POWERPLAN®



2023 ATTENDEE BROCHURE

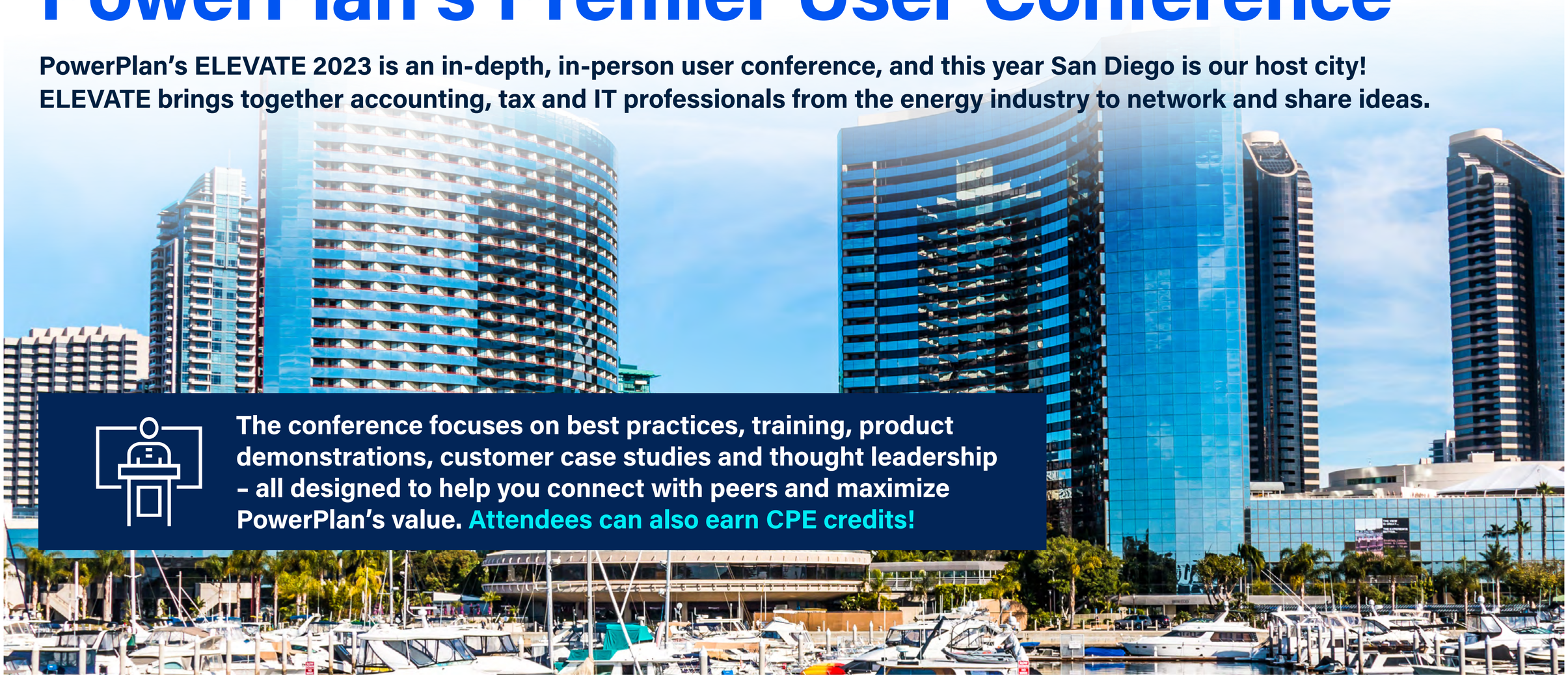
October 22 – 24, 2023
San Diego, California

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PowerPlan's Premier User Conference

PowerPlan's ELEVATE 2023 is an in-depth, in-person user conference, and this year San Diego is our host city! ELEVATE brings together accounting, tax and IT professionals from the energy industry to network and share ideas.



