MEET THE SPEAKERS

Jan Ahlen is the Vice President, Utility Research & Policy at the National Rural Utilities Cooperative Finance Corporation (CFC). In this position, Jan leads the Federal Relations and Industry Research & Analysis teams. Prior to joining CFC, Jan held senior positions at the National Rural Electric Cooperative Association (NRECA) as Director of Energy Solutions and Senior Regulatory Affairs Manager. Prior to joining NRECA, Ahlen served as the energy lobbyist for the National Farmers Union.

Jan holds a Bachelor of Arts and Master of Arts in political science from the University of North Carolina at Chapel Hill and a Master in Business Administration from Johns Hopkins University.

JAN AHLEN

Zach Anderson is the Chief Operating Officer of Wolverine Power Cooperative. Mr. Anderson's background includes power supply portfolio management, cost of service analysis, and rate design. Additionally, Mr. Anderson is responsible for oversight of Wolverine's engineering, construction, field operations, generation plants, and market operations in MISO and PJM.

Mr. Anderson earned a bachelor's degree from Northern State University and an MBA from Western Michigan University. He has worked for Wolverine Power Cooperative since 2011.Mr. Anderson is proud to call Northern Michigan home and currently resides in Cadillac, Michigan with his wife Cassandra, daughter Amelia, and sons Alexander and Avrey.

ZACH ANDERSON

David Bodek is a Managing Director and Sector Leader of S&P Global Ratings' Public Power and Electric Cooperative practice. David speaks frequently at industry conferences, discusses credit opinions with utilities, their financial intermediaries, and investors, actively monitors the credit ratings of a portfolio of high-profile public power and electric cooperative utilities, provides analytical guidance to colleagues, chairs rating committees, and develops rating methodologies.

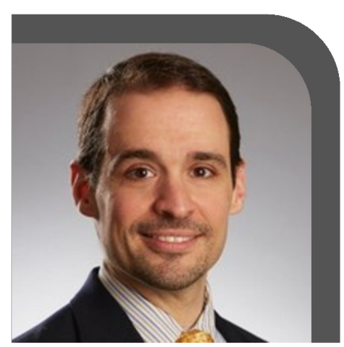
David also gained extensive experience at S&P Global Ratings performing credit analyses for investor-owned utilities, their unregulated affiliates, and energy sector project-financings.

David holds a B.A., cum laude, in Economics from the State University of New York at Albany, and a Juris Doctor degree from the Hofstra University School of Law, where he was a member of the Law Review. Before joining S&P, David practiced law with an emphasis on commercial litigations and utilities' regulatory proceedings. He holds a license to practice law in state and federal courts in New York.

DAVID BODEK

Nick Cappiello is a supervising project manager researching several topics identified as potential projects in the FASB's current invitation to comment on the Board's future agenda. He has lead the FASB's project on the Accounting for and Disclosure of Crypto Assets. Nick has also been project manager on the Disclosure Framework and Measurement portion of the Conceptual Framework, as well as the FASB/IASB joint projects on Financial Statement Presentation and Leases. Nick has worked on issues related to revenue recognition and insurance contracts and was an XBRL team project manager.

Prior to his role as at the FASB, Nick was a Director of Reporting at USI Holdings Corp. and prior to that, Controller at Independence Holding Company. Before that, Nick worked in Business Assurance at PwC. Nick earned both a BBA and MBA from Pace University and he is a Certified Public Accountant.

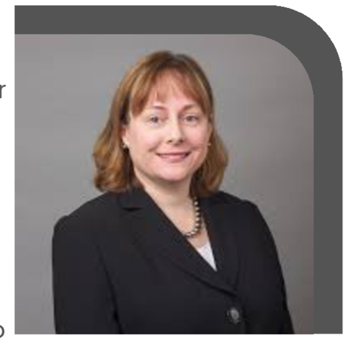


NICK CAPPIELLO

MEET THE SPEAKERS

TOM CHAMBERLIN

Tom Chamberlin is the Senior Manager of Insurance and Member Financial Services at Old Dominion Electric Cooperative (ODEC). For over 35 years, Tom has been responsible for managing ODEC's property & casualty insurance program and the wholesale billing process to its member-cooperatives. Tom is active with Risk & Insurance Management Society and is a past-president and current treasurer of the Virginia Chapter. He currently holds insurance related certifications including CRM and ARM. Tom received his Bachelor of Science in Mathematics from Virginia Tech and his Master of Business Administration from Virginia Commonwealth University.



