

2<sup>nd</sup> ANNUAL

# EVERCORE ISI

## GLOBAL CLEAN ENERGY & TRANSITION TECHNOLOGIES SUMMIT

JUNE 15-16, 2023 | MANDARIN ORIENTAL | NEW YORK CITY



All Times are Eastern Standard Time (EST)

### WEDNESDAY, JUNE 14, 2023

**WiFi Access:**  
Network: Mandarin Oriental  
Access Code: EvercoreISI

**5:00pm – 7:00pm** Welcome Cocktail Reception  
Mandarin Oriental, 35<sup>th</sup> Floor, Asiate

### THURSDAY, JUNE 15, 2023

	<b>TRACK 1</b> North Salon, Mandarin Ballroom	<b>TRACK 2</b> South Salon, Mandarin Ballroom	<b>TRACK 3</b> Lotus Suite
<b>8:00am – 8:45am</b>	<b>Bloom Energy (BE)</b> Greg Cameron, President & CFO	<b>Lithium Americas Corp (LAC)</b> Jonathan Evans, President & CEO	<b>Sunnova (NOVA)</b> Robert Lane, EVP & CFO
<b>9:00am – 9:20am</b>	<b>TPI Composites (TPIC)</b> Ryan Miller, CFO	<b>Rubicon Carbon (PRIVATE)</b> Tom Montag, CEO	<b>Allego (ALLG)</b> Ton Louwers, CFO
<b>9:25am – 9:45am</b>			<b>FreeWire Technologies, Inc. (PRIVATE)</b> Arcady Sosinov, CEO Michael Beer, CFO
<b>10:00am – 10:20am</b>	<b>SunPower (SPWR)</b> Peter Faricy, CEO	<b>Monolith Materials (PRIVATE)</b> James Premkumar, Senior Director of Capital Markets	<b>Arcadia (PRIVATE)</b> Kiran Bhatraju, CEO John Rucker, CFO
<b>10:25am – 10:45am</b>		<b>LanzaTech (LNZA)</b> Dr. Jennifer Holmgren, CEO	<b>FLO (PRIVATE)</b> Francis Baillargeon, CFO
<b>11:00am – 11:45am</b>	<b>Sunrun (RUN)</b> Patrick Jobin, SVP, Finance & IR	<b>Livent Corp (LTHM)</b> Paul Graves, CEO	<b>Aptiv (APTV)</b> Joseph Massaro, CFO & SVP, Business Operations
<b>12:00pm – 12:45pm</b>	<b>Brian Deese, Director of the National Economic Council of the United States, Former Global Head of Sustainable Investing at BlackRock &amp; Former Senior Advisor to the President of the US</b> <i>Introduction by James West, Senior Managing Director, Sustainable Technologies &amp; Clean Energy Research</i> <i>Moderated by Jake Siewert, Head of Global Public Policy &amp; Political Risk, Warburg Pincus</i>		
<b>1:00pm – 1:20pm</b>	<b>Enphase Energy, Inc. (ENPH)</b> Raghu Belur, Co-Founder & Chief Products Officer	<b>AES Corporation (AES)</b> Chris Shelton, SVP, CPO & President, AES Next James Marshall, CFO, AES Clean Energy	<b>Hyllion (HYLN)</b> Thomas Healy, Founder & CEO Jon Panzer, CFO
<b>1:25pm – 1:45pm</b>			<b>Persefoni (PRIVATE)</b> Kentaro Kawamori, CEO & Co-Founder
<b>2:00pm – 2:45pm</b>	<b>Chart Industries, Inc. (GTLS)</b> Jill Evanko, President & CEO	<b>Clean Energy PE Investor Panel</b> Dan Gross, Director, Amazon Climate Pledge Fund Rob Walsh, MD, Blackstone Credit Sameer Reddy, Managing Partner, Flagship, Energy Impact Partners Cliff Ryan, Co-Head, Venture & Growth, Galvanize Climate Solutions Steven Mandel, Partner, TPG Rise Climate <i>Moderated by Ted Michaels, Senior Managing Director, Advisory &amp; Chris Buddin, Senior Managing Director, Advisory</i>	<b>Piedmont Lithium (PLL)</b> Keith Phillips, CEO

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## THURSDAY, JUNE 15, 2023 (cont'd)

