



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
		Presenter	Dante DeAntonio Senior Director of Economic Research Moody's Analytics
	10:15 – 10:30 a.m.	BREAK Salons C & D	
	PANEL 2 Financial Implications of Data Center Load Growth	Moderator	Enrique Bacalao, MBA, CRRA, Founder and Manager Bacalao Consulting Services, LLC
		Panelists	Sam Holeman Senior Vice President Grid Special Projects Duke Energy John Medina Senior Vice President Project & Infrastructure Finance Group Moody's Ratings The Honorable Sarah Freeman, JD Commissioner Indiana Utility Regulatory Commission
	10:30 – 12:15 p.m.		



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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>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>Moderator Edward Kaufman, CRRA Principal Utility Specialist Virginia State Corporation Commission</p> <hr/> <p>Panelists Carla Nunes, CFA, ABV Managing Director - Office of Professional Practice Global Leader – Valuation Digital Solutions Kroll Institute Fellow</p> <p>John Graham, Ph.D. 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>7:30 – 8:30 a.m. Breakfast Buffet Salons C & D</p>	<p>SURFA Forum Registration and Breakfast: Salons C & D Sessions: Salons C & D</p>
<p>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 Course Level: Intermediate 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>Moderator Ryan Wobbrock, CRRA Vice President – Senior Credit Officer Moody's Ratings</p>
	<p>PANEL 5: Wall Street's Perspective Course Level: Intermediate 10:15 – 12:00 p.m. Salons C & D</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 Fitch Ratings</p>