

SOLARCONNECTIONS™

A NETWORK OF INNOVATORS ADVANCING OUR RENEWABLE FUTURE

THURSDAY DECEMBER 11, 2025

JW MARRIOTT ESSEX HOUSE | 160 CENTRAL PARK SOUTH | NEW YORK, NEW YORK 10019 | +1 212-247-0300

HOSTED BY:



The AGENDA

07:30 - 08:30 **REGISTRATION & WELCOME BREAKFAST**

08:30 - 08:35 **OPENING REMARKS**

Andrew Worden, Executive Chairman & Founder - GameChange Solar

Panel Discussion

08:35 - 09:15 **HYPERSCALE DATA CENTERS & AI**

Moderator: David Lincoln, SVP - Rosendin

Panelists:

Jeremy Teresinski, Vice President of Construction, Qcells USA

Todd Coffin, Senior Managing Director - TerraNova Capital

Nicholas Bair, CEO/CFO - Bair Energy & Clean Energy Holdings

Stephen Clevett, VP Corporate Development - NACCO Natural Resources

Philippe Pontbriand, Head of Project Development - Ørsted

Fireside Chat

09:15 - 09:45 **U.S. UTILITY SCALE SOLAR OUTLOOK FOR 2026 AND BEYOND**

Moderator: Mark Gibbens, Head of Strategy & CFO - GameChange Solar

Speakers:

Phil Shen, Managing Director, Sr. Research Analyst - Roth Capital Partners

Daniel Cruise, Partner - Lium Research

Panel Discussion

09:45 - 10:30 **LEVERAGING SOFTWARE, AI & AUTOMATION IN WORK FLOWS**

Moderator: Claude Colp, CCO - GameChange BOS

Panelists:

Armando Solis, VP of Engineering, Americas - Lightsource bp

Jason Fields, Project Executive - The Boldt Company

Claude Guinchard, Director of Origination - BrightNight

Jason Evans, Co-Founder & CPIOO - ProScore Technologies

Finlay Lewis, Operations Manager, Renewables & Clean Power - Bechtel

10:30 - 11:00 **NETWORKING COFFEE BREAK**

Panel Discussion

11:00 - 11:45 **CURRENT & FUTURE STATE OF THE MODULE INDUSTRY AND SUPPLY CHAIN**

Moderator: Natasha Cherenkova, SVP, Supply Chain - DEPCOM Power

Panelists:

Emilie O'Leary, CEO - Green Clean Solar

Michael Foster, VP Supply Chain - Linea Energy

Aaron Kinkelaar, Renewable Energy Segment Lead, Supply Chain - Black & Veatch

Peggy Hock, Director, Utility Scale Project Sales - JA Solar USA

Eric Nicolaides, CEO - Wildcat Infrastructure

Panel Discussion

11:45 - 12:30 **FINANCING PROJECTS IN THE U.S. POST ITC**

Moderator: Melissa Baldwin, Senior Vice President - Tigercomm

Panelists:

Izzet Bensusan, CEO & Founder - Captona

Charlie Fiechter, President - TNX Holdings

Chris Diaz, Co-CEO - Seminole Financial Services

Claudia Morrow, SVP, Development - Vistra Corp.

Jatin Gupta, CIO - BrightNight

The AGENDA

12:30 - 14:00 NETWORKING LUNCH

Panel Discussion

14:00 - 14:45 DC COUPLED VS. AC COUPLED SOLAR+STORAGE PROJECTS

Moderator: Scott Van Pelt, Chief Engineer - GameChange Solar

Panelists:

Adam Bernardi, Solar Business Line Director - Burns & McDonnell

Mike Doman, President & Founder - Doman Energy

Andrew Moles, VP & General Manager - PCL Construction

Samir Dube, Managing Director - Heliovaas

Michael Moritz, COO - Monarch Infrastructure

Fireside Chat

14:45 - 15:15 THE FUTURE OF SOLAR IN THE U.S.

