



Friends of Finance

December, 2004

January 13, 2005
Roger Staubach
Chairman & CEO

The Staubach Companies



On January 13, 2005, Roger Staubach, Heisman Trophy Winner at Navy, Dallas Cowboy star quarterback and successful real estate businessman, will be our Executive Luncheon speaker.

The high demand for seats may force us to limit the number of seats available for non-members. Therefore, if you want to guarantee a seat and are not a Friends of Finance member, please join today by completing the attached membership application. Friends of Finance members will have preference until December 10th.

[Please register today.](#) To print the meeting registration form, go to [Meeting Registration](#).

NOTE: The meeting will be held at the Downtown DoubleTree Hotel. Tickets will be mailed to you by January 7th.

Sponsor
Trust Company of Oklahoma

Our sponsor for the Roger Staubach luncheon and reception is The Trust Company of Oklahoma. We thank them for their generous support.

Roger Staubach
January 13, 2005
Private Reception

At 10:00 a.m., prior to the FOF Executive Luncheon, a private reception will be held. Attendees will have the opportunity to visit with Roger Staubach and have their picture taken with him. Attendance will be limited to:

- Corporate Sponsors and their table attendees
- Individuals and their guests who purchase a table for 10 for \$1,000 (Each reserved table will receive one autographed football)
- Non-members of Friends of Finance who purchase individual luncheon tickets for \$100
- Friends of Finance members who purchase an individual luncheon ticket for \$75
- Friends of Finance members who have pre-paid for the year may purchase a reception ticket for \$50

To make reception reservations, contact Judy Miller at judy-miller@utulsa.edu or 631-2588.

We have a limited amount of reception spaces, so register early to guarantee a place.

Drew Pearson comes to TU

Drew Pearson ('73), one of Roger Staubach's favorite receivers will attend the private reception and introduce Roger Staubach at the January 13th luncheon.

January 20, 2005
Douglas E. Hill
Managing Partner

EdwardJones



Our January 20, 2005 speaker is Douglas E. Hill, Managing Partner of EdwardJones. Hill has been with EdwardJones since 1968 when he graduated from Kansas State. In January 2004, Doug Hill became

EdwardJones' managing partner, becoming only the fourth person to hold this position in the firm's 133 year history.

EdwardJones has experienced great growth over the past fifty years. The number of investment representatives has grown from 32 in 1950; to 60 in 1960; 149 in 1970; 378 in 1980; 1,644 in 1990; 5,939 in 2000; and some 9,000 today. Come and learn how they have achieved such amazing growth and what the vision for EdwardJones future is.

Please register today. A meeting registration form is at [Friends of Finance](#).

Avoid Parking Problems

At every on-campus FOF meeting, Bill White Shuttle Service will provide shuttle service from the parking lot north of the Reynolds Center (8th & Harvard) to the Allen Chapman Activity Center between 11:00 a.m. and 2:00 p.m. This service is funded by FOF officers and directors. A campus map is available at <http://www.utulsa.edu/campusmap/print.html>

Alumni News

Clint Dishman (BSBA '92, MBA '97) has joined BOK Financial Group as vice president and trust investment officer

Melissa Bitsche (BS '01, MSF '03) was promoted to assistant vice president in BOK's consumer banking and wealth management division.

Elena Zimina (MSF '03) has accepted a position with the Danish Investment Fund. She is in a training program in Copenhagen for the next 1-2 years and then will transfer to Moscow.

Please send any news, personal or business, that you would like to share with FOF members to judy-miller@utulsa.edu.

No Shows

We have had an increasing number of individuals who make reservations, indicate they will pay at the door, but do not attend or cancel their reservation. Since we have guaranteed a place for them, we unfortunately have to pay for their meal even though we have not received any revenue.

To eliminate FOF from having to absorb these costs, we will begin to invoice individuals who register but do not attend and do not pay.

If you have not paid for your reservation, you may avoid being invoiced by canceling your reservation three business days prior to the luncheon (that is when we must guarantee our luncheon attendance).

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. Contact Judy Miller at 631-2588 or judy-miller@utulsa.edu and tell her how many students you would like to host.

New Member Services

New exclusive on-line serves for members include:

- Membership Directory
- Ability to update your membership profile
- Job Postings
- Resume Postings
- Membership Renewal

In addition, first time members may join on-line. Go to:

<https://bus.cba.utulsa.edu/fof/memberapp.asp> to join or re-new your membership.

Seeking a Position

FOF members may now post their resume on the FOF web site. E-mail your resume as a Word file to Judy Miller (judy-miller@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.

Filling Your Positions

Corporations and placement firms may now post professional job openings on the FOF web site. <https://bus.cba.utulsa.edu/fof>. To post a job opening, e-mail the job description in Word or PDF file, along with contact information to Judy Miller (judy-miller@utulsa.edu) who will post it. We will not edit the files. Once a job opening has been posted, an e-mail with the job title will be sent to everyone on our e-mail distribution list.

The cost of posting job openings for one year (June 1 – May 31) is \$500 for corporations, and \$1,000 for placement or employment agencies. Posting fees include one FOF membership for the participating firm or agency contact person. Job postings for all professional positions, any area, are welcome.

Luncheon Sponsor

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. The Luncheon Sponsorship is for one meeting. The cost is \$1,000. There will be no more than two Luncheon Sponsors at a single meeting. Contact Judy Miller, (judy-miller@utulsa.edu or 631-2588) if you are interested in being a Luncheon Sponsor.

