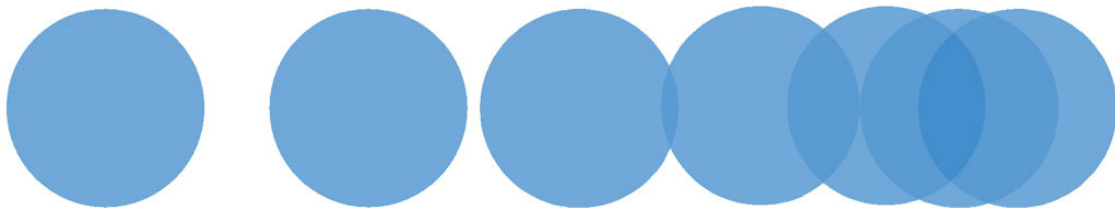


FORWARD OKLAHOMA CITY III  
CAMPAIGN CLOSE-OUT REPORT

**G R E A T E R**  
**O K L A H O M A   C I T Y**  
**C H A M B E R**



SUBMITTED BY:  
RESOURCE DEVELOPMENT GROUP  
APRIL 9, 2006

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**FORWARD OKLAHOMA CITY III  
CAMPAIGN SUMMARY  
APRIL 9, 2006**

	<u>Five-Year Commitments</u>	<u>Campaign Goal</u>	<u>Status</u>
166 Forward III Investors	\$14,987,164	\$14 million	107%

Of the 166 committed investor:

81 are brand new investors.....49%

44 Forward II investors increased their investment..... 27%

35 Forward II investors renewed at the same level ..... 21%

258 solicitation calls were conducted

## FORWARD II AND III INVESTORS

	<b>FORWARD II</b>	<b>FORWARD III</b>	
<b><u>Accounting</u></b>	<b>1%</b>	<b>1%</b>	
Alpha Management Corp.	\$1,000	\$0	
Cole & Reed PC	\$0	\$5,000	
Ernst & Young LLP	\$5,000	\$15,000	
Grant Thornton, LLP	\$12,500	\$12,500	
KPMG LLP	\$25,000	\$25,000	
Thom - Dobson - Womack, Inc.	\$200	\$0	
Truckers Bookkeeping Service, L.L.C.	\$500	\$0	
	<b>\$44,200</b>	<b>\$57,500</b>	<b>30% Increase</b>

	<b>1%</b>	<b>1.40%</b>	
<b><u>Architects/Engineers</u></b>			
Allen Brown Architects LLC	\$1,000	\$0	
Architectural Design Group Inc.	\$0	\$12,500	
C.H. Guernsey & Company	\$0	\$5,000	
Cardinal Engineering	\$0	\$5,000	
Clowers Engineering Company	\$1,000	\$0	
Coon Engineering, Inc.	\$5,000	\$0	
Cooper Medical Buildings, Inc.	\$1,000	\$0	
Frankfurt-Short-Bruza Associates	\$5,000	\$25,000	
Milam Engineering	\$100	\$0	
Miles Associates Incorporated	\$0	\$10,000	
Studio Architecture	\$100	\$0	
TAParchitecture	\$0	\$5,000	
The Benham Companies, L.L.C.	\$125,000	\$125,000	
The Facility Group	\$0	\$12,500	
Wallace Engineering	\$0	\$5,000	
Zahl-Ford	<u>\$0</u>	<u>\$5,000</u>	
	<b>\$138,200</b>	<b>\$210,000</b>	<b>52% Increase</b>

	<b>1%</b>	<b>1%</b>	
<b><u>Attorneys</u></b>			
Crowe & Dunlevy	\$35,000	\$50,000	
Fellers, Snider, Blankenship, Bailey & Tippens, PC	\$500	\$0	
Kevin Blaney, Attorney at Law	\$1,000	\$0	
McAfee & Taft A Professional Corp.	\$10,000	\$12,500	
Phillips McFall McCaffrey McVay & Murrah PC		\$12,500	
Rainey, Ross, Rice & Binns	<u>\$7,500</u>	<u>\$0</u>	
	<b>\$54,000</b>	<b>\$75,000</b>	<b>39% Increase</b>

**Automotive**

	<b>1%</b>	<b>1%</b>	
Bob Howard Auto Group	\$10,000	\$15,000	
Enterprise Rent-A-Car	0	\$12,500	
Eskridge Lexus	\$5,000	\$0	
Hudiburg Auto Group	\$10,000	\$0	
Mercedes-Benz of Oklahoma City	<u>\$0</u>	<u>\$100,000</u>	
	<b>\$25,000</b>	<b>\$127,500</b>	<b>500% Increase</b>

**Banking**

	<b>7%</b>	<b>9%</b>	
Arvest Bank	\$50,000	\$100,000	
BancFirst	\$50,000	\$100,000	
Bank of Oklahoma, N.A., OKC	\$400,000	\$300,000	
Coppermark Bank	\$15,000	\$20,000	
FAA Employees Credit Union	\$2,500	\$0	
First Fidelity Bank	\$0	\$125,000	
First Security Bank & Trust	\$500	\$0	
IBC Bank	\$100,000	\$200,000	
JPMorganChase Bank, N.A.	\$100,000	\$150,000	
Legacy Bank	0	\$5,000	
MidFirst Bank	\$50,000	\$125,000	
SpiritBank	\$5,000	\$0	
Stillwater National Bank & Trust Company	\$25,000	\$25,000	
Tinker Federal Credit Union	\$50,000	\$62,500	
UMB Oklahoma Bank	\$25,000	\$25,000	
Union Bank & Trust Company	<u>2500</u>	<u>\$0</u>	
	<b>\$875,500</b>	<b>\$1,348,500</b>	<b>54% Increase</b>

**Business Services**

	<b>1.20%</b>	<b>1%</b>	
Ackerman McQueen, Inc.	\$100,000	\$100,000	
Cher A. Bumps & Associates, Inc.	\$100	\$0	
Heritage Press	\$4,750	\$0	
Jordan Associates	\$5,000	\$5,000	
Pension Solutions, Inc.	\$10,000	\$10,000	
Southwestern Stationery & Bank Supply	0	\$12,500	
Third Degree Advertising & Communications	\$5,000	\$5,000	
Visual Image Advertising	\$5,000	\$0	
Vox Printing, Inc.	\$1,250	\$0	
Xerox Corporation	<u>\$25,000</u>	<u>\$0</u>	
	<b>\$156,100</b>	<b>\$132,500</b>	<b>15% Decrease</b>

**Business Supplier**

	<b>1%</b>	<b>1%</b>	
Southwestern Stationery & Bank Supply Inc.	0	\$5,000	
Thrifty Office Supply, Inc.	<u>\$2,500</u>	<u>\$0</u>	
	<b>\$2,500</b>	<b>\$5,000</b>	<b>100% Increase</b>

**Communications**

	<b>5.60%</b>	<b>4.20%</b>	
Alltel Communications	0	\$12,500	
AT&T	\$600,000	\$300,000	
Cingular Wireless, LLC	\$5,000	\$0	
Cox Communications	\$100,000	\$250,000	
Dobson Communications Corporation	<u>\$10,000</u>	<u>\$50,000</u>	
	<b>\$715,000</b>	<b>\$612,500</b>	<b>14% Decrease</b>

**Construction Supply**

	<b>1.60%</b>	<b>1.90%</b>	
Acme Brick & Tile Company	\$5,000	\$5,000	
Associated Glass Company	0	\$12,500	
Butterly Co. LTD	\$2,500	\$0	
Cherokee Building Materials of Oklahoma City, Inc.	0	\$12,500	
Dolese Brothers Company	\$200,000	\$250,000	
LPM Parts and Service	\$100	\$0	
McConnell Construction, Inc.	<u>\$1,250</u>	<u>\$0</u>	
	<b>\$208,850</b>	<b>\$280,000</b>	<b>34% Increase</b>

**Consultants**

	<b>1%</b>	<b>1%</b>	
Wilson Research Strategies (In-Kind Investment)	<u>\$10,000</u>	<u>\$50,000</u>	
	<b>\$10,000</b>	<b>\$50,000</b>	<b>200% Increase</b>

