



NUCLEAR FINANCING SUMMIT

January 27, 2026

7:30 a.m. – 4 p.m.
Empire Foyer

Registration

7:30 – 8:30 a.m.
Empire Ballroom

Coffee and Breakfast

8:30 – 9 a.m.
Empire Ballroom

Welcome and Opening Keynote

Maria Korsnick
President and Chief Executive Officer
Nuclear Energy Institute

Jay Horine
Head of Global Banking SRI
JP Morgan

9 – 9:45 a.m.
Empire Ballroom

The Policy Primer: How U.S. Frameworks Are Driving Nuclear Investment

Federal and state policy momentum is reshaping the investment outlook for nuclear energy in the United States. As incentives expand and market rules evolve, nuclear projects are finding fresh traction with investors seeking stable, long-term value. Industry, government, and finance leaders will explore how emerging frameworks are driving capital toward nuclear energy—and what signals will shape the market in the years ahead.

Moderator

Michael Flannigan
Vice President Government Affairs
Nuclear Energy Institute



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Panelists

Kathryn Biegel
Manager, New Generation Development
Constellation Energy

Marc Bianchi
Managing Director
TD Securities

Reed Clay
President
Texas Nuclear Alliance

9:45 – 10:10 a.m.
Empire Ballroom

The True Cost of Power: Why Reliability Makes Nuclear Competitive

Speakers

Enrique Glotzer
Managing Director of Power, Renewables and Energy Transition
FTI

Mitchell DeRubis
Senior Director, Economic Consulting
FTI

10:10 – 10:25 a.m.

State of Play in New York

Sean Ewart
Deputy Secretary for Energy at the Office of the New York State
Governor
State of New York

10:25 – 10:45 a.m.
Lenox Ballroom

Networking Break



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10:45 – 11:30 a.m.
Empire Ballroom

The Second Act: Financing Restarts, Uprates, and Life Extensions

Across the country, operators are breathing new life into existing reactors—restarting idled units, boosting output, and pursuing decades-long extensions. Backed by evolving market structures and corporate demand from hyperscalers, these projects are redefining the nuclear investment landscape. Panelists will examine the economics, contracting models, and capital strategies that make nuclear’s “second act” possible.

Moderator

Doug True
Senior Vice President and Chief Nuclear Officer
Nuclear Energy Institute

Panelists

Lynsey Wenger
Vice President, Finance and Assistant Treasurer
NextEra

Gene Miles
Director and Assistant Treasurer
Constellation Energy

James Krellenstein
Chief Executive Officer and Co-Founder
Alva Energy

Josh Thomas
Vice President of Commercial Engagement
Entergy

11:30 a.m. – 12:15 p.m.
Empire Ballroom

Beyond the Megawatt: Accounting for Nuclear’s Full Value



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New crediting systems and 24/7 clean energy frameworks are changing how markets recognize nuclear's reliability and carbon attributes. As granular tracking and