

Preliminary Agenda – LDC Gas Forum Southeast 2026

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| <u>Wednesday, April 8</u> | |
| 7:15 am – 8:15 am | Networking with the Industry: Registration and Continental Breakfast |
| 8:15 am - 8:30 am | <p>Welcome & Overview:</p> <p>Christy Coleman, Vice President, LDC Gas Forums</p> |
| 8:30 am - 9:15 am | <p>Opening Keynote:</p> <p>Speaker: Lane Wilson, Senior Vice President & General Counsel, Williams</p> |
| 9:15 am – 10:00 am | <p>Presentation:</p> <p>Speaker: James Pearson, Sr. Analyst Gas Fundamentals, ConocoPhillips</p> |
| 10:00 am – 10:30 am | Networking Break: Shell Energy Cafe – Sponsored by: Shell Energy |
| 10:30 am – 12:00 pm | <p>Panel: Supply/Demand Market Fundamentals This Panel of expert industry analysts provides an up-to-the-minute update about natural gas & LNG market conditions, with particular focus on the Southeast U.S. region. Panelists will offer a fundamental market examination including supporting data, contextual analysis, forecasts, and actionable takeaways. Analysis includes supply, demand, price, midstream infrastructure capability, exports, and influencing factors. Policy and regulatory impacts will also be considered. Insights provided by this Panel offer an excellent foundation and factual references for the overall Agenda and ensuing discussions.</p> <p>Moderator: Nick Kapur, Vice President, Argus Media</p> <p>Speakers: Jack Weixel, Senior Director, East Daley Analytics Mark Aufmuth, Managing Director, bp Leticia Gonzales, Managing Director, North American Natural Gas Pricing, Natural Gas Intelligence</p> |
| 12:00 pm - 12:15 pm | Board Buses & Depart for Optional Afternoon Networking Activity (Beach Bowl Jax) |
| 12:15 pm – 4:30 pm | Networking Activity - Beach Bowl Jax |
| 4:30 pm – 6:30 pm | Wednesday Evening Welcome Reception (Location: American Gator Club & Lagoon Pool Deck) |
| <u>Thursday, April 9</u> | |
| 7:15 am - 8:15 am | Networking with the Industry: Registration and Continental Breakfast |
| 8:15 am – 8:30 am | Welcome & Overview: |

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| | Christy Coleman, Vice President, LDC Gas Forums |
| 8:30 am – 9:30 am | <p>Fireside Chat with Tala Goudarzi — Geopolitics and Impacts of Recent Events on US Energy Policy</p> <p>Tala Goudarzi, Partner, Torridon Group Cleve Hogarth, Principal, Cleveland Advisory, LLC</p> |
| 9:30 am – 10:45 am | <p>Panel: Pipeline to Profits: Ensuring Efficient Delivery Supply to Markets Including Eliminating Constraints In Critical Natural Gas Midstream Infrastructure</p> <p>U.S. energy dominance policy is often captioned “Drill Baby Drill”, however the reality is that natural gas midstream infrastructure is a more significant constraint than gas supply. This Panel is comprised of leading experts from several key elements of the natural gas midstream infrastructure value chain, specifically gas storage, infrastructure development, infrastructure EPC, and gas transmission. The Panel will discuss current market conditions, constraints, and new project plans. In addition, the Panel will share insights into the development and supply chain process, including latest approaches and techniques to ensure efficient achievement of shovel ready projects to deliver critical energy infrastructure.</p> <p>Moderator: Speakers: Sean Churchill, Lead Commercial Advisor, NeuVentus Jeff Tounge, Development Lead, CPC Rafael Velasco, Director Process Technology, CB&I Ryan Leahy, Director, Business Development, Kinder Morgan, Inc.</p> |
| 10:45 am – 11:15 am | Networking Break: Shell Energy Cafe – Sponsored by: Shell Energy |
| 11:15 am – 12:45 pm | <p>Panel: Breaking the Bottlenecks: Infrastructure and Coordination</p> <p>As energy demand accelerates and reliability challenges intensify, the U.S. natural gas, oil and power system is reaching a critical inflection point. This timely panel brings together industry leaders to examine two of the most urgent and deeply interconnected issues facing the energy sector today: infrastructure permitting and gas-electric coordination.</p> <p>Drawing on recent National Petroleum Council studies, panelists will discuss how electrification, data center growth, and renewable integration are colliding with misaligned markets, constrained pipeline flexibility, and increasingly complex permitting processes. The discussion will move beyond problem-statement to practical solutions, focusing on what it will take to better align policy, market design, and infrastructure investment to ensure reliability and affordability.</p> <p>Join this forward-looking conversation on how the industry can break through bottlenecks, strengthen coordination, and build a resilient energy system capable of meeting the demands of the next decade.</p> <p>Moderator: Erin Potter Sullenger, Senior Counsel, Williams Companies, Inc. Speakers: Kenneth Yagelski, Gas Supply Operations, Southern Company Gas</p> |