**Contractors / General**

	<b>1%</b>	<b>2.30%</b>	
Anderson & House, Inc.	\$1,000	\$0	
Boldt Construction Company	\$25,000	\$125,000	
Clyde Riggs Construction	\$500	\$0	
EGR Construction	\$5,000	\$5,000	
Flintco, Inc.	\$25,000	\$125,000	
J. L. Walker Construction, Inc.	\$4,000	\$0	
Lippert Bros., Inc.	\$25,000	\$25,000	
Maccini Construction Company	\$1,000	\$0	
Richey / Zink & Associates, Inc.	\$250	\$0	
Richey/Zink & Associates, Inc.	\$1,250	\$0	
Scharlach & French Construction	\$1,250	\$0	
Smith & Pickel Construction, Inc.	\$25,000	\$35,000	
Timberlake Construction Co., Inc.	0	\$25,000	
Urban Contractors, Inc.	\$1,000	\$0	
Van Hoose Construction Co.	\$15,000	\$0	
Vantage Paving, Inc.	<u>\$1,000</u>	<u>\$0</u>	
	<b>\$131,250</b>	<b>\$340,000</b>	<b>259% Increase</b>

**Contractors / Specialty**

	1%	1%	
Connelly Paving Company	0	\$5,000	
Coreslab Structures	0	\$12,500	
Delta Electrical Contractors, Inc.	\$2,500	\$0	
Harrison-Orr Air Conditioning, Inc.	\$1,250	\$1,250	
Hinton Refrigeration	\$500	\$0	
Marathon Electric	\$1,000	\$0	
Midwest Wrecking	0	\$25,000	
Oil Capital Electric	0	\$2,500	
OKC Electrical Contractors, Inc.	\$5,000	\$0	
Oklahoma Electrical Supply Company	\$15,000	\$15,000	
Oklahoma Roofing & Sheet Metal	0	\$25,000	
Osborne Electric Company	0	\$25,000	
Southwestern Roofing & Metal Company, Inc.	\$5,000	\$5,000	
Statewide Painting Contractors, Inc.	<u>\$2,500</u>	<u>\$0</u>	
	<b>\$32,750</b>	<b>\$116,250</b>	<b>320% Increase</b>

**Distributors**

	1%	1%	
Associated Wholesale Grocers, Inc.	0	\$5,000	
Ben E. Keith Foods	\$1,000	\$0	
Central Liquor Company	\$37,500	\$50,000	
Clements Foods Company - Garden Club	\$7,500	\$0	
Exide Technologies	\$2,500	\$0	
Great Plains Coca Cola Bottling Company	0	\$50,000	
Ozarka Water & Coffee Service	<u>\$15,000</u>	<u>\$15,000</u>	
	<b>\$63,500</b>	<b>\$120,000</b>	<b>89% Increase</b>

**Education**

	1%	1%	
Langston University	0	\$5,000	
Oklahoma City University	0	\$10,000	
Oklahoma State University - Oklahoma City	<u>\$10,000</u>	<u>\$0</u>	
	<b>\$10,000</b>	<b>\$15,000</b>	<b>50% Increase</b>

**Employment Agencies**

	1%	1%	
Accel Financial Staffing Solutions	0	\$5,000	
Adecco Personnel Services	0	\$5,000	
Express Personnel	\$200,000	\$0	
Partners Human Resources Co.	0	\$5,000	
Wegener Human Resource Group	<u>\$3,000</u>	<u>\$0</u>	
	<b>\$203,000</b>	<b>\$15,000</b>	<b>96% Decrease</b>

**Entertainment/Recreation**

	1%	0%	
Six Flags, Inc.	<u>\$100,000</u>	<u>\$0</u>	
	<b>\$100,000</b>	<b>\$0</b>	<b>100% Decrease</b>

**Foundations**

	<b>10%</b>	<b>10.50%</b>	
Fred & Mary Eddy Jones Foundation	\$100,000	\$110,000	
Inasmuch Foundation	0	\$250,000	
Jean I. Everest Foundation	\$100,000	\$100,000	
Kirkpatrick Family Fund	\$15,000	\$25,000	
Oklahoma Medical Research Foundation	\$50,000	\$50,000	
Presbyterian Health Foundation	\$1,000,000	\$1,000,000	
The Kerr Foundation	0	\$0	
	<b>\$1,265,000</b>	<b>\$1,535,000</b>	<b>21% increase</b>

**Government**

	<b>3.90%</b>	<b>3.30%</b>	
Oklahoma County	\$500,000	\$500,000	
	<b>\$500,000</b>	<b>\$500,000</b>	<b>0% Increase</b>

**Health Care**

	<b>6.40%</b>	<b>6.50%</b>	
Bulldog Laboratory	\$1,000	\$0	
Deaconess Hospital	\$75,000	\$0	
Dean A. McGee Eye Institute	\$25,000	\$25,000	
Dr. Don Rhinehart/Oklahoma Blood Institute	\$1,000	\$0	
INTEGRIS Health	\$350,000	\$400,000	
Medical Consultants, Inc.	\$2,500	\$0	
Mercy Health Center, Inc.	\$100,000	\$100,000	
Oklahoma Allergy & Asthma Clinic, Inc.	\$1,000	\$0	
Oklahoma Blood Institute	\$4,000	\$0	
Oklahoma Heart Hospital	0	\$50,000	
OU MEDICAL CENTER	0	\$100,000	
SSM Health Care of Oklahoma	<u>\$250,000</u>	<u>\$300,000</u>	
	<b>\$809,500</b>	<b>\$975,000</b>	<b>20% Increase</b>

**Home Builders**

	<b>1%</b>	<b>1%</b>	
Bridgeport Holdings	0	\$5,000	
Hearthstone Homes	\$500	\$0	
Home Creations	0	\$5,000	
Ideal Homes	\$5,000	\$25,000	
Mike Gilles Custom Homes	<u>\$1,000</u>	<u>\$0</u>	
	<b>\$6,500</b>	<b>\$35,000</b>	<b>538% Increase</b>

**Hotels/Motels**

	<b>1%</b>	<b>1%</b>	
Courtyard By Marriott / OKC Northwest	\$1,000	\$0	
Holiday Inn Oklahoma City Airport	0	\$5,000	
Renaissance Oklahoma City Hotel	<u>\$5,000</u>	<u>\$7,500</u>	
	<b>\$6,000</b>	<b>\$12,500</b>	<b>108% Increase</b>



**Insurance**

	<b>1.50%</b>	<b>1.50%</b>	
Alan W. Bradshaw Farmers Insurance Agency	\$100	\$0	
Alexander & Strunk, Inc.	\$500	\$0	
American Fidelity Group / First Fidelity Bank	\$125,000	\$125,000	
American Guaranty Title Co.	\$2,500	\$5,000	
Benchmark Financial Group, Inc.	\$500	\$0	
Blue Cross Blue Shield of Oklahoma	\$25,000	\$50,000	
Bradford-Irwin Insurance Agency, Inc.	\$100	\$0	
Capitol Abstract & Title Company	0	\$5,000	
Daniel Chavez Insurance Agency	\$500	\$0	
Lawyers Title of Oklahoma City, Inc.	\$6,250	\$0	
Maschino Hudelson & Associates	\$2,500	\$0	
Medley-Turrentine & Associates	\$2,500	\$3,750	
Meyers-Reynolds & Associates, Inc.	0	\$25,000	
Reed Downey Life Insurance Agency	\$5,000	\$0	
Reserve National Insurance Co.	\$15,000	\$0	
Roger Hicks & Assoc. Group Insurance, Inc.	\$5,000	\$5,000	
Shelter Insurance Companies / Billy Doyal	\$500	\$0	
The Hartford	0	<u>\$5,000</u>	
	<b>\$190,950</b>	<b>\$223,750</b>	<b>17% Increase</b>

**Investment Firms**

	<b>1.50%</b>	<b>1.30%</b>	
Capital West Securities, Inc.	0	\$5,000	
Dorchester Capital	\$100,000	\$100,000	
Jerryco, Ltd.	\$5,000	\$0	
Kestrel Investments, Inc.	\$15,000	\$15,000	
Legacy Wealth Management, LLC	0	\$12,500	
Luther T. Dulaney Company	\$1,000	\$5,000	
McCaskill Financial Group / Mass Mutual	\$500	\$0	
Mike Krywucki and Associates	\$1,000	\$0	
Norick Investment Company	\$60,000	\$60,000	
Oppenheim, a division of Bosc, Inc.	<u>\$15,000</u>	<u>\$0</u>	
	<b>\$197,500</b>	<b>\$197,500</b>	<b>0% Increase</b>