Moderator: Mark Gibbens, Head of Strategy & CFO - GameChange Solar

Speakers:

Sean Gallagher, SVP, Policy - SEIA

Peter Roskam, Partner / Federal Policy Leader - BakerHostetler

15:15 - 15:45 NETWORKING COFFEE BREAK

Panel Discussion

15:45 - 16:30 OUTLOOK ON POWER PURCHASE AGREEMENT (PPA) PRICES

Moderator: Meghan DeMasi, VP, Finance - GameChange Solar

Panelists:

Panos Ninios, Managing Partner - True Green Capital

David Perez, Head of Power Origination - Energy Transfer

Nicholas Minekime, Founder & CEO - Sunrise Mountain Partners

Nathan Krieger, SVP, Commercial - Sunraycer

Patrick Verdonck, Founder - Verdonck Partners

Panel Discussion

16:30 - 17:15 COMPARING POST SAFE HARBOR VIABILITY AND LCOE FOR SOLAR+STORAGE VS GAS AND NUCLEAR

Moderator: Brian Hartmann, President and CEO - NorthStar Clean Energy

Panelists:

David Rosenblatt, Founder and Executive Chairman - Arava Power Company

Paul Curran, CDO - CleanCapital

David Zwillinger, CEO - DESRI

Terry Warren, CEO - Off Grid Innovations

Reagan Farr, CEO - Silicon Ranch Corporation

17:15 - 17:20 CLOSING REMARKS

Andrew Worden, Executive Chairman & Founder - GameChange Solar

17:20 - 19:30 COCKTAIL RECEPTION

The **SPEAKERS**

PANEL: **Hyperscale Data Centers & AI**

Moderator



DAVID LINCOLN

SVP

Rosendin

David Lincoln has 43+ years in the electrical and renewable industries. He founded Rosendin's Solar Division in 2009, growing it to \$1.1B in revenue and over 8.2GW of solar built. A SEIA board member, he supports the Navy SEAL Foundation, raising \$4.5M through Rosendin's annual golf tournament. David is also a SEIA board member.



JEREMY TERESINSKI

VP of Construction

Qcells USA

Coming soon.

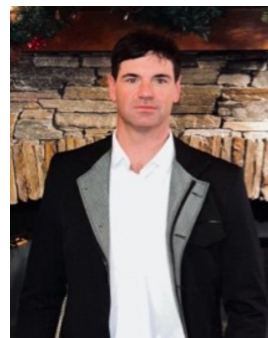


TODD COFFIN

Senior Managing Director

TerraNova Capital

W. Todd Coffin is Senior Managing Director and Head of Structured Finance at TerraNova Capital Equities. With over 35 years in financial services, he has led major financings for renewable and infrastructure projects. He previously founded Source Renewables and co-founded Greenbacker Capital, with earlier roles at Source Capital, Alex Brown & Sons, and Smith Barney.



NICHOLAS BAIR

CEO & CFO

Clean Energy Holdings

Nicholas I. Bair, CEO of Clean Energy Holdings LLC, is a visionary leader in renewable energy and green hydrogen innovation. He drives advancements in transportation, aerospace, and energy security through community-driven models that overcome economic barriers without relying on tax subsidies, advancing sustainable and transformational energy technologies.



STEPHEN CLEVETT

VP, Corporate Development

NACCO Natural Resources

Stephen H. Clevett is Vice President of Corporate Development at NACCO Natural Resources and President of ReGen Resources. With decades of experience in energy, finance, and venture development, he leads redevelopment of NACCO's mine properties into renewable and thermal energy projects. He holds an MBA from Rutgers and a B.E. from Stevens Institute of Technology.



PHILIPPE PONTBRIAND

Head of Project Development

Ørsted

Philippe Pontbriand is Ørsted's Head of Project Development and a leading force in utility-scale renewables and hyperscaler-aligned energy solutions. Nominated for industry leadership recognition, he is a major contributor to LCOE reduction over 20+ years, shaping strategy, interconnection, siting, and policy across North America's clean-energy landscape.