RACHEL CORTEZ

Rachel Cortez is an Associate Managing Director with the Global Project & Infrastructure Finance Group of Moody's Ratings. She manages a sizeable portfolio of US municipal public power utilities, joint action agencies, and generation and transmission cooperatives. Previously, Rachel was the manager of Moody's Chicago-based public finance analytical team, where she covered tax-backed and revenue-secured debt issued by US cities, counties, school districts, community colleges, and water and sewer utilities.

Prior to joining Moody's in 2005, Rachel spent five years with CGI American Management Systems, where she implemented budget and financial management systems for state and local governments. She was also a Medicaid analyst with the State of Illinois and spent several years working in not-for-profit development. Rachel currently serves on the board of the Chicago chapter of Women in Public Finance. She was President of the Chicago Municipal Analysts Society and served on the board of the National Federation of Municipal Analysts. Rachel received an MPA from Syracuse University and a BA from Cornell University.

KATIE CURTIS

Katie Curtis is the VP Controller for Oglethorpe Power Corporation (OPC).Katie joined OPC in 2021 and, prior to assuming her current role in January 2025, she served in various roles, including Deputy Controller and Director of Tax. Her responsibilities have included tax, accounting and internal controls. Prior to joining OPC, Katie's experience included over fourteen years of tax accounting with a focus on Securities and Exchange Commission reporting, and Sarbanes-Oxley Act of 2002 internal controls and compliance. She began her career in public accounting with KPMG and has since held various tax and financial reporting roles at Fortune 500 companies. A certified public accountant, Katie is an alumna of The University of Georgia, obtaining both her bachelor's in business administration and master's in accounting.

JOHN FRANK

John Frank, Director of Risk and Insurance, Basin Electric Power Cooperative, Bismarck, ND, has overseen the risk and insurance programs at Basin Electric Power Cooperative and its subsidiary, the Dakota Gasification Company, for nineteen years. A 1988 graduate of the University of North Dakota, Grand Forks, John majored in management and minored in economics. John worked for EMC Insurance Companies for 15 years as a multi-line underwriter prior to joining Basin. A member of the CPCU Society and RIMS, John has an M.B.A from the University of Mary, and two professional designations, CPCU and AU. John serves on the AEGIS Risk Management Advisory Committee (RMAC), the FM Global Risk Management Executive Council (RMEC) and the GTAFA Insurance Committee.

MEET THE SPEAKERS

Archie Griffin is known to the world as the only two-time winner of the Heisman Trophy; Griffin is also one of a select group of Buckeyes to be named a three-time All American during his playing days from 1972-1975. A member of the National Football Foundation & College Hall of Fame and current board of directors, Griffin is a member of the Rose Bowl Hall of Fame and was named the All-Century Player by the Tournament of Roses Association during the centennial celebration of the Rose Bowl in 2014. Griffin is one of two players in NCAA history to start in four Rose Bowls.

After serving for 11 years as President and CEO of The Ohio State University Alumni Association, Griffin stepped back in 2015 to a consultant role as senior advisor in the Office of Advancement at Ohio State. During his tenure leading the OSUAA, Griffin led an expanded effort to embrace young alumni and began initiatives focusing on career assistance and establishing an Office of Volunteer Relations.

ARCHIE GRIFFIN

Craig Grooms has served OEC and Buckeye Power since 2004 and recently assumed the position of President and CEO. Previously, Grooms served the organizations as chief operating officer, vice president of engineering and operations, and director of resource scheduling. A rural southern Ohio native, Grooms has also worked in a variety of roles at NRG Energy and Dayton Power & Light.

CRAIG GROOMS

Paul Gutierrez works as a lobbyist at the NRECA. His main areas of responsibilities include working on legislative and regulatory policy strategies, outreach and coalition coordination in the areas of taxes and transportation.

Gutierrez previously served as the Executive Director for New Mexico Association of Counties. He also served as a Deputy Assistant Secretary at USDA and was State Director for both the Rural Development and Farm Service Agencies in New Mexico.