**Manufacturing**

	<b>1%</b>	<b>1%</b>	
Advance Food Company	\$10,000	\$0	
Arrow Machinery Co.	\$500	\$0	
Boardman, Inc.	\$500	\$0	
Capitol Glass & Mirror Company, Inc.	\$1,000	\$0	
Century, Incorporated	\$5,000	\$0	
Chickasaw Enterprises	0	\$25,000	
Duct Fab Company, Inc.	\$1,250	\$0	
Environmental Roofing Systems, Inc.	\$500	\$0	
General Motors	\$10,000	\$0	
Industrial Gasket Inc. (IG)	\$2,500	\$0	
KP Supply Company, Inc.	\$250	\$0	

Mercer Valve Co., Inc.	\$5,000	\$0	
Nyswonger Spring Company	\$500	\$0	
Quad/Graphics, Inc.	0	\$50,000	
Signworks, Inc.	\$1,250	\$0	
Xerox Corporation	<u>\$25,000</u>	<u>\$0</u>	
	<b>\$65,250</b>	<b>\$75,000</b>	<b>15% Increase</b>

### **Media**

	<b>5.30%</b>	<b>8%</b>	
FRIDAY - Nichols Hills Publishing Co.	\$2,500	\$0	
Griffin Communications / NEWS 9	\$75,000	\$100,000	
Journal Record Publishing Company	\$25,000	\$35,000	
KFOR-TV	\$50,000	\$50,000	
KOMA / KRXO / KMGL	\$5,000	\$7,500	
Oklahoma Woman Magazine	\$5,000	\$0	
The Oklahoma Publishing Company	\$500,000	\$1,000,000	
Tyler Media - KKNG/ KTUZ/ KTLR/ KOCY	<u>\$6,250</u>	<u>\$0</u>	
	<b>\$668,750</b>	<b>\$1,192,500</b>	<b>78% Increase</b>

### **Miscellaneous**

	<b>1%</b>	<b>0%</b>	
ACP Sheet Metal Co., Inc.	\$1,250	\$0	
AIR Technologies	\$500	\$0	
American Millwork Co., Inc.	\$750	\$0	
Atchley Resources, Inc.	\$1,000	\$0	
Atlas Glass & Mirror	\$1,000	\$0	
Hinton Refrigeration	\$500	\$0	
Oklahoma RedHawks	\$5,000	\$0	
Sine Construction/Kitchen & Bath Gallerie	\$1,250	<u>\$0</u>	
	<b>\$11,250</b>	<b>\$0</b>	<b>100% Decrease</b>

### **Oil & Gas**

	<b>15%</b>	<b>27%</b>	
Arnold Oil Properties, Inc.	\$2,500	\$0	
B & W Exploration, Inc.	0	\$8,000	
Blake Production Company	0	\$10,000	
Buttram Energies, Inc.	\$0	\$25,000	
Carl E. Gungoll Exploration, L.L.C.	\$5,000	\$25,000	
Chesapeake Energy Corporation	\$250,000	\$1,500,000	
Clearwater Enterprises, LLC	0	\$0	
Cleary Petroleum Corporation	\$5,000	\$25,000	
Compressco, Inc.	0	\$25,000	
Crusader Energy Corp	0	\$25,000	
Cummings Oil Company	\$2,500	\$0	
Devon Energy Corporation	\$500,000	\$1,500,000	
Duncan Oil Properties, Inc.	0	\$5,000	
Dutcher & Company, Inc.	\$2,500	\$5,000	
Five Star Rig & Supply	\$2,500	\$0	
Indian Exploration Co., L.L.C.	\$2,500	\$0	
Jan Oil Co.	\$5,000	\$5,000	
JMA Energy Company LLC	0	\$25,000	

Kerr-McGee Corporation	\$1,000,000	\$750,000	
Ladd Equipment	0	\$5,000	
LASSO Corp.	\$2,500	\$0	
Meade Energy Corporation	0	\$1,000	
Mustang Fuel Corporation	\$100,000	\$0	
Panhandle Royalty Company	0	\$5,000	
R.L. Sias	0	\$25,000	
Raydon Exploration, Inc.	0	\$5,000	
Singer Oil Company, L.L.C.	\$250	\$0	
The GHK Company, LLC	0	\$50,000	
The Reserve Petroleum Company	\$1,000	\$0	
Tularosa, Inc.	0	\$25,000	
Winston International, LLC	<u>0</u>	<u>\$25,000</u>	
	<b>\$1,881,250</b>	<b>\$4,074,000</b>	<b>217% Increase</b>

### **Real Estate (Developers)**

	<b>1%</b>	<b>1%</b>	
B.D. Eddie Enterprises	\$50,000	\$50,000	
Charles S. Givens Interests	\$20,000	\$0	
Gibraltar Investments, LLC	0	\$10,000	
J.W. Mashburn	0	\$25,000	
Stonegate-Hogan	0	\$30,000	
TAPP Development Corporation	<u>\$25,000</u>	<u>\$10,000</u>	
	<b>\$95,000</b>	<b>\$125,000</b>	<b>32% Increase</b>

### **Real Estate (Realtors)**

	<b>1%</b>	<b>1%</b>	
Equity Realty	0	\$5,000	
Gardner/Tanenbaum Group	0	\$25,000	
Gerald L. Gamble Co., Inc.	\$20,000	\$12,500	
Grubb & Ellis / Levy Beffort	\$15,000	\$25,000	
LaGree Associates	0	\$5,000	
Michael Biddinger Real Estate, Inc.	\$1,000	\$2,000	
NAI Sullivan Group	0	\$5,000	
Paradigm Realty	\$2,500	\$2,500	
Price Edwards & Company	\$15,000	\$18,000	
Snoddy Properties	0	\$5,000	
Sperry Van Ness	0	\$5,000	
Trammell Crow Company	\$25,000	\$5,000	
Wiggin Properties, LLC	\$5,000	\$12,500	
Zerby Interests	<u>0</u>	<u>\$5,000</u>	
	<b>\$83,500</b>	<b>\$132,000</b>	<b>58% Increase</b>

### **Restaurant**

	<b>1.90%</b>	<b>1.70%</b>	
Sonic Corp.	\$250,000	\$250,000	
The Petroleum Club of Oklahoma City, Inc.	\$2,500	\$0	
Charleston's Restaurants	<u>\$0</u>	<u>\$12,500</u>	
	<b>\$252,500</b>	<b>\$262,500</b>	<b>4% Increase</b>

<b><u>Retail</u></b>	<b>1%</b>	<b>1%</b>	
B. C. Clark Jewelers	\$15,000	\$15,000	
Bass Pro Shops	0	\$0	
Bill Warren Office Products	\$5,000	\$5,000	
Hobby Lobby	\$25,000	\$0	
Hunzicker Brothers	\$500	\$0	
Oklahoma Flower Market	\$100	\$0	
Woods Downtown Floral	<u>\$125</u>	<u>\$0</u>	
	<b>\$45,725</b>	<b>\$20,000</b>	<b>56% Decrease</b>
<b><u>Technology</u></b>	<b>1%</b>	<b>1%</b>	
DIANON Systems	\$25,000	\$0	
Computer System Designers	\$0	\$1,000	
IngenuitE, Inc	\$0	\$5,000	
Perimeter Technology Center	<u>\$0</u>	<u>\$5,000</u>	
	<b>\$25,000</b>	<b>\$11,000</b>	<b>56% Decrease</b>
<b><u>Utilities</u></b>	<b>13.60%</b>	<b>12.30%</b>	
AIR Technologies	\$500	\$0	
OGE Energy Corp.	\$1,200,000	\$1,500,000	
Oklahoma Natural Gas Company	\$500,000	\$300,000	
Trigen-Oklahoma City Energy Corp.	<u>\$26,000</u>	<u>\$26,000</u>	
	<b>\$1,726,500</b>	<b>\$1,826,000</b>	<b>6% Increase</b>
<b><u>Warehousing</u></b>	<b>1%</b>	<b>0%</b>	
Albright Steel & Wire Co.	\$250	\$0	
J. D. Thompson & Associates	<u>\$1,500</u>	<u>\$0</u>	
	<b>\$1,750</b>	<b>\$0</b>	<b>100% Decrease</b>
<b>Pledge Totals</b>	<b>\$12,065,510</b>	<b>\$14,987,164</b>	<b>24% Increase</b>