The conference focuses on best practices, training, product demonstrations, customer case studies and thought leadership – all designed to help you connect with peers and maximize PowerPlan's value. Attendees can also earn CPE credits!

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San Diego

ELEVATE 2023 will be hosted in San Diego, California at the city's leading waterfront hotel, Marriott Marquis San Diego Marina. The hotel overlooks a private marina and is near Seaport Village, the Gaslamp Quarter, and Petco Park. Every hotel room and suite have impressive views of the city or San Diego Bay.



Fun Facts About San Diego

San Diego County Produces **60% of All California Avocados**.

San Diego Has **the Most Dog-Friendly Restaurants** Per Capita in the U.S.

The **top employer** in the city is the United States Navy.

San Diego has **more small farms than any other city** in the U.S. - 7,000!

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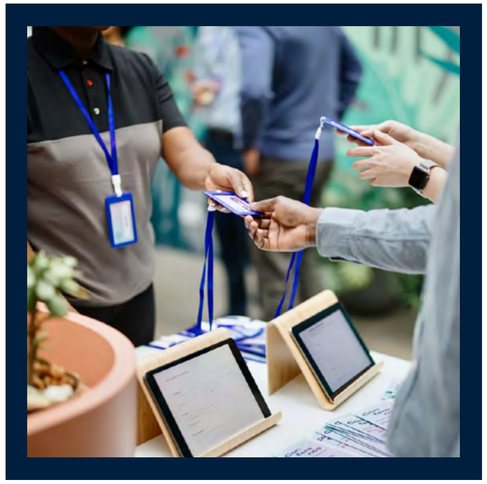
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About the Conference

ELEVATE 2023 will include 50+ breakout sessions, networking opportunities, three general sessions, industry panels, keynote speakers, awards, receptions, product demonstrations, client case studies, thought leadership breakouts and more. ELEVATE 2023 is the place to be!

The Solution Zone will also showcase the all-new Innovation Station, a chance to try your hand and provide feedback on PowerPlan's future products.







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Networking

With sunset cruises, dinner receptions overlooking the beautiful San Diego Marina, and group meals onsite, we've curated multiple networking opportunities to meet peers across the industry and the experts that build the PowerPlan solutions.

While we are happy to welcome special guests traveling with PowerPlan users to the evening receptions, we limit networking, sessions and daily meals to those registered as an ELEVATE attendee.







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Sunday Evening Sunset Cruise & Reception

Oct. 22 - 4:15 - 7:00 pm

Join us Sunday evening to kick off ELEVATE 2023 with a sunset reception cruise! Boarding begins at 4:15 pm and the ship leaves the dock at 5:00 pm, with cocktails, food and a DJ to get the party started. Enjoy a magnificent sunset over the San Diego Bay as you network with peers on a chartered yacht. We're ready to welcome you aboard!





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Monday Evening Reception

Oct. 23 - 6:00-9:00 pm

Join us Monday evening for a dinner reception to celebrate ELEVATE 2023! Dinner and drinks will be provided, along with music and entertainment on the Marriott Coronado Terrace overlooking beautiful San Diego Bay.