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| | <p>Brianne Metzger-Doran, <i>VP, Operation Services</i>, TC Energy Matthew Agen, <i>Chief Regulatory Counsel, Energy</i>, American Gas Association Alex Dewar, <i>Managing Director and Partner</i>, Boston Consulting Group Danielle Bertoldi, <i>Technical Advisor, Office of Commissioner Lindsay S. See</i>, Federal Energy Regulatory Commission (FERC)</p> |
| <p><i>12:45 pm - 2:15 pm</i></p> | <p>Keynote Lunch:</p> <p>Speaker: Jessica Jensen, <i>Region Vice President of Service Sales for Large Power Equipment</i>, Siemens Energy</p> |
| <p><i>2:15 pm – 3:15 pm</i></p> | <p>Panel: Utilities Operating In Regulated Energy Markets – Unique Aspects, Implications, Challenges, and Customer Benefits</p> <p>While much of the natural gas market is deregulated, the natural gas Utilities segment operates in a regulated environment and must adhere to specific regulations regarding pricing, service quality, and infrastructure investment. Regulatory frameworks are designed to safeguard consumers against unfair practices, ensure fair pricing, reliable service, and transparency. Rules and standards vary by jurisdiction, compliance is mandatory, and non-compliance can lead to penalties or legal consequences. Regulations often require additional reporting and documentation, as well as audits. Sometimes there are limitations on operational flexibility and innovation. Rate structures are often structured by regulatory bodies to balance consumer interests, operational demands, and utility profitability. All this means that regulated natural gas Utilities segment must play by different rules, often driven to structuring specific commercial arrangements necessary to navigate regulatory requirements.</p> <p>This Panel is comprised of leading experts representing a variety of entities in the regulated natural gas Utility segment, including a leading gas Utility trade association, a city-owned public natural gas Utility, and a multi-city Gas District Utility distributing natural gas to consumers. The Panel will highlight various unique aspects of commercial and physical operations in the regulated Utility segment, in the context of how Utilities acquire gas supply, transport supply to their location, and distribute and sell natural gas to their customers. Examples will point out distinctions where the Utility’s flexibility in structuring commercial arrangements is limited by regulation and risk of cost recovery. Panelists will also examine various operational constraints imposed by regulation such as contracting for firm upstream pipeline transportation capacity and integration of renewable energy alternatives.</p> <p>Speakers: Dave Schryver, <i>CEO</i>, American Public Gas Association Stephen Mayfield, <i>AGM - Gas Operations</i>, City of Tallahassee Matthew McKinley, <i>CEO</i>, Black Belt Energy</p> |

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| <p>3:15 pm – 4:30 pm</p> | <p>Panel: Where There’s A Will, There’s A Solution - Providing Innovative Technology Solutions To Overcome Infrastructure Management Challenges This Panel of industry experts from a variety of technology providers spanning the energy value chain discuss innovative solutions to overcoming challenges in infrastructure management. With the remarkable increase in demand for natural gas as a vital energy source, attention now turns to ensuring sufficient infrastructure to move energy efficiently and securely from production sources to demand centers. The Panel will identify and explore specific technology solutions including:</p> <ul style="list-style-type: none"> • Managing commercial natural gas transactions (Natural Gas Pricing, Billing, Scheduling, ETRM, Customer Management, LDC EDI & Transaction Automation, and Producer Services) • End-to-end Wholesale and Retail Operations Solution serving the needs of Natural Gas Marketers, Producers, Distributors, LDCs, Utilities, and Pipelines • Ensuring visibility and contextual presence of solutions to potential markets • Energy trade and transaction management that is digital, scalable, efficient, and secure • Technology Innovations include: leveraging machine learning, digital twins, AI, digital transformation of business operations, unlocking the power of your data by integrating operations and deploying business intelligence <p>Moderator: Melissa Griffith, Director of Operations, Enspire Energy, LLC</p> <p>Speakers: Andy Snyder, Sales Manager, Emerson Scott Vogan, SVP Sales & Marketing, nGenuie Jason Langella, Chief Marketing Officer, SEO Agency USA Dhruv Venkatraman, Customer Success, Trellis Energy Software</p> |
| <p>4:30 pm – 6:30 pm</p> | <p>Cocktail Reception - Hosted by the Sponsors Please join our hosts, the Corporate Sponsors, at a cocktail reception in your honor. Don't make your dinner plans too early as hors d'oeuvres and an open bar will be the highlight of this extremely well attended session!</p> |
| <p><u>Friday, April 10</u></p> | |
| <p>7:45 am – 8:45 am</p> | <p>Networking with the Industry: Registration and Continental Breakfast</p> |
| <p>8:45 am – 9:00 am</p> | <p>Welcome & Overview: Christy Coleman, Vice President, LDC Gas Forums</p> |
| <p>9:00 am – 10:45 am</p> | <p>Gas Buyers Panel: End-Use Gas Consumers Share Perspectives On Purchasing Requirements, Preferences, and Portfolio Management End-use natural gas consumers include Gas Distribution Utilities (LDCs), Power Generation (Utility, IPP, On-site Power), Petrochem, Refining, Industrial & Manufacturing (Process, Heat), and Commercial Businesses. Included are investor-owned and public utilities that are subject to regulation. There are also many private sector consumers that are unregulated. Gas Buyers for these entities have a unique perspective on markets, given their location at the end of the value chain, their dependence on natural gas supply, and absolute requirement to meet the demands of their customers. Creative negotiation of commercial terms for gas supply arrangements is crucial to ensure security of supply, operational flexibility, and competitive pricing. Regulated entities must also address the complexities of</p> |

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| | <p>regulatory oversight and pass through gas costs in published rates. The Panel is comprised of a diversity of Gas Buyers, offering a range of perspectives and insights. The following topic categories will assist with framing the discussion:</p> <ul style="list-style-type: none">• Market Fundamentals Considerations• Security Of Supply (competition for supply from other demand sources)• Midstream Infrastructure (delivery certainty, storage, accommodating flexibility)• Gas Supply Portfolio Management• Price Certainty & Forecasting• Regulatory Management <p>Moderator: Jason Waters, <i>Sr. Manager of Business Development</i>, Gas South</p> <p>Speakers: Andrew James, <i>Lead Originator</i>, Duke Energy Speaker TBD - Tennessee Valley Authority (TVA) - Invited Jerry Masters, <i>CFO</i>, CMC Gas - Invited Speaker TBD - International Paper - Invited</p> |
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