

**TXCPA**  
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# 2020 ENERGY CONFERENCE

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FOUNDATION

**VIRTUAL WEBCAST**

**AUGUST 26, 2020 • 7:50 A.M. - 5:30 P.M.**

Seasoned energy industry professionals address current issues significantly affecting their industry and their accounting processes.

**REGISTER TODAY: [www.houstoncpa.org](http://www.houstoncpa.org) or 713-622-7733**



## Message from the Chair

I would like to personally invite you to join us for the 2020 TXCPA Houston Energy Conference. Due to COVID-19, this year we have transitioned to a virtual conference designed to provide fantastic insights from top executives and professionals in the accounting and energy industry. In this virtual environment, we look forward to expanding the reach and industry impact beyond Houston.

As the premier conference for accounting professionals focused in the energy industry, our goal is to provide a setting to learn from top industry leaders and insiders, gaining valuable knowledge and useful information to bring back to your own firms and organizations. We have secured a wonderful selection of speakers and panelists from industry specialists, such as Enverus, PwC, KPMG, EY and Deloitte, who will be "on hand" to discuss mergers and acquisitions, technology, E&P and much more. This year, our keynote speaker is Jennifer Kirk, Senior Vice President of Integration and Value Capture at Occidental Petroleum Corporation, who will share energy outlooks and trends as well reflecting on acquisition insights and lesson learned.

Since this conference began nearly 18 years ago, it has grown to be THE summer event for the energy industry to reconnect and share ideas and best practices. You will have the opportunity to ask questions of the speakers and panelists while simultaneously receiving current industry updates. Sponsors will host innovative "Exhibit Rooms" and are excited to connect with you in this new way of doing business.

We are proud to partner with the *Houston Business Journal* (HBJ), our media sponsor for the fifth year. Joshua Mann, HBJ's Senior Energy Reporter, will be joining us to kick things off!

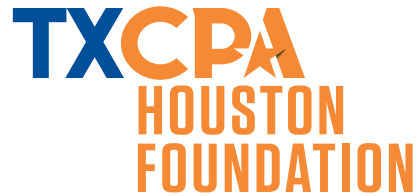
I encourage you to invite colleagues and friends to this incredibly informative virtual conference. Register early and share the digital brochure with your network. Register online at [www.houstoncpa.org](http://www.houstoncpa.org) or call 713-622-7733. For firms and organizations registering six or more attendees, there is a 10% discount!

We will "see" you online on August 26, 2020!

Brian Baumler, CPA, Director, Audit, Pannell Kerr Forster of Texas, P.C.  
TXCPA Houston Energy Committee Chair & Conference Chair

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# OVERVIEW

Join energy industry and accounting professionals for the TXCPA Houston 2020 Energy Conference - Virtual Webcast on Wednesday, August 26. This 18th annual event is your one-stop opportunity to learn the latest news and trends that will impact the Houston Energy Sector and your business.

This year, our keynote speaker is Jennifer Kirk, Senior Vice President, Integration and Value Capture for Occidental Petroleum Corporation.

**Date:**

Wednesday, August 26, 2020

**Location:**

Virtual Webcast

**Session Times:**

7:50 a.m. - 5:30 p.m. (Central Time)

**CPE Hours:**

Up to 9 hours

**Prerequisite:** None

**Level of Instruction:** Update/Overview

**Course Objective:**

To gain valuable insights, strategies, and updates affecting the energy industry, as well as the accounting processes.

**Trending Topics**

- Energy Economic Update and Outlook
- Mergers and Acquisitions & Capital Markets Insights and Trends - Panel
- Tax Trends and Outlook
- Cybersecurity
- Accounting and SEC Update
- Environmental Social Governance
- Environmental and Water Rights
- Mergers and Acquisitions, and Capital Markets Insights and Trends
- Artificial Intelligence (AI) and Data Analytics
- Geopolitical Outlook
- Oilfield Services Technology Evolutions
- Bankruptcy, Restructuring and Reorganizations