FIRESIDE CHAT: U.S. Utility Scale Solar Outlook for 2026 and Beyond

Moderator



MARK GIBBENS

Head of Strategy & CFO

GameChange Solar

Mark Gibbens is CFO at GameChange Energy with extensive experience in finance, M&A, and corporate development. He has led over \$25B in financings and \$40B in transactions across GM, Lucent, Alcatel-Lucent, and Arysta LifeScience. Mark chairs the CFO Leadership Group and advises Kasi Cloud. He holds an MBA from the University of Chicago.



PHIL SHEN

Managing Dir & Sr. Research Analyst - Cleantech

Roth Capital Partners

Philip specializes in equity research coverage of the cleantech sector, focusing on renewables. Since 2010, he has established a strong reputation and network, allowing him to stay at the forefront of developments impacting solar stocks and the broader industry. Prior, Philip was Research Associate at J.P. Morgan and Bear Stearns.



DANIEL CRUISE

Partner

Lium Research

Daniel Cruise, partner at Lium Research, leads renewables and utility-scale solar market analysis for institutional investors. With nearly 20 years in energy finance, he oversees proprietary datasets and quantamental insights. Previously, he founded Coras Research and worked as both a Wall Street publishing analyst and hedge fund analyst.

PANEL: Leveraging Software, AI & Automation in Work Flows

Moderator



CLAUDE COLP

Chief Commercial Officer
GameChange BOS

Claude Colp has over 15 years in renewable energy, specializing in systems integration and NEC code compliance. With expertise in electrical engineering, construction, and power electronics, he enhances GameChange customers' projects. Previously, he co-founded and grew one of New England's most successful commercial and industrial solar development companies.



ARMANDO SOLIS

VP of Engineering, Americas
Lightsource bp

Armando joined Lightsource bp in 2019 with 14+ years in utility-scale solar across 10+ countries and 5 GW projects. He currently leads the USA's engineering team. Solis previously held positions at Adapture Renewables and Qcells. He holds a degree in Mechanical Engineering from Stanford University.



JASON FIELDS

Project Executive
The Boldt Company

Experienced project executive with 18+ years in renewable energy, delivering over 2 GW of utility-scale solar across North America. Skilled in full project lifecycle management, team leadership, and stakeholder engagement. Passionate about sustainable infrastructure, driving strategic execution and operational excellence to create long-term value for clients and communities.



CLAUDE GUINCHARD

Director of Origination
BrightNight

Claude Guinchard is Director of Origination at BrightNight, where he blends technical and commercial expertise to craft innovative, low-carbon power solutions. With experience spanning natural gas, retail energy, and renewables, he structures customized energy agreements for diverse industries. Previously at AES, he advanced market expansion across major U.S. power markets.



JASON EVANS

Co-Founder & CPIOO
ProScore Technologies

Jason Evans is Chief Innovation Officer and Co-Founder of ProScore Technologies, where he leads AI-driven innovation for the construction and renewable energy industries. His work addresses complex workforce challenges—from compliance and classification to training, ratio management, and skills development—bridging technology, data, and policy to modernize how projects achieve readiness and compliance at scale.



FINLAY LEWIS

Operations Manager,
Renewables & Clean Power
Bechtel

During his 22 years with Bechtel, Finlay has held diverse roles across multiple business areas and project teams. He joined Renewables as the Manager of Pre-Construction. In 2025, he became Operations Manager for US Renewables overseeing all renewables projects in execution, development, and project development.

PANEL: Current and Future State of the Module Industry and Supply Chain

Moderator



NATASHA CHERENKOVA

SVP, Supply Chain

DEPCOM Power

Natasha is SVP of Supply Chain at DEPCOM Power Inc., with over 20 years of international B2B experience. She has held diverse leadership roles in supply chain, execution, and commercial management across the oil, gas, and solar energy industries, leading corporate and business strategy.



EMILIE O'LEARY

Chief Executive Officer

Green Clean Solar

Emilie Oxel O'Leary, CEO of Green Clean Solar, leads nationwide efforts in solar and wind recycling, decommissioning, and landfill diversion. Named a Top 50 Most Powerful Woman in Atlanta by ATL Plus Magazine, she is a sought-after speaker and author of Megawatts to Mega Recycling.



