Finance & Accounting Career Day

Friday, November 1

Executive Speakers and Panel Discussion
1:15 – 4:50 p.m.
OSU Student Union Theatre

Reception
5 – 6 p.m.
Business Building
Keystone Commons

Audience
Spears School of Business undergraduate students (sophomore – senior, especially finance and accounting majors); MBA students; MSQFE students; MS Accounting students; FMA Chapter members; Beta Alpha Psi Chapter Members

Registration

Hosted By
The Department of Finance, The School of Accounting, The Eastin Center for Career Readiness

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**Finance & Accounting Career Day**

SPEARS SCHOOL OF BUSINESS | OSU STUDENT UNION THEATRE

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<th>Time</th>
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<td>1:15 p.m.</td>
<td>Welcome</td>
<td>Dr. Ken Eastman - Dean, Norman and Suzanne Myers Chair and Richard W. Poole Professorship - Spears School of Business, Oklahoma State University - Stillwater, OK</td>
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<td>Moderator:</td>
<td>Dr. Betty Simkins - Head of Finance, Regents Professor of Finance, and Williams Companies Chair - Spears School of Business, Oklahoma State University - Stillwater, OK</td>
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| 1:30 p.m. | Executive Speakers      | **Corporate Finance:** Jill Sharp, Vice President of Finance - Western Hemisphere, Halliburton Company - Houston, TX  
**Private Equity:** Carl Thoma, Founder and Managing Partner, Thoma Bravo, LLC - Chicago, IL  
**Investment Banking / M&A:** Justine Tobin, Founder & Managing Partner, Tobin & Company Investment Banking Group - Charlotte, NC |
| 3:00 p.m. | Break                    |         |
| 3:20 p.m. | Career Path Panel Discussion | **Business Consulting/Advisory Services:** Kristi Chapman, Partner - Financial Accounting Advisory Services, Ernst & Young, LLP - Dallas, TX  
**Debt & Structured Equity Finance/Investing:** Matt Carter, Vice President, Goldman Sachs Specialty Lending - Dallas, TX  
**Institutional Hedge Fund Investing:** Will Cooper, Co-Founder and Chief Executive Officer, Caption Partners - Oklahoma City, OK  
**Commercial Banking and Wealth Management:** Jeff Phillips, Senior Vice President, Landmark National Bank - Kansas City, MO  
**Real Estate Investing / Finance:** Bryan Morland, Managing Director - Head of Portfolio Management Industrial, Colony Capital, Inc. - Dallas, TX |
| 5 p.m.   | Reception                 | Business Building, Keystone Commons |

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DR. KEN EASTMAN
DEAN, SPEARS SCHOOL OF BUSINESS
Stillwater, OK

Ken Eastman is the Dean for the Spears School of Business. His research interests are mainly in the areas of leadership and organizational politics. He has published articles in such journals as the Academy of Management Review, Academy of Management Journal, Journal of Applied Social Psychology, Journal of Management Information Systems, and Journal of Business Ethics. He received a bachelor’s degree in management from Iowa State University in 1982, his master’s degree in management from Iowa State in 1985, and his Ph.D. in organizational behavior from the University of Nebraska in 1990.

DR. BETTY SIMKINS
HEAD OF FINANCE, REGENTS PROFESSOR OF FINANCE, AND WILLIAMS COMPANIES CHAIR, SPEARS SCHOOL OF BUSINESS
Stillwater, OK

Betty Simkins, Ph.D., is a Regents Professor of Finance, the Williams Companies Chair of Business, and Head of the Department of Finance at Oklahoma State University’s Spears School of Business. She received her bachelor’s degree in Chemical Engineering from the University of Arkansas, her M.B.A. from OSU, and her Ph.D. from Case Western Reserve University. She currently serves on the Commodity Futures Trading Commission Market Risk Advisory Committee. She is co-editor of the Journal of Commodity Markets and serves on 11 other editorial boards. Dr. Simkins loves teaching as evidenced by the six teaching awards. Prior to entering academia, she worked in the energy industry for Conoco (now ConocoPhillips) and Williams Companies.

JILL SHARP
VICE PRESIDENT OF FINANCE – WESTERN HEMISPHERE, HALLIBURTON COMPANY
Houston, TX

Jill Sharp is Halliburton Vice President of Finance for the Western Hemisphere. In that role, she oversees the finance and accounting organization for North America and Latin America, and is the principal financial advisor to the Halliburton President for the Western Hemisphere. Sharp joined Halliburton in 1992 as an accountant. She has progressed through a variety of finance-related roles, including Country Controller for Canada, Global Finance and Accounting Senior Manager for the Production Enhancement product service line, and Senior Controller for the Asia Pacific Region. Most recently, she served as Senior Director of Finance for the Western Hemisphere. Her international assignments have included Calgary and Kuala Lumpur.