	TRACK 1 North Salon, Mandarin Ballroom	TRACK 2 South Salon, Mandarin Ballroom	TRACK 3 Lotus Suite
3:00pm – 3:45pm	<b>EVgo (EVGO)</b> Cathy Zoi, CEO	<b>Renewable Panel</b> Andrew Littlefair, President & CEO, Clean Energy Fuels Corp Robert Vreeland, CFO, Clean Energy Fuels Corp Jonathan Maurer, CEO, Opal Fuels Ann Anthony, CFO, Opal Fuels <i>Moderated by Sean Morgan, Managing Director, Liquefied Natural Gas, Sustainable Clean Energy Technologies, &amp; Marine Transportation Equities</i>	
4:00pm – 4:45pm	<b>Chargepoint Holdings (CHPT)</b> Pasquale Romano, CEO & President	<b>Battery Materials – Are Projects Garnering Sufficient Support?</b> John Dowd, CEO, GoGreen Investments Chris Showalter, President & CEO, Lifezone Metals Keith Phillips, CEO, Piedmont Lithium Jean-François Béland, VP, Ressources Québec, Investissement Québec <i>Moderated by Steve Richardson, Senior Managing Director, Battery Materials</i>	<b>Priority Power (PRIVATE)</b> Brandon Schwertner, CEO
5:00pm	<b>Cocktail Reception</b> 35 <sup>th</sup> Floor, Asiate		

## FRIDAY, JUNE 16, 2023

	TRACK 1 North Salon, Mandarin Ballroom	TRACK 2 South Salon, Mandarin Ballroom	TRACK 3 Lotus Suite
8:00am – 9:00am	<b>Jim Coulter, Co-Founding Partner and Executive Chairman of TPG, and Managing Partner of TPG Rise Climate</b> <b>David Crane, Under Secretary for Infrastructure, U.S. Department of Energy</b> <i>Moderated by Jonathon Kaufman, Senior Managing Director, Advisory</i>		
9:00am – 9:20am	<b>Plug Power (PLUG)</b> Andy Marsh, CEO	<b>Sila Nanotechnologies (PRIVATE)</b> Warren DeSouza, CFO Kurt Kelty, VP of Commercialization	<b>SES AI Corp (SES)</b> Jing Nealis, CFO
9:25am – 9:45am			<b>Charge Enterprises (CRGE)</b> Andrew Fox, Founder, Chairman & CEO
10:00am – 10:20am	<b>Fluence Energy, Inc. (FLNC)</b> Marek Wolek, CSO & CCO	<b>Redaptive (PRIVATE)</b> Arvin Vohra, CEO Matt Gembrin, CFO	<b>Aker Carbon Capture Norway AS (AKCCF)</b> David Phillips, Head of UK & IR
10:25am – 10:45am			<b>InductEV (PRIVATE)</b> Brian Callahan, CFO
11:00am – 11:45am	<b>General Motors (GM)</b> Kristen Siemen, VP of Sustainable Workplaces & Chief Sustainability Officer	<b>Stem (STEM)</b> Bill Bush, CFO	



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## PARTICIPATING COMPANIES

**AES Corporation (AES)**

Fireside Chat &amp; 1x1 Meetings

Chris Shelton, SVP, Chief Product Officer & President, AES  
Next

James Marshall, CFO, AES Clean Energy

Susan Harcourt, Vice President, Investor Relations

*Analyst: Durgesh Chopra***Aker Carbon Capture Norway AS (ACC NO)**

Presentation &amp; 1x1 Meetings

David Phillips, Head of UK &amp; Investor Relations

*Analyst: James West***Allego (ALLG)**

Presentation &amp; 1x1 Meetings

Ton Louwers, Chief Financial Officer

*Analyst: James West***Altus Power Inc (AMPS)**

1x1 Meetings Only

Gregg Felton, Co-Chief Executive Officer

Chris Shelton, Head of Investor Relations

*Analyst: James West***Amazon Climate Pledge Fund (AMZN)**

Panel Only

Daniel Gross, Director, Climate Pledge Fund

*Analyst: James West***Aptiv PLC (APTIV)**

Fireside Chat &amp; 1x1 Meetings

Joseph Massaro, Chief Financial Officer & Senior Vice  
President, Business Operations

Jane Wu, VP of Investor Relations &amp; Corporate Development

Evan Goss, Sr. Investor Relations Manager

Gabi Alves, Sr. Investor Relations Analyst

Connor Quinn, Investor Relations Analyst

*Analyst: Chris McNally***Arcadia (PRIVATE)**

Presentation &amp; 1x1 Meetings

Kiran Bhatraju, Chief Executive Officer

John Rucker, Chief Financial Officer

Paul Mule, SVP, Corporate Development and Strategic  
Finance*Analyst: James West***Blackstone Credit (PRIVATE)**

