The Arthur B. Adams Society Dinner

Nov. 8, 2019

Sam Noble Oklahoma Museum of Natural History
WELCOME AND PRICE COLLEGE UPDATE
Wayne Thomas

SEED SOWER RECOGNITION

FEATURED SPEAKERS
Price College Student Leaders:
Chris Beasley
Karma Choedak
Wayne Dallas II
McKinzie Deaton
Alexis Mann
Salma Morales

SOCIETY CHAIR TOAST
Phil Estes

-DINNER-

FOUNDING MEMBER RECOGNITION
Wayne Thomas

ADVANCING MEMBER RECOGNITION
Wayne Thomas

NEW MEMBER RECOGNITION AND INDUCTION
Wayne Thomas

CLOSING REMARKS AND OU CHANT

Phil Estes grew up in Oklahoma City and is a lifelong, third-generation Sooner. He holds a bachelor of science degree in geology from OU, a master of science degree in petroleum geology from Stanford University and an MBA from Harvard University. While at OU, Estes was active in Sigma Phi Epsilon fraternity, in many campus events, and in OU student government. He has been a private equity and debt investor for more than 30 years with Horizon Holdings, LLC, a San Francisco-based firm he co-founded in 1989. In addition to serving as a board member of each of Horizon's investments in both public and private companies, Estes is an active community leader and is particularly engaged in philanthropy and nonprofit work in the human services and education fields. In 2011, he received the Jefferson Award for Public Service, and in 2015, he received the Distinguished Partner Award from the Price College of Business. Estes and his wife, Nancy, have established endowed Estes Family Scholarships in Price College and the Jeannine Rainbolt College of Education. Estes serves on Price College's MBA Board of Advisors. In his spare time, he is a drummer for an aspiring rock band.
New Members

Richard L. Kent - Visionary Leader
Richard L. Kent of Centennial, Colorado, graduated in 1962 with a BBA in accounting. A passionate photographer, avid hiker and world traveler, Kent originally hailed from Seiling, Oklahoma, where his father owned an International Harvester dealership. An arch in northern Arizona was named in his honor after discovering it during a hike. The University of Oklahoma and the Price College of Business are most grateful to Kent for his generosity in leaving OU in his estate plans. His estate gift will provide the Kent Family Chair in Entrepreneurship in support of our Tom Love Division of Entrepreneurship and Economic Development.

Anne and Donald M. Graubart - Chairman
Donald M. Graubart earned his BBA in 1960 and serves as director of IFAM Capital Advisors. Graubart and his spouse, Anne, split time between Houston and the Vail, Colorado, area. Through an estate gift, the Graubarts have established an endowed scholarship fund in the OU Foundation that will provide scholarship support to deserving entrepreneurship students participating in the Price College study abroad program. The couple is honored to give back to the institution that offered Graubart so much.

Frederick G. “Chip” and Lisa S. Taylor - Director
Frederick G. “Chip” Taylor is president of Taylor Oil and Gas Partners, LLC. Prior to forming Taylor Oil and Gas Partners, Taylor served as vice president of land for Silver Hill Energy Partners, LLC, from 2012 to 2017. He began his career with Getty Oil Co. in New Orleans and, over the span of 38 years in the industry as a petroleum landman, served in a number of staff and management positions with Ladd Petroleum, Petro-Hunt, Crawley Petroleum Corp., and RKI Exploration and Production. Taylor received a BBA in petroleum land management from OU and is a member of the American Association of Professional Landmen and the Oklahoma City Association of Professional Landmen. Their generous gifts support an endowed fund for adjunct professors in the Robert M. Zinke Energy Management Program, an endowed fund in support of students matriculating through Price College’s Center for Student Success, and the naming of the Division of Finance Collaborative Flex Conference Room, as part of the Adams Hall third-floor renovation project.