MICHAEL FOSTER

VP Supply Chain

Linea Energy

Michael Foster is Vice President of Supply Chain at Linea Energy, a utility-scale solar, wind, and storage developer backed by EnCap. He leads EPC, BESS, solar, and wind sourcing and partnerships for major equipment. Since 2009, he has held supply chain and EPC leadership roles at Avantus, Origis, Sempra, and SDG&E.



AARON KINKELAAR

Renewable Energy Segment Lead - Supply Chain

Black & Veatch

Aaron Kinkelaar has 12 years of supply chain experience with Black & Veatch, and over 25 years of experience in supply chain. At Black & Veatch, Aaron has supported water design-build and renewable energy EPC projects and programs from the proposal stage to warranty. Aaron is also a member of the Black & Veatch Solar Innovation Team.



PEGGY HOCK

Director, Utility Scale Project Sales

JA Solar USA

A solar energy leader with over 20 years work in renewables, Peggy's extensive experience in PV includes: utility scale sales and business development (modules and trackers); project development; finance and contract negotiations while holding key positions with leading corporations such as JA Solar USA, LONGi Solar Technologies, Gestamp, Solar FlexRack, Valmont, and Unisolar.



ERIC NICOLAIDES

Chief Executive Officer

Wildcat Infrastructure

Eric Nicolaides is Chairman and Group Chief Executive of Wildcat Equity Partners, where he has built a vertically integrated investment firm with global reach. With over 20 years of experience across infrastructure, renewable energy, healthcare, and private equity, he is recognized for driving strategic growth across the U.S., India, and the Middle East.

PANEL: Financing Projects in the U.S. Post ITC

Moderator



MELISSA BALDWIN

Senior Vice President
Tigercomm

Melissa Baldwin is Senior Vice President at Tigercomm, the nation's top clean energy communications firm. With over 20 years of experience in climate and cleantech PR, she drives strategy for clients in solar, storage, and grid technology. Baldwin is also the host of Scaling Clean, the podcast for cleantech CEOs, investors, and the people who advise them.



IZZET BENSUSAN

CEO & Founder
Captona

Izzet Bensusan is Founder & CEO of Captona, an Energy Transition investment firm specializing in solar, wind, storage, and next-gen power assets. He also founded Karbone, an award-winning energy finance firm. He holds an MBA from Columbia University and BA/MA degrees from Brandeis University.



CHARLIE FIECHTER

President
TNX Holdings

Charlie leads TNX Holdings. He has developed/owned ~2 GW of renewable energy projects across the U.S., India and Mexico. TNX has built a domestic solar module factory to supply project pipeline and is now developing site-connected data center assets. Charlie holds advanced degrees from Yale and Duke and holds seven U.S. patents.



CHRIS DIAZ

Co-CEO
Seminole Financial

Chris Diaz is Co-CEO of Seminole Financial Services, overseeing Capital Raise, Investor Relations, and Business Development. Since 2009, Seminole has financed over \$3 billion in solar and wind projects nationwide. A frequent industry speaker, Chris serves on the boards of SEIA, RE+ Events, and the Distributed Wind Energy Association.



CLAUDIA MORROW

SVP, Development
Vistra Corp.

Claudia J. Morrow is SVP of Corporate Development at Vistra Corp., an integrated energy company serving nearly 5 million customers nationwide. She oversees an 8+ GW development pipeline spanning gas, solar, and storage projects. Since joining Vistra in 2001, she has led initiatives in origination, pricing, risk management, and structuring.



JATIN GUPTA

Chief Information Officer
BrightNight

Jatin has over 20 years of investment experience in renewable energy and infrastructure. Before joining BrightNight, he was Managing Director at Rubicon Capital Advisors and previously Senior Vice President at GE Energy Financial Services, where he led over \$5B in investments across power, renewables, and oil and gas sectors.