**Sessions led by dynamic speakers like:**

Marcella Burke, JD, Environmental, Health and Safety Partner, King and Spalding



Tauseef Ghazi, RSM US LLP - National Leader for Cyber Governance & Compliance



Jennifer Kirk, CPA, Occidental Petroleum, SVP Integration and Value Capture

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# AGENDA - AUGUST 26

<b>Time</b>	<b>Virtual Webcast</b>
7:50 a.m. - 8:00 a.m.	<b>Opening Remarks, Welcome and Log In</b> Josh Mann - Houston Business Journal - Senior Energy Reporter
8:00 a.m. - 8:50 a.m.	<b>Energy Economic Update and Outlook</b> Dan Zhigatov - Enverus - Research Associate
9:00 a.m. - 9:50 a.m.	<b>Mergers and Acquisitions &amp; Capital Markets Insights and Trends - Panel</b> Moderator - Pavi Mani - PwC - M&A Tax Partner Panelist - Hillary Holmes - Gibson, Dunn & Crutcher LLP - Partner Panelist - Thomas Amburgey - First Reserve - Director (Founders and Investment Team) Panelist - Kevin Rosenberg - EDP Renewables - Controller
10:00 a.m. - 10:50 a.m. (breakout session a)	<b>Tax Trends and Outlook</b> Steve Landry - EY - Tax Partner
10:00 a.m. - 10:50 a.m. (breakout session b)	<b>Cybersecurity</b> Tauseef Ghazi - RSM US LLP - National Leader for Cyber Governance & Compliance
11:00 a.m. - 11:50 a.m.	<b>Accounting and SEC Update</b> Sam Hall - KPMG - Audit Partner Joel Smith - KPMG - Audit Partner Robert Weatherford - KPMG - Audit Partner
11:50 a.m. - 12:30 p.m.	<b>LUNCH</b>
12:30 p.m. - 1:20 p.m.	<b>Keynote Speaker</b> Jennifer Kirk - Occidental Petroleum Corporation - SVP Integration and Value Capture
1:30 p.m. - 2:20 p.m. (breakout session a)	<b>Environmental Social Governance</b> John Corrigan - PwC - Partner Vrushali Gaud - PwC - Director, Sustainability and Future of Corporate Reporting Pavi Mani - PwC - M&A Tax Partner
1:30 p.m. - 2:20 p.m. (breakout session b)	<b>Environmental and Water Rights</b> Marcella Burke - King and Spalding - Environmental, Health and Safety Partner Granta Nakayama - King and Spalding - Environmental, Health and Safety Partner
2:30 p.m. - 3:20 p.m.	<b>Artificial Intelligence (AI) and Data Analytics</b> Ginny Coulter - Deloitte LLP - Audit Senior Manager Allison Leonard - Deloitte LLP - Senior Manager Ed Wilkins - Deloitte LLP - National Leader of Audit Analytics and Assurance
3:30 p.m. - 4:20 p.m.	<b>Geopolitical Outlook</b> James Auslander - Beveridge & Diamond, P.C. - Principal Peter Schaumberg - Beveridge & Diamond, P.C. - Principal
4:30 p.m. - 5:20 p.m.	<b>Oilfield Services Technology Evolutions</b> Alan Quintero - Valaris - Senior Vice President, Business Development Chandra Yeleshwarapu - Halliburton - Senior Director of Digital Transformation
5:20 p.m. - 5:30 p.m.	<b>Closing Remarks</b>
Bonus/On-Demand Session	<b>Bankruptcy, Restructuring and Reorganizations</b> Moderator - Margaret Stribling - SolomonEdwards - Partner Panelist - John D. Baumgartner - Stout Risius Ross, LLC - Managing Director Panelist - Josh Sussberg - Kirkland and Ellis LLP - Partner

**PLEASE NOTE:** Current schedule represents approximately 9 hours of CPE if you attend all sessions. Hours may be reduced or increased before actual conference date. Refer to program at the event for correct number of hours and session times.

# SPEAKERS



**Josh Mann, Senior Energy Reporter, Houston Business Journal**

Joshua Mann is senior reporter for the Houston Business Journal. He is responsible for the paper's coverage of Houston's extremely broad energy and manufacturing business, from oil and gas to petrochemicals and power. He graduated from the University of Houston with a print journalism degree in 2013.



**Dan Zhigatov, CPA, Research Associate, Enverus**

Dan Zhigatov is a Research Associate with Enverus, a leading data, software, and insights company focused on the energy industry.



