Colleen Taylor is Executive Vice President, New Payments, at Mastercard. In this role, Colleen is responsible for driving volume growth from B2B, Government and new economy (P2P, C2B, B2C, BlockChain, etc.) sources. Colleen joined Mastercard from Capital One, where she most recently served as head of Treasury Management and Enterprise Payments. She was also the Market President for Brooklyn & Queens. Colleen has had a successful career in finance with various positions at Wachovia Bank/Wells Fargo and J.P. Morgan in the US and the UK.

Colleen is a Spelman College graduate and received her MBA from The Wharton School at the University of Pennsylvania. Colleen chairs the Samaritan Village Daytop Foundation Board, serves on the board of Year-Up New York and is a trustee of Spelman College, her alma mater.

Reservations are required. You may register online: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until October 3, 2018.

Scott Sheffield has served as Chairman of the Board at Pioneer Natural Resources since August 1999. He previously held the positions of Chief Executive Officer for the Company from August 1997 through December 2016, and President from August 1997 to November 2004.

Mr. Sheffield serves as a director of The Williams Companies, Inc., a provider of large-scale infrastructure for natural gas and natural gas products, on the advisory board of the Center for Global Energy Policy at Columbia University, and on the Energy Council of CSL Capital Management, LLC, a private equity firm.

Mr. Sheffield is a distinguished graduate of The University of Texas with a Bachelor of Science degree in Petroleum Engineering.

Reservations are required. You may register online: FOF Meeting Registration or contact Judy Adair judy-adair@utulsa.edu or 918-631-2588. Friends of Finance members will have preference until October 23, 2018.
University of Tulsa
Friends of Finance
2018-2019
Executive Speaker Series Luncheons

Alex Lintner
President
Consumer Info Services
Experian
September 4, 2018

Colleen Taylor
EVP
Mastercard
October 17, 2018

Scott Sheffield
Chairman
Pioneer Natural Resources
November 6, 2018

John Hewitt
President & CEO
Matrix Service Company
January 17, 2019

Dana Weber
President & CEO
Webco Industries
February 20, 2019

TBA
March 2019

TBA
May, 2019

Steve Berberich
President & CEO
California ISO
April 23, 2019
Student Success in the CFA® Program

The Chartered Financial Analyst® (CFA) credential is the professional standard of choice for more than 31,000 investment firms worldwide. When hiring, leading firms demand investment professionals with real-world analytical skills, technical competence, and the highest professional standards, often requiring the CFA credential for consideration. To be awarded a Charter, candidates must pass three levels of the exam and obtain 4 years of work experience. The average passing candidate spends between 250 and 300 hours preparing for the exam.

Mariyam Khan (BSBA Finance ’18) graduated from the University of Tulsa as Outstanding Finance Graduate in 2017. Upon graduation, Mariyam is a Financial Analyst in the Treasury Department at ONE Gas. Mariyam is currently pursuing her MBA at TU. “Long nights of studying after a full work day were made much better knowing I was working toward the goals I had for myself.” Mariyam passed Level I of the CFA Exam this summer.

Mahitha Dadireddy (BSBA Finance ’18) is currently pursuing her MS in Finance while working as a Graduate Assistant for the School of Finance. Mahitha passed CFA Level I this summer and say she is “looking forward to continue my journey in attaining the CFA charter.”

Jessie Sheng is pursuing her MS in Quantitative Finance and will graduate in December 2018. Jessie received her master degree in Petroleum Engineering at Texas Tech University. Jessie passed CFA Level I exam this June.

John Norton is currently pursuing his MS in Quantitative Finance at TU. John passed CFA Level II exam this summer.

SIF Student Update

By: William Shanhouse

After graduating in May, a desirable living situation opened up for me in Denver so I took advantage of it and moved to Colorado in early June. As I made the transition, I had FedEx Kinkos create a professional looking booklet for me in which I included my resume, a cover letter, Tally Ferguson’s letter of recommendation, another recommendation letter, and, most importantly, my Student Investment Fund (SIF) New Security Report on Whiting.