Gutierrez, a native of Magdalena, New Mexico grew up on a cow calf ranch and small farming operation. He earned a B.S. degree in agricultural economics from New Mexico State University.

PAUL GUTIERREZ

Shari Heino joined Brazos Electric, a Texas electric cooperative, in 2011 and has served as its Chief Risk & Compliance Officer since 2016. Shari started her career in the electric industry in 1999, serving as an attorney for the Electric Reliability Council of Texas, Inc. ("ERCOT") for eight years. She then spent another five years practicing utility law with Mathews & Freeland, a small Austin utility law firm. Shari graduated with a Bachelor of Arts Degree in Plan II/Philosophy cum laude at the University of Texas at Austin and received her J.D. from the UT School of Law. She is licensed to practice law in the State of Texas. Shari's hobbies include dog training, ballroom dancing and magic.

SHARI HEINO

MEET THE SPEAKERS

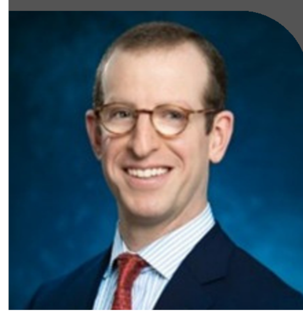
GREG HUMPHREYS

Greg Humphreys is Vice President and CFO of Deseret Power, located in South Jordan, Utah. Desert Power serves five member cooperatives in rural Utah, Wyoming, Nevada, and Arizona. Greg recently celebrated his 23rd year as a Deseret employee. He has almost 30 years serving cooperatives in one capacity or another. Greg is a licensed CPA & CGMA in the state of Utah. He received both a bachelor's degree and master's degree in accounting from Brigham Young University. He also completed the Advanced Regulatory Studies program at Michigan State University.

Greg spent the first 8 years of his career with one of the Big 4 accounting firms performing a variety of services including Auditing, Forensic Accounting, and Consulting. During his time as a public accountant, he worked with a variety of organizations in many industries.

At Deseret Power he served in a broad range of accounting and finance positions, eventually becoming the Chief Financial Officer in 2017. Through his 30-year career, Greg directed or helped on many projects including Mergers & Acquisitions, IPO's, Debt Restructurings, Risk Management programs, Forensic Accounting, Auditing and Process improvement/streamlining. Additionally, Greg has spent more than 10 years serving the G&T Accounting and Finance Association in various capacities and is currently serving as President of the organization. He has also been involved in Rotary International, Scouting, and other areas of volunteerism throughout his career. Mr. Humphreys is married and has three amazing, intelligent, and beautiful girls who call him Dad.

Luke Jenkins is an Executive Director in Wells Fargo Securities' Public Finance Department in the New York City office. He works in the Utilities and Structured Finance groups, working closely with electric cooperatives, public power utilities, corporate-backed issuers, and project finance issuers in the taxable and tax-exempt markets. Luke's capital markets experience includes structuring taxable, tax-exempt, private placement, and 144A transactions. He works closely with the commercial and corporate bank to provide credit and on balance sheet solutions to clients. Luke started his career in 2012 as a credit analyst at Wells Fargo for public power utilities before moving to Wells Fargo Securities in 2016.



LUKE JENKINS

CHRIS JOHNSON

Chris Johnson has been employed with Basin Electric since January of 2024. He has over 30 years of finance and accounting experience in the utility industry. He holds an M.B.A. from the University of Georgia and a B.B.A. in Accounting from Georga State University.

Jeff Johnston is lead digital infrastructure economist in CoBank's Knowledge Exchange research division. He focuses on identifying emerging technologies, business models, risks and opportunities within the telecommunications industry, and providing strategic analyses to both internal and external stakeholders.

Prior to joining CoBank in 2018, Mr. Johnston was an equity analyst covering the tech, media and telecom sectors. He has also held various senior management positions in the telecommunications industry. Mr. Johnston earned his bachelor's degree in business administration, accounting and finance from York University and he is also a CFA (Chartered Financial Analyst®) charterholder.

JEFF JOHNSTON

MEET THE SPEAKERS

JORGE LOPEZ

Jorge Lopez is a Vice President and Distinguished Analyst based in the United States, where he leads research of the Gartner research theme of the industrialization of space. He also is a leader in the global theme and research agenda of digital business. This includes advancing the research of the theme and managing its delivery throughout Gartner. His target audience is the CIO, with emphasis on how to help the CIO engage the CEO and the board of directors on many issues of concern to business executives, including digital business. He draws on his prior research on board of directors, CEO and CIOs to advise Gartner clients on how best to leverage technology to generate business results.