Membership

Membership is running at the highest rate ever. We already have 313 members and are well on our way to our goal of 400. Charter members who also are members this year will receive special recognition at one of our spring meetings. New members since our last newsletter are listed below. You may join on-line by going to [Membership Application](#). Members may view the complete Membership Directory by visiting our web site at <https://bus.cba.utulsa.edu/fof>, clicking on [Member Services](#), logging-in, and clicking on [Directory](#).

Dr. Jerry Brickner
James Campbell
James Colgan
Mike Dodson
Michael Esmond
Francis Gajan
Wayne Hearon
Jim Hill
Stan King

Stan King
Nathan Lovelle
Wayne Middleton
Mahlon Pitt
Robert Prince
Sharon Prince
James Wilburn
Danny Williams

Finance Excellence Fund

Our 20th anniversary Finance Excellence Fund (FEF) Campaign is having an excellent year. Our \$100,000 goal is very achievable. Your support is very gratifying. To contribute on-line go to: [FEF Gift & Pledge form](#).

FEF gifts are placed in the Student Investment Fund (SIF) which is managed by our students. Earnings from the SIF are used to support scholarships. To date, 97 students have received some \$135,000 in scholarships.

This year we have had 66 donors and \$50,800+. Last year YTD we had 39 donors and \$33,300 in gifts. Honor roll members for 2004-05 are.

Founder

Mike Hess
Ralph & Frances McGill
Foundation

Partner

Beryl McElhiney

Benefactor

Keith Bailey

Patrons

Bank One
Bank of Oklahoma
Roger Bey
Collins Foundation
Frank Fisher, Jr.
Kerry Freeman
Steve Hildebrand
Leggett & Platt
Craig Loseke
Bob & Sharon Prince
Genave Rogers

Associates

Joe Adwon
Jeff Davis
Bob Fitzgerald
Karl Knight
John Pilkington
Zarrow Family Foundation

Friends

Jim Arens
Gary Belitz
Sharon Bell
Wade Biswell
Arnold Brown
Denie Buchanan
Michael Burton
John Buxton
John Chandler
Louis Coleman
Susan Cravens
Tally Ferguson
Francis Gajan
Steve Ganzkow
Bob Geweniger
Keith Goddard
Jim Hill
Bob Jennings
John Kauth
James Kelly
Sanford Leeds
William Lissau
Dee McDugle
Jim McGill
Callie Mitchell
Rocky Moore
Pam Peck
Jim Pinkerton
Ryan Rex

Friends (continued)

Ellen Sembe
Bill Snow
Cherl Snyder
Tom Stees
Gale Sullenberger
Brook & Jill Tarbel
Bob Traband
Dick Williamson
Daryl Woodard
Steve Zenthoefer
Weidong Zhou

Donors

Patrick Engelmann
Richard Pane
Marilyn Rains
Joe Redman
Don Rubottom

Corporate Sponsors

We thank this year's Corporate Sponsors for their support.



Samson



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. This year, Corporate Sponsors will be able to post their job openings on our web site for no additional cost. The cost of the Corporate Sponsorship is \$2,500. Contact Judy Miller at 631-2588 or judy-miller@utulsa.edu if you would like to be added to our Corporate Sponsor waiting list.

Upcoming Executive Luncheons:

Date	Speaker	Position & Company
January 13, 2005	Roger Staubach	Chairman & CEO, The Staubach Companies
January 20, 2005	Douglas E. Hill	Managing Partner, EdwardJones
February 17, 2005	Thomas L. Kivisto	President & CEO, SemGroup, LP
March 10, 2005	Gary Forsee	Chairman & CEO, Sprint Corp.
April 21, 2005	James A. Firestone	President, Xerox North America
May, 2005	TBA	

Affiliate's Programs

Our partnerships with other professional groups have worked very well. They help to promote our programs and we do the same. This year's partnerships are:

TU Executive & Professional Development

For more information on any seminar, call 631-2215.

Upcoming Seminars:

Attorneys: Ethics at Work

December 10, 2004

CPA's: Ethics at Work

December 10, 2004

Accounting and Finance for Attorneys

December 3, 2004

Ins and Outs of IRS Practice & Procedure &

Tax Preparer Liability

December 6, 2004 – OKC

December 8, 2004 – Tulsa

Federal Estate & Gift Taxation &

Estate Planning

December 7, 2004 – OKC

December 9, 2004 – Tulsa

Friends of Risk

FOR is devoted to providing discussions on a very wide range of risk management topics.

Contact Judy Miller at judy-miller@utulsa.edu or (918) 631-2588

Oklahoma Investment Forum

Oklahoma Private Enterprise Luncheon

11:45 a.m., Petroleum Club, 15th Floor

[January 11, 2005](#)

Shane Goodwin, Director of Global Mergers & Acquisitions, CitiGroup

For details or reservations: (918) 584-8884

Or e-mail Carla Shwadlenak at Carla@oifonline.org

NAIC

4th Thursday Free Education Classes

6:45 p.m. – 7:30 p.m.

Hardesty Library, 8316 E. 93rd

NAIC Contact:

deangelistami@hotmail.com or 747-9303

Energy Advocates

For more information: 599-7767

info@energyadvocates.org

Aon Risk Services

2005 Business Forum—1st Wednesday of the month
11:30 am to 1:00 pm.

This is a free series and lunch will be included.

Contact Jeannette Oravec

Jeannette_oravec@ars.aon.com

(918) 496-6932

Links

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

[January 13, 2005 Registration form](#)

[January 20, 2005 Registration form](#)

[Membership Form](#)

[Pledge](#)