## FORWARD III COMMITTED INVESTORS- ALPHABETICAL

<u>Organization</u>	<u>Contact Name</u>	<u>Five-Year Pledge</u>
Accel Financial Staffing Solutions	Meg Salyer	\$5,000
Ackerman McQueen, Inc.	Edmund Martin	\$100,000
Acme Brick & Tile Company	Jay Cox	\$5,000
Adecco Personnel Services	Kathy Beachler	\$5,000
Alltel Communications	Tony Ferguson	\$12,500
American Fidelity Group / First Fidelity Bank	William Cameron	\$250,000
American Guaranty Title Co.	Joan Hunter	\$5,000
Architectural Design Group Inc.	Thomas Wilson	\$12,500
Arvest Bank	Bradley Krieger	\$100,000
Associated Glass Company	Ruth Sallis	\$12,500
Associated Wholesale Grocers, Inc.	Steven Arnold	\$5,000
AT&T	Donald Cain	\$300,000
B & W Exploration, Inc.	Kirk Whitman	\$8,000
B. C. Clark Jewelers	James Clark	\$15,000
B.D. Eddie Enterprises	Clay Farha	\$50,000
BancFirst	David Harlow	\$100,000
Bank of Oklahoma, N.A., OKC	V. Burns Hargis	\$300,000
Bill Warren Office Products	Bill Warren	\$5,000
Blake Production Company	Blake Vernon	\$10,000
Blue Cross Blue Shield of Oklahoma	Ronald F. King	\$50,000
Bob Howard Auto Group	Hal Steinke	\$15,000
Boldt Construction Company	Jerry Ennis	\$125,000
Bridgeport Development Group	Jim Meyer	\$5,000
Bridgeport Holdings	Jim Meyer	\$5,000
Bridgeport Lending	Jim Meyer	\$5,000
Buttram Energies, Inc.	Preston Buttram	\$25,000
C.H. Guernsey & Company	Pat Carroll	\$5,000
Capital West Securities, Inc.	James Lisle	\$5,000
Capitol Abstract & Title Company	Jackie Hatton	\$5,000
Cardinal Engineering	Steve Mason	\$5,000
Carl E. Gungoll Exploration, L.L.C.	Ramsey Drake, II	\$25,000
Central Liquor Company	Bradley Naifeh	\$50,000
Charleston's Restaurant Group, Inc.	David Brauckmann	\$12,500
Cherokee Building Materials of Oklahoma City	Chad McCollum	\$12,500
Chesapeake Energy Corporation	Aubrey McClendon	\$1,500,000
Chickasaw Enterprises	Neal McCaleb	\$25,000
Cleary Petroleum Corporation	Doug Cleary	\$25,000
Coldwell Banker Advantage	Jim Meyer	\$5,000

Cole & Reed PC	James Denny	\$5,000
Compressco, Inc.	Mims Talton	\$25,000
Computer System Designers	Terry Salmon	\$1,000
Connelly Paving Company	Jim Connelly, Jr.	\$5,000
Coppermark Bank	Thomas Legan	\$20,000
Coreslab Structures	Ken Whitten	\$12,500
Cox Communications	David Bialis	\$250,000
Crowe & Dunlevy	Michael Stewart	\$50,000
Crusader Energy Corp	David Le Norman	\$25,000
Dean A. McGee Eye Institute	David Parke	\$25,000
Devon Energy Corporation	J. Larry Nichols	\$1,500,000
Dobson Communications Corporation	Everett Dobson	\$50,000
Dolese Brothers Company	Tony Basolo	\$250,000
Dorchester Capital	Clayton Bennett	\$100,000
Duncan Oil Properties, Inc.	Walter Duncan, IV	\$5,000
Dutcher & Company, Inc.	William Dutcher	\$5,000
EGR Construction	Darren Lister	\$5,000
Enterprise Rent-A-Car	Tim Lovett	\$12,500
Equity Realty	Judy Hatfield	\$5,000
Ernst & Young LLP	Mark Wood	\$15,000
Flintco, Inc.	Mark Grimes	\$125,000
Frankfurt-Short-Bruza Associates	William Frankfurt	\$25,000
Fred & Mary Eddy Jones Foundation	Fred Hall	\$110,000
Gardner/Tanenbaum Group	Richard Tannenbaum	\$25,000
Gerald L. Gamble Co., Inc.	Gerald Gamble	\$12,500
Gibraltar Investments, LLC	Kirk Humphreys	\$10,000
Grant Thornton, LLP	Tom R. Gray, III	\$12,500
Great Plains Coca Cola Bottling Company	Robert Browne	\$50,000
Griffin Communications / NEWS 9	David Griffin	\$100,000
Grubb & Ellis / Levy Beffort	Harrison Levy	\$25,000
Harrison-Orr Air Conditioning, Inc.	Joe McKenzie	\$1,250
Holiday Inn Oklahoma City Airport	Michael Farney	\$5,000
Home Creations	Mohammad Farzaneh	\$5,000
IBC Bank	Thomas L. Travis	\$200,000
Ideal Homes	Vernon McKown	\$25,000
Inasmuch Foundation	Bob Ross	\$250,000
IngenuitE, Inc	J. Isabel Chancellor	\$5,000
INTEGRIS Health	Stanley Hupfeld	\$400,000
J.W. Mashburn	J.W. Mashburn	\$25,000
Jan Oil Co.	Ben Shanker	\$5,000
Jean I. Everest Foundation	James Everest	\$100,000
JMA Energy Company LLC	Jeff McDougall	\$25,000

Jordan Associates	Rhonda Hooper	\$5,000
Journal Record Publishing Company	Mary Mélon	\$35,000
JPMorganChase Bank, N.A.	James Young, Jr.	\$150,000
Kerr-McGee Corporation	Luke Corbett	\$750,000
Kestrel Investments, Inc.	G. Rainey Williams	\$15,000
KFOR-TV	Timothy Morrissey	\$50,000
Kirkpatrick Family Fund	Liz Eickman	\$25,000
KOMA / KRXO / KMGL	Alan Serena	\$7,500
KPMG LLP	Keith Schwarz	\$25,000
Ladd Equipment	Dale Reid	\$5,000
LaGree Associates	Jim LaGree	\$5,000
Langston University	Blayne Hinds	\$5,000
Legacy Bank	Richard Horton	\$5,000
Legacy Wealth Management, LLC	Jay Bidy	\$12,500
Lippert Brothers., Inc.	D.E. Lippert, Jr.	\$25,000
Love's Travel Stops & Country Stores, Inc.	Greg Love	\$150,000
Luther T. Dulaney Company	L. Thomas Dulaney, Jr.	\$5,164
McAfee & Taft A Professional Corp.	John Hermes	\$12,500
Meade Energy Corporation	Virginia Fox	\$1,000
Medley-Turrentine & Associates	Bob Medley	\$3,750
Mercedes-Benz of Oklahoma City	Bob Howard	\$100,000
Mercy Health Center, Inc.	Michael Packnett	\$100,000
Meyers-Reynolds & Associates, Inc.	Lee Reynolds	\$25,000
Michael Biddinger Real Estate, Inc.	Michael Biddinger	\$2,000
MidFirst Bank	Alan Kraft	\$125,000
Midwest Wrecking	Ben Kates, Jr.	\$12,500
Miles Associates Incorporated	Bud Miles	\$10,000
NAI Sullivan Group	Bob Sullivan, CCIM	\$5,000
Norick Investment Company	Ronald Norick	\$60,000
OGE Energy Corp.	Steven Moore	\$1,500,000
Oil Capital Electric	Jim Lewis	\$2,500
Oklahoma Christian University	Mike O'Neal	\$1,000
Oklahoma City University	Tom McDaniel	\$10,000
Oklahoma County	Jim Roth	\$500,000
Oklahoma Electrical Supply Company	Stephen Young	\$15,000
Oklahoma Heart Hospital	Jim Best	\$50,000
Oklahoma Medical Research Foundation	J. Donald Capra	\$50,000
Oklahoma Natural Gas Company	Phyllis Worley	\$300,000
Oklahoma Roofing & Sheet Metal	Melvin Thompson	\$25,000
Oliver Investments	Mark Beffort	\$250,000
Osborne Electric Company	Rob Cherry	\$25,000
OU MEDICAL CENTER	Gerald Maier	\$100,000