Prior to his current role, Mr. Lopez was chief of research for industry research, where he also managed cross-industry and vertical research, including education. He has extensive experience in the information technology industry, including various executive roles in marketing and sales, research and development, implementation services, strategic planning, supply chain, and corporate business development. Before joining Gartner, Mr. Lopez was vice president, corporate development and strategic planning for Frontstep, as well as vice president, strategic alliances and Latin America for Avalon Software. He also worked on various assignments at IBM in research and development, marketing and sales, and management.

Lynn Maloney has been with Old Dominion Electric Cooperative (ODEC) for the past 35 years. She joined ODEC in 1990 as its Senior Financial Analyst, held the position of Vice President of Finance from 1995 to 2009, and was Vice President of Financial Reporting and Investor Relations from 2009 until 2022. Now back in the position of Vice President of Finance, Lynn is responsible for ODEC's treasury operations, risk management, rating agency and investor relations, corporate policies and governance documents, and member billing.

Before joining ODEC, Lynn worked in the areas of credit and commercial lending with Crestar Bank (now Truist Bank).

A native Virginian, Lynn holds a Bachelor of Science in Business degree from the University of Richmond, and a Masters in Business Administration from Emory University in Atlanta, Georgia. Lynn is a licensed CPA in the Commonwealth of Virginia.

LYNN MALONEY

GAVIN MCCOLLAM

Gavin McCollam has been employed with Basin Electric since 1989; Masters in Systems Management, University of Southern California, Los Angeles; B.S. Mechanical Engineering, North Dakota State University, Fargo; registered Professional Engineer.

MEET THE SPEAKERS

CHRISTOPHER MCLEAN

Christopher A. McLean is the Assistant Administrator of the Rural Utilities Service (RUS) Electric Programs. He served as Acting Administrator for the agency from the beginning of the Biden Administration until October 2022 when Andy Berke was appointed Administrator.

RUS is a USDA Rural Development agency that provides loan and grant financing for electric infrastructure, including renewable energy, energy efficiency, smart grid technology and grid modernization; EV charging station infrastructure; telecommunications and broadband infrastructure; and water and wastewater facilities serving rural communities.
Since January 11, 2015, Mr. McLean has served as Assistant Administrator for RUS' Electric program, presiding over a $53 billion loan portfolio. In recent years the RUS annual lending budget for new electric infrastructure loans has exceeded $5 billion.

Mr. McLean has extensive experience with RUS. From 2010-2012, he served as a senior advisor to the Administrator of the Rural Utilities Service (RUS). He is a former RUS Administrator and former Governor of the Rural Telephone Bank. Mr. McLean was appointed Deputy Administrator in January 1998. In 2000, he was the first person nominated and confirmed for the position of RUS Administrator. Mr. McLean served the Acting Director of the Program Planning and Accountability Division of the Office of the Assistant Secretary for Civil Rights (OASCR) at the United States Department of Agriculture. He came to OASCR in 2013 as civil rights fellow in the OASCR's policy office.

Mr. McLean was in private practice from 2001-2010, and a co-owner of a consulting firm that specialized in telecommunications, transportation, and technology policy. Mr. McLean is also the former Executive Director of the Consumer Electronics Retailers Coalition (CERC).

Mr. McLean worked on Capitol Hill for more than 15 years. He served on Senator Jim Exon's staff and Senator Bob Kerrey's staff both from Nebraska.
Mr. McLean hails from Omaha, Nebraska. He received an LL.M. in International and Comparative Law from Georgetown University in 1985, a J.D. from Creighton University School of Law in 1982, and a degree in Business Administration from Creighton University in 1980. Chris also completed the Key Executive Leadership Program at American University in 2015.

NATE MELBY

Nate Melby is Vice President and Chief Information Officer (CIO). He joined Dairyland on February 29, 2016.

As Vice President and CIO, Nate is responsible for leading the strategy, development and implementation of information technology initiatives and systems that align and advance Dairyland's business/operations strategies.