Panel Only

Robert Walsh, Managing Director

*Analyst: James West***Bloom Energy (BE)**

Fireside Chat &amp; 1x1 Meetings

Greg Cameron, President &amp; Chief Financial Officer

Ed Vallejo, Vice President - Investor Relations

*Analyst: James West***Charge Enterprises, Inc. (CRGE)**

Presentation &amp; 1x1 Meetings

Andrew Fox, Founder, Chairman &amp; Chief Executive Officer

Leah Schweller, Chief Financial Officer

*Analyst: James West***Chargepoint Holdings, Inc. (CHPT)**

Fireside Chat &amp; 1x1 Meetings

Pasquale Romano, CEO &amp; President

Patrick Hamer, VP, Capital Markets &amp; IR

*Analyst: James West***Chart Industries, Inc. (GTLS)**

Fireside Chat &amp; 1x1 Meetings

Jill Evanko, President &amp; CEO

John Walsh, VP, IR

*Analyst: James West***Clean Energy Fuels Corp (CLNE)**

Panel Discussion &amp; 1x1 Meetings

Andrew Littlefair, President &amp; Chief Executive Officer

Robert Vreeland, Chief Financial Officer

*Analyst: Sean Morgan***Energy Impact Partners**

Panel Only

Sameer Reddy, Managing Partner, Flagship

*Analyst: James West*

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**PARTICIPATING COMPANIES (cont'd)****Enphase Energy, Inc. (ENPH)**

Fireside Chat &amp; 1x1 Meetings

Raghu Belur, Co-Founder &amp; Chief Products Officer

Analyst: James West

**Enovix Corp (ENVX)**

1x1 Meetings Only

Samira Naraghi, VP, Product Management

Charlie Anderson, VP, IR

Analyst: James West

**Eos Energy Enterprises, Inc. (EOSE)**

1x1 Meetings Only

Joe Mastrangelo, Chief Executive Officer

Nathan Kroeker, Chief Financial Officer

Analyst: James West

**EVgo (EVGO)**

Fireside Chat &amp; 1x1 Meetings

Cathy Zoi, Chief Executive Officer

Heather Davis, VP Investor Relations

Scott McGill, Associate, Investor Relations

Analyst: James West

**Fisker Inc (FSR)**

1x1 Meetings Only

Frank Boroch, VP, IR &amp; Treasury

Patrick Newsom, Head of ESG

Analyst: Chris McNally

**FLO (PRIVATE)**

Presentation &amp; 1x1 Meetings

Francis Baillargeon, CFO

Analyst: James West

**Fluence Energy, Inc. (FLNC)**

Fireside Chat &amp; 1x1 Meetings

Marek Wolek, Chief Strategy &amp; Commercial Officer

Lexington May, VP Investor Relations

Analyst: James West

**FreeWire Technologies, Inc. (PRIVATE)**

Presentation &amp; 1x1 Meetings

Arcady Sosinov, Chief Executive Officer

Michael Beer, Chief Financial Officer

Analyst: James West

**Galvanize Climate Solutions (PRIVATE)**

Panel Only

Cliff Ryan, Co-Head, Venture &amp; Growth

Analyst: James West

**General Motors (GM)**

Fireside Chat, 1x1 Meetings, Dinner

Kristen Siemen, Vice President Sustainable Workplaces &amp; Chief

Sustainability Officer Sustainable Workplaces

Ashish Kohli, VP Investor Relations

Analyst: Chris McNally

**GoGreen Investments (GOGN)**

Panel Discussion &amp; 1x1 Meetings

John Dowd, Chief Executive Officer

Michael Sedoy, Chief Financial Officer

Chris Showalter, President &amp; CEO, LifeZone Metals

Analyst: Steve Richardson

**H2U Technologies (PRIVATE)**

1x1 Meetings Only

Mark McGough, President &amp; CEO

Analyst: James West

**Hyllion (HYLN)**

Fireside Chat &amp; 1x1 Meetings

Thomas Healy, Founder &amp; CEO

Jon Panzer, CFO

Kellen Ferris, Director of IR

Analyst: Chris McNally

**InductEV (PRIVATE)**

Presentation &amp; 1x1 Meetings

Brian Callahan, CFO

Analyst: James West

**Investissement Québec**

Panel Only

Jean-François Béland, VP, Ressources Québec

Analyst: Steve Richardson

**LanzaTech (LNZA)**

Presentation &amp; 1x1 Meetings

Dr. Jennifer Holmgren, CEO

Geoff Trukenbrod, CFO

Omar El-Sharkawy, VP of Corporate Development

John Ragozzino, IR

Analyst: Sean Morgan



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**PARTICIPATING COMPANIES (cont'd)****Lithium Americas (LAC)**

