Friends of Finance

March 2005

March 10, 2005
Gary D. Forsee
Chairman and CEO

The January 10, 2005 issue of Business Week had a special report on "The Best & Worst Managers of the Year." Gary Forsee was listed as one of the best. Business Week's description of Forsee was – "Give Gary D. Forsee credit for his vision. After taking the reins at the Sprint Corporation in March, 2003, he recognized that for his company to excel in the sluggish telecom sector, it would have to jettison its image as a long-distance provider. So Forsee combined Sprint's wireless and wire line businesses to create a company that could provide everything from cellular to local phone services. Then, buoyed by a stock that had soared 50% from a year earlier, Forsee agreed to a $35 billion merger with Nextel Communications Inc. in December. He'll serve as CEO of the combined Sprint Nextel." He will discuss the future of the telecommunications industry and the future of Sprint Nextel.

April 21, 2005
James Firestone
President
Xerox North America

James Firestone was appointed president, Xerox North America at Xerox Corporation in 2004. He is responsible for all direct and indirect channels of distribution in the United States and Canada. Firestone joined Xerox from IBM in 1998 as president of Xerox Channels Group. His most recent responsibilities include the strategy and operational support functions that are managed as centralized corporate initiatives.

Prior to joining Xerox, Firestone held positions with IBM (1995-1998), Ameritech (1993-1995), and American Express (1978-1993).

Firestone's presentation will address the strategy Xerox employed to turn Xerox around and the future direction of Xerox.

Avoid Parking Problems

At every on-campus FOF meeting, Bill White Shuttle Service provides 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

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 theses 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.

Challenge Grant Update

Since announcing the $75,000 Karl and June Martin Jr. Foundation Challenge Grant at our January luncheon, more than $61,000 has been raised. This is a fantastic response. We now want to complete the Challenge by our March 10th luncheon.

All gifts made between December 15, 2004 and May 31, 2005 above the level you gave last year (June 1, 2003 – May 31, 2004) count toward the challenge. The match is dollar for dollar. Corporate matches on your increased gifts also count toward the challenge gift. For example, a $1,000 increase in your gift over last year results in $4,000 for the Finance Excellence Fund if you have a corporate match and $2,000 if you do not have a corporate match.

This is a fantastic opportunity and a huge challenge. However, with the support of all of our 379 members, we can meet the challenge. There are few places where your charitable gifts will be doubled or quadrupled. Give to Friends of Finance and maximize the value of your contribution.

Go to:
https://bus.cba.utulsa.edu/fof/excellencepledge.asp
to make an on-line gift, or send your check, made payable to University of Tulsa, Finance Excellence Fund, to:

Friends of Finance
The University of Tulsa
600 South College Avenue
Business Administration Hall, Room 118-G
Tulsa, OK 74104-3189

Membership

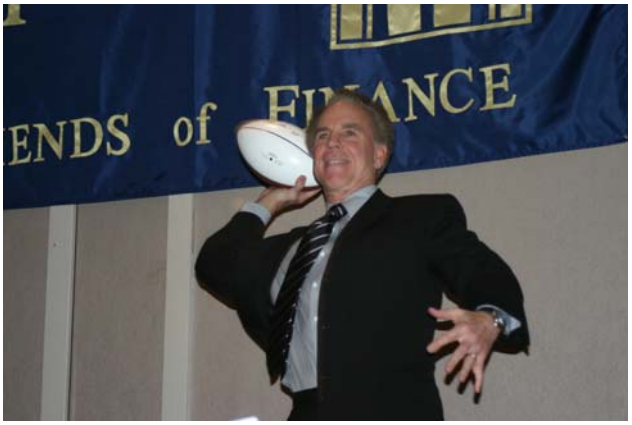
Membership is running at the highest rate ever. We already have 379 members and are well on our way to our goal of 400. Charter members who also are members this year will receive special recognition at one of our spring meetings. New members since our last newsletter are listed below. You may join by completing the attached 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.

Nevyle Cable	Lance Laubach
Adelia Chadwick	Michael McVey
Nicholas Cordle	Jason Reinbold
Barry Davis	Bailey Siegfried
Jeff James	David Turner

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.

Tom Kivisto, President & CEO, SemGroup, LP speaks to FOF on February 17, 2005.



Roger Staubach, Chairman & CEO, Staubach Company tosses a football to Drew Pearson at the FOF luncheon on January 13, 2005.

MS in Finance Students Go to Zurich

Jason Cho, Chad White, and Brian Sulley, all MS in Finance students, will be attending the University of Zurich (UZ) for UZ's summer term (April – July). They are participating in the UZ/TU student exchange program and will be part of UZ's Masters in Finance program. It is a great opportunity for them and is one way we provide international training for our students. In the near future, it will be *auf wiedershen* to Jason, Chad, and Brian.