Nate has a Bachelor of Science in Information Systems from the University of Wisconsin-La Crosse, a Master of Business Administration with an emphasis in Technology and Training from the University of Wisconsin-Whitewater, and a Ph.D. in Information Systems from Nova Southeastern University, specializing in Information Security and Telecommunications. He also earned a Certificate of Management Excellence from Harvard Business School and completed the Tuck School of Business at Dartmouth's Business Engagement for the Security Professional (BESP) executive program. In 2024, Nate earned the Wisconsin CIO of the Year ORBIE award in the Large Corporate category.

An active member of his community, Nate is Fire Chief of the Town of Campbell Fire Department and serves on the Board of Directors of the Wisconsin State Fire Chiefs Association. He is a recipient of the University of Wisconsin-La Crosse's Rada Distinguished Alumni Award.

Prior to joining Dairyland, he led Information Security for Ingersoll Rand in La Crosse, Wis. He also held other positions in Global Telecommunications Engineering and Architecture, Data Communications and Information Technology for Trane and American Standard Companies.

MEET THE SPEAKERS

BILL MILLER

Bill Miller, CPA is a tax partner with the accounting firm of Bolinger, Segars, Gilbert & Moss in Lubbock, Texas. He began his career with the firm in 1992 and holds a degree in accounting from the University of Texas at Austin.

Bill is in charge of the firm's utility tax practice, providing tax and consulting services to exempt and non-exempt utility cooperatives. Traditional responsibilities include tax research, tax planning, recommending entity types for new business ventures, and oversight of the tax return preparation. Cooperative specific responsibilities include compliance with co-op principles and plans to allocate and redeem patronage capital.

In addition to working with the firm's audit clients, Bill has consulted with national and regional trade associations in providing guidance on tax and equity issues pertaining to the utility cooperative industry. Past guidance includes working with the 2005 Capital Credits Task Force, preparing a trade association memo on tax issues related to electric cooperatives entering the broadband business, and also providing technical assistance on a national level regarding the tax impact of proposed legislation.

Bill is active in the National Society of Accountants for Cooperatives. He has served as past National President and a National Director representing the Electric Cooperative Chapter. Bill is also the 2023 recipient of the NSAC Silver Bowl Award.

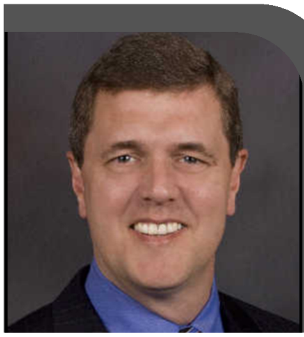
NARMADA NANJUNDEN

Narmada Nanjundan is currently Director of Risk for East Kentucky Power Cooperative (EKPC). Ms. Nanjundan joined EKPC in November 2011. In her current capacity she is responsible for EKPC's Enterprise Risk Program (ERP), market risk, credit risk, business insurance, Captive Insurance and business continuity.

Ms. Nanjundan has over twenty-five years of experience in the energy industry, with investor-owned utilities, federal government as well as cooperatives. Prior to working at EKPC, Ms. Nanjundan worked for the Federal Energy Regulatory Commission in Washington, D.C., where she was a Branch Chief for Surveillance, Energy Market Oversight at the Office of Enforcement. Ms. Nanjundan also worked for NextEra Energy Resources, Duke Energy and Exelon.

Her industry experience includes enterprise risk management, business insurance, rates & regulatory policy, asset acquisition & optimization, wholesale & retail structuring, marketing & trading, business development, portfolio modeling, renewable energy logistics & financial statement analysis.

Ms. Nanjundan holds a Master of Science degree in Economics from Illinois State University, a graduate degree in cost accounting from the Institute of Cost Accountants of India in Calcutta, India, and a Bachelor of commerce degree in Taxation from Bangalore University in Bangalore, India. Ms. Nanjundan also earned her Energy Risk Professional (ERP) certification in 2013 from Global Association of Risk Professional (GARP). Ms. Nanjundan is a chartered accountant, the equivalent in India of a certified public accountant.



PAUL NEUHEDEL

Paul W. Neuhedel is a Managing Director, and Co-Head of the Public Power and Prepay Energy Group. His primary areas of focus include Electric Cooperatives, Public Power, and Municipal Utilities. Prior to joining RBCCM in July 2011, Paul was an Executive Director at J.P. Morgan Securities where he worked in the Energy and Environmental Group. Previously he was a Senior Director at Fitch where he managed the Public Power Group, rating Public Power, Electric Cooperatives, and Municipal Utilities.

