

Preliminary Agenda – LDC Gas Forum Southeast 2026

Wednesday, April 8	
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: Powering the Future: How Regulatory Policy Is Deciding Where Data Centers — and Economic Growth — Go Next</p> <p>The data center boom is reshaping America’s energy landscape, and not every region is positioned to win. As hyperscalers and AI-driven workloads send electricity demand surging, the states that welcome growth are pulling ahead, while others are watching opportunity leave.</p> <p>Liz Bowman, VP of government affairs and outreach for Williams Companies, examines how Southern states have leveraged pragmatic, growth-oriented regulatory frameworks to attract a wave of data center investment, creating jobs, tax revenue, and grid modernization in their wake. By contrast, restrictive policies across the Northeast — driven by aggressive decarbonization mandates, interconnection bottlenecks, and capacity market constraints — are tightening reliability margins and sending developers elsewhere.</p> <p>This session offers a frank comparison of two divergent regulatory philosophies and their real-world consequences: one that says “yes, and here’s how” and one that too often says “not here, not now.” Attendees will leave with a clearer picture of how policy shapes infrastructure investment, what utility leaders and regulators can learn from each region’s playbook, and what’s at stake for grid reliability as demand continues to climb.</p> <p>Speaker: Liz Bowman, Vice President, Government Affairs and Outreach, Williams</p>
9:15 am – 10:00 am	<p>Presentation: North America natural gas – how will the market balance?</p> <p>Natural gas rig counts and production are growing in anticipation of increasing demand, and right now the market looks balanced with reasonable storage levels. How will the market balance in the future? We will discuss how the winter season has concluded and how we anticipate this summer season will shape up. We will touch on high level themes including weather, LNG, coal, renewables, and power demand growth that will influence the market this season and into the future.</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</p> <p>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</p>

	<p>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, <i>Vice President</i>, Argus Media</p> <p>Speakers: Jack Weixel, <i>Senior Director</i>, East Daley Analytics Leticia Gonzales, <i>Managing Director</i>, North American Natural Gas Pricing, Natural Gas Intelligence Mark Aufmuth, <i>Managing Director</i>, bp</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	<p>Welcome & Overview:</p> <p>Christy Coleman, <i>Vice President</i>, LDC Gas Forums</p>
8:30 am – 9:30 am	<p>Fireside Chat with Tala Goudarzi — Geopolitics and Impacts of Recent Events on US Energy Policy</p> <p>In the recent past, geopolitics and U.S. energy policy have been on a collision course, primarily driven by exports of U.S. LNG to global markets. With the unfolding of events in Iran on February 28th, it is now glaringly apparent that geopolitics, foreign policy, national security and energy policy are inextricably intertwined.</p> <p>Tala Goudarzi is a seasoned energy policy expert and strategic communications leader with extensive experience across both public and private sectors. Tala’s extensive career includes roles as <i>Acting Assistant Secretary</i> and <i>Principal Deputy Assistant Secretary</i> for the <i>Office of Fossil Energy (FE)</i> at the <i>U.S. Department of Energy (DOE)</i>, prior to her recent return to the private sector as Partner at the Torridon Group, working with colleagues Dan Brouillette, Bill Barr, and Mike Pompeo.</p> <p>In this Fireside Chat, Tala will share insights and perspectives on the current intersection of geopolitics and energy policy, specifically in light of recent global events, including Iran, Venezuela, Ukraine, and others. Tala will draw upon her unique experience and expertise to “connect the dots”, providing actionable takeaways for stakeholders across U.S. natural gas, LNG and other energy value chains.</p>