With some clever networking both before and after that submission, not only did I meet with Whiting's VP of Land about joining the company, but Whiting's CEO invited me to attend their weekly officer meeting on the following Monday to present my paper and findings.

I spent the weekend updating my figures and putting together a presentation that would wow their c-suite. This serves as a perfect indication of the impact that picking the right new security and putting in effort can have on one's career.

I was offered and have accepted a position as a financial analyst within the BD/A&D group at Whiting Petroleum. If it weren't for my involvement in SIF, I seriously doubt this opportunity would have ever taken root. Therefore, thank you again for mentoring and instructing me this spring. My journey is a testament to SIF’s existence and success. Best of luck with this fall class and beyond.
2018-2019
Finance Excellence Fund

Thanks to the amazing support of FOF members and friends, we raised $73,290 from 86 donors in 2017-2018. 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!

2018-2019 Finance Excellence Fund Honor Members are:

**Finance Founder**
Sharon & Robert Prince

**Finance Partner**
Phillips 66

**Finance Benefactors**
Joe Adwon
William & Susan Thomas
Williams

2018-2019 Membership

We have 268 members to date. Members since our last newsletter are listed below:

<table>
<thead>
<tr>
<th>Nick Allen</th>
<th>Jane Faulkenberry</th>
<th>Don Lane</th>
<th>Toni Rahilly</th>
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<td>Michael Balp</td>
<td>Scott Filstrup</td>
<td>Pete Leininger</td>
<td>Rob Rainey</td>
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<td>Steve Barnes</td>
<td>David Fleske</td>
<td>John Lindsay</td>
<td>Chris Rector</td>
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<td>Mike Bartlett</td>
<td>Maria Franzetti</td>
<td>Ann Lowry</td>
<td>Joe Redman</td>
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<td>David Basden</td>
<td>Curtis French</td>
<td>Marcia MacLeod</td>
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<td>Sharon Bell</td>
<td>Bob Fries</td>
<td>Nicole Marquard</td>
<td>Jerry Reeves</td>
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<td>Alyssa Bolliger</td>
<td>Carter Gates</td>
<td>David Merrill</td>
<td>Patrick Rooney</td>
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<td>John Boone</td>
<td>Sabrina Gicaletto</td>
<td>Jordan Mitchell</td>
<td>Megan Senol</td>
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<td>Chase Bovaird</td>
<td>Ashley Griffin</td>
<td>Michael Monahan</td>
<td>Shannon Shang</td>
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<td>Theron Bowling</td>
<td>Zac Grusendorf</td>
<td>Luke Monsees</td>
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<td>Marco Buitrago Gomez</td>
<td>Chris Guglielmo</td>
<td>Dale Morgan</td>
<td>Yoeri Sijbers</td>
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<td>Ellen Burgess</td>
<td>Timothy Harding</td>
<td>Marilyn Morris</td>
<td>Jim Sorem</td>
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<td>Victoria Burris</td>
<td>Hans Helmerich</td>
<td>Tara Mundell</td>
<td>Tori Stafford</td>
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<td>Kristen Campbell</td>
<td>Courtney Hoffman</td>
<td>Mike Neal</td>
<td>Charles Stuart</td>
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<td>Anita Holloway</td>
<td>Steven Neal</td>
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<td>Frankie Horne</td>
<td>Devin Nelson</td>
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<td>Grey Howard</td>
<td>Gordon Nielsen</td>
<td>Zac Uhles</td>
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<td>Dan Hughes</td>
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<td>Susan Cravens</td>
<td>Paul Johnson</td>
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<td>Jessica Crews</td>
<td>James Kelley</td>
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<td>Natalie Killingsworth</td>
<td>Dick Pittenger</td>
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<td>Ashley Kiser</td>
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<td>Jessica Knobbe</td>
<td>Bob Prince</td>
<td>Daryl Woodard</td>
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<td>Larry Krieg</td>
<td>Sharon Prince</td>
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<td>Paula Kuykendall</td>
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<td>Bill Fader</td>
<td>Kolby LaBorn</td>
<td>Frauke Quiroga</td>
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Internships and Mentoring

Your support of the Finance department through contributions to the Finance Excellence Fund is very much appreciated. It helps build the endowment for future scholarships for finance students and supports the resources our finance students and faculty need to succeed in their classes and careers.

