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SEPTEMBER 29-30, 2010
THE RITZ-CARLTON, SAN FRANCISCO

Tuesday, September 28, 2010

Opening Reception
6:00pm-8:00pm

Join us for a drink and an initial meet and greet with your fellow event attendees on the eve of the conference.

Hosted by [Orrick](#) and [Marathon Capital](#)



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September 29-30 2010



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Wednesday, September 29, 2010

7:30am Registration and Coffee

8:45am Welcome and Opening Remarks

Paul Clark, Conference Manager, Euromoney Energy Events

Michael Eckhart, President, ACORE

9:00am-9:30am **SESSION 1: OPENING KEYNOTES**

This opening session will provide a backdrop for subsequent conference proceedings by giving high-level perspectives on public policy, financial markets and corporate strategy in the renewable energy sector. Senior speakers will share their experience and knowledge of the sector and set the scene for this year's REFF-Wall Street.

Chair:

Michael Eckhart, President, ACORE

Speakers:

Matt Rogers, Senior Advisor, US Department of Energy

Dan Arvizu, Director, National Renewable Energy Laboratory

9:30am-10:30am **SESSION 2: MARKET DRIVERS FOR RENEWABLE ENERGY**

As we move towards a new era in renewable energy, this session will examine the global macro factors impacting upon the energy sector, including:

World energy outlook: How is renewable energy viewed globally and what is the outlook for its development as a greater part of the energy mix?

Climate & sustainability drivers: Impacts on capital markets and investment decision-making by institutional investors, corporates and utilities

Economic growth and job creation: The story on Germany and China and the implications of these on the US renewable energy market

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MARATHON CAPITAL, LLC

Momentum: Major facts and trends in renewable energy investment and financing and the intersection of renewable energy and the commodities market

Co-Chairs:

Dan Reicher, Director of Energy & Climate Change Initiatives, Google
Craig Kline, Partner, Troutman Sanders LLP

Speakers:

Lisa Frantzis, Managing Director for Renewable & Distributed Energy, Navigant Consulting
Andrew Beebe, Chief Commercial Officer, Suntech Power
Jeffrey Holzschuh, Vice Chairman, Institutional Securities Group, Morgan Stanley
Declan Flanagan, Chief Executive Officer, LincolnRenewable Energy, LLC

10:30am-11:00am

Networking Refreshment Break *Hosted by [SunPower](#)*

11:00am-12:30pm

SESSION 3: THE VIEW FROM WALL STREET

REFF-West is the only major renewable energy event on the West Coast to bring you up-to-the-minute commentary from Wall Street. A panel of top energy investment bankers, representing world-leading financial institutions, who are all currently leading major deals, will debate how the financial landscape has changed over the last 12-18 months and explore what we can expect from the market moving forward.

Chair:

John Cavalier, Managing Partner, Hudson Clean Energy Partners

Speakers:

Kevin Genieser, Managing Director, Morgan Stanley
Brian Bolster, Managing Director, Goldman Sachs
Jeffrey McDermott, Managing Partner, Greentech Capital Advisors
Jeffrey Lipton, Managing Director – Head of Clean Tech Group, Jefferies & Company Inc.
Ray Wood, Co-Head Global Alternative Energy, Credit Suisse
Parker Weil, Managing Director, Co-Head Americas Energy & Power Group, Bank of America – Merrill Lynch
Sandip Sen, Global Head - Alternative Energy, Citigroup Global Markets
Jonathan Yellen, Managing Director, Deutsche Bank

12:30pm-2:00pm

Networking Lunch *Hosted by [Stoel Rives](#)*

2:00pm-3:15pm

SESSION 4: RENEWABLE ENERGY PROJECT FINANCE

As we progress further towards economic recovery, investment in renewable energy is increasing. Whilst we have seen continued investment throughout even the bleakest of financial outlooks, investment must continue if we are to move forward. This session will compare different financial models and their outlooks as we move forward, including:

- Project debt and equity
- Tax equity and other tax considerations
- Leasing and other project finance structures
- Overall deal structuring, issues and trends

Co-Chairs:

Michael Butler, Co-Founder, Cascadia Capital
Mark P. Weitzel, Partner, Orrick

Speakers:

John Eber, Managing Director, JP Morgan Capital Corporation
Gisela Kroess, Director, Power & Environment, Global Project Finance, UniCredit Bank AG New York Branch
Matt Cheney, Managing Director, Cleanpath Ventures
Matt Ferguson, Principal, Renewable Energy Practice Leader, Reznick Group
Kenneth Westrick, Founder & Chief Executive Officer, 3TIER

1:00pm-2:30pm

Networking Refreshment Break *Hosted by [SunPower](#)*

3:45pm-4:45pm

SESSION 5: WEST COAST DEVELOPERS' PERSPECTIVES

Following insight from the major investment banking players and project financiers in the renewable energy sector, this panel will focus on the financing of West-Coast renewable energy projects from a developer's point of view. Hear from leading west-coast developers as they give you insight into how your projects can achieve bankability.

Co-Chairs:



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2010 EXHIBITORS



2010 MEDIA PARTNERS



Ted Brandt, Principal-CEO, Marathon Capital, LLP

David T. Quinby, Partner, Stoel Rives LLP

Speakers:

Daniel Schochet, Executive Vice President, Ram Power Corporation

Michael Walsh, Chief Financial Officer, NTR Plc

Tim Derrick, Chief Executive Officer, Axio Power Inc.

William Lee, Vice President Project Finance, SunEdison

David Oxtoby, Chief Executive Officer, CarbonFree Technology

4:45pm-5:00pm

SESSION 6: SUMMARY OF DAY ONE

In this wrap-up session for Day One, a selection of the REFF-West Conference Co-Chairs will look back at the presentations made, summarize the discussion and further develop some of the themes outlined, giving you key take-away strategies for your business.

5:00pm

Close of Conference Sessions

Evening Networking Reception

5:00pm-7:00pm

Join us for our lavish evening networking reception at the end of Day One, for a chance to discuss the day's proceedings with fellow delegates, cement existing relationship and meet new business partners, in a relaxed informal setting.

Hosted by [Milbank](#)



Thursday, September 30, 2010

Networking Breakfast

8:00am-8:50am

Raise your profile at our popular networking breakfast, where delegates will have the opportunity to introduce themselves to their fellow conference attendees using a roving microphone.

Hosted by [Duff & Phelps LLP](#)



7:45am

Registration Opens

8:50am

Conference Opens

Paul Clark, Conference Manager, Euromoney Energy Events

9:00am-9:30am

SESSION 7: WELCOME AND KEYNOTE PRESENTATION

The opening session on Day Two will feature a keynote address from a senior level industry executive, considering changing dynamics in the renewable energy markets and providing a context for the day's discussions.

Chair:

Michael Eckhart, President, ACORE

Speaker:

Don Paul, University of Southern California Energy Institute & William M. Keck Chair of Energy Resources

9:30am-10:45am

SESSION 8: GOVERNMENT POLICY & INCENTIVES

In the wake of 2009's American Recovery & Reinvestment Act, this session will examine the impact of new legislation on the renewable energy industry. Topics to be addressed include:

How has the stimulus package encouraged investment in the sector and has the Loan Guarantee Program been a game changer?