Finance Excellence Fund

Our 20th anniversary Finance Excellence Fund (FEF) Campaign is having an excellent year. Your support is very gratifying. 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 scholarships.

This year we have had 113 donors and $206,700+. To contribute on-line go to: FEF Gift & Pledge Form.

We have received more than $61,000 toward our $75,000 Challenge goal. Let's meet the challenge!

Honor roll members for 2004-05 are.

Finance Sponsor
SemGroup, LP

Founder
Mike Hess
Ralph & Frances McGill Fnd.

Partner
Keith Bailey
Beryl McElhiney

Benefactor
John Chandler
George & Jennie Collins Fnd.
Susan Cravens
Frank Fisher, Jr.
Craig Loseke
Bob Prince
Frank Rhoades
Samson Investment Company

Patrons
Joe Adwon
Bank One
Bank of Oklahoma
Roger Bey
EdwardJones
Alan Ford
Kerry Freeman
Steve Hildebrand
Leggett & Platt
John Pilkington
Frank Robson
Genave Rogers
George Schulz

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Jeff Davis
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Karl Knight
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Zarrow Family Foundation

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Bill Fader
Tally Ferguson
Deborah Fleming
Skilly Forsman
Phil Franczyk
Bob Gaddis

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Steve Ganzkow
Bob Geweniger
Keith Goddard
Bill Gottfried
E. J. Hammond
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Bruce Humphrey
Russ Iorio
Bob Jennings
John Kauth
James Kelly
Jack Koehle
Sanford Leeds
Pete Leininger
William Lissau
Max Mason
Marc Maun
Dee McDugle
Jim McGill
Wayne Middleton
Callie Mitchell
Rocky Moore
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Jim Pinkerton
Steve Poleman
Don Quint
Tom Redman
Ryan Rex
Ellen Sembe
Bill Snow
Cherl Snyder
Tom Stees

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Brook & Jill Tarbel
Bob Traband
Dick Willliamson
Chris Wolking
Daryl Woodard
Steve Zenthoefer
Weidong Zhou

Donors
Clint Alexander
Nevyle Cable
Patrick Engelmann
Jane Faulkenberry
Gary Morgan
Richard Pane
Marilyn Rains
Joe Redman
Dennis Reecher
Don Rubottom
Kent VanValkenburgh
Dudley Viles
Meg Whitney-Brimmer

Corporate Sponsors

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

Williams & Williams
Changing the way real estate changes hands

THE TRUST COMPANY OF OKLAHOMA

SMITH BARNEY citigroup

JPMorganChase

BANK OF OKLAHOMA N.A.

Samson

Northwestern Mutual FINANCIAL NETWORK

SpiritBank

THE NORDAM GROUP

Williams

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
March 10, 2005	Gary D. Forsee	Chairman & CEO, Sprint Corp.
April 21, 2005	James A. Firestone	President, Xerox North America
May 24, 2005	Maureen Power	Vice President, IBM Business Consulting Services

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

Upcoming Seminars:
National programs from American Management Association:

The Voice of Leadership: How Leaders Inspire, Influence and Achieve Results (AMA)
March 2, 3 & 4, 2005

Technical Project Management (AMA)
March 28, 29 & 30, 2005

Getting Results Without Authority
April 12, 13 & 14, 2005

Lessons Learned from The Apprentice
April 22nd 9:00 a.m.-12:30 p.m.
Featuring TV Apprentice Cast Members. Take part in an Apprentice-style business competition dealing with real workplace business challenges.

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

Oklahoma Investment Forum

Oklahoma Private Enterprise Luncheon
11:45 a.m., Petroleum Club, 15th Floor

March 1, 2005
Ray Booker, Weather Science, Inc. & Aeromet, Inc.

April 5, 2005
Jeff Davis, CEO, U.S. Beef Corporation

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
03/24/05 Annual Reports

Other Classes:
03/11 & 03/12/05 Beg. Stock Study $35
04/09/05 Club Leadership Day

NAIC Model Investment Club
1st Thursday of each month 7:00 p.m.
8316 E. 93rd Hardesty Library

NAIC Contact:
deangelistami@hotmail.com or 747-9303

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.
March 2, 2005
SURETY SERVICES
Presented by AJ Jain, Surety Group

April 6, 2005
ACTUARIAL TOPIC
Presented by Terry Alfuth, Aon Risk Consultants

Contact Jeannette Oravec
Jeannette_oravec@ars.aon.com
(918) 496-6932

Energy Advocates

For more information: 599-7767
info@energyadvocates.org

Links

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

March 10, 2005 Registration form

April 21, 2005 Registration form

May 24, 2005 Registration form

On-Line Membership

Finance Excellence Fund Pledge or Gift