Prior to Fitch, Paul was a Vice President at Ambac, covering Electric Cooperative, Public Power, Municipal and Investor-Owned Utilities. Earlier, Paul was a Senior Power Analyst with the New York Power Authority and a Rate Design Analyst at the Long Island Lighting Company. Paul began his career at Argus Research Corporation covering utilities. Paul regularly presents at national forums on public power and electric cooperative issues and previously testified at FERC on behalf of Old Dominion Electric Cooperative.

Paul earned a B.A. in Public Affairs and Political Science from the University at Albany before receiving an M.S. in Environmental and Waste Management from the State University of New York at Stony Brook. He also earned a M.A. from the Seminary of the Immaculate Conception. Paul is an Ordained Deacon of the Roman Catholic Church. He holds Series 7, 52, 53, 63 and 79 licenses.

MEET THE SPEAKERS

Rodney Palesano is the VP of Human Resources at Western Farmers Electric Cooperative (WFEC). Currently, in addition to property & casualty insurance, Rodney oversees all the Human Resources functions such as recruitment, employee relations, and payroll. He is also responsible for the plans related to retirement / medical / dental / vision / life / disability. Previous experience, in addition to HR, during his 30 years at WFEC include Resource Planning, Safety, and Risk Management. Rodney has served on multiple Boards and Committees and held Officer positions. He currently holds several HR-related certifications and previously held several Safety-related certifications. Rodney received his Bachelor of Science in Fire Protection and Safety Engineering Technology from Oklahoma State University and his Master of Arts in Organizational Management from University of Phoenix.

RODNEY PALESANO

Ryan Pearl graduated from Eastern Kentucky University in 2008 with a Bachelor's degree in Finance and earned his Masters of Business Administration from Eastern Kentucky University in 2012. He holds a Certified Treasury Professional (CTP) certification and is a veteran of Operation Iraqi Freedom.

Since graduating, Ryan has gained valuable finance experience across the manufacturing and electric utility industries. Ryan joined East Kentucky Power Cooperative (EKPC) in 2014 as a Treasury Analyst and is currently serving as the Assistant Treasurer. In this role, he helps to lead EKPC's Treasury department, overseeing critical functions in liquidity and debt management that support the Cooperative's financial stability and strategic goals.

RYAN PEARL

Dennis M. Pidherny is a Managing Director – Public Finance at Fitch Ratings, Ltd, and responsible for overseeing the firm's analytical activities related to U.S. public power and water & sewer utilities, prepaid energy, state revolving funds and municipal bond pools, and municipal structured finance. In his current role he is responsible for the development and implementation of master and sub-sector rating criteria, as well as presenting Fitch's research to a wide variety of issuers, institutional investors, lenders and other financial intermediaries. As a member of the U.S. Public Finance leadership team, Dennis has also held managerial responsibilities for a broader group of Fitch's municipal sector revenue-supported analytical groups including healthcare, higher education and community development & social lending.

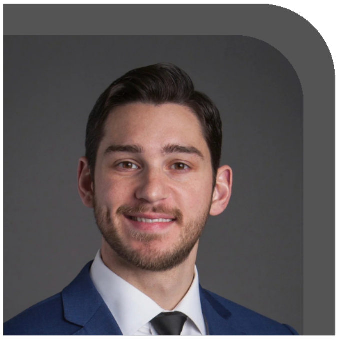
Prior to joining Fitch Ratings in 2010, Dennis was Managing Director at Ambac Assurance Corporation where he was principally responsible for managing the underwriting activity for the company's U.S. based investor-owned, cooperative and wholesale municipal utility clients, as well as for many international clients.

Dennis began his career as a member of The Bank of New York's Energy Industries Division and Capital Markets Division, where he was responsible for financing domestic and international electric and gas utilities, municipal electric companies and independent power producers.

Dennis earned a B.A. degree in Economics and Organizational Psychology from the University of Rochester. He also earned an M.B.A. degree in Finance, Accounting and Corporate and Market Organizations from the William E. Simon School of Business Administration at the University of Rochester. He has served as a member of the William E. Simon School's Executive Advisory Committee and its Alumni Council, and been a featured seminar speaker for over 40 organizations.