Sharp serves on the advisory board for Halliburton University, and is a member of the Halliburton Benefits Committee. She also serves on the board of directors of the Gratitude Initiative, a nonprofit organization that provides educational support to children of U.S. military personnel and veterans.

Sharp holds a bachelor’s degree in accounting from Oklahoma State University, and an MBA from The University of Calgary in Alberta, Canada. She is a 2013 graduate of the President’s Leadership Excellence Program.

CARL THOMA
FOUNDER AND MANAGING PARTNER, THOMA BRAVO, LLC
Chicago, IL

Carl Thoma is a managing partner of Thoma Bravo LLC., a private equity firm he founded in 1980 that currently manages a series of funds representing more than $30 billion of equity commitments. Thoma has previously served on the boards of the National Venture Capital Association and the Illinois Venture Capital Association, Northwestern Evanston Hospital and the Illinois Institute of Technology. Currently, he holds a seat on the Stanford GSB Advisory Council.

Thoma and his wife, Marilynn, are philanthropists and have been active art collectors since the 1970s. The Thomas founded the Carl & Marilynn Thoma Art Foundation to support arts and education initiatives. As their collections have evolved, they have contributed to and supported the development of exhibitions, symposia and publications, the formation of fellowships and awards, and the endowment of professorial chairs and curatorial positions. The Foundation lends and exhibits artworks from the Thomas’ collection of over 900 objects across 3 distinct fields: Spanish Colonial, Japanese Bamboo, and Contemporary, with a major focus on Electronic Art. Carl currently serves on the boards of the McKnight Center for the Performing Arts, New Mexico School for the Arts and SITE Santa Fe, and is a commissioner for the National Portrait Gallery.

Thoma earned his bachelor’s degree in agricultural economics from Oklahoma State University. He went on to complete his MBA at Stanford Graduate School of Business. Thoma primarily resides in Chicago, Ill. The Thomas also own and operate Van Duzer Vineyards, an 80-acre premium estate Pinot Noir winery in the Willamette Valley of Oregon. The Thomas have two adult children.

JUSTINE E. TOBIN
FOUNDER & MANAGING PARTNER, TOBIN & COMPANY INVESTMENT BANKING GROUP
Charlotte, NC

Justine Tobin founded Tobin & Company Investment Banking Group in 2001 and opened the doors of Tobin & Company Securities, the broker dealer subsidiary, in 2006. Tobin is an investment banker with 36 years of experience at TOBIN, First National Bank of Tulsa, Goldman Sachs, Salomon Brothers and Bank of America.

Tobin’s firm focuses on mergers and acquisitions, valuations, private placements as well as broker-dealer services to a variety of clients.

Tobin earned her MBA in Finance from Columbia Business School in New York City and graduated with a Bachelor of Business Administration from the University of Texas at Austin with a double major in Finance and International Business and a minor in French. She attended Oklahoma State University for her freshman and sophomore years as a business major. At OSU, Justine was a Top Ten Freshman Woman, the co-chair of the Homecoming Steering Committee and a member of Standards Committee of Gamma Phi Beta Sorority.

She holds the Series 28, 24, 7, 79, 99 and 63 securities license designations from FINRA and is a member of the Advisory Board of mobilads and the First Citizens Bank Charlotte Advisory Board.
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KRISTI CHAPMAN
PARTNER – FINANCIAL ACCOUNTING ADVISORY SERVICES; ERNST & YOUNG, LLP
Dallas, TX

Kristi Chapman is a Partner in the Financial Accounting Advisory Practice (FAAS) focusing on assisting clients through strategic accounting and financial reporting challenges related to transformation events. She focuses on assisting clients through all aspects of pre- and post IPO, divestitures, finance function optimization, restatements/remediation and implementation of technical accounting standards. Prior to joining FAAS, Chapman served as a Partner in the Dallas Transaction Support group providing primarily due diligence services to both corporate and private equity clients. Chapman also spent 12 years in the Assurance Audit Practice including time in Tulsa, Oklahoma, and Columbus, Ohio. In addition, she served as a resident in the Professional Practice Director’s Group for the Southwest Region and the National Sector Resident for the Retail/Wholesale industry. Chapman earned a bachelor’s degree in Accounting from Oklahoma State University and is Licensed as a Certified Public Accountant in Texas and Ohio. Chapman lives in Dallas with her husband and daughter. She enjoys spending time at the lake, all types of water activities, snow skiing and all OSU sports.