Federal tax incentives and state renewable portfolio standards

CEDA/Green Bank proposals

Potential for a Feed-In Tariff in the USA

Chair:

John Geesman, Co-Chair, Board of Directors, ACORE

Questions? To learn more about REFF-West, please e-mail weirich@acore.org Copyright 2002-2010

Speakers:

Jackie Pfannenstiel, Assistant Secretary of the Navy (Energy, Installations and Environment)

Dan Kalafatas, President, 3Degrees

Woodrow Clark II, Managing Director, Clark Strategic Partners

Wendolyn Holland, Senior Advisor, Commercialization and Deployment, DOE Office of Energy Efficiency and Renewable Energy (EERE)

Laura Lovelace, President, Wellford Energy Advisors

David Kappos, Under Secretary of Commerce for Intellectual Property & Director of the United States Patent and Trademark Office

10:45am-11:15am

Networking Refreshment Break

11:15am-12:30pm

SESSION 9: PUBLIC CAPITAL MARKETS

This new session for REFF-West 2010 will examine the changing state of public capital markets and how they relate to renewable energy development. Issues for discussion include:

Update on the state of public equity markets, IPO and IPO secondary markets

Sources of capital for high-grossing companies

Global perspectives: How do global public capital markets compare with the US?

Co-Chairs:

Michael Eckhart, President, ACORE

Adam S. Umanoff, Partner, Chadbourne & Parke

Speakers:

Mark Nydam, Managing Director, Cleantech Investment Practice, PCG Asset Management

Scott B. Livingston, Chief Executive Officer, Livingston Securities

Nat Kreamer, President, Acro Energy Technologies

Ungad Chadda, Senior Vice President, Toronto Stock Exchange

John Bohn, Commissioner, California Public Utilities Commission

12:30pm-1:45pm

Networking Lunch

1:45pm-3:15pm

SESSION 10: STRIVING FOR EXCELLENCE - C-LEVEL INSIGHT PANEL

In this stand-out session, leading renewable energy CEOs will outline how they have achieved success over the last year and what they are expecting to see from the industry over coming months. Key questions that will be answered include:

What do you see as the major challenges facing the renewable energy industry at the moment?

How have you responded to the difficult economic climate over the last 18 months?

What do you see as the most significant opportunities for renewable energy companies and investors over the next year?

Chair:

Bruce Pasternack, Operating Partner, Venrock

Speakers:

Peter Duprey, Chief Executive Officer, Acciona Energy North America

Jack Jenkins-Stark, CFO, BrightSource Energy

Arno Harris, CEO, Recurrent Energy

Michael Garland, CEO, Pattern Energy Group

Dennis Arriola, CFO, SunPower Corporation

Lyndon Rive, CEO, SolarCity

3:15pm-3:45pm

Networking Refreshment Break

3:45pm-5:00pm

SESSION 11: INVESTOR PERSPECTIVES ON RENEWABLE ENERGY

In this session, investors of varying sizes and types, from VC to Institutional Investor, will sit alongside each other and examine the differences in their approaches to financing. Topics to be considered include:

How can you reconcile Silicon Valley investment opportunities with the Institutional Investor attitude?

Early stage venture capital, later stage and expansion venture capital and private equity

Mergers and acquisitions and IPO market developments

Global equity markets – investing in publicly-traded cleantech/renewable energy companies

Co-Chairs:

Dan Adler, President, California Clean Energy Fund, CalCEF

Kenneth R. Locklin, Director Finance & Investment, Clean Energy Group

Speakers:

Pat Eilers, Managing Director, Madison Dearborn

Stephan Dolezalek, Managing Director & Clean Tech Group Leader, Vantage Point Venture Partners

Sha Wang, Principal, Cybernaut (China) Investment

Tim Woodward, Managing Director, Nth Power

Ira Ehrenpreis, General Partner, Technology Partners

Bob O'Connor, Partner, Wilson Sonsini Goodrich & Rosati

5:00pm

Closing Remarks

Michael Eckhart, President, ACORE

Paul Clark, Conference Manager, Euromoney Energy Events

5:15pm

Close of REFF-West 2010.

* Indicates invited speaker

“REFF-Wall Street annually redeems my confidence in the potential of alternative energy and offers hope of a better future for humanity and the planet.”
-Andrew Brengle, KLD Research & Analytics, Inc.

