

AGENDA

2023 Spring Renewable Energy and Environmental Tax Credits Conference

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May 18-19, 2023

*All times PDT

Wednesday, May 17, 2023

9 a.m.-4 p.m.

Project Finance Primer

Learning objective(s):

- Calculate investment tax credits given qualifying costs and calculate production tax credits given electricity produced
- Identify reasons behind tax equity financing trends
- Identify most likely market developments on the horizon
- Calculate tax equity contributions based on given criteria
- Identify the more common transactions structures
- Identify key elements of a closing checklist
- Define back leverage and how it works
- Track the progress of partnership capital accounts at various stages of a partnership flip
- Project tax benefits of the partnership flip transaction
- Differentiate between the partnership and non-partnership version of an inverted lease transaction, project its tax benefits and those of a sale leaseback transaction, or record proper GAAP accounting transactions for sponsors and investors of tax equity transactions

Instructional delivery method: Group live

Program level: Basic

Prerequisites: None

Advance preparation required: None

Recommended field of study: Taxes

Recommended CPE credit: 6

Thursday, May 18, 2023

9:05-10:45 a.m.

Washington Report

Learning Objective(s): Identify outstanding questions following the Inflation Reduction Act, as well as expected regulatory updates from the IRS

Instructional delivery method: Group live

Program level: Update

Prerequisites: A basic understanding of the ITC and PTC incentives

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 2

11 a.m.-Noon

Monetizing Tax Credits: Tax Equity, Transferability

Learning Objective(s): Identify best practices for the transfer of credits, and the role of nonprofits in investments

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of how the LIHTC incentive works

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 1

1:30-2:30 p.m.

Debt Financing Insights

Learning Objective(s): Identify innovative financing products and structures for renewable energy transactions

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the ITC and PTC incentives

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 1

2:45-3:45 p.m.

Sponsors Speak Out

Learning Objective(s): Identify the IRA's impact on the overall availability of debt, cash equity, and tax credit equity

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the ITC and PTC incentives

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 1

4-5 p.m.

IRA Technical Tax Issues

Learning Objective(s): Apply IRS guidance to new and existing incentives

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the ITC and PTC incentives

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 1

Friday, May 19, 2023

9-9:55 a.m.

New Technologies: Attracting Capital

Learning Objective(s): Identify best practices to attract capital for new technologies and developments

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the ITC and PTC incentives

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 1

10-10:55 a.m.

Navigating the Adders

Learning Objective(s): Identify best practices for navigating the IRA provisions for bonus tax credit percentages related to domestic content, low-income communities and energy communities

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the ITC and PTC incentives

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 1

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