2020 Spring Accounting Conference
EEI Budgeting & Financial Forecasting Committee
Grand Hyatt Denver – Denver, CO – May 17-20, 2020

Preliminary Agenda

Sunday, May 17, 2020

3:00 – 4:00 pm
Joint Committee Leadership Meeting
(Mt. Columbia, 3rd Fl.)
(Leadership of the EEI Accounting Standards, Corporate Accounting, Property Accounting & Valuation, and Budgeting & Financial Forecasting Committees and the AGA Accounting Services Committee)

4:00 – 4:30 pm
First-time Attendees Orientation
(Mt. Sopris, Lobby Level)
(All first-time attendees are strongly encouraged to attend)

Lisa Saragusa-DaBello – Facilitator
Manager, FBP – Corporate Planning
Entergy
Chair – EEI Budgeting & Financial Forecasting Committee
Vice Chair – AGA Accounting Services Committee

5:00 – 7:00 pm
Registration
Aspen Ballroom, Foyer, 2nd Fl.
Edison Electric Institute and American Gas Association

5:00 – 7:00 pm  
Sunday Evening Reception  
Aspen Ballroom, 2nd Fl.  
(Spouses and Guests Welcome)

Monday, May 18, 2020

7:00 – 8:00 am  
Registration  
Colorado Foyer, 2nd Fl.

7:00 – 8:00 am  
Joint Committee Breakfast  
Aspen Ballroom, 2nd Fl.  
(Spouses and Guests Welcome)

Joint Session – All Attendees

8:00 – 8:20 am  
Opening Remarks & Administrative Matters  
Colorado Ballroom, 2nd Fl.  
Laura Mollenschott  
Manager, Financial & Compliance Accounting  
FirstEnergy  
Vice Chair – EEI Accounting Standards Committee

8:20 – 9:10 am  
Welcome to Denver and the Colorado Electric/Gas Industry  
Dianne Primavera (invited)  
Lieutenant Governor  
State of Colorado

9:10 – 10:25 am  
CAO Roundtable  
Randall Hartman – Moderator  
Director, Accounting  
Edison Electric Institute  

Lori Colvin  
Vice President, Controller & Chief Accounting Officer  
Southwest Gas

Glenn Barba  
Vice President, Controller & Chief Accounting Officer  
CMS Energy  
Vice Chair – EEI Accounting Executive Advisory Committee  
Jeffrey Savage  
Senior Vice President & Controller  
Xcel Energy
10:25 – 10:45 a.m.  
**Morning Break**  
*Colorado Foyer, 2nd Fl.*

10:45 – 11:35 a.m.  
**FASB/SEC/FERC Update**  
*Colorado Ballroom, 2nd Fl.*  
*Conor Tamms*  
Senior Manager  
Deloitte  
Utility Industry Accounting Fellow

11:35 am – 12:25 pm  
**Alteryx/RPA/Automation**  
*Kiela Abbott-Robinson*  
FCOE Accounting Manager  
NextEra Energy

12:25 – 1:25 pm  
**Lunch**  
*Aspen Ballroom, 2nd Fl.*  
(Spouses and Guests Welcome)

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**Budgeting & Financial Forecasting Breakout Session**

1:35 – 1:45 pm  
**Opening Remarks & Administrative Matters**  
*Lisa Saragusa-DaBello*  
Manager, FBP – Corporate Planning  
Entergy  
Co-Chair – EEI Budgeting & Financial Forecasting Committee  
*Mt. Evans GHCC, 2nd Fl.*

1:45 – 2:30 pm  
**Economic Outlook for Electric & Gas Industries – A Wall Street Perspective**  
*Michael Haggarty*  
Associate Managing Director  
Moody’s Investors Service

2:30 – 3:15 pm  
**Leveraging Long-term Operational Plans to Enable Financial Decision Making**  
*TBD*

3:15 – 3:30 pm  
**Afternoon Break**
3:30 – 4:15 pm  
**Mt. Evans GHCC, 2nd Fl.**  
**FERC-based Budgeting vs. GAAP-based Budgeting**  
*Lisa Saragusa-DaBello*  
Manager, FBP – Corporate Planning  
Entergy  
*Kelly McLaughlin*  
Director  
Consolidated Edison

4:15 – 5:00 pm  
**Open Forum Discussion**  
*Josh Kliever* – Facilitator  
Manager, Corporate Planning  
Portland General Electric

5:30 – 7:30 p.m.  
**Aspen Ballroom, 2nd Fl.**  
**Monday Evening Reception**  
(Spouses and Guests Welcome)