Fireside Chat &amp; 1x1 Meetings

Jonathan Evans, President &amp; CEO

Pablo Mercado, CFO

Virginia Morgan, Sr. Director, Investor Relations &amp; ESG

Analyst: Steve Richardson

**Livent Corporation (LTHM)**

Fireside Chat &amp; 1x1 Meetings

Paul Graves, Chief Executive Officer

Daniel Rosen, Investor Relations &amp; Strategy

Analyst: Steve Richardson

**Monolith Materials, Inc. (PRIVATE)**

Presentation &amp; 1x1 Meetings

James Premkumar, Senior Director of Capital Markets

Analyst: James West

**Nikola Corporation (NKLA)**

1x1 Meetings Only

Dhillon Sandhu, Investor Relations Lead

Analyst: Chris McNally

**Opal Fuels (OPAL)**

Panel Discussion &amp; 1x1 Meetings

Jonathan Maurer, Chief Executive Officer

Ann Anthony, Chief Financial Officer

Analyst: Sean Morgan

**Persefoni (PRIVATE)**

Presentation &amp; 1x1 Meetings

Kentaro Kawamori, CEO &amp; Co-Founder

Analyst: James West

**Piedmont Lithium (PLL)**

Panel Discussion, Fireside Chat &amp; 1x1 Meetings

Keith Phillips, Chief Executive Officer

Michael White, Chief Financial Officer

Erin Sanders, SVP, Corporate Communications &amp; Investor Relations

Analyst: Steve Richardson

**Plug Power (PLUG)**

Fireside Chat &amp; 1x1 Meetings

Andy Marsh, Chief Executive Officer

Roberto Friedlander, Director of Investor Relations

Analyst: James West

**Priority Power (PRIVATE)**

Fireside Chat &amp; 1x1 Meetings

Brandon Schwertner, CEO

Analyst: James West

**QuantumScape (QS)**

1x1 Meetings Only

John Saager, IR

Analyst: Chris McNally

**Redaptive Inc. (Private)**

Presentation &amp; 1x1 Meetings

Arvin Vohra, Chief Executive Officer

Matt Gembrin, Chief Financial Officer

Christian Smith, VP of Finance &amp; Investor Relations

Analyst: James West

**Rubicon Carbon (PRIVATE)**

Presentation Only

Tom Montag, CEO

Analyst: James West

**SES AI Corp (SES)**

Presentation &amp; 1x1 Meetings

Jing Nealis, CFO

Analyst: Chris McNally

**Sila Nanotechnologies (PRIVATE)**

Fireside Chat &amp; 1x1 Meetings

Warren DeSouza, Chief Financial Officer

Kurt Kelty, VP of Commercialization

Analyst: Chris McNally

**Stem (STEM)**

Fireside Chat &amp; 1x1 Meetings

Bill Bush, Chief Financial Officer

Analyst: James West

**Sunnova (NOVA)**

Fireside Chat &amp; 1x1 Meetings

Robert Lane, Executive Vice President &amp; Chief Financial Officer

Analyst: Sean Morgan

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## PARTICIPATING COMPANIES (cont'd)

### **SunPower (SPWR)**

[Fireside Chat & 1x1 Meetings](#)

Peter Faricy, Chief Executive Officer

Michael Weinstein, VP, Investor Relations

*Analyst: Sean Morgan*

### **Sunrun Inc. (RUN)**

[Fireside Chat & 1x1 Meetings](#)

Patrick Jobin, SVP, Finance & IR

Ben Combes, IR

*Analyst: James West*

### **Tesla (TSLA)**

[1x1 Meetings Only](#)

Martin Viecha, Senior Director, Investor Relations Analyst

*Analyst: Chris McNally*

### **TPG Rise Climate (PRIVATE)**

[Panel Only](#)

Steve Mandel, Partner

*Analyst: James West*

### **TPI Composites, Inc. (TPIC)**

[Fireside Chat & 1x1 Meetings](#)

Ryan Miller, CFO

*Analyst: James West*

### **Tritium (DCFC)**

[1x1 Meetings Only](#)

Cary Segall, Global Head of IR

*Analyst: James West*