13th Annual
Gas Storage Outlook
LNG Exports and Power Generation — A Bridge to the Future

We Ask Cheniere:
How Do We Value Gas Storage in an LNG Export-Driven World?
J. Corey Grindal, Vice President, Supply, Cheniere Energy Partners, LP

Gain Insights from Interactive and Informative Discussions on:

- Winter 2015 natural gas supply and expectations for Summer 2015
- Interplay between power generators and pipeline capacity — Will the demand for gas-fired power generation drive change in the gas storage industry?
- Gas storage as a solution to the variability of renewable power
- Does a viable NGL storage market provide an opportunity for traditional gas storage operators?
- Do the Mexican energy reforms open the door for storage development?
- Lessons learned from the 2014 Polar Vortex and the opportunities for gas storage operators moving forward

Executive Sponsor:

King & Spalding

Supporting Organizations:
DAY 1: Monday, January 12, 2015

7:45  Conference Registration and Networking Breakfast

8:45  Chair’s Welcome and Opening Remarks
   James F. Bowe, Jr., Partner, King & Spalding LLP

9:00  Record Production Outlook — Effect on Traditional Storage Markets

9:00  Natural Gas Outlook and Implications for Storage Operators
   • Production records shattered — The new 70 Bcf/d market
   • Infrastructure drives gains — Gas pipeline projects in Northeast and Southeast
   • LNG exports, Mexico, power generation, and other new sources of demand for storage
   • Winter 2015 supply and demand fundamentals and expectations for Summer 2015
   Jack Weixel, Director, Energy Analysis, Bentek Energy

9:30  Re-plumbing the North American Gas Transmission Grid
   • Gulf Coast updates — What LNG exports will mean for the storage market
   • The impacts of changing gas supply sources on traditional market areas
   • Implications to West and Midwest markets from REX reversal
   • Basis and change in basis, particularly between Henry Hub and the Northeast
   • Storage developments north of the border
   • How to address California’s storage woes
     ○ infrastructure challenges
     ○ deliverability issues
     ○ lack of investment in gas-fired generation
   • Recent transactions impacting the gas storage industry in the West
   • Updates on demand in the Southeast
   Steven Poredos, General Manager, Storage US, Spectra Energy
   Scott Smith, Senior Vice President and Chief Commercial Officer, Midstream Energy Holdings, LLC
   John Harpole, President and Founder, Mercatur Energy
   Theo Bean, Manager, D’Lo Gas Storage

9:30  PANEL DISCUSSION

10:45  Networking & Refreshment Break

11:15  Gas Pipeline Reversals and Infrastructure Updates — Impacts on Storage
   • Development of gas pipeline infrastructure into Mexico and LNG export terminals
   • Reversals coming online sooner than readied LNG plants
     ○ what happens in the interim?
     ○ when will demand pick up?

12:00  Networking Luncheon

LNG and Power Generation — Expanding Roles for Gas Storage

1:15  LNG as a Demand Driver for Gas Storage
   • How do we value gas storage in an LNG export-driven world?
   • Updates on Sabine Pass
   • Gulf Coast export and pipeline expansion project updates
   • Opportunities and challenges in the Pacific Northwest
   J. Corey Grindal, Vice President, Supply, Cheniere Energy Partners, LP

1:45  Role Gas Storage Plays in Providing Reliability and Flexibility to the Electric Grid
   • Interplay between power generators and pipeline capacity — Will the demand for gas-fired generation drive change in the gas storage industry?
   • Utilities expanding their footprint into storage — Does owning gas production and storage lessen the risk of price spikes and deliverability shortfalls?
   • Gas storage as a solution to the variability of renewable power
   • High deliverability gas storage as a surrogate for electric storage in supporting the grid
   • Proposals for regulations and practices impacting gas-electric integration
   Justin Sperazza, Asset Manager, Gas Supply, Tennessee Valley Authority
   Kay Atchison, Senior Vice President, Leaf River Energy Center
   Bryan Hassler, Vice President, Asset Development, Xcel Energy

3:00  Networking & Refreshment Break

Where are the Markets for NGL Storage and What Opportunities Does Mexico Present?

3:30  Creating a Viable NGL Storage Business
   • Is there a market for commercial NGL storage?
     ○ Northeast?
     ○ Canada and Rockies?
   • Current status of existing NGL storage
   • Updates on NGL-by-rail
   Andrew Franks, President, AF Energy LLC
   Kendall Puig, NGL Analyst, Bentek Energy

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4:30 Implications of Mexican Energy Reform on Storage
- Breaking down the massive changes taking place in the Mexican power markets
- Do the Mexican reforms open the door for storage development?
Ken Culotta, Partner, King & Spalding, LLP

5:00 Wine & Cheese Networking Reception

6:00 Close of Day One

DAY 2: Tuesday, January 13, 2015

7:45 Networking Breakfast

8:30 Chair’s Review of Day One
James F. Bowe, Jr., Partner, King & Spalding LLP

Lessons, Challenges, and Opportunities — What Did the Polar Vortex Teach Us?

8:45 Post-2014 Polar Vortex — What Did We Learn from It?
- Polar Vortex and Winter 2013/2014 — How did record withdrawals change how storage customers view and manage storage?
- General insight on need for storage during tougher than normal winters
- Is the answer simply more storage to prevent future Winter-driven price spikes?
Cliff Parsons, Ph.D., President, WTM Energy Software, LLC
Steve Richman, Director, Long Term Storage and Marketing, DTE Energy
John Rudiak, Senior Director, Energy Supply, Connecticut Natural Gas & Southern Connecticut Gas
Fred Metzger, Vice President, Gas Storage Engineering, Kinder Morgan, Inc.

10:00 Networking & Refreshment Break

10:30 Shifting Dynamics — Northwest Sees Need for Storage and Pipeline Capacity
- Evolving demand profile
- 2013/2014 Winter approached system limits
- Existing and planned pipeline capacity
- Power/gas coordination
Dan Kirschner, Executive Director, Northwest Gas Association

11:00 Dealing with Lower Seasonal Spreads and Volatility in the Natural Gas Storage Market
- How does this environment help and hurt both operators and leasers?

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Learn from Prominent Companies in Gas Storage:
- BNP Paribas
- Cheniere Energy Partners, LP
- Connecticut Natural Gas & Southern Connecticut Gas
- Crestwood Midstream Partners LP
- D'Lo Gas Storage
- DTE Energy
- Kinder Morgan, Inc.
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