DENNIS PIDHERNY

MEET THE SPEAKERS



George Ransom is a Business Development Manager in Burns & McDonnell's Energy Division. He is responsible for strategic planning and business development in the electric utility and power market sectors. His territory is primarily in the Midwest region of the United States, with clients in Indiana, Kentucky, Ohio, Alabama and North Dakota.

Prior to client management, he served as an electrical engineer in the Energy Division at Burns & McDonnell. He is experienced in the design of electrical systems, development of equipment specifications, EPC proposal estimating, and preparation of construction contracts. His responsibilities also included compliance submittal review and contract administration. He has been heavily involved in evaluation, design, and upgrading of air pollution control systems and gas conversions for coal-fired power plants.

Mr. Ransom holds a Bachelor of Science in Electrical and Electronics Engineering and am a professional engineer in the state of Missouri.

GEORGE RANSOM

Chip Reagan started his career with the McGriff Energy practice in 2013. In his role, Chip oversees the overall strategy, insurance placements and service for his clients which include co-ops, investor-owned utilities, public power and IPPs. McGriff is one of the largest trading partners of AEGIS and EIM, and Chip has a deep working relationship with them and familiarity with their products and offerings. Chip's core product strengths include excess liability (including wildfire), property and builder's risk insurance. Chip received his B.A. in Risk Management & Insurance from the University of Georgia and has earned designations as a Certified Insurance Counselor (CIC) and Certified Risk Manager (CRM).

CHIP REAGAN

Jason Reschly is a tax attorney at Husch Blackwell, LLP. Jason has practiced in the tax law area for more than 40 years, handling corporate tax planning relating to reorganizations, purchases, divestitures, sales of business assets and tax considerations with respect to financings. Jason has handled numerous controversial matters with the Internal Revenue Service and other state and local taxing authorities, including audits, informal appeals and litigation in Tax Court, Federal District Court, Federal Court of Claims and Appeals Courts. He has extensive experience in the areas of cooperative taxation, cooperative joint ventures and financing transactions for cooperatives.

JASON RESCHLY

Joe Rick is Senior Director of Capital Markets & Investor Relations at Oglethorpe Power Corporation. He is responsible for Oglethorpe's capital markets and bank financings, rating agency and investor relations, interest rate derivatives, and counterparty credit risk activities. Prior to joining Oglethorpe in 2008, Mr. Rick worked at J.P. Morgan Securities as a Vice President covering G&T cooperatives. He previously served as a Peace Corps Volunteer in Africa for three years, focusing on microfinance and business development. Mr. Rick holds a B.B.A. from St. Norbert College, an M.B.A. from the University of Chicago Booth School of Business, and a Juris Master degree from Emory University School of Law. Mr. Rick served as the president of the G&T Accounting and Finance Association during the 2018-2019 term.

JOE RICK

MEET THE SPEAKERS

Britt Roarx is the Director of Risk at Texas Roadhouse, where he manages enterprise-wide risk management, insurance placement, and claims strategies. He played a pivotal role in introducing a Captive insurance structure to the company's insurance framework, a key move in optimizing risk management. With over 15 years of experience, Britt continues to drive innovative solutions in risk management.

BRITT ROARX

James Sorenson is the Client Relationship Leader within Brown & Brown's energy practice and functions as the overall account leader responsible for the client experience. In addition, he provides account leadership ensuring client goals are achieved through the design and implementation of solutions that more efficiently manage risk and support overall business objectives.

James has been working in the insurance industry for over 18 years both as an underwriter and national account broker. James holds the Chartered Property Casualty Underwriter ("CPCU") and Associate in Reinsurance ("ARe") designations. Over the past 8 years James has been part of the Brown & Brown energy practice leadership serving in a variety of roles.

Prior to joining Brown & Brown, James was an underwriter at Travelers Insurance and a broker at Aon within their Financial Services Group.

JAMES SORENSON

Steve Stanton, Insurance Manager, Tri-State Generation and Transmission. Over 40 years of experience in accounting, auditing and risk management. Six years at Tri- State with four years as the Insurance manger.