PANEL: DC Coupled vs. AC Coupled Solar+Storage Projects

Moderator



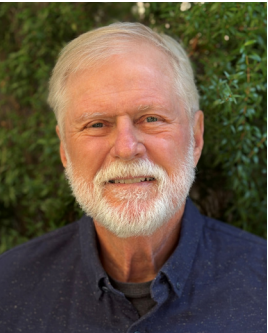
SCOTT VAN PELT

Chief Engineer
GameChange Solar
Scott leads the customer-facing engineering team at GameChange Solar, ensuring the accuracy and timeliness of all technical deliverables. A licensed Professional Engineer in over 20 states, he has served as Structural Engineer of Record for 10 GW of solar projects. He also contributes to UL and IEC solar standards committees.



ADAM BERNARDI

Solar Business Line Director
Burns & McDonnell
Adam leads the Solar Business Line at Burns & McDonnell, a leading EPC firm. With over 3.6 GW of solar projects completed or underway nationwide, he drives large-scale renewable success. He holds a B.S. in Mechanical Engineering from the University of Illinois at Chicago and an MBA in Finance from the University of Texas at Dallas.



MIKE DOMAN

President & Founder
Doman Energy
Mike's experience in Renewable Business spans 26 years. He ran the North American Distribution of PV Modules for both Siemens Solar and Shell Solar that helped some of the largest solar companies today get started. For 16 years he's been the founder & CEO of Doman Energy dedicated to utility scale solar and BESS.



ANDREW MOLES

VP & General Manager
PCL Construction
Andrew leads solar and energy storage projects across Canada, the U.S. and Australia. With 18 years at PCL, he champions a bold vision for renewable energy, empowering the next generation of EPC leaders and growing a sustainable impact across two continents — all while uplifting the communities PCL serves.



SAMIR DUBE

Managing Director
Heliovaas
Samir co-founded Heliovaas, a vertically integrated IPP that acquires projects early or late stage and develops, constructs, finances, owns and operates utility-scale PV & BESS plants. He has been involved in over \$650 million of successfully deployed Renewable Assets; Prior he was involved in over \$60 billion in municipal bond underwritings.



MICHAEL MORITZ

Chief Operating Officer
Monarch Infrastructure
Michael Moritz is COO of Monarch Infrastructure, a renewables developer focused on acquiring early stage development assets and positioning them for success in a post-tax credit environment. He is also a partner at Plains Power, a developer that deploys energy storage at existing community solar and DG portfolios.

FIRESIDE CHAT: The Future of Solar in the U.S.

Moderator



MARK GIBBENS

Head of Strategy & CFO

GameChange Solar

Mark Gibbens is CFO at GameChange Energy with extensive experience in finance, M&A, and corporate development. He has led over \$25B in financings and \$40B in transactions across GM, Lucent, Alcatel-Lucent, and Arysta LifeScience. Mark chairs the CFO Leadership Group and advises Kasi Cloud. He holds an MBA from the University of Chicago.



SEAN GALLAGHER

Senior Vice President of Policy
SEIA

Sean Gallagher is SEIA's Senior Vice President of Policy where he oversees all of SEIA's policy work in states nationwide, as well as the organization's federal legislative and regulatory policy efforts. Previously he served as an executive for firms developing utility scale solar power projects, including supporting the first utility scale solar plant developed on an Indian reservation in the U.S.



PETER ROSKAM

Partner / Federal Policy Leader

BakerHostetler

Peter Roskam served in the U.S. House of Representatives for twelve years (2007-2019) where he was appointed to the Congressional Leadership and chaired three subcommittees of the Ways and Means Committee. Today he is a partner at BakerHostetler where he leads the Federal Policy Team.

PANEL: Outlook on Power Purchase Agreement Prices

Moderator



MEGHAN DEMASI

VP, Finance

GameChange Solar

Meghan DeMasi has been Vice President of Finance since February 2021. She is an experienced leader in financial accounting, regulatory compliance, and governance, with over \$10B in transaction experience at Covia, Arch Chemicals, and KPMG. She holds a B.S. in Accounting from Fairfield University and is a licensed CPA in Connecticut.



PANOS NINIOS

Managing Partner

True Green Capital

Panos Ninios is a Co-Founder and Managing Partner of True Green Capital Management LLC ("TGC"). He is primarily responsible for defining the firm's investment strategy, portfolio management, risk management and capital strategy. Panos is the Chairman of the Investment Committee and contributes decades of experience investing in renewable energy markets.



