



57th Financial Forum

<p>W</p> <p style="writing-mode: vertical-rl; transform: rotate(180deg);">Wednesday, April 15, 2026</p>	<p style="text-align: center;">CRRA Certification Testing – Salon D (Edward Kaufman, CRRA) 12:00 p.m. – 5:00 p.m.</p>
<p>7:30 – 8:30 a.m. Registration</p>	<p style="text-align: center;">SURFA Forum Registration: Uptown Foyer Sessions: Salons B, C & D</p>
<p>8:00 – 8:30 a.m.</p>	<p>Introduction Geoffrey Rush, CRRA, SURFA President Oklahoma Corporation Commission Welcoming Remarks TBD</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Thursday, April 16, 2026</p> <p style="text-align: center;">PANEL 1</p> <p>Economic Outlook</p>	<p>Moderator Geoffrey Rush, CRRA, SURFA President Oklahoma Corporation Commission</p>
<p>Course Level: Intermediate</p> <p>8:30 - 10:15 a.m.</p>	<p>Presenter Travis Kavulla Head of Policy Base Power Company</p>
<p>10:15 – 10:30 a.m.</p>	<p style="text-align: center;">BREAK Salons B, C & D</p>



57th Financial Forum

<p>PANEL 2</p> <p>Financial Implications of Data Center Load Growth</p> <p>Course Level: Intermediate</p> <p>10:30 – 12:15 p.m.</p>	<p>Moderator</p> <p>Enrique Bacalao, MBA, CRRA, Founder and Manager Bacalao Consulting Services, LLC</p>
	<p>Panelists</p> <p>Rounette Nader, P.E. Vice President New Nuclear Generation Duke Energy</p> <p>James Schaefer Senior Managing Director Guggenheim Partners</p> <p>Matthew Crozat Executive Director, Strategy and Policy Development Nuclear Energy Institute</p>
<p>WORKING LUNCH</p> <p>12:15 – 2:00 p.m.</p>	<p>Buffet – Salons B, C & D</p> <p>Luncheon Speaker: Ross A. Fowler, CFA Managing Director Head of NA Power & Regulated Utilities Research BofA Securities</p>
<p>PANEL 3:</p> <p>The Affordability Paradigm: Delivering Reliable Service Amid Rising Costs</p> <p>Course Level: Intermediate</p> <p>2:00 – 4:00 p.m.</p>	<p>Moderator</p> <p>Mark Khouzam, CRRA FERC Rate & Tariffs Senior Advisor Regulatory Affairs Southern California Edison</p>
	<p>Panelists</p> <p>Clark Kaml Founder CDK Consulting</p> <p>Alison Bahen Director of Regulatory Economic and Modeling and Capital Asset Analysis</p> <p>Lillian Federico (Invited) Research Director, RRA S&P Global Energy</p>



57th Financial Forum

<p>RECEPTION & DINNER 4:30 – 8:00 p.m.</p> <p>Reception: Uptown Foyer Dinner: Salons A & B</p>	<p>RECEPTION & DINNER:</p> <p>Introduction: Geoffrey Rush, CRRA, SURFA President</p> <p>Keynote speaker: Roger A. Morin, Ph.D. Emeritus Professor of Finance – Robinson College of Business Administration and Distinguished Professor of Finance for Regulated Industry at the Center for the Study of Regulated Industry at Georgia State University</p>
<p>7:30 – 8:30 a.m. Registration Salons B, C & D</p>	<p>SURFA Forum Registration: Uptown Foyer Sessions: Salons B, C & D</p>
<p>Friday</p> <p>PANEL 4 Fun with Beta</p>	<p>Moderator Edward Kaufman, CRRA Principal Utility Specialist Virginia State Corporation Commission</p>



57th Financial Forum

<p>Course Level: Intermediate</p> <p>8:15 – 10:00 a.m. Salons B, C & D</p>	<p>Aaron Rothschild Partner Rothschild Financial Consulting</p> <p>Carla Nunes, CFA, ABV Managing Director – Office of Professional Practice Leader – Valuation Digital Solutions</p> <p>Panelists</p> <p>Richard A. Michelfelder, Ph.D. Professor of Finance Rutgers University School of Business – Camden</p> <p>Rodney Sullivan Executive Director Richard A. Mayo Center for Asset Management</p>
<p>10:00 – 10:15 a.m.</p>	<p>BREAK Salons B, C & D</p>
<p>PANEL 5:</p> <p>Wall Street's</p>	<p>Moderator</p> <p>Ryan Wobbrock, CRRA Vice President – Senior Credit Officer Moody's Ratings</p>



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Perspective

**Course Level:
Intermediate**

**10:15 – 12:00 p.m.
Salons B, C & D**

Panelists

Bob Carney
Managing Director
Private Placements Team – Power and Utilities
Nuveen

Greg Gordon
Senior Advisor
Moelis & Company

David A. Paz
Director
Wolfe Research