Previous experience in Risk Management with an Oil and Gas company and many years as an Internal Auditor for various utilities. Steve has designations of CPA, CIA, CFA and ERIS which are inactive currently.

STEVE STANTON

Michelle Strobel has been the vice president and chief financial officer of Great River Energy (GRE) since April 2018. She is responsible for all of GRE's financial and risk management functions. Michelle joined GRE in 2010 as the company's controller. Prior to joining GRE, Michelle was an audit partner at Baker Tilly Virchow Krause, LLP, and audit managing director at Deloitte & Touche, LLP. Michelle earned her bachelor's degree in accounting from the College of St. Benedict and her master's degree in business administration from the University of St. Thomas. Michelle serves on the audit and finance committee of NMDP/Be The Match.

MICHELLE STROBEL

MEET THE SPEAKERS

ROGER TUTTEROW

Roger Tutterow is Professor of Economics at Kennesaw State University where he holds the Henssler Financial Endowed Chair.

His analysis of the economic, business and political environments have been featured in a variety of media including Wall Street Journal, Financial Times, Business Week, Forbes, CNBC, Bloomberg, NPR's "Marketplace" and CNN-Radio as well as by regional electronic and print media. In addition to his work in academia, Dr. Tutterow has served as a consultant on financial economics and statistical modeling for corporate clients ranging from Fortune 500 companies to closely held businesses and has provided expert testimony on financial and statistical matters in state and federal court.

A Georgia native, Dr. Tutterow holds a B.S. in Decision Science from Berry College and a M.A. and Ph.D. in Economics from Georgia State University. Prior to joining Kennesaw State University, Dr. Tutterow held appointments at West Virginia University, Georgia State University and Mercer University. He has also served as a visiting professor at the University of the West Indies in Trinidad and at the Institute for Industrial Policy Studies in Seoul, South Korea.

TERI VISWANATH

Teri Viswanath is lead economist for power, energy and water in CoBank's Knowledge Exchange research division. She focuses on the energy industry, including the electric distribution, generation and transmission sectors, as well as the rural water industry. She develops market intelligence, strategic guidance and policy assessments on these key industries to inform CoBank and customer leadership decisions.

Before joining CoBank, Ms. Viswanath was director of corporate strategy for First Solar, where she led the market and competitive intelligence research for the organization including initiating long-term scenario planning to identify evolving market risks in order to manage future uncertainties. She previously held energy economist positions with S&P Global, BNP Paribas, Credit Suisse and Deutsche Bank and began her work in energy with Dynegy, as a power plant asset manager. In all, Ms. Viswanath has more than 20 years of expertise in energy economics, in addition to her early career experience in finance and law.

Ms. Viswanath earned a bachelor's degree in finance from Central Michigan University and a juris doctorate from Fordham University and also studied at the University of Texas School of Law.

ANDY WHITESITT

Andy Whitesitt is Senior Vice President and Chief Commercial Officer at ACES in Carmel, Indiana. In this role, Andy leads ACES' Business Development, Fuels, Meteorology, and West Power Trading teams. Andy joined ACES in July 2003 and has held various positions in power, natural gas, and business development, most recently as Senior Vice President and Chief Business Development Officer.

Andy began his energy career in 2001 with ICAP Energy as a Commodity Broker. In addition to providing leadership to fuels and power trading, Andy has presented on a variety of topics including natural gas & power markets as well as the ever-evolving electric utility industry.
Andy holds an MBA and a MS in Finance from Indiana University's Kelley School of Business.

JAMES WRIGHT

James Wright joined the ODEC team in 2007 after graduating from Elon University with a B.A. in Physics. James initially focused on Power Supply Planning through his first fifteen years with the company, focused on portfolio modeling, power market modeling, and Resource Planning. He was the lead analyst on two RFPs for baseload and intermediate resources. When ODEC proceeded with Wildcat Point, a 1,000 MW 2x1 combined cycle project in Maryland, James led analysis supporting equipment and EPC selection and upgrade and option analysis. James also worked with development partners on a building a small solar portfolio following the completion of Wildcat Point. James got an MBA with a concentration in Finance from VCU in 2023, and partway through that program changed roles in 2022 to do rate design and financial forecasting for ODEC. Much of the rate design work has focused on rates for large loads, which included developing and implementing weekly market-based rate billing processes that took effect in late 2024.