Ozarka Water & Coffee Service	Steve Raupe	\$15,000
Panhandle Royalty Company	H.W. Peace, II	\$5,000
Paradigm Realty	Charlene Wilson	\$2,500
Partners Human Resources Co.	Roger Rock	\$5,000
Pension Solutions, Inc.	Kenneth Culver	\$10,000
Perimeter Technology Center	Russ Koch	\$5,000
Phillips McFall McCaffrey McVay & Murrah PC	Keith McFall	\$12,500
Presbyterian Health Foundation	Michael Anderson	\$1,000,000
Price Edwards & Company	Carl Edwards	\$18,000
Quad/Graphics, Inc.	Steve Horning	\$50,000
R.L. Sias	R.L. Sias	\$25,000
Raydon Exploration, Inc.	Steve Raybourn	\$5,000
Renaissance Oklahoma City Hotel	John Pasley	\$7,500
Roger Hicks & Assoc. Group Insurance, Inc.	Roger Hicks	\$5,000
Rose Rock Bank	Mike Sterkel	\$5,000
Smith & Pickel Construction, Inc.	James Pickel	\$35,000
Snoddy Properties	James Snoddy	\$5,000
SONIC	Cliff Hudson	\$250,000
Southwestern Roofing & Metal Company, Inc.	Max Pope	\$5,000
Southwestern Stationary & Bank Supply Inc.	Robert Allee	\$5,000
Sperry Van Ness	Tim Strange	\$5,000
SSM Health Care of Oklahoma	Jim Hyde	\$300,000
Stillwater National Bank & Trust Company	Joey Root	\$25,000
Stonegate-Hogan	Randy Hogan	\$30,000
TAParchitecture	Anthony McDermid	\$5,000
TAPP Development Corporation	Barry Tapp	\$10,000
The Benham Companies, L.L.C.	Lance Benham	\$125,000
The Facility Group	Steve Salmon	\$12,500
The GHK Company, LLC	Bob May	\$50,000
The Hartford	Gunnar Hood	\$5,000
The Oklahoma Publishing Company	Christy Everest	\$1,000,000
Third Degree Advertising & Communications	Roy Page	\$5,000
Timberlake Construction Co., Inc.	Bryan Timberlake	\$25,000
Tinker Federal Credit Union	Michael Kloiber	\$62,500
Trammell Crow Company	Shaun Frankfurt	\$5,000
Trigen-Oklahoma City Energy Corp.	Ken Stone	\$26,000
Tularosa, Inc.	Mack Cogburn	\$25,000
UMB Oklahoma Bank	Royce Hammons	\$25,000
Wallace Engineering	Brad Thurman, P.E.	\$5,000
Wiggin Properties, LLC	Charles Wiggin	\$12,500
Wilson Research Strategies	Chris Wilson	\$50,000
Winston International, LLC	Tom Walbert	\$25,000



Zahl-Ford  
Zerby Interests  
Totals

Steve Ford  
Terryl Zerby

\$5,000  
\$5,000  
**\$14,987,164**

## FORWARD III COMMITTED INVESTORS- DESCENDING ORDER

<u>Organization</u>	<u>FORWARD II</u>	<u>FORWARD III</u>
Devon Energy Corporation	\$500,000	\$1,500,000
OGE Energy Corporation	\$1,200,000	\$1,500,000
Chesapeake Energy Corporation	\$250,000	\$1,500,000
Presbyterian Health Foundation	\$1,000,000	\$1,000,000
The Oklahoma Publishing Company	\$500,000	\$1,000,000
Kerr-McGee Corporation	\$1,000,000	\$750,000
Oklahoma County	\$500,000	\$500,000
INTEGRIS Health	\$350,000	\$400,000
Bank of Oklahoma, N.A., OKC	\$400,000	\$300,000
SSM Health Care of Oklahoma	\$250,000	\$300,000
Oklahoma Natural Gas Company	\$500,000	\$300,000
AT&T	\$600,000	\$300,000
Oliver Investments	\$0	\$250,000
Sonic Corp.	\$250,000	\$250,000
American Fidelity Group / First Fidelity Bank	\$125,000	\$250,000
Dolese Brothers Company	\$200,000	\$250,000
Inasmuch Foundation	\$0	\$250,000
Cox Communications	\$100,000	\$250,000
IBC Bank	\$100,000	\$200,000
JPMorganChase Bank, N.A.	\$100,000	\$150,000
Love's Travel Stops & Country Stores, Inc.	\$125,000	\$150,000
The Benham Companies, L.L.C.	\$125,000	\$125,000
Boldt Construction Company	\$25,000	\$125,000
Flintco, Inc.	\$25,000	\$125,000
MidFirst Bank	\$50,000	\$125,000
Fred & Mary Eddy Jones Foundation	\$100,000	\$110,000
Ackerman McQueen, Inc.	\$100,000	\$100,000
Griffin Communications / NEWS 9	\$75,000	\$100,000
Dorchester Capital	\$100,000	\$100,000
Mercy Health Center, Inc.	\$100,000	\$100,000

Arvest Bank	\$50,000	\$100,000
BancFirst	\$50,000	\$100,000
OU MEDICAL CENTER	\$100,000	\$100,000
Mercedes-Benz of Oklahoma City	\$0	\$100,000
Jean I. Everest Foundation	\$100,000	\$100,000
Tinker Federal Credit Union	\$50,000	\$62,500
Norick Investment Company	\$60,000	\$60,000
Oklahoma Medical Research Foundation	\$50,000	\$50,000
Central Liquor Company	\$37,500	\$50,000
Oklahoma Heart Hospital	\$0	\$50,000
Blue Cross Blue Shield of Oklahoma	\$25,000	\$50,000
Great Plains Coca Cola Bottling Company	\$0	\$50,000
Dobson Communications Corporation	\$10,000	\$50,000
The GHK Company, LLC	\$0	\$50,000
Quad/Graphics, Inc.	\$0	\$50,000
Wilson Research Strategies	\$10,000	\$50,000
B.D. Eddie Enterprises	\$50,000	\$50,000
Crowe & Dunlevy	\$50,000	\$50,000
KFOR-TV	\$50,000	\$50,000
Journal Record Publishing Company	\$25,000	\$35,000
Smith & Pickel Construction, Inc.	\$25,000	\$35,000
Stonegate-Hogan	\$25,000	\$30,000
Trigen-Oklahoma City Energy Corp.	\$26,000	\$26,000
Gardner/Tanenbaum Group	\$0	\$25,000
KPMG LLP	\$25,000	\$25,000
Grubb & Ellis / Levy Beffort	\$15,000	\$25,000
Frankfurt-Short-Bruza Associates	\$5,000	\$25,000
Winston International, LLC	\$0	\$25,000
UMB Oklahoma Bank	\$25,000	\$25,000
Lippert Bros., Inc.	\$25,000	\$25,000
Crusader Energy Corp	\$0	\$25,000
R.L. Sias	\$0	\$25,000
Tularosa, Inc.	\$0	\$25,000
Dean A. McGee Eye Institute	\$25,000	\$25,000
Meyers-Reynolds & Associates, Inc.	\$0	\$25,000