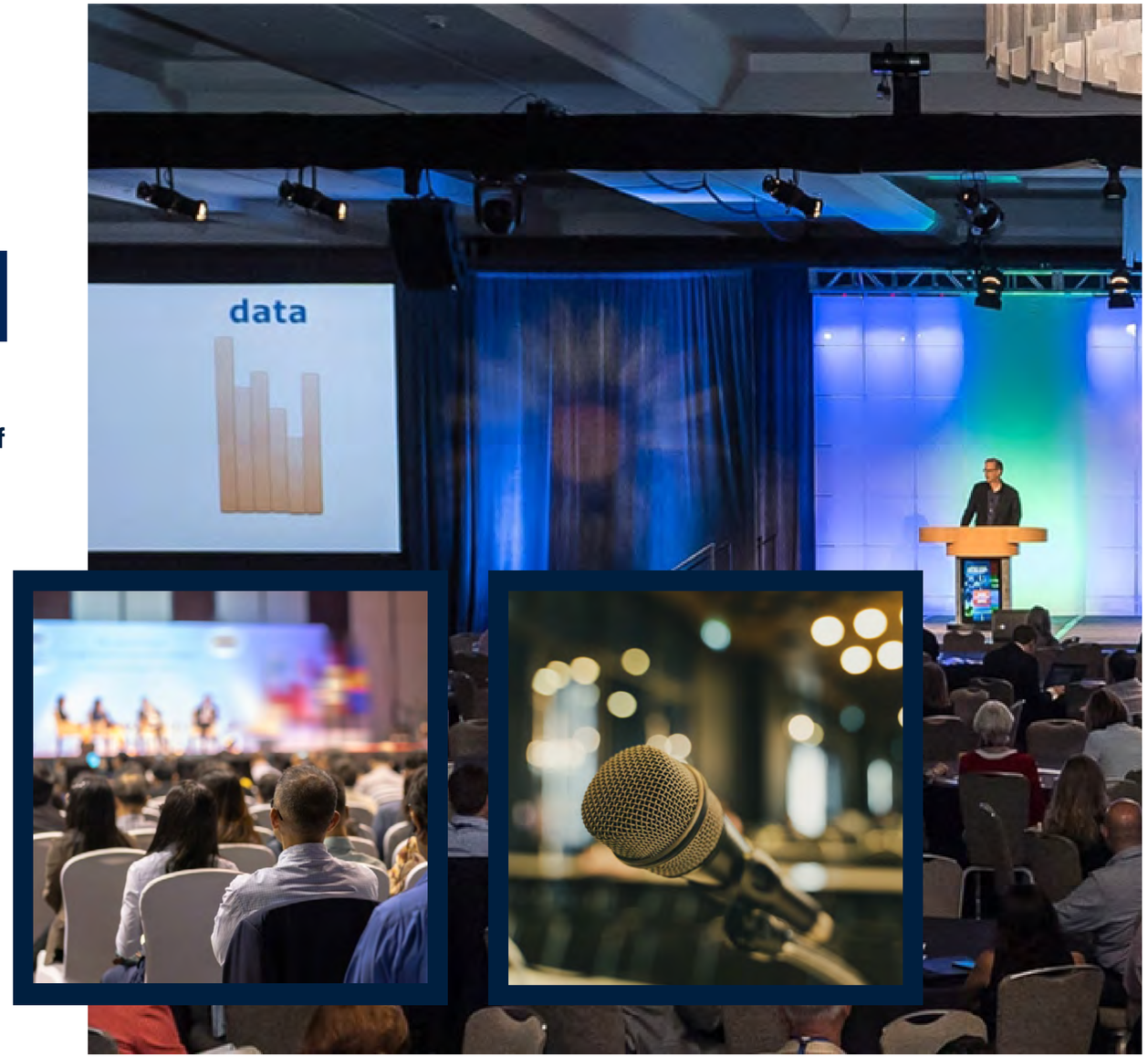
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General Session Keynotes

Providing New Insights

This year's ELEVATE will feature three exciting General Sessions over two days. Kicking off the conference will be PowerPlan CEO Joe Gomes with an overview of the past, current and future state of the company. Next up is our keynote speaker Andrew Urich on *The Power of Influence*, followed by our Customer Award Ceremony. And we'll finish our General Sessions with Chief Product Officer Suzanne Ward leading a product roadmap overview and industry panel with a Q&A session. You won't want to miss these always-informative, always-fun general sessions!





Joe Gomes
CEO, PowerPlan



Suzanne Ward
CPO, PowerPlan



Andrew Urich
Keynote Speaker

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50+ Breakout Sessions

PowerPlan Best Practices

Learn best practices from both PowerPlan experts and your fellow users. Experience in-depth demonstrations, discover new-use strategies and attend panel discussions. Hear case studies and the impressive results directly from your peers.