**Pavi Mani, CPA, M&A Tax Partner, PwC**

Pavi Mani is a mergers and acquisitions (M&A) tax partner. She has over 19 years of experience assisting private equity and multinational clients with tax structuring, due diligence, tax modeling and other U.S. and cross border deal-related matters. Mani has extensive experience leading large deals across several industries, including information technology, services, renewable energy, oil & gas, power and utilities infrastructure. She has led large U.S. and global Yieldco IPO structuring.



**Hillary Holmes, JD, Partner, Gibson, Dunn and Crutcher LLP**

Hillary Holmes is a partner in the Houston office of Gibson, Dunn & Crutcher LLP, Co-Chair of the firm's Capital Markets practice group and a member of the firm's Securities Regulation and Corporate Governance, Energy, Private Equity and M&A practice groups. Holmes advises companies in all sectors of the energy industry on long-term and strategic capital planning, disclosure and reporting obligations under U.S. federal securities laws and corporate governance issues. She represents issuers, underwriters, MLPs, financial advisors, private investors, management teams and private equity firms in all forms of capital markets transactions. She has served as outside general counsel to publicly traded companies.



**Thomas Amburgey, Director (Founders and Investment Team), First Reserve**

Thomas Amburgey, Director, joined First Reserve in 2012. Amburgey's responsibilities include investment origination, execution, monitoring and exit strategy, focusing on the global energy value chain with emphasis on equipment, manufacturing and services sector. Prior to joining First Reserve, he was an Analyst in the Financial Sponsors and Leveraged Finance division at UBS Investment Bank. Amburgey holds a B.B.A. and a Master of Accountancy from the University of Georgia.



**Kevin Rosenberg, CPA, Controller, EDP Renewables**

Kevin Rosenberg is currently the controller for EDP Renewables North America, one of the country's leading generator of renewable sourced electricity. He has over years experience in various aspects of the energy space, including over 20 years in power generation and 14 in renewables. He is a CPA and holds a BS in Accounting from Louisiana State University.

# SPEAKERS



## **Steve Landry, CPA, Tax Partner, EY**

Stephen Landry serves as the tax leader at EY for oil and gas, delivering tax subject matter and thought leadership to his audience. He has been with EY since 1985, then left briefly for a job with Marathon Oil Company as director of tax compliance and accounting before returning to EY in 2013. He is a member of the AICPA, Texas Society of CPAs and is on the board for Make a Wish Texas/Louisiana Gulf Coast Chapter.



## **Tauseef Ghazi, Cyber Governance & Compliance, RSM**

Tauseef Ghazi currently serves as a principal in RSM's security, privacy, and risk practice. He is a technical lead with more than 15 years of infrastructure security, system implementation and application security review experience. He has served as the lead director with responsibility for planning, budgeting, execution and delivery of information technology (IT) security assessments, cyber maturity evaluations, process control assessments, data privacy, business continuity, disaster recovery, IT governance, IT performance, IT risk assessment, infrastructure risk assessments, penetration testing and diagnostics.



## **Sam Hall, Audit Partner, KPMG**

Sam Hall is an audit partner at KPMG, primarily serving clients in the energy and natural resources, engineering and construction, oil field services and transportation industries. He has served as an instructor on both a national and international basis, as well as co-authored various articles for publications.



## **Joel Smith, Audit Partner, KPMG**

Joel Smith, an audit partner in the KPMG's Houston office, has more than 20 years of experience providing audit services primarily in the energy industry. As the National Audit Industry Leader – Oil and Gas and an SEC Reviewing Partner, Joel has extensive experience addressing complex accounting and financial reporting issues in the exploration and production, midstream, and oilfield services industries. Joel is a regular speaker at internal and external events, including the KPMG Global Energy Conference and Financial Reporting Symposium, among others. Joel had received his bachelor's and master's degrees from Stephen F. Austin State University.



## **Robert Weatherford, CPA, Audit Partner, KPMG**

Robert "Trey" Weatherford is an audit partner in KPMG's energy and natural resources and engineering and constructions practices. During his recent three-year rotation, he was a key contributor evaluating the impact Topic 606 had on the energy and natural resources industry and parlaying those learnings to entities and engagement teams. He serves as the audit practice's leasing champion and also serves as a national audit quality support partner.