Chickasaw Enterprises	\$0	\$25,000
Cleary Petroleum Corporation	\$5,000	\$25,000
Ideal Homes	\$5,000	\$25,000
Osborne Electric Company	\$0	\$25,000
JMA Energy Company LLC	\$0	\$25,000
Oklahoma Roofing & Sheet Metal	\$0	\$25,000
Compressco, Inc.	\$0	\$25,000
Kirkpatrick Family Fund	\$15,000	\$25,000
Carl E. Gungoll Exploration, L.L.C.	\$5,000	\$25,000
J.W. Mashburn	\$0	\$25,000
Timberlake Construction Co., Inc.	\$0	\$25,000
Stillwater National Bank & Trust Company	\$25,000	\$25,000
Buttram Energies, Inc	\$0	\$25,000
Coppermark Bank	\$15,000	\$20,000
Price Edwards & Company	\$15,000	\$18,000
Kestrel Investments, Inc.	\$15,000	\$15,000
Ozarka Water & Coffee Service	\$15,000	\$15,000
Oklahoma Electrical Supply Company	\$15,000	\$15,000
Ernst & Young LLP	\$5,000	\$15,000
Bob Howard Auto Group	\$10,000	\$15,000
B. C. Clark Jewelers	\$15,000	\$15,000
McAfee & Taft A Professional Corp.	\$2,500	\$12,500
Alltel Communications	\$0	\$12,500
Midwest Wrecking	\$0	\$12,500
Legacy Wealth Management, LLC	\$0	\$12,500
Cherokee Building Materials of Oklahoma City	\$0	\$12,500
Gerald L. Gamble Co., Inc.	\$20,000	\$12,500
The Facility Group	\$0	\$12,500
Phillips McFall McCaffrey McVay & Murrah PC	\$0	\$12,500
Grant Thornton, LLP	\$12,500	\$12,500
Coreslab Structures	\$0	\$12,500
Enterprise Rent-A-Car	\$0	\$12,500
Architectural Design Group Inc.	\$0	\$12,500
Wiggin Properties, LLC	\$5,000	\$12,500
Associated Glass Company	\$0	\$12,500

Charleston's Restaurant Group, Inc.	\$0	\$12,500
Blake Production Company	\$0	\$10,000
Pension Solutions, Inc.	\$10,000	\$10,000
Oklahoma City University	\$0	\$10,000
Miles Associates Incorporated	\$0	\$10,000
TAPP Development Corporation	\$25,000	\$10,000
Gibraltar Investments, LLC	\$0	\$10,000
B & W Exploration, Inc.	\$0	\$8,000
Renaissance Oklahoma City Hotel	\$0	\$7,500
KOMA / KRXO / KMGL	\$5,000	\$7,500
Luther T. Dulaney Company	\$1,000	\$5,164
Duncan Oil Properties, Inc.	\$0	\$5,000
Rose Rock Bank	\$0	\$5,000
Zahl-Ford	\$0	\$5,000
IngenuitE, Inc	\$0	\$5,000
Trammell Crow Company	\$25,000	\$5,000
Partners Human Resources Co.	\$0	\$5,000
Cole & Reed PC	\$0	\$5,000
C.H. Guernsey & Company	\$0	\$5,000
Langston University	\$0	\$5,000
Adecco Personnel Services	\$0	\$5,000
Bridgeport Development Group	\$0	\$5,000
Steve Raybourn	\$0	\$5,000
American Guaranty Title Co.	\$0	\$5,000
Acme Brick & Tile Company	\$5,000	\$5,000
Ladd Equipment	\$0	\$5,000
Associated Wholesale Grocers, Inc.	\$0	\$5,000
Cardinal Engineering	\$0	\$5,000
Connelly Paving Company	\$0	\$5,000
Sperry Van Ness	\$0	\$5,000
Jan Oil Co.	\$5,000	\$5,000
Roger Hicks & Assoc. Group Insurance, Inc.	\$5,000	\$5,000
Coldwell Banker Advantage	\$0	\$5,000
Home Creations	\$0	\$5,000
Holiday Inn Oklahoma City Airport	\$0	\$5,000

Panhandle Royalty Company	\$0	\$5,000
Equity Realty	\$0	\$5,000
Wallace Engineering	\$0	\$5,000
Bridgeport Holdings	\$0	\$5,000
Accel Financial Staffing Solutions	\$0	\$5,000
NAI Sullivan Group	\$0	\$5,000
Jordan Associates	\$5,000	\$5,000
LaGree Associates	\$0	\$5,000
Capitol Abstract & Title Company	\$0	\$5,000
TAParchitecture	\$0	\$5,000
Southwestern Stationary & Bank Supply Inc.	\$0	\$5,000
Legacy Bank	\$0	\$5,000
Southwestern Roofing & Metal Company, Inc.	\$5,000	\$5,000
Snoddy Properties	\$0	\$5,000
Bill Warren Office Products	\$5,000	\$5,000
Bridgeport Lending	\$0	\$5,000
Capital West Securities, Inc.	\$0	\$5,000
Dutcher & Company, Inc.	\$2,500	\$5,000
Third Degree Advertising & Communications	\$5,000	\$5,000
The Hartford	\$0	\$5,000
Zerby Interests	\$0	\$5,000
EGR Construction	\$0	\$5,000
Perimeter Technology Center	\$0	\$5,000
Medley-Turrentine & Associates	\$2,500	\$3,750
Oil Capital Electric	\$0	\$2,500
Paradigm Realty	\$2,500	\$2,500
Michael Biddinger Real Estate, Inc.	\$0	\$2,000
Harrison-Orr Air Conditioning, Inc.	\$1,250	\$1,250
Computer System Designers	\$0	\$1,000
Oklahoma Christian University	\$0	\$1,000
Meade Energy Corporation	<u>\$0</u>	<u>\$1,000</u>
<b>Totals</b>	<b>\$9,973,250</b>	<b>\$14,987,164</b>

**FORWARD III**  
**INDUSTRY SECTOR FUNDING**

<b><u>INDUSTRY SECTOR</u></b>	<b><u>% of TOTAL</u></b>	<b><u>5-YEAR TOTAL</u></b>
Oil & Gas	27%	\$4,074,000
Utilities	12%	\$1,826,000
Foundations	10%	\$1,535,000
Banking	9%	\$1,346,500
Media	8%	\$1,192,500
Health Care	7%	\$ 975,000
Communications	4%	\$ 612,500
Government	3%	\$ 500,000
Construction General Contractors	2.3%	\$ 340,000
Construction Supply	1.9%	\$ 280,000
Restaurants	1.7%	\$ 262,000
Insurance	1.5%	\$ 223,750
Architectural/Engineering	1.4%	\$ 197,000
Business Services	1%	\$ 132,500
Automobile Dealers	1%	\$ 127,500
Real Estate – Realtors	1%	\$ 132,000
Real Estate – Developers	1%	\$ 125,000
Distributors	1%	\$ 120,000
Contractors – Specialty	1%	\$ 116,250
Manufacturing	1%	\$ 75,000
Law Firms	1%	\$ 75,000
Accounting	1%	\$ 57,500
Consultants	1%	\$ 50,000
Home Builders	1%	\$ 35,000
Retail	1%	\$ 20,000
Education	1%	\$ 15,000
Employment Services	1%	\$ 15,000
Hospitality	1%	\$ 12,500
Technology	1%	\$ 11,000
Business Suppliers	<u>1%</u>	<u>\$ 5,000</u>
	<b>100%</b>	<b>\$14,987,164</b>

## FORWARD III - PENDING ACCOUNTS

<u>Organization</u>	<u>Contact Name</u>	<u>Phone</u>	<u>Five-Year Request</u>
All State Electric	Tony Boevers	(405) 235-6543	\$12,500
Bass Pro Shops	Martin MacDonald	(417) 873-5023	\$12,500
Charles S. Givens Interests	Charles Givens	(405) 848-8686	\$20,000
Clearwater Enterprises, LLC	Tony Say	(405) 842-9200	\$25,000
FRIDAY - Nichols Hills Publishing Co.	J. Leland Gourley	(405) 755-3311	\$10,000
Gable & Gotwals	Eric R. King	(405) 235-5500	\$25,000
Genzyme	William Canfield	(405) 271-8144	\$25,000
Globe Life & Accident Insurance	Ann Allen	(405) 270-1410	\$25,000
Indian Exploration Co., L.L.C.	Richard Dunning	(405) 231-2476	\$25,000
Johnson Controls, Inc.	Matt Kwiatkowski	(405) 947-0384	\$25,000
Mustang Fuel Corporation	E. Carey Joullian, IV	(405) 748-9400	\$100,000
Oklahoma State University - OKC	Jerry Carroll	(405) 947-4421	\$25,000
Rees Associates Inc.	Leroy James	(405) 942-7337	\$25,000
Remington Park	Scott Wells	(405) 424-1000	\$50,000
SPARKS	Omar Khoury	(405) 290-7727	\$5,000
The Burgess Company	Phil Burgess	(405) 691-0005	\$12,500
United Mechanical Inc.	Rod Rutherford	(405) 528-1234	\$25,000
UPS	Terry Gilchrist	(405) 409-5609	<u>\$25,000</u>
<b>Total</b>			<b>\$472,500</b>



## REMAINING PENDING ACCOUNTS

The following companies have been solicited and we believe should continue to be followed up by leadership and staff.