Everything from Accounting Fundamentals, Budgeting and Income Tax, to Lease, Property Tax, Regulatory and more....there's a myriad of sessions available. Discover new ways to do things, processes to be improved, and how you can succeed in your role and improve your organization's output. Check out the agenda on the ELEVATE app and plan out your schedule today!



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Solution Zone

PowerPlan's Latest Solutions

Stop by the Solution Zone to ask our Subject Matter Experts questions, and learn how our latest products can solve some of your toughest reporting challenges. If you attend a full demonstration of either TFA, WPA or Data Hub, you'll receive a PowerPlan surge protector/USB charger.



Innovation Station

New this year, visit the Innovation Station! Test drive products currently under development and provide feedback to help us improve future solutions. All participants will be entered to win a YETI 35 Hard Cooler (a $275 value). The Solution Zone area will be open throughout the conference, so be sure to stop by!

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Featured Sessions

MONDAY, OCTOBER 23, 2023

**All sessions are Pacific Standard Time (PST)*



Tim Zeldenrust
VP, Strategic Consulting, PowerPlan

Case Study: Regulatory for Accounting & Complex Rider Automation

Grand Ballroom Room 12 | 9:00 AM-10:00 AM

Are you getting bogged down in extensive manual queries to file your plant-related regulatory riders? Learn how a PowerPlan client used our regulatory solution to automate key aspects of their plant-related regulatory rider.



James Major
Lead Consultant, PowerPlan

Why PowerPlan Should be Involved Early and Often

Grand Ballroom Room 12 | 10:30 AM-11:30 AM

Discuss the transformational process, why and how PowerPlan should be in the conversation early, and the successful project impacts with early planning.



Sebastian Cordoba
Manager, Product and Market Research, PowerPlan

Tax Accounting for IRA - General

Grand Ballroom Room 3 | 2:45 PM-3:45 PM

This timely and relevant discussion focuses on the impacts of the Inflation Reduction Act. In this must-attend session, learn how PowerPlan can help meet evolving requirements stemming from this legislation.



Rob Burns
Product Manager, PowerPlan

TFA Q&A Session

Solution Zone | 2:45 PM-3:45 PM

Do you have questions about TFA? Well...we have answers! Come prepared with all the things you wanted to know about TFA but never asked. Be sure to join this lively, interactive session!

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Featured Sessions

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Logan Morrison
Lead Technical Consultant, PowerPlan

Performance Tuning Strategies - Increase Performance for Both Internal and External Processes

Grand Ballroom Room 1 | 4:00 PM-5:00 PM

Review common performance tuning strategies used by PowerPlan Professional Services, including SQL tuning, Database tuning, Query Hints, metric analysis and more.



Phil Zegarelli
VP, Strategic Consulting, PowerPlan

Panel: Utility Industry Tax Outlook

Grand Ballroom Room 3 | 4:00 PM-5:00 PM

A forward-looking discussion of trends, legislative discussions, and greenfield topics on the minds of industry tax experts.



Berrin Thomas
Senior Solution Manager, PowerPlan

PowerPlan System Administration for Business Users

Grand Ballroom Room 10 | 4:00 PM-5:00 PM

Ever wonder the what and why of PowerPlan System Administration? This hour will explain the importance and share best practices. You won't want to miss this informative session.



Ed Ivey
Senior Learning Consultant, PowerPlan

Depreciation Concepts

Grand Ballroom Room 13 | 4:00 PM-5:00 PM

No understanding of PowerPlan's asset module is complete without also knowing how the system calculates, logs and reports asset depreciation on a month-to-month basis. This presentation will explain the structure and ways depreciation can be calculated, reported and maintained with PowerPlan.

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Featured Sessions

TUESDAY, OCTOBER 24, 2023

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Suzanne Ward
CPO,
PowerPlan

General Session 3 - Product Roadmap & Industry Panel

Grand Ballroom | 8:00 AM - 9:30 AM

Suzanne Ward, CPO, will review PowerPlan's product roadmap, the cloud journey, and future plans for PowerPlan's software solutions. Immediately following, join an industry panel with executives from across industries to discuss current challenges and how PowerPlan can make life easier for business and IT users alike.



Ed Ivey
Senior Learning Consultant,
PowerPlan

Accounting Reports & Queries

Grand Ballroom Room 13 | 9:45 AM-10:45 AM

By example of the Projects module, this hour will explain how to find, filter, run, save, and export PowerPlan reports and User Queries.



Logan Morrison
Lead Technical Consultant,
PowerPlan

Advanced Security Techniques - Fine Tune Your PowerPlan Security

Marriott Grand Ballroom 1 | 9:45 AM-10:45 AM

This advanced security session focuses on complex topics such as Oracle Roles, Object-Level Security, Security Rules, and Cloud Access Security.



Michael Hnatiuk
Professional Services Senior Consultant,
PowerPlan

Import Tool: Did You Know?

Grand Ballroom Room 4 | 9:45 AM-10:45 AM

Maximize the utiltiy of the Import Tool in your organization to make configuration or transactional changes in PowerTax more efficiently. This session covers capabilities and use cases of the Import Tool such as maintaining and updating key mappings, importing book or tax activity, and applying depreciation adjustments.

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Featured Sessions

TUESDAY, OCTOBER 24, 2023

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Dominque Angelucci
Senior Product Manager, PowerPlan

Get the Most from PowerPlan Reporting Using WPA

Grand Ballroom Room 11 | 9:45 AM-10:45 AM

Workflow Process Automation (WPA) capabilities continue to expand. This seession will focus on new features to take advantage of your PowerPlan solutions reporting and query features.



Kristen Wallace
Director, Managed Services, PowerPlan

Managed Services (PAMS) Q&A Session

Solution Zone | 11:15 AM-12:15 PM

This session is your opportunity to ask your questions--and get answers--from your Managed Services (PAM) team. Whether it's reducing IT costs or embarking on an initiative to improve organizational efficiency, learn best practices that support an ongoing cycle of success.



Hunter Smith
Product Manager, PowerPlan

Lease Lessons Learned + Customer Best Practices

Grand Ballroom Room 2 | 11:15 AM-12:15 PM

This hour will focus on real life lessons learned and best practices around PowerPlan Lease adoption. We'll cover how the Lease solution is used and the advantages you'll gain through it's implementation.



David Liss
Director, Imp. Strategy, PowerPlan

Cloud Adoption Roundtable

Grand Ballroom Room 3 | 1:15 PM-2:15 PM

Join us in an insightful roundtable discussion with PowerPlan's David Liss and Logan Morrison as they delve into the crucial aspects of Cloud Adoption.

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Featured Sessions

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Phil Zegarelli
VP, Strategic Consulting, PowerPlan

Income Tax Roundtable

Grand Ballroom Room 2 | 1:15 PM-2:15 PM

Join us and be a part of our roundtable discussion with PowerPlan leaders Phil Zegarelli and Rob Burns. We'll delve into crucial topics surrounding Income Tax. Bring your questions to this informative, interactive session.



Cherish Loog
Product Manager, PowerPlan

A Look Into New Product Discovery with Design Prototypes

Grand Ballroom Room 12 | 2:30 PM-3:30 PM

In this session we will showcase the Product process of engaging customers in prototype review / user testing and how different contributions have been made towards the PFAA design / features.



Hunter Smith
Product Manager, PowerPlan

Lease Disclosure Deep-Dive

Grand Ballroom Room 2 | 4:00 PM-5:00 PM

Reporting is a key outcome when organizations use PowerPlan. In this hour we'll deep dive into the lessee and lessor disclosure reports and discover how it can benefit your business.



Ed Ivey
Senior Learning Consultant, PowerPlan

What's New in Recent Version Releases for Fixed Asset and Project Accounting

Grand Ballroom Room 13 | 4:00 PM-5:00 PM

What's New for Fixed Assets and Projects? During this time we will highlight some of the major enhancements to functionality from the last few releases.

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