

# Nuclear Financing Summit

February 11, 2025

8 a.m. – 4 p.m.  
*Majestic Foyer*

## Registration

8 – 9 a.m.  
*Majestic Foyer*

## Breakfast

8:30 – 9:00 a.m.  
*Majestic Ballroom*

## Welcome and Opening Keynote

Maria Korsnick  
President and Chief Executive Officer  
Nuclear Energy Institute

Alan Schwartz  
Executive Chairman  
Gugenheim Partners

9 – 9:30 a.m.  
*Majestic Ballroom*

## Fireside Chat with NYSERDA President & CEO

Doreen Harris  
President and CEO  
NYSERDA

Maria Korsnick  
President and Chief Executive Officer  
Nuclear Energy Institute

9:30 – 10:30 a.m.  
*Majestic Ballroom*

## A New Era for U.S. Power Demand

For decades, U.S. electricity demand has been flat. This dynamic impacted investment decisions by both industrial energy consumers and utilities. This reality is quickly changing. New demand from data centers and shifting demand from other industrials has led to record electricity demand growth. This panel will explore how power demand is changing in the U.S. and the role nuclear can play in this new era.

# Nuclear Financing Summit

**Moderator:**

Carol Massar  
Reporter and Anchor  
Bloomberg's Businessweek

**Speakers:**

Rob Gramlich  
Founder and President  
Grid Strategies

Fengrong Li  
Managing Director, Power, Renewables, and Energy Transition  
FTI Consulting

Brian Singer  
Managing Director,  
Global Head of GS Sustain, Global Investment Research  
Goldman Sachs

10:30 – 11 a.m.  
*Majestic Foyer*

**Networking Break**

11 a.m. – Noon  
*Majestic Ballroom*

**The Value of Nuclear: Thinking Beyond LCOE**

Over the past decade, the U.S. prematurely lost several nuclear power plants as the result of market undervaluation. Recent changes in demand and a recognition of the importance of reliability illuminated the need to value nuclear energy appropriately. This panel will dive into recent transactions that demonstrate the imperative of nuclear energy to consumers and the broader electricity system.

**Moderator:**

Julien Dumoulin-Smith  
Managing Director, US Power, Utilities & Clean Energy Research  
Jefferies

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**Speakers:**

Marc Bianchi  
Managing Director, Research Division  
TD Cowen

Kirsty Gogan  
Managing Partner  
LucidCatalyst

Paul Murphy  
Managing Director  
Murphy Energy & Infrastructure Consulting

Noon – 1 p.m.  
*Majestic Ballroom*

**Lunch**

1 – 2:00 p.m.  
*Majestic Ballroom*

**Getting Back to Building: New Approaches to Delivering Nuclear Projects**

Every nuclear power plant in the U.S. has been built under a regulated asset base model. As we look at the next fleet of nuclear reactors, these new power plants will be constructed in a variety of market structures posing new considerations. This panel discussion will highlight emerging business models and financing structures for delivering new nuclear projects.

**Moderator:**

Arthur Hyde  
Partner and Portfolio Manager  
Segra Capital

**Speakers:**

Dan Faherty  
Co-Founder and Chief Financial Officer  
Elementl

Tom O'Neill  
Chief Commercial Officer  
Blue Energy

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Charles Oppenheimer  
Founder  
Oppenheimer Energy

W. Robb Stewart  
Chief Technology Officer  
Alva Energy

2:00 – 3:00 p.m.  
*Majestic Ballroom*

## **Leveraging Wall Street: Private Sector Financing**

Conversations on financing nuclear projects typically have a common theme, the role of government support. This panel will turn that conversation on its head and focus on the role of private investment and finance in building the next nuclear reactor fleet.

### **Moderator:**

Ryan Nielson  
Vice President of Investment Banking  
Citi

### **Speakers:**

Genevieve Kinney  
Head of Climate & Energy Investment  
General Catalyst

Samuel Meyers  
Senior Vice President  
Brookfield Renewable & Transition

James Schaefer  
Senior Managing Director  
Guggenheim Securities

Jonathan Silver  
Chair, Global Climate Council  
Apollo Global Management

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3:00 – 3:15 p.m.  
*Majestic Foyer*

## **Networking Break**

3:15 – 3:45 p.m.  
*Majestic Ballroom*

## **Fireside Chat with the NRC Chairman**

Honorable David A. Wright  
Chairman  
Nuclear Regulatory Commission

Maria Korsnick  
President and Chief Executive Officer  
Nuclear Energy Institute

3:45 – 4:45 p.m.  
*Majestic Ballroom*

## **Strategic Partnerships for Nuclear Success**

As customers increasingly demand nuclear power, the role of strategic partnerships has come into focus. Whether the project is providing process heat to an industrial facility, delivering electricity to a customer, or bolstering the grid where new data centers are being deployed, these projects will require a collaborative approach. This panel will explore the role of strategic partnerships in new nuclear builds and provide insights into recent announcements.

### **Moderator:**

Maritza Liaw  
Partner  
NGP Energy

### **Speakers:**

Caroline Golin  
Global Head, Energy Market Development and Innovation  
Google

Seth Grae  
Chairman and Chief Executive Officer  
Lightbridge Corporation

Bill Goodwin  
Chief Strategy and Legal Officer  
OKLO

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Brad Hartnett  
Strategic Marketing Lead  
GE Hitachi Nuclear Energy

4:45 – 5:45 p.m.  
*Gershwin Ballroom*

## **Closing Day 1 Remarks**

Ellen C. Ginsberg  
Senior Vice President, General Counsel, and Secretary  
Nuclear Energy Institute

## **Networking Reception**

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8 a.m. – 4 p.m.  
*Majestic Foyer*

## Registration

8 – 9 a.m.  
*Majestic Ballroom*

## Breakfast

9 a.m.  
*Majestic Ballroom*

## Day 2 Welcome

Ellen C. Ginsberg  
Senior Vice President, General Counsel, and Secretary  
Nuclear Energy Institute

9 – 10 a.m.  
*Majestic Ballroom*

## What's New in Electricity Markets

As electricity demand grows at a record rate, new focus is being placed on the role FERC, state PUCs, and other market regulators play in energy transactions for both new and existing nuclear power plants. This panel will bring together regulatory experts to discuss what is changing in electricity markets and how these changes will affect industry and consumers.

### Moderator:

Paul Kjellander  
Senior Advisor, Public Utilities Fortnightly &  
Past President, NARUC

### Speakers:

Neil Chatterjee  
Former Chairman  
FERC

Jimmy Glotfelty  
Former Commissioner  
Public Utility Commission of Texas

David Hill  
Former General Counsel, NRG Energy, Inc.  
Former General Counsel, U.S. Department of Energy



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10 – 10:50 a.m.  
*Majestic Ballroom*

## **Managing Risk in New Nuclear Construction**

Managing the construction and supply chain risks associated with new nuclear is critical to building an orderbook. From incorporating lessons learned to developing new financial tools and insurance products, it will take a comprehensive approach to manage the risks with early movers of new nuclear projects. This panel will explore the resources available and what is still needed to manage project risks during construction.

### **Moderator:**

Ben Holtzman  
Director, New Nuclear  
Nuclear Energy Institute

### **Speakers:**

Kate Fowler  
Global Nuclear Energy Leader  
Marsh

James Krellenstein  
CEO and Co-Founder  
Alva Energy

Gary Rodrigues  
Nuclear Lead  
WTW Global Construction Industry Vertical

John Williams  
Senior Vice President of Technical Services and External Affairs  
Southern Company



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10:50 – 11:10 a.m.

*Majestic Foyer*

## **Networking Break**

11:10 – Noon

*Majestic Ballroom*

## **Back-to-School: Universities Leading the Way for Next-Gen Nuclear**

Universities are revered for their role in educating the workforce, and we increasingly see a shift to these institutions as incubators for not only technology development, but also deployment. This panel will highlight unique approaches as universities facilitate reactor demonstration and accelerate nuclear product delivery for commercial applications.

### **Moderator:**

Lisa Marshall

President, American Nuclear Society

Extension Assistant Professor & Director of Outreach, Retention, and Engagement

NC State University Nuclear Engineering

### **Speaker:**

Joe Elabd, Ph.D.

Vice Chancellor for Research

The Texas A&M University System

Doug Robison

President and Chief Executive Officer

Natura Resources

Michael Hoehn II

Program Director for NextGen MURR

University of Missouri-Columbia

Noon – 1 p.m.

*Majestic Ballroom*

## **Lunch**

# Nuclear Financing Summit

1 – 1:50 p.m.  
*Majestic Ballroom*

## **A Global Perspective on Nuclear Energy**

As energy demand increases globally, countries are looking to expand their existing nuclear fleets or enter the nuclear energy market for the first time. During this session, experts will discuss how the global energy landscape is changing and how nuclear energy is being viewed by the world.

### **Moderator:**

Kevin Warnke  
Nuclear Energy Institute

### **Speakers:**

Cosmin Ghita  
Chief Executive Officer  
Nuclearelectrica

Jill Baker  
Vice President, Regulatory Affairs, Policy, and Corporate Events  
Canadian Nuclear Association

Dr. Henri Paillere  
Head, Planning and Economic Studies Sections  
International Atomic Energy Agency

Nick Sherman  
Deputy Head, Division for Nuclear Technology Development and  
Economics  
OECD Nuclear Energy Agency

1:50 - 2:40 p.m.  
*Majestic Ballroom*

## **Capital Formation for New Nuclear**

Capitalizing the next fleet of nuclear reactors will require investors to incorporate nuclear's unique risk reward profile. As new investors look to gain exposure to nuclear energy, the market is seeing an unprecedented level of investment interest in nuclear energy. This panel will explore the changing dynamics of nuclear capital formation.

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**Moderator:**

Benton Arnett  
Senior Director, Market and Policy  
Nuclear Energy Institute

**Speakers:**

Mark Sowinski  
Executive Director, Investment Banking Division  
Morgan Stanley

Bryan Popoola  
Associate Director, Sustainable Finance  
S&P Global Ratings

Sarfraz Taj  
Director, M&A Corporate Development & Strategic Projects  
Constellation Energy Generation

Alexei Viarrael  
Executive Director, Power and Renewables Investment Banking  
JP Morgan

2:40 – 3:00 p.m.  
*Majestic Foyer*

**Networking Break**

3:00 – 3:30 p.m.  
*Majestic Ballroom*

**Fireside Chat with Constellation CFO**

Daniel L. Eggers  
Executive Vice President and Chief Financial Officer  
Constellation

Pippa Stevens  
Markets & Energy Reporter  
CNBC

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3:30 – 4:20 p.m.

*Majestic Ballroom*

## **Unlocking the Nuclear Potential**

As the nuclear industry continues to move the ball forward on technology development, new deployment strategies for those technologies are coming into greater focus. This panel will focus on innovators making the next fleet of nuclear reactors a reality.

### **Moderator:**

Farah Benahmed  
Manager, U.S. Policy and Advocacy  
Breakthrough Energy

### **Speakers:**

Reed Clay  
President  
Texas Nuclear Alliance

Yvon Mompeysson  
Vice President, Business Development and Investment  
Emirates Nuclear Energy Corporation

Jason Thompson  
President and Chief Financial Officer  
The Nuclear Company

Chad Eaton  
Director, Government Affairs  
Nucor

4:20 – 4:30 p.m.

*Majestic Ballroom*

## **Closing Remarks**

5:30 – 8:00 p.m.

## **Nuclear New York New Nuclear Mixer**

31 West 52<sup>nd</sup> Street  
29<sup>th</sup> Floor Terrace  
New York, NY 10019

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