**All State Electric** – Tony Boevers attended the Boldt breakfast in late November. We are asking them to consider a \$2,500 annual investment. I have been unable to reach Tony directly by telephone. Jerry Ennis may be helpful in following up with Tony.

**Bass Pro Shops** – Chip met with Jill Deveroux at their downtown store in 2005. Jill forwarded our materials to their company executives at headquarters. Chip has spoken with Martin MacDonald and Larry Whitely at their headquarters in Kansas (417) 873-5023. They are interested in becoming an investor and should finalize their decision in April. We asked them to consider \$2,500 annually.

**Charles S. Givens Interests** – They were a \$20,000 investor in Forward II and asked us to mail him the Forward III materials which we did in January. I have been unable to reach Charles by phone – he travels frequently. There is a good chance he will renew. Staff or leadership should follow up.

**Clearwater Enterprises** – Philippe made this visit and asked Tony Say to consider a \$25,000 five year pledge. We have been unable to connect with Tony by phone.

**FRIDAY – Nichols Hills Publishing** – They were a \$2,500 Forward II investor. We asked them to consider a \$10,000 five-year pledge. Staff should follow up with Leland.

**Gable & Gotwals** – Law firm – Philippe made this call on Eric King. Staff or leadership should follow up.

**Genzyme** - Philippe made this solicitation call and believes the \$25,000 request may be a bit too high.

**Globe Life & Accident** – Chip has several phone messages into Ann Allen with no reply. If someone knows her they might have some success in following up. Otherwise, Globe should be put on the decline investment list.

**Indian Exploration** – Philippe made this solicitation call and asked them to consider \$25,000. Perhaps Larry Nichols, Tom Price or Aubrey could follow up.

**Johnson Controls** – Chip spoke with Matt Kwiatkowski in March and our request is still in process. If someone knows Matt they might give him one more try. Probably not a high priority pending account.

**Mustang Fuel Corporation** – Chip called on Carey Joullian in August of 2005. Carey was not overly excited about the Forward III program. He probably would come aboard, perhaps at his Forward II level of \$100,000, if asked to by Larry Nichols.

**Oklahoma State University – OKC** – Chip had a good meeting with Jerry Carroll in March. I asked them to consider a \$25,000 five-year pledge. They will make their decision in May/June when they do their budgets.

**Rees Associates** – Chip has had several conversations with Leroy James in March after Bill Cameron encouraged Leroy to make a commitment. Leroy gave me a verbal commitment that they would come aboard, but have not received his pledge form. Staff or Bill Cameron follow up should do the trick.

**Remington Park** – Chip had a good meeting with Scott Wells in January. They definitely want to become more engaged with the Chamber. I proposed a \$50,000 five-year pledge. Staff follow up with Scott should bring them aboard.

**SPARKS** – Philippe made this solicitation call. Omar Khoury is the contact person for this small engineering firm. Request is \$1,000 annually.

**The Burgess Company** - Phil Burgess attended the Boldt breakfast in November and gave Chip a verbal commitment that they would support Forward III. Staff follow up to encourage Phil to send in his pledge form should do it. Jerry Ennis could also help.

**United Mechanical** – Chip spoke with Rod Rutherford in late March and they were still discussing their involvement. Staff follow up with Rod should do it.

**UPS** – Philippe made this call on Terry Gilchrist. UPS is generally not a good funding source for economic development programs.

**FORWARD III  
DECLINED INVESTORS - ALPHA**

<b><u>Organization</u></b>	<b><u>FORWARD II PLEDGE</u></b>	<b><u>FORWARD III REQUEST</u></b>
Allied Waste Co.	\$0	\$12,500
American Waste/North East Landfill, Inc.	\$0	\$25,000
Baker First Commercial Real Estate Services	\$0	\$5,000
Bank of America	\$0	\$250,000
Bank of Nichols Hills	\$0	\$25,000
Bank2	\$0	\$5,000
Battelle Memorial Institute	\$0	\$50,000
Battelle Oklahoma LLC	\$0	\$50,000
Cingular Wireless, LLC	\$5,000	\$25,000
City Properties	\$0	\$5,000
Cobb Engineering	\$0	\$12,500
Coldwell Banker Commercial	\$0	\$25,000
Commercial Law Group, P.C.	\$0	\$12,500
Crossroads Mall	\$0	\$50,000
Dell USA, L.P.	\$0	\$125,000
Dianon Systems, a Lab Corp. Company	\$25,000	\$25,000
Express Personnel Services	\$200,000	\$250,000
FAA Employees Credit Union	\$2,500	\$5,000
First American Title & Trust	\$0	\$12,500
First Commercial Bank	\$0	\$25,000
Five Star Steel	\$0	\$12,500
Forest Building Materials	\$0	\$5,000
GBR Properties, Inc.	\$0	\$5,000
General Electric Healthcare	\$0	\$25,000
General Motors	\$10,000	\$10,000
GlobalHealth Inc.	\$0	\$25,000
Hilb Rogal & Hobbs	\$0	\$12,500
Hope Lumber & Supply Company	\$0	\$25,000
Bruce Holmes & Associates	\$0	\$5,000
Hudiburg Auto Group	\$10,000	\$25,000
Intelek Technologies	\$0	\$5,000
J. L. Walker Construction, Inc.	\$4,000	\$12,500

J. R. Fulton & Associates	\$0	\$5,000
Kevin Blaney, Attorney at Law	\$1,000	\$5,000
Logix Communications	\$0	\$12,500
Manhattan Construction Co.	\$0	\$75,000
Maxwell Supply Company	\$0	\$25,000
Merrill Lynch	\$0	\$25,000
Metheny Concrete Products, Inc.	\$0	\$50,000
North American Group	\$0	\$10,000
Northwest Surgical Hospital	\$0	\$20,000
OEC/Oklahoma Electric Coop.	\$0	\$12,500
Oklahoma City Community Foundation	\$0	N/A
Oklahoma Farmers Bureau Mutual Ins.	\$0	\$12,500
Oklahoma Spine Hospital	\$0	\$50,000
Oklahoma Sports Science & Orthopedics	\$0	\$50,000
Penn Square Mall	\$0	\$25,000
Perry Publishing and Broadcasting	\$0	\$25,000
Pippin Properties	\$0	\$5,000
Premium Beers of Oklahoma	\$0	\$25,000
RE/MAX First, Realtors	\$0	\$12,500
Sara Lee Foodservice	\$25,000	\$25,000
SpiritBank	\$5,000	\$7,500
The Boeing Company	\$0	\$100,000
The Oklahoma City Abstract & Title Co.	\$0	\$12,500
The Pepsi Bottling Group of Oklahoma City	\$25,000	\$50,000
Trison Properties	\$0	\$5,000
Union Bank & Trust Company	\$2,500	\$25,000
Valir Health	\$0	\$12,500
Van Hoose Construction Co.	\$15,000	\$15,000
Vanguard Development Company	\$0	\$5,000
W.H. Braum, Inc.	\$0	\$50,000
Waste Connections of Oklahoma	\$0	\$5,000
Waste Management of Oklahoma, Inc.	\$0	\$50,000
Waterford Marriott	<u>\$0</u>	<u>\$10,000</u>
	<b>\$330,000</b>	<b>\$1,980,000</b>

## FORWARD III

### DECLINED APPOINTMENT - ALPHA

#### Organization

7-Eleven Stores  
Accord Human Resources, Inc.  
Advanced Masonry  
Affiliated Movers of Oklahoma City  
Allen Brown Architects LLC  
Allied Steel Construction and Crane Rental  
Andrews Davis Legg Bixler Milsten & Price  
Aramark  
Bob Moore Auto Group  
Brewster Realty Enterprises  
Bridgestone / Firestone  
Bronco Drilling Company  
Buy for Less  
C. Watts and Sons Construction Co., Inc.  
Cardinal River Energy Co.  
Chaparral Energy, Inc.  
Cintas Corporation  
Citadel Communication Corporation  
Clements Foods Company - Garden Club  
Communication Federal Credit Union  
Consolidated Electrical Distributors, Inc.  
Coors Distributing Company  
Crest Foods of Windsor Hills  
Cummings Oil Company  
Delta Electrical Contractors, Inc.  
Edmond Medical Center  
Elliott + Associates Architects  
Eskridge Auto Group  
Eskridge Lexus  
Evans & Associates Utility Services, Inc.  
Fagin Brown Bush Tinney & Kiser  
Fellers, Snider, Blankenship, Bailey & Tippens, PC  
First National Bank  
Five Star Ford  
Five Star Rig & Supply  
Frontier State Bank  
Gale Drywall & Acoustics Inc.