Richard L. and Toni M. Bergmark - Executive
Richard L. Bergmark recently retired as executive vice president, chief financial officer and treasurer of Core Laboratories NV, after joining the company in 1994. Previously, he was employed with Western Atlas, holding positions of treasurer in Houston and manager of finance and administration for Western Geophysical in London from 1987 to 1994. He joined Global Marine as assistant treasurer in 1983, and the Gulf Oil Treasury Department in 1977. Bergmark is a 1975 graduate of the Georgia Institute of Technology with a bachelor of science degree in industrial management. He received his MBA from OU in 1977. He also is a CPA in the state of Texas. He is a member of Core Laboratories’ Board of Directors. The Bergmarks’ gift was made in honor of Steve Long and supports study abroad scholarships for students in the Robert M. Zinke Energy Management Program.

Matthew and Laura Brockwell - Executive
Matthew Brockwell earned a BBA in accounting from Price College in 1983 and is a recently retired audit partner with PwC in the Washington, D.C., area. Brockwell is a member of the Steed School of Accounting Board of Advisors and also serves as an adjunct professor of accounting in the McDonough School of Business at Georgetown University. He and his wife, Laura, reside in Vienna, Virginia, and support the Steed School of Accounting through their Adams Society membership.

Jacob R. and Annette M. Cooper - Executive
Jacob Cooper received his bachelor of accountancy from Price College in 2002, where he was named Price College Outstanding Senior and graduated with honors. He is a partner with Ernst & Young, Annette Cooper received her bachelor of arts degree in journalism with an emphasis in advertising from the Gaylord College of Journalism and Mass Communication in 2003. The couple recently returned from a multi-year assignment with Ernst & Young’s United Kingdom offices. They now reside in Atlanta and support the Steed School of Accounting through gifts to the Ernst & Young Accounting and Accounting Scholarship funds.

Billy G. and Kaye Davis - Executive
A couple from Tulsa, Billy G. and Kaye Davis are generous supporters of Price College’s Steed School of Accounting. Bill received his BBA in accounting from OU in 1957 and is retired from IBM. Along with their son, Chris (who is also a Price College accounting graduate), the Davises created an endowed scholarship fund that will provide support of students majoring in accounting and hailing from the Tulsa or Norman areas.
New Members

Manderson Miles - Executive
In 2019, Mandy Miles Mendicino and her husband, Frank, steered a substantial gift from the Miles Charitable Trust to honor her father, Manderson L. Miles, Jr., a 1969 finance alumnus and managing partner with Knowlton and Miles, PLLC, in Lewiston, Idaho. The contribution supports undergraduate students and the efforts of the Price College Center for Student Success.

Stephen M. O’Shaughnessy - Executive
Stephen M. O’Shaughnessy is the owner of Milan Resources and Investments, LLC, located in Denver. Over the past 38 years, he has been involved in and managed various real estate development projects in California and Colorado. In addition, he has been and continues to be active in many oil and gas developments during that same timeframe in Oklahoma, Colorado, Nebraska, Kansas and North Dakota. O’Shaughnessy graduated from OU in 1972 with a BBA in petroleum land management and completed an MBA in finance in 1974 from the University of Colorado. He worked for WR Grace and Co. and Grace Petroleum during his early years as a financial analyst, security analyst, capital budgeting manager and oil and gas acquisition analyst.

Steven R. and Lea A. Cherek - Partner
Steve Cherek received his BBA in MIS in 1989. That same year, he began his career with Exxon Co. U.S.A. as an application support analyst in Houston. Throughout his career, Cherek has held a variety of business, sales and IT roles in various affiliates, including Exxon Pipeline Co., Exxon Co. International, and Esso Thailand, based in Bangkok. In 2007, he was appointed manager of chemical and corporate IT and, in 2009, became manager of SAP Application Services. He assumed his current role as corporate IT manager in 2018. Cherek currently resides in Houston with his wife, Lea, also an OU alum (B.A., psychology, 1989). Their daughter, Sydney, is a current Price College MIS student following in her father’s footsteps. The Chereks are supporting Price College by naming a faculty office in the Division of Management Information Systems’ new home on the third floor of historic Adams Hall.