# SPEAKERS



## **Jennifer Kirk, CPA, MBA, SVP Integration and Value Capture, Occidental Petroleum Corporation**

Jennifer M. Kirk is Senior Vice President, Integration and Value Capture for Occidental Petroleum Corporation where she is responsible for ensuring the successful integration of Anadarko and facilitating the achievement of the company's \$3.5B of synergy targets. Previously, she served as Vice President, Controller and Principal Accounting Officer. In this role, she was responsible for the direct oversight of all company financial activities, including financial reporting, accounting, compliance and internal controls. Ms. Kirk joined Occidental in 1999, and has served in several financial and operational roles of increasing responsibility and leadership. Ms. Kirk is on the board of directors for Republic Services, Inc (RSG) and Western Midstream Gas (WES).



## **John Corrigan, Partner, Strategy&, Part of the PwC Network**

John Corrigan focuses on the corporate and business unit strategies in the EUM sector, bringing his deep expertise in helping clients with commodity market strategies. John has deep knowledge in the Energy industry across functions including Market Entry, Strategic Planning and Corporate Performance. Next to this, he was formerly engaged as Practice Leader for the North America Oil and Gas Practice at Strategy&.



## **Vrushali Gaud, Director, Sustainability & Future of Corporate Reporting, PwC**

Vrushali Gaud is a director with the Sustainability & Future of Corporate Reporting at PwC, USA. Gaud helps clients through ESG assessment, strategy and reporting. Gaud is fascinated by the concepts of interconnectivity – across business, nature, society and technology. She is committed to helping businesses take impactful actions towards creating value for itself and society as a whole.



## **Marcella Burke, JD, Environmental, Health and Safety Partner, King and Spalding LLP**

Marcella Burke is an energy lawyer and strategic advisor in the Houston and Washington, DC offices of King & Spalding LLP, where she leads her firm's energy transition initiative. With a background in corporate upstream mergers and acquisitions, she counsels clients across the energy sector, including conventional oil and gas, hydraulic fracturing, renewables, and offshore wind on high stakes environmental and regulatory matters.



## **Granta Nakayama, JD, Environmental, Health and Safety Partner, King and Spalding LLP**

Granta Nakayama is a partner in King & Spalding LLP's environmental practice with a focus on energy. Granta represents companies in a range of regulatory and enforcement matters. With training as a nuclear engineer and more than a decade of experience as a practicing engineer and technical manager, Granta represents clients with products or services regulated by the Environmental Protection Agency (EPA) and Consumer Product Safety Commission (CPSC), along with state government agencies such as the California Air Resources Board. He defends companies in enforcement actions and litigation involving regulations and rate proceedings, and represents their interests in agency rulemakings and Congressional matters.



# SPEAKERS



## **Ginny Coulter, Audit Senior Manager, Deloitte LLP**

Ginny works for Deloitte and Touche, LLP in the Houston, Texas area as an audit senior manager. She is a licensed CPA in the state of Texas. She has spent the majority of her tenure at Deloitte working on integrated audits of global public and private corporations in the chemicals and downstream industry over the past 12 years. She has significant experience in SEC reporting, private company audit methodology, revenue recognition and lease advisory services, IPO readiness, and management estimates. She is a leader in the Intelligent Automation and Analytics ARA service offering line for the Houston market. She holds a Bachelor's Degree in Accounting from Texas A&M University and a Master's Degree in Finance from Texas A&M University.



## **Allison Leonard, Senior Manager, Deloitte LLP**

Allison began her career in 1998 as an auditor in the Houston practice, specializing in oilfield services. With the formation of the Audit Analytics practice, Allison was thrilled to return to her roots combining her audit experience with her rigorous mathematics and analytics background. Currently, she leads analytics in several industries as well as serving Deloitte's National Office ensuring alignment between analytics and audit methodology and advising on statistical applications. A passionate life-long learner herself, Allison is a leader in the development and facilitation of learning programs for audit practitioners. Allison is a CPA, holds a BS in Accounting and an MS in Applied Mathematics from the University of Houston.