#### Contact Name

William C. Brown  
Dale Hageman  
Mark Rose  
Tom Howell  
Allen Brown  
Randy Sudik  
Cathy Collins  
Troy Jesseph  
Mark Moore  
Bruce Alleman  
Barry Owens  
Frank Harrison  
Hank Binkowski  
Calvin Watts  
Frank Schroeder  
Mark Fischer  
Stephen Stephenson  
Larry Bastida  
Richard Clements  
William L. Counts  
Bill Harmon  
Clint Edenfield  
Bruce Harroz  
Douglas Cummings  
Larry Shea  
Ed Gray  
Rand Elliott, FAIA  
E.A. Eskridge  
Frank Eskridge  
J.D. Kliever  
Gary Bush  
Susan French Koran  
Robert Croak  
Don Williams  
Mike Marshall  
Bill Haycraft  
Stan Gale

Garrett & Company Insurance Agency  
GMX Resources, Inc.  
H. Huffman & Co.  
Hartzog Conger, Cason & Neville  
Heartland Homes LLC  
Hertz Corporation  
Hobby Lobby  
Hogan Capital Investment  
Ikon Office Solutions  
Intrust Bank  
Jackie Cooper Enterprises  
Jerryco, Ltd.  
Johnson & Associates, Inc.  
Landmark Construction Group  
Leader Communication, Inc.  
M-D Building Products Incorporated  
Manpower Staffing Services  
Marlin Oil Corporation  
Maschino Hudelson & Associates  
Mathis Brothers Furniture Company  
ML Young Construction Company  
Mock, Schwabe, Waldo, Elder, Reeves & Bryant  
OKC Thrift Federal Credit Union  
Oklahoma Association of Electric Cooperatives, Inc.  
Oklahoma Building Supply  
Oklahoma National Stockyards Company  
Oklahoma Office Systems Inc.  
Oklahoma Woman Magazine  
P.B. Odom III Land Development Companies  
Pratt & Whitney  
Precor Realty Advisors, Inc.  
Quail Creek Bank NA  
Quail Springs Mall  
Rainey, Ross, Rice & Binns  
Reed Downey Life Insurance Agency  
Reserve National Insurance Co.  
Sanguine LTD  
Simons Petroleum, Inc.  
Southwestern Bank & Trust Company  
Star Fuel Marts  
Stewart Abstract & Title of Oklahoma  
Teachers Credit Union

Steve Garrett  
Ken Kenworthy  
Huston Huffman, Jr.  
John Robertson  
Dave Osborn  
Steve Schwarz  
David Green  
Dan Hogan  
Damon Roberts  
Marsha Coffee  
Jackie Cooper  
M. Stanley Lee  
Tim Johnson  
Stan Steffen  
Michael Lyles  
Loren Plotkin  
Steven Clay  
Ralph Harvey  
Karen Brown  
Calvin Worth  
Michael Young  
G. Blaine Schwabe, III  
Carol Underhill  
Larry Watkins  
Gary Adams  
Rob Fisher  
Ron Carr  
Chondra Moore  
Paul Odom, III  
Fred Mullis  
Nicholas Preftakes  
Bert Olah Jr.  
Kelly Waswo  
Hugh Rice  
Reed Downey, Jr.  
Roger Cole  
R.L. Hauschild, Jr.  
Roger Simons  
David Schaefer  
Lincoln Clifton  
Gerri Heidebrecht  
Everett Baker

The Reserve Petroleum Company  
US Foodservice  
Visual Image Advertising  
W & W Steel  
Wegener Human Resource Group  
Weokie Credit Union  
Williams, Box, Foshee & Bullard, P.C.  
Wynn Construction Co., Inc.

Mason McLain  
Sam Erwin  
Tim Berney  
Bert & Rick Cooper  
Dick Wegener  
Marvin Cottom  
John Michael Williams  
Rick Thompson

## IN-KIND INVESTMENTS

Oklahoma Gas & Electric	\$750,000
The Benham Companies	\$100,000
Wilson Strategies	\$ 50,000
The Journal Record	\$ 25,000
KOMA Radio	\$ 7,500*
Renaissance Hotel	\$ 7,500**
Holiday Inn Airport	<u>\$ 5,000**</u>
Total	\$945,000

\* KOMA will provide \$7,500 of in-kind radio air time in 2006 and will consider elevating that level in 2007 and beyond if the Chamber wants it.

\*\* This in-kind was in the form of complimentary sleeping rooms which were fully used during the campaign process in 2005 and early 2006.



## INVESTMENT LEVELS

	<u>Forward II</u>	<u>Forward III</u>
\$1,000,000+	4 @ \$4,200,000	5 @ \$6,500,000
\$500,000 - \$999,999	5 @ \$2,900,000	2 @ \$1,250,000
\$250,000 - \$499,999	5 @ \$2,900,000	11 @ \$3,100,000
\$100,000 - \$249,999	15 @ \$1,675,000	17 @ \$2,010,000
\$50,000 - \$99,999	12 @ \$698,460	14 @ \$722,500
\$25,000 - \$49,999	19 @ \$488,500	29 @ \$751,000
\$5,000 - \$24,999	47 @ \$485,000	80 @ \$638,164
Less than \$5,000	98 @ \$118,550	8 @ \$15,000
	\$12,065,510 205 Investors	\$14,987,164 166 Investors

## NEED PLEDGE FORMS

<u>ORGANIZATION</u>	<u>FIVE-YEAR PLEDGE</u>
Chesapeake Energy	\$1,500,000
INTEGRIS Health	\$ 400,000
SONIC Corporation	\$ 250,000
Dorchester Capital	\$ 100,000
Great Plains Coca Cola	\$ 50,000
KFOR – TV	\$ 50,000
Gardner/Tannenbaum Group	\$ 25,000
Chickasaw Enterprises	\$ 25,000
Alltel Communications	\$ 12,500
The Facility Group	\$ 12,500
Coreslab Structures	\$ 12,500
Enterprise Rent-A-Car	\$ 12,500
Jordan Associates	\$ 5,000
Capitol Abstract	\$ 5,000
Capital West Securities	\$ 5,000
Zerby Interests	\$ 5,000
EGR Construction	<u>\$ 5,000</u>
	\$2,375,000

***REGIONAL E.D. PROGRAMS  
COMPARATIVE FUNDING ANALYSIS***

<u>METRO AREA</u>	<u>POPULATION</u>	<u>ANNUAL FUNDING</u>	<u>PRIVATE SECTOR PER CAPITA</u>
HOUSTON	5 MILLION	\$3 MILLION	\$0.60
ATLANTA	4.6 MILLION	\$4.8 MILLION	\$1.04
PITTSBURGH	2.4 MILLION	\$4 MILLION	\$1.67
COLUMBUS	1.6 MILLION	\$1.5 MILLION	\$0.97
FT. WORTH	1.4 MILLION	\$1.5 MILLION	\$0.97
CHARLOTTE	1.4 MILLION	\$1.4 MILLION	\$1
JACKSONVILLE	1.2 MILLION	\$2 MILLION	\$1.81
OKLAHOMA CITY	1.1 MILLION	\$2.9 MILLION	\$2.63