Hank and Michele Kraft - Partner
Hank and Michele Kraft of Nichols Hills joined the Adams Society to provide discretionary funds for Price College. In 1992, Hank joined fellow Price College alumnus Hal Smith to form Hal Smith Restaurants. Kraft serves as the chief operating officer of the restaurant empire, which includes Charleston’s, Redrock Canyon Grill, Mahogany Prime Steakhouse, Neighborhood Jam and many more. The Krafts champion causes such as the Civic Center Foundation, the Oklahoma Restaurant Association and the Fellowship of Christian Athletes.

Pat S. and Kevin Mitchell - Partner
Pat S. Mitchell earned her bachelor of business administration degree in accounting from Price College in 1986. Her spouse, Kevin, is the executive vice president, finance and chief financial officer for Phillips 66. The couple reside in Houston and contribute to the Momentum Scholarship fund in support of need-based scholarships for Price College students.

Chris J. Murphy - Partner
Chris J. Murphy received a BBA in accounting from the Price College of Business in 1991. Shortly thereafter, he joined BKD, LLP. He resides in Tulsa and is currently a partner, CPA, and healthcare consultant in BKD’s National Healthcare Group, with more than 21 years’ experience as a trusted advisor for healthcare providers. Murphy generously supports the BKD Accounting Education and BKD School of Accounting funds in the Steed School of Accounting, which provide faculty enrichment and scholarship support.

Bo Olson - Partner
Forrest “Bo” Olson, Jr. graduated from OU in 1972 with a degree in accounting. Olson has more than 40 years of experience, with a special focus on healthcare and professional services. Currently, he serves as a president of Olson Neaves and Co. in Oklahoma City. He has extensive experience in business valuation and litigation support. Olson is a member of the American Institute of Certified Public Accountants, the Oklahoma Society of Certified Public Accounts and the National Association of Certified Valuation Analysts. He and his wife, Pamela, support various charities in the Oklahoma City area, and in their free time enjoy traveling and spending time with their children and grandchildren.

Laurie Pertile - Partner
Laurie Pertile is the private client investment consultant for TD Ameritrade for the Dallas/Fort Worth market. Previously, she served the Clark Financial Group as a financial advisor, as well as Fidelity Investments, where she held the position of financial consultant until her promotion to vice president/financial consultant. Pertile received her BBA in finance from OU in 1987. She is also a Certified Financial Planner™ professional. She supports Price College by naming the faculty/staff workroom in the Division of Finance in honor of her mother, Wren Stalnaker Howard.
New Members

R. Leon Price and Carole Pence - Partner
Professor Emeritus R. Leon Price is known as the founding father of the Division of Management Information Systems in the Price College of Business. During his tenure as OU faculty, he was an active member of the International Conference of Information Systems, the Decision Sciences Institute, the Association of Information Technology Professionals and the Association for Information Systems. Price was an outstanding teacher who won 27 teaching awards and taught more than 27,000 students during his time at OU. In 2010, he was the first professor at Price College to be inducted into the Oklahoma Higher Education Hall of Fame. Price received his BBA in management in 1966 and a Doctor of Business Administration in 1978. He and wife, Carole Pence (B.A. in philosophy, 1971; M.A. in philosophy, 1975; MBA, 1985), have provided stalwart support of Price College over the years, with gifts to the Alumni Council fund, MIS scholarship fund, Business Dean’s Excellence fund and the renovation of the third floor of beloved Adams Hall.

Mark and Deborah Robbins - Partner
Mark Robbins, a 1986 marketing graduate of the Price College of Business, is the president of Benefit Architects, Inc., which has been creating benefit combinations for insurance professionals and consumers since 1987. The company starts by consulting with organizations or corporate leadership to understand the desires, needs and goals with regard to members-only or employee benefit programs. Robbins and his wife, Deborah, live in Colleyville, Texas, with their son and twin daughters. They have chosen to name a faculty office in the Division of Management Information Systems as part of the Adams Hall third-floor renovation initiative.

Morgan and Jackson Dean - Investor
Morgan LePage Dean graduated with honors in 2013 with a BBA in energy management. She is currently a financial analyst at ExxonMobil Corp. Morgan’s husband, Jackson Dean, also earned a BBA in energy management with honors in 2013, and is a landman with ExxonMobil. The couple resides in Spring, Texas, and have supported OU since graduation as members of the President’s Associates program. They recently joined the Adams Society as a way to “pay it forward” in support of students and programs in the Price College of Business.