## **Ed Wilkins, National Leader of Audit Analytics and Assurance, Deloitte LLP**

Ed Wilkins currently co-leads the Firm's Audit Analytics practice which is responsible for developing and executing the Firm's strategy in using data analytics in the audit practice. Leveraging his experience, he is the Firm's representative on the PCAOB's Data and Technology Task Forces and is an advisory board member for Rutgers' Continuous Auditing and Reporting Lab and Center of Audit Quality's Data Analytics Task Force Champion. In his role he works with leaders across Deloitte's global analytics network to help create new capabilities in using data analytics to increase audit quality and effectiveness. With more than 35 years of experience, Ed has served some of the most prominent global companies in Deloitte's portfolio, including Fortune 50 companies.



## **James Auslander, JD, Principal, Beveridge & Diamond, P.C.**

James Auslander co-chairs Beveridge & Diamond's Natural Resources and Project Development Practice Group, including its Energy Practice. He focuses on complex legal issues surrounding the development of oil and gas, hard rock minerals, renewable energy, and other natural resources on public lands onshore and on the Outer Continental Shelf.



## **Peter Schaumberg, JD, Principal, Beveridge & Diamond, P.C.**

Peter Schaumberg counsels major multinational corporations, domestic companies, and leading industry trade associations regarding development and operations on the Outer Continental Shelf and on federally-managed lands onshore, including oil & gas, solar, wind, and geothermal resources. Schaumberg also advises mining company and trade association clients on matters related to the development of hard-rock mineral resources on public lands.

# SPEAKERS



## **Alan Quintero, Senior Vice President, Business Development, Valaris PLC**

Alan Quintero became Senior Vice President – Business Development at Valaris PLC in April 2019 in connection with the EnscoRowan combination. Previously, he served as Rowan’s Senior Vice President, Business Development since 2018, after joining Rowan as Senior Vice President, Chief Technology Officer in 2017. Prior to joining Rowan, Mr. Quintero was a Partner at Trenegey Incorporated, a management consulting firm, and spent more than 20 years in various operational and managerial roles for international offshore drilling companies including serving as Senior Vice President, Operations at Transocean. Mr. Quintero received a Bachelor of Science in Mechanical Engineering from Texas A&M University. He also received education at Heriot-Watt University, Columbia University, Harvard University and the Wharton School of Business.



## **Chandra Yeleshwarapu, Senior Director of Transformation, Halliburton**

Chandra Yeleshwarapu is Senior Director of Transformation. His responsibilities include business development, marketing, customer success, and delivering the digital tools for the Energy industry, OpenEarth® community and platform, iEnergy® Cloud, SmartDigital innovation services and artificial intelligence and machine learning with the Big Data Center of Excellence.



## **John D. Baumgartner, CIRA, CDBV, Managing Director, Stout Risius Ross, LLC**

John D. Baumgartner is a Managing Director in the Disputes, Compliance, & Investigations group. He has more than 18 years of consulting, restructuring, and corporate finance experience. He has been involved with financial and operational restructurings, solvency analyses, fraudulent transfer disputes, investigations of fraud and misconduct, forensic accounting investigations, valuation of assets and enterprises, asset divestitures, and due diligence.



## **Margaret Stribling, CPA, PMP, Partner, SolomonEdwards**

Margaret Stribling serves as a Partner with SolomonEdwards, where she leads the Houston Business Advisory and National Energy Practices. With over 25 years of experience in accounting, finance and business transformation, her expertise includes project management, business process improvement, and transaction advisory support. Margaret has served numerous clients through complex restructuring and bankruptcy cases.



## **Josh Sussberg, JD, Partner, Kirkland & Ellis LLP**

Josh Sussberg is a partner in the Restructuring Practice Group at Kirkland & Ellis LLP. He represents debtors, creditors, equity holders, sponsors, boards of directors and investors in all aspects of restructuring stressed and distressed companies. Sussberg has over 20 years of experience representing public and private companies providing practical solutions to what can be complex restructuring/bankruptcy issues.

# REGISTRATION

## 2020 ENERGY CONFERENCE

Virtual Webcast • August 26, 2020 • 7:50 a.m. - 5:30 p.m. CT

Registration Options and Fees			
One Day Fees:	Member/Non-CPA	Non-member	
Aug. 26, 2020	\$200	\$300	\$
		<b>Total</b>	<b>\$</b>

**REGISTER ONLINE:** at <https://www.houstoncpa.org/education/energy-conference>

**REGISTER BY PHONE:** at 713-622-7733

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