MATT CARTER
VICE PRESIDENT, GOLDMAN SACHS SPECIALTY LENDING
Dallas, TX

Matt Carter is a Vice President at Goldman Sachs in the Special Situations Group (SSG) where he is responsible for structuring, underwriting and execution as well as portfolio management for debt and structured equity investments across a variety of industries. SSG is a global, multi-asset class principal investing business, specializing in investing and lending Goldman’s capital directly to mid-sized companies in all levels of capital structures. Prior to joining Goldman in 2014, Carter worked in the Investment Banking Division at Barclays Capital in New York where he advised clients on private capital financing solutions. Carter began his career in the Alternative Investments group at Lehman Brothers in 2008.

Carter earned a Bachelor of Science in Economics from the Spears School of Business at Oklahoma State University where he was the 2008 Raymond D. Thomas Award recipient. Carter currently represents Goldman in its capacity as a board member or observer with 1849 Energy Partners, Altamont Energy, Advance Science Technologies, Fortior Solutions and Paragon Payment Solutions.

WILL COOPER
CO-FOUNDER AND CHIEF EXECUTIVE OFFICER, CAPTION PARTNERS
Oklahoma City, OK

Will Cooper has served as the Chief Executive Officer at Caption Management since 2012. Prior to co-founding Caption, Cooper was on the investment team at Landmark Partners, a $9 billion private equity fund manager, from 2011 to 2012. From 2008 to 2011, Cooper was an analyst at Cogent Partners, a Dallas, TX based boutique investment bank focusing primarily on secondary private equity transactions. Cooper graduated from Duke University in 2008 with a master’s in Engineering Management and in 2007 with a bachelor’s degree in Biomedical Engineering.

JEFF PHILLIPS
SENIOR VICE PRESIDENT, LANDMARK NATIONAL BANK
Kansas City, MO

Jeff Phillips is Senior Vice President of Landmark National Bank. An Oklahoma native, Jeff began his banking career in high school as a teller in his rural community bank and has since experienced many different aspects of the banking industry. His attraction to banking has been the opportunity to build strong relationships with interesting people and to play a small part in the success of many different families/companies/organizations. He and his family moved to Kansas City in 2003 and quickly called the Country Club Plaza area home. Phillips is actively involved in his church serving in several leadership roles, gladly gives of his time through board positions for a select few non-profit organizations and enjoys supporting various civic organizations through board and committee engagements. He deeply loves his wife Allison and daughters Eliza and Rosie. He enjoys exploring the wilderness, witty movies, showing how un-athletic he is and checking out new, local restaurants.

BRYAN D. MORLAND
MANAGING DIRECTOR – HEAD OF PORTFOLIO MANAGEMENT INDUSTRIAL, COLONY CAPITAL, INC.
Dallas, TX

Bryan Morland is Managing Director, Head of Portfolio Management Industrial at Colony Capital, Inc. He is responsible for Portfolio Management including Asset Management and Property Management in the Industrial platform.

Prior to joining Colony Capital in 2015, Mr. Morland was Managing Director of Cobalt Capital Partners, L.P. overseeing property operations. Previously he was General Manager for Bumgarner Asset Management, a family office investment fund located in Tulsa, Oklahoma. Earlier in his career, he was Assistant Vice President of American Industrial Properties, a public REIT focused on the industrial and flex property sector. Morland also spent a combined six years in public accounting with both Ernst & Young and Deloitte Consulting.

Morland received a Bachelor of Science in Business Administration in Accounting and a Bachelor of Applied Science in Sociology, both from Oklahoma State University. He also obtained the certification of Certified Public Accountant but is no longer carrying a license to practice.

Morland is a native Oklahoman and grew up in Oklahoma City. He graduated from John Marshall High School in 1987. He has been married to his wife Jennifer since 1999 and has two boys, Mason, high school class of 2020 and Maxwell, high school class of 2023.

The Morlands currently live in the Dallas/Fort Worth metroplex and are active members of their church Watermark Community Church. The Morlands serve as leaders of their Community Group and participate in the hospitality service part of the ministry. Their two sons attend Trinity Christian Academy in Addison, TX. Mason is on the cross country, wrestling and track teams and Maxwell is on the Golf and Wrestling teams.