membership

<https://collinssecure.utulsa.edu/fof/Application.aspx>

Meeting Registration

<https://collinssecure.utulsa.edu/fof/Meetings.aspx>

Members Services

<https://collinssecure.utulsa.edu/fof/Members/> (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.

Job Postings

Corporate job openings are posted on the web site by members. View job description of openings after logging in to Member Services.

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 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. 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 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.

Alumni News

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) and we will include it in our newsletter.

2013-2014
Finance Excellence Fund

The 2013-2014 Finance Excellence Fund Campaign has been launched. Our goal for 2013-2014 is \$225,000 including \$75,000 in new contributions to the Judy A. Adair Endowment. The Adair Endowment was established in 2008 and includes a challenge grant. To date, we have raised \$81,735 from 65 donors. Hence, we need everyone's help to continue raising FOF to higher and higher levels.

Contribute on-line at: <https://collinssecure.utulsa.edu/fof/Pledge.aspx> or send 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, Oklahoma 74104-9700

2013-2014 Honor Roll

Finance Excellence Fund Honor Members to date are:

Finance Sponsor

Mike & Kathi Colby

Finance Partner

Michael Krimbill

Finance Benefactors

Joe Adwon
Arnold Brown
George & Jennie Collins Foundation
Helmerich & Payne
J.P. Morgan Chase
Tammie Maloney

Finance Patrons

J. Markham & Becky Collins
Steve Hildebrand
Pete Meinig

Finance Associates

Ben Abney Bill Snow
Sharon Bell Jack Koehle
Jake Dollarhide Tom Warburton
Bob Fredrickson Dick Williamson

Finance Friends

Kent Allingham	Russell Iorio
Loren Armstron	John Kauth
Tory Baker	Stephen Layton
Mike Bartlett	Sandy Leeds
Roger Bey	Jim McGill
Denie Buchanan	Joe McGraw
BUDCO	Johnson Moore
Andrew Comstock	Greg Oliphant
Megan Cordle	Frauke Quiroga
George Dallas	Tom Redman
Harry Dandelles	Phil Reedy
Mike Dill	Tom Stees
Frederick Drummond	Bruce Stoesser
Tally Ferguson	Gale Sullenberger
Debbie Fleming	Richard Sullivan
Bob Geweniger	Baxter Thorman
Keith Goddard	Bob Traband
Carlyne Holmes	Weidong Zhou
Mike Huckaby	

Finance Donors

Scott Bennett	Bob Jennings
John Buxton	Mary Korthase
Jane Faulkenberry	Dennis Reecher
Irving Fenster	Meg Whitney
John Hartman	

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.

Corporate Sponsors make a \$3,800 commitment to Friends of Finance. 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:



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.

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 and Professional Development offers a variety varied curriculum of seminars, certificate programs and conferences. A series of energy-related programs for accountants, auditors, tax professionals are scheduled in Houston: and Tulsa: through the year. In addition, a multi-level series in project management is offered this spring in Tulsa. All programs can be customized and delivered as onsite at any company.

For more program descriptions, registration information or questions, please go to: <http://bus.collins.utulsa.edu/CEPD/> or contact Center Director Linda Adlof at linda-adlof@utulsa.edu.

NAIC

Greater Tulsa Area Chapter, BetterInvesting

4th Thursday Free Education Classes

6:45 p.m. – 7:30 p.m.

Hardesty Library, 8316 E. 93rd

NAIC Contacts:

Tami deangelistami@hotmail.com or 747-9303
Barbara wollmersh@aol.com



Volunteer Opportunity in February

Junior Achievement[®]
of Oklahoma

Needs mentors to pair with high school teams of four in a Stock Market Simulation

11th Annual JA Investor Challenge

Tuesday, February 11 or Wednesday, February 12

3 hour time commitment-lunch provided
Tulsa Tech-Lemley Complex-3420 S. Memorial

Sessions are 8:30-11:30 a.m. or 11:30 a.m.-2:30 p.m. either day

This event is an experiential learning opportunity that correlates to Oklahoma Financial Literacy Standard, "Saving & Investing."

[Click here to Sign up](#)

For more information mroney@jaok.org

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We are also on **LinkedIn** 