Another way to support the finance students is through internships and mentoring. While our students receive a world-class education at the University of Tulsa, adding experience to the education helps develop these students by putting into practice what they have learned, and gaining the guidance and experience of area professionals as they begin and continue to advance in their careers.

If you have an internship opportunity for a finance student, whether it is a summer internship or one that occurs during the academic year, please contact Ryan Flugum (Ryan-Flugum@utulsa.edu, 918-631-2956) in the School of Finance and he will be happy to help find the right student for your internship.

In addition, another way to have a substantial impact on a student is to serve as a mentor to a student as they complete their education and begin their career. Providing career advice, discussing next steps, letting students know about your experiences and successes provides a real connection to students that will help them advance now and in the future. Please consider mentoring a student.

The University of Tulsa Student Investment Fund

Cordially invites members to the

Fall 2018 New Securities Presentations

Wednesday, November 7th

Wednesday, November 14th

University of Tulsa
Collins College of Business
Helmerich Hall

http://www.utulsa.edu/sif
Membership Event

Please mark your calendars for the first Friends of Finance social event of the 2018-2019 year! On Tuesday, September 25th, we will have the opportunity to join the football team practice session and tour H. A. Chapman stadium on The University of Tulsa’s campus.

We will have the opportunity to hear from members of the athletic department and football coaching staff about the upcoming season.

Appetizers and refreshments will be provided.

This event is open to all current members as well as those interested in getting involved with Friends of Finance.

RSVP’s are required and may be made by email judy-adair@utulsa.edu or 918-631-2588.

Leadership

Our Friends of Finance officers and directors for 2018-2019 are:

**Officers**

President   Kala Sharp, ONEOK
VP Programs Roberta Preston, Girl Scouts of Eastern Oklahoma
Treasurer   Phil Reedy
Secretary   Jeff Husen, ONE Gas
FEF Chair   Andrew Ziola, ONEOK
Membership Curtis French, Phillips66

**Directors**

Bruce Currie, MidFirst Bank
Ryan Flugum, University of Tulsa
Marc Maun, BOK Financial
Mike Neal, Tulsa Regional Chamber
Greg Oliphant, Caja Corporation
Mike Osborne, Ernst & Young
Lane Wilson, Williams
Larry Wofford, University of Tulsa

Membership

Last year we had membership of 327. This year our membership goal is 400. Membership fees support all of the expenses associated with Friends of Finance. To renew your membership or join, go to [Membership Application](#). Encourage your friends and colleagues to do the same. Friends of Finance is the largest and strongest finance group in Oklahoma and the Southwest.

Fees

**Fees for the 2018-2019 year**

- $250  (Membership + all remaining 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)
- $525  (Membership plus all remaining luncheon fees for yourself and one guest)
- $2,500 One reserved table (8 seats) at each luncheon

Shuttle Service

918 Shuttle Service will provide shuttle service from the parking lots along Gary Place to the Allen Chapman Student 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.
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 receives 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. At least 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. In support of this, members and their firms may participate through 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.

Affiliate Programs

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/

NAIC
Greater Tulsa Area Chapter, BetterInvesting
Educational Classes
Tulsa, Oklahoma

NAIC Contact:
contact@tulsa.betterinvesting.net

Like us on Facebook! University of Tulsa Friends of Finance

We are also on LinkedIn®
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. 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: