



56th Financial Forum

Thursday, April 24, 2025	7:30 – 8:30 a.m. Breakfast Buffet	SURFA Forum Registration and Breakfast Salons C & D Sessions: Salons C & D	
	8:00 – 8:30 a.m.	Introduction Geoffrey Rush, CRRA, SURFA President Oklahoma Corporation Commission Welcoming Remarks Kodwo Ghartey-Tagoe, J.D. Executive Vice President and Chief Legal Officer Duke Energy	
	PANEL 1 Economic Outlook	Moderator	Geoffrey Rush, CRRA, SURFA President Oklahoma Corporation Commission
	Course Level: Intermediate 8:30 - 10:15 a.m.	Presenter	Dante DeAntonio, Senior Director of Economic Research Moody's Analytics
	10:15 – 10:30 a.m.	BREAK Salons C & D	
	PANEL 2	Moderator	Enrique Bacalao, MBA, CRRA, Founder and Manager Bacalao Consulting Services, LLC
	Financial Implications of Data Center Load Growth	Nelson Peeler, Senior Vice President Transmission and Fuel Strategy & Planning Duke Energy	
	Course Level: Intermediate 10:30 – 12:15 p.m.	Panelists	John Medina, Senior Vice President Project & Infrastructure Finance Group Moody's Ratings The Honorable Sarah Freeman, JD Commissioner Indiana Utility Regulatory Commission



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<p>WORKING LUNCH 12:15 – 2:00 p.m.</p>	<p>Buffet – QC Lounge Luncheon Speaker: Julien Dumoulin-Smith, Equity Analyst Jeffries LLC / Jeffries Research Services, LLC</p>
<p>PANEL 3:</p>	<p>Moderator Edward Kaufman, CRRA, Principal Utility Specialist Virginia State Corporation Commission</p>
<p>DCF and Discount Rates Framework – Theory vs. Practice and Input Fallacies</p> <p>Course Level: Intermediate</p> <p>2:00 – 4:00 p.m.</p>	<p>Panelists</p> <p>Carla Nunes, CFA, ABV Managing Director - Office of Professional Practice Global Leader – Valuation Digital Solutions Kroll Institute Fellow</p> <p>John Graham D. Richard Mead Professor of Finance, Duke Univ. Past President, American Finance Association</p>
<p>RECEPTION & DINNER 4:30 – 8:30 p.m.</p> <p>Reception: Uptown Foyer Dinner: Salons A & B</p>	<p>RECEPTION & DINNER:</p> <p>Introduction: Geoffrey Rush, CRRA, President</p> <p>Dinner speaker: Nick McKee, Managing Director Group Head & Corporate Banking US Energy Power and Renewables Bank of America</p>



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<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Friday, April 25, 2025</p>	<p>Moderator Richard Michelfelder, Ph.D. Professor of Finance Rutgers University School of Business - Camden</p>
	<p>PANEL 4 Climate Change and Utilities</p> <p>Course Level: Intermediate</p> <p>8:15 – 10:00 a.m. Salons C & D</p> <p>Speaker Richard Michelfelder, Ph.D. Professor of Finance Rutgers University School of Business – Camden</p> <p>Dylan D’Ascendis, CRRA Partner ScottMadden, Inc.</p> <p>John Borrmann Office of the Economist New Jersey Board of Public Utilities</p>
	<p>BREAK Salons C & D</p>
<p>10:00 – 10:15 a.m.</p> <p>PANEL 5: Wall Street’s Perspective</p> <p>Course Level: Intermediate</p> <p>10:15 – 12:00 p.m. Salons C & D</p>	<p>Moderator Ryan Wobbrock, CRRA Vice President – Senior Credit Officer Moody’s Ratings</p> <p>Panelists Brandon Gregor, Executive Director / Investment Banking, Utilities & Renewables Wells Fargo Corporate & Investment Banking</p> <p>Greg Gordon, Senior Advisor Power and Utilities Moelis & Company</p> <p>Barbara Chapman, CFA Senior Director, Corporates FitchRatings</p>