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**Tuesday, May 19, 2020**

7:00 – 8:00 a.m.  
**Colorado Foyer, 2nd Fl.**  
**Registration**

7:00 – 8:00 a.m.  
**Aspen Ballroom, 2nd Fl.**  
**Joint Committee Breakfast**  
(Spouses and Guests Welcome)

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**Joint Session – All Attendees**

8:00 – 8:10 am  
**Colorado Ballroom, 2nd Fl.**  
**Opening Remarks & Administrative Matters**  
*Dylan Syse*  
Accounting Manager  
Alliant Energy  
Chair – EEI Corporate Accounting Committee
8:10 – 9:00 am  
**Electric Industry Update**  
*Megan Vetula*  
Associate General Counsel, Energy Regulation  
Edison Electric Institute

9:00 – 9:50 am  
**Gas Industry Update**  
*Brendan O’Brien*  
Energy Manager  
American Gas Association

9:50 – 10:10 am  
**Morning Break**  
*Colorado Foyer, 2nd Fl.*

10:10 – 11:00 am  
**Adopting Cloud Technologies: Focusing Beyond the ERP**  
*Vadim Lantukh*  
Chief Executive Officer  
Lucasys  
*Daniel Chang*  
Chief Operating Officer  
Lucasys

11:00 – 11:50 am  
**The Power of Your Personal and Leadership Brand**  
*Aimee Davis*  
Vice President – Communications & Marketing  
Alliant Energy

11:50 am – 12:50 pm  
**Lunch**  
*Aspen Ballroom, 2nd Fl.*  
(Spouses and Guests Welcome)

**Budgeting & Financial Forecasting Breakout Session**

12:55 – 1:00 pm  
**Opening Remarks & Administrative Matters**  
*Simar Grewal*  
Section Manager, Corporate FP&A  
Consolidated Edison  
Co-Chair – EEI Budgeting & Financial Forecasting Committee
1:00 – 1:45 pm

**Leveraging the Cloud – Planning & Budgeting Transformation**

*Mt. Evans GHCC, 2nd Fl.*

*Kelly McLaughlin*
Director
Consolidated Edison

*Simar Grewal*
Section Manager, Corporate FP&A
Consolidated Edison

*Brad Stansberry*
Partner, Advisory
KPMG

1:45 – 2:30 pm

**Unit-based Budgeting**

*Chris Sills*
Managing Director – Energy & Utilities
Huron Consulting Group

2:30 – 2:45 pm

**Afternoon Break**

2:45 – 3:30 pm

**Duke’s Journey to Optimize Capital Investments Across the Enterprise**

*Mt. Evans GHCC, 2nd Fl.*

*Jason Parham*
Finance Program Office (FPO), Business Manager
Duke Energy

*Rick Fisher*
Manager
PowerPlan

3:30 – 4:00 pm

**Open Forum Discussion**

*Josh Kliever* – Facilitator
Manager, Corporate Planning
Portland General Electric

4:30 – 10:00 pm

**A Night at the Denver Performing Arts Center**
Reception and Dinner in the Seawell Ballroom followed by Disney’s Lion King Show

Need to register for the conference by April 17th to have a show ticket
Meet in the hotel lobby at 4:30 pm and depart for the Denver Performing Arts Center by 4:40 pm
(Spouses and Guests with a ticket are Welcome)
Wednesday, May 20, 2020

7:00 – 8:00 a.m.  
Registration  
*Colorado Foyer, 2nd Fl*

7:00 – 8:00 a.m.  
Joint Committee Breakfast  
*Aspen Ballroom, 2nd Fl*  
(Spouses and Guests Welcome)

**Budgeting & Financial Forecasting Breakout Session**

8:00 – 8:05 am  
Opening Remarks & Administrative Matters  
*Mt. Evans GHCC, 2nd Fl.*  
*Lisa Saragusa-DaBello*  
Manager, FBP – Corporate Planning  
Entergy  
Co-Chair – EEI Budgeting & Financial Forecasting Committee

8:05 – 8:50 am  
How Companies Leverage Budgeting & Planning Software  
*TBD*

8:50 – 9:35 am  
Efficient Growth Matters – Analyzing the Main Drivers of Capital Efficiency  
*Simar Grewal*  
Section Manager, Corporate FP&A  
Consolidated Edison

9:35 – 9:45 am  
Morning Break

9:45 – 10:30 am  
Open Forum Discussion  
*Josh Kliever* – Facilitator  
Manager, Corporate Planning  
Portland General Electric

10:30 am  
Adjourn