Matthew and Amy Kingsolver - Investor
After graduating from the Price College of Business with a bachelor’s of business administration degree in finance in 2003, Matthew Kingsolver began his career with Royal Dutch Shell in Houston. Over the past 16 years, he has held multiple positions in Shell’s finance group across their various business lines, including in their corporate M&A team, manufacturing and marketing businesses. He currently is the finance manager for their LNG trading business in the Americas. The Kingsolvers support the Division of Finance through their Adams Society membership.

Brittney and Mark McKinney - Investor
Brittney (Gilliam) McKinney received her BBA in marketing from Price College in 2008. While at OU, she was an active member of the JCPenney Leadership Program. McKinney currently is a natural gas scheduler at ConocoPhillips in Houston. She has served on the board of the JCPenney Leadership Program since 2014 and is currently serving as chairwoman. Mark McKinney earned a bachelor of arts degree in economics from the University of Kentucky in 2002 and an MBA from Texas A&M University in 2007. He is currently a senior planning analyst at Exxon Mobil. The McKinneys support the JCPenney Leadership Program through their Adams Society membership.

Kelly C. Porras - Investor
Kelly C. Porras earned a BBA in MIS from Price College with a minor in Mandarin Chinese in December 2018. While studying at OU, Porras received the National Award scholarship for being named a National Merit Scholar, and she served as president of the Phi Sigma Pi honor fraternity. In May, Porras joined ExxonMobil, where she serves as a change management specialist in IT. She has established an endowed scholarship at the OU Christopher C. Gibbs College of Architecture in honor of her uncle, Mike Bowers, an OU alumnus who recently was diagnosed with stage four pancreatic cancer. As an Adams Society member, she established a Price scholarship in honor of Professor Albert Schwarzkopf, for his dedication to OU students and his passion for making a difference in their lives.

Lauren E. Woodward - Investor
Lauren E. Woodward is a technology project manager at Pioneer Natural Resources, where she has worked for five years in various technology positions. Most recently, she helped to build a technology strategy team, where she led company-wide implementations of communication applications. Woodward graduated from the Price College of Business in 2013 with a bachelor’s degree in MIS and entrepreneurship and venture management. She is a certified Project Management Professional. Woodward invests directly into the lives of MIS students through her Adams Society gifts, which are designated to MIS scholarships.
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It would be difficult to separate the history of the College of Business and that of Arthur Barto Adams, who figures so prominently in the college’s early-day development, and whose legacy at Price College continues through the prestigious Arthur B. Adams Society.

Professor Adams began his long and distinguished career at the University of Oklahoma in 1913, when he joined the faculty as an assistant professor in the newly created School of Commerce and Industry. A native of South Carolina, Adams earned his undergraduate degree from the University of South Carolina and his master’s and doctoral degrees from Columbia University.

Adams was promoted to associate professor at OU in 1916. With the country’s entry into World War I, he had the opportunity to serve the nation as an economist for the Federal Trade Commission in Washington, D.C. His service came on the heels of being promoted to full professor and director of the School of Public and Private Business at OU. In 1919, with a burgeoning student enrollment, the School of Business became an independent entity within the University, and the Bachelor of Science in Business degree was enacted.

In 1923, Professor Adams was named dean of the School of Business. Two years later, the School of Business was admitted as a member of the American Association of Collegiate Schools of Business, the standardizing agency for collegiate schools of business in the United States. The school was elevated to the College of Business Administration in 1929. Adams served as dean until 1948, when he stepped down from his administrative post to return to teaching – a role he would continue until two years before his death in 1959.

During his tenure as dean, the College of Business Administration continued to grow in reputation, student enrollment and programs. By 1941, it was one of the 10 largest collegiate schools of business in the United States. Other highlights include the construction of a new Business Administration building, which was named in honor of Adams in 1952; the initiation of the MBA Program; and the establishment of the Bureau of Business Research, which published the Oklahoma Business Bulletin.
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