DAVID PEREZ

Head of Power Origination

Energy Transfer

David joined ETC – Endure Energy in 2012 to lead power origination, focusing on structured deals in U.S. power and natural gas markets. With nearly 30 years of experience, he previously held roles at NextEra, Citigroup, Deutsche Bank, and Louis Dreyfus. He holds a B.A. from Benedictine College and a J.D. from Creighton University.



NICHOLAS MINEKIME

Founder & CEO

Sunrise Mountain Partners

Nicholas Minekime is the Founder & CEO of Sunrise Mountain Partners and has developed over 50 solar projects across 16 states. Previously a Managing Director at Altus Power and a leader at True Green Capital, he has helped build major community solar portfolios. He lives in Connecticut with his family and enjoys cycling and gardening.



NATHAN KRIEGER

SVP - Commercial

Sunrayer

Nathan has 16 years of renewables experience, focused on the commercial and development functions. He has been involved in ~5 GW of project development activities across the United States. Prior to Sunrayer, Nathan has spent time with 174 Power Global, Zelestra, and others. Nathan is a graduate of Lehigh University (BSIE) and the University of Pittsburgh (MBA).



PATRICK VERDONCK

Founder

Verdonck Partners

Patrick Verdonck is the founder of Verdonck Partners, advising investors and energy developers on due diligence, asset management, and project structuring. He also founded Rhyndland Energy, a battery storage developer. Previously, he spent nearly a decade with Starwood Capital's Energy Group, focusing on power and renewable investments.

PANEL: Comparing Post Safe Harbor Viability and LCOE for Solar+Storage vs Gas and Nuclear

Moderator



BRIAN HARTMANN

President and CEO

NorthStar Clean Energy

Brian Hartmann is President of NorthStar Clean Energy, a wholly owned subsidiary of CMS Energy. NorthStar owns and operates over 2,000 megawatts of generating capacity across the United States with 1,000 megawatts in active development and construction. NorthStar's asset base includes gas, biomass, solar, wind, and storage.



DAVID ROSENBLATT

Founder & Executive Chairman

Arava Power Company

David Rosenblatt is Founder of Arava Power Company, with global experience scaling energy and technology companies. He's led renewables projects in Israel, Africa, and the U.S. He holds an MBA from Harvard, a JD from Northwestern, and a BS from Penn State.



PAUL CURRAN

Chief Development Officer

CleanCapital

Paul Curran is Chief Development Officer at CleanCapital and founder of BQ Energy, acquired by CleanCapital in 2022. A pioneer in developing renewable projects on landfills and brownfields, he focuses on bringing clean energy to LMI communities. He holds an engineering degree from Columbia and an MBA from Marist College.



DAVID ZWILLINGER

CEO & Co-Founder

DESRI

David Zwillinger is the CEO of D. E. Shaw Renewable Investments ("DESRI"). Mr. Zwillinger has been focused on DESRI since 2012. DESRI is a market-leading owner and operator of renewable energy projects across the US that acquires, develops, owns, operates or has contracted more than 8 GW of capacity among a portfolio of over 65 renewable energy projects.



TERRY WARREN

Chief Executive Officer

Off Grid Innovations

As CEO of Off Grid Innovations, TJ Warren drives projects from utility-scale solar farms to transmission and distribution developments. He also leads InfraSale.com, a first-of-its-kind marketplace and developer connecting data center stakeholders. InfraSale is advancing a 100 MW Virginia project with onsite natural gas and an 800 MW behind-the-meter pipeline.



REAGAN FARR

Chief Executive Officer

Silicon Ranch Corporation

Reagan Farr co-founded Silicon Ranch, a leading U.S. solar developer, owner, and operator. Through its Regenerative Energy® agribusiness, Silicon Ranch owns and operates the nation's largest agrivoltaics portfolio. Previously, Reagan served as Tennessee's Revenue Commissioner, an experience that yielded valuable public service perspective to his leadership in the renewable energy sector.