	<p>Tala Goudarzi, <i>Partner</i>, Torridon Group Cleve Hogarth, <i>Principal</i>, Cleveland Advisory, LLC</p>
<p>9:30 am – 10:45 am</p>	<p>Panel: Pipeline to Profits: Ensuring Efficient Delivery Supply to Markets Including Eliminating Constraints In Critical Natural Gas Midstream Infrastructure 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: Natalie Grindle, <i>Business Development Director</i>, Williams</p> <p>Speakers: Ryan Leahy, <i>Director, Business Development</i>, Kinder Morgan, Inc. Rafael Velasco, <i>Director of Process Technology</i>, CB&I Sean Churchill, <i>Lead Commercial Advisor</i>, NeuVentus Jeff Tounge, <i>Development Lead</i>, CPC</p>
<p>10:45 am – 11:15 am</p>	<p>Networking Break: Shell Energy Cafe – Sponsored by: Shell Energy</p>
<p>11:15 am – 12:45 pm</p>	<p>Panel: Breaking the Bottlenecks: Infrastructure and Coordination 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, <i>Senior Counsel</i>, Williams Companies, Inc.</p> <p>Speakers: Brianne Metzger-Doran, <i>VP, Operation Services</i>, TC Energy Kenneth Yagelski, <i>Gas Supply Operations</i>, Southern Company Gas 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>12:45 pm - 2:15 pm</p>	<p>Keynote Lunch: From Demand Surge to Delivered Megawatts: The Gas-to-Power Opportunity Ahead</p> <p>The U.S. power sector is experiencing an unprecedented surge in demand, driven by AI data centers, economic expansion, and the need for reliable, dispatchable energy. This keynote examines how that demand is translating into real projects—new units, upgrades, and capacity additions—and why those investments represent a significant opportunity for the natural gas and LNG markets. The discussion will highlight how gas-to-power solutions are essential to delivering megawatts at the scale and speed the grid now requires, and how Siemens Energy’s investment in U.S. manufacturing—including the expansion of its Charlotte facility—is enabling faster execution, localized supply chains, and dependable delivery. The energy transition isn’t just about ambition—it’s about turning demand into delivered power.</p> <p>Speaker: Jessica Jensen, <i>VP Service Region Sales - Southeast</i>, Siemens Energy</p>
<p>2:15 pm – 3:15 pm</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>

<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</p> <p>Speakers: Dhruv Venkatraman, <i>Customer Success</i>, Trellis Energy Software Andy Snyder, <i>Sales Manager</i>, Emerson Scott Vogan, <i>SVP Sales & Marketing</i>, nGenuie Jason Langella, <i>Chairman</i>, SEO Agency USA</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, <i>Vice President</i>, 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</p>

arrangements is crucial to ensure security of supply, operational flexibility, and competitive pricing. Regulated entities must also address the complexities of 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:

1. Current Market Conditions – Perspectives & Impact on Gas Buying

- Do current market conditions present a challenge for your gas supply strategy?
- How have market conditions evolved from the past, and what has caused the change?
- Are you concerned about competition for supply from LNG exports?
- Are you concerned about competition for supply from AI Data Centers?
- Do you experience infrastructure constraints that impact your gas supply strategy (pipeline, storage)?
- This past winter brought some extreme weather – how did you manage?

2. Gas Buying Strategies

- Describe your overall gas buying strategy?
- What is the size of your gas supply portfolio (e.g. # of producers, marketers)?
- Is diversification of your gas supply portfolio important?
- Are you currently looking to add gas suppliers to your portfolio?
- What are important characteristics that you look for in your gas suppliers (contract performance, problem solving, creativity, reliability, etc.)?
- What is the mix of the “term” of your gas supply portfolio (long, short, daily, etc.)?
- Where do you buy gas - at the wellhead, delivered to Citygate, liquid trading points? Is this strategy dictated by regulation?
- Do you hold any firm transportation capacity?
- When pipeline capacity is constrained, do you employ innovative solutions such as storage, virtual pipeline, small-scale LNG, CNG, peaking, fuel switching, etc.?
- With pipeline expansions increasingly difficult, do you expect your ability to get supply to your system to become increasingly problematic?
- Do you actively hedge?
- Do you actively utilize gas storage and/or peaking?
- Are your gas suppliers responsive in addressing your preferences?
- Are your gas suppliers proactive in offering innovative products / services?
- How has your gas supply strategy evolved over time?
- Do you expect gas/electric coordination to affect your gas supply portfolio?
- As AI Data Center demand increases, do you anticipate challenges with reliability of gas transportation?
- Do you have a “clean energy” mandate? Is it required by policy/regulation? Do your Customers ask for it? Is there a price premium required for clean energy?

3. Regulatory Considerations/Constraints

- Describe challenges and limitations presented by regulatory requirements and oversight?

	<ul style="list-style-type: none">• Are you at risk for cost recovery?• Are you required to prospectively file and obtain approval for a gas supply plan?• Do you have state/local policies that affect your gas supply strategy (e.g. gas bans; renewable mandates, etc.)?• Has the delivered price of gas increased in your service area? Are customers concerned? <p>4. Technology</p> <ul style="list-style-type: none">• How important a role does technology play in your operations?• Do you utilize technology solutions (software) to manage your portfolio?• What impact do you anticipate on your gas supply strategy from AI?• Is cybersecurity a concern? <p>Moderator: Jason Waters, <i>Sr. Manager of Business Development</i>, Gas South</p> <p>Speakers: Andrew James, <i>Lead Originator</i>, Duke Energy Zak Clift, <i>Sr. Manager Natural Gas Supply</i>, Tennessee Valley Authority (TVA) Freddie Martin, <i>Natural Gas Supply Officer</i>, Greenville Utilities Commission Jeremy Masters, <i>CFO</i>, CMC Gas</p>
--	---