

# Friends of Finance

**April - May, 2003** 

# May 22, 2003

# Steve Malcolm Chairman, President & CEO Williams



For the last year Williams has been selling assets and restructuring. At our next luncheon, Steve Malcolm will explain challenges Williams faced, the actions they have taken meet these challenges, the and

future that faces Williams.

Our attendance has reached capacity and we expect the same for this meeting. Register today to guarantee a seat.

# 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 Miller at 631-2588 or <a href="mailto:judy-miller@utulsa.edu">judy-miller@utulsa.edu</a> 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.

# Student Employment

If you have either summer (part-time or full-time) or permanent positions you need to fill we have some great students who are seeking employment. E-mail a job description and contact information to Judy Miller (631-2588 or judy-miller@utulsa.edu) and she will make sure that our students are aware of opportunities with your firm.

#### Web Site

Please visit our web site at www.cba.utulsa.edu/organizations/FOF.

Membership forms, pledge cards, meeting registration forms, and our newsletter are all there. We plan to make it possible to join, register, and make payments on-line in the near future. In the meantime, print the forms and fax or mail. Sorry.

#### E-Mail

If you are still receiving a paper copy of the newsletter and would like to go electronic, please contact Judy Miller at (918) 631-2588 or <a href="mailto:judy-miller@utulsa.edu">judy-miller@utulsa.edu</a>. Our electronic format takes you to the newsletter on our website. We do not send it as an attachment.

# Corporate Sponsors

We thank all of our corporate sponsors for their support.









# <u>Oxley Petroleum</u>



Corporate sponsors receive a table for eight at all FOF meetings for the year; recognition in every newsletter; a prominent table sign noting their sponsorship; a guaranteed front of the room table; and recognition at each luncheon.

The annual cost of a Corporate Sponsorship is \$2,500. Consider having your corporation join. Contact Judy Miller at 631-2588 or judy-miller@utulsa.edu for details.

# Anonymous

# Membership



Eleven more members and this year's goal of 350 members will be met. Bring a guest and encourage them to join. It is only \$10 for the remainder of the year. New members since our last newsletter are:



Cathy Audley
Rose Barnett
Ed Belan
Terry Bigger
John Buxton
Roger Collins
Keith Goddard
Nelda Hall

Dennis Heaberlin
Kent Hudson
David Kollmann
Jody Parker
Lisa Peters
Gordon Robinson
Timothy Tsai



# **Upcoming Executive Luncheons:**

Date	Speaker	Title	Company
May 22, 2003	Steve Malcolm	Chairman, President, & CEO	Williams
September 17, 2003	Archie Dunham	Chairman, President & CEO	Conoco-Phillips
October, 2003	TBA		
November 19, 2003	Janice Stoney	Former EVP	U. S. West (Qwest)

# Affiliate's Programs

#### **Energy Advocates**

For more information: 599-7767

#### **Oklahoma Investment Forum**

May 19, 2003 (Speaker To Be Announced)
Tulsa Downtown DoubleTree Hotel. RSVP required
Oklahoma Private Enterprise Luncheon
Registration begins at 11:45 am
Call 918-584-8884 for more details
info@oifonline.org

#### **COEITT**

See <u>www.coeitt.net</u> for details. Go to 'Partner Events'

#### **NAIC**

2003 Education Classes & Board Meeting dates 4<sup>th</sup> Monday Free Classes 6:45 p.m. – 7:30 p.m. Hardesty Library

Date	Class
06/23/03	Portfolio Diversity
07/28/03	PE – Not a Gym Class!
08/25/03	Intro to Stock Selection Guide
09/22/03	Mutual Fund Basics and
	ANNUAL MEETING
10/27/03	Panel Discussion w/ NAIC Directors
11/24/03	Balancing Growth and Yield

#### NAIC Contact:

deangelistami@hotmail.com or 747-9303

## Summer Time

This is our last newsletter for this year. Please watch for next year's membership materials about August 1<sup>st</sup>. Next year is shaping up as another great year. Have a good summer. We look forward to seeing you in September.

# Strategic Plan Update

In 2002, the FOF Executive Committee adopted an ambitious strategic plan. Great progress has been made in achieving our goals. A summary of our goals and our current status follows.

- **Goal** Increase Student Investment Fund to \$1,000,000 by May 31, 2005.
- ❖ Status Current value is \$520,000; the markets have not been kind.
- **Goal** Increase contributions to \$100,000 annually by May 31, 2005.
- ❖ Status This year's contributions are \$86,000+ with the potential for more significant gifts by May 31<sup>st</sup>.
- **Goal** Increase membership to 325 by May 31, 2003
- ❖ Status Current membership is 339.
- **Goal** Award \$35,000 per year in scholarship, fellowships, and awards by May 31, 2005.
- **♦ Status** \$25,000-\$30,000 will be awarded for 2003-2004.
- **Goal** Provide \$5,000 per year for international finance programs by May 31, 2005.
- ❖ Status No expenditures to date.
- Goal Obtain funding for one named scholarship per year.
- ❖ Status No named scholarships (since adopting strategic plan) to date.
- Goal Obtain funding for one named professorship, distinguished chair, or endowed chair by May 31, 2005.
- ❖ Status Funds not yet obtained.

Thank you to everyone who has helped us achieve so much.

## Finance Excellence Fund

The extreme generosity of 128 donors and \$86,215 has brought Friends of Finance closer to reaching our revised goal of \$90,000. Our goal is 135 donors. We can reach this goal too.

These funds are managed by students in our Student Investment Fund. Earnings from the SIF are used to support the foregoing objectives. Sixty students have received some \$70,000 in scholarships. This year fourteen students are being helped by your generous support. A pledge card is available at: <a href="https://www.cba.utulsa.edu/organizations/FOF">www.cba.utulsa.edu/organizations/FOF</a>. Click on 'Pledge Card' to open a Word file. Please respond generously.

Honor roll members for 2002-03 are.

#### **Founders**

Friends of Finance Michael & Caryn Hess

#### <u>Partner</u>

Beryl McElhiney
Ralph & Frances McGill Foundation

#### **Benefactors**

Ellen Adelson	Michael Minahan
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Michael Colby	Charlie Stephenson
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Jim Flaherty	

#### <u>Patrons</u>

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Robert & Annette Boyd	Donald Lorack, Jr.
Susan Cravens	Donald Newman
Alan Ford	Genave Rogers

## **Associates**

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Richard & Ellen Burgess	Mike Rothman
Thomas Campbell	Dan Schuman
Robert Fredrickson	Zarrow Family

### Friends

<u>Friends</u>		
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Michael Evanson	Jody Parker	
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#### **Donors**

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Julia Klammer	Cindy Xi

# Links

http://www.cba.utulsa.edu/organizations/FOF

Registration Form

Membership Form

Pledge Card

NOTE: When you open a link, you will need to use your "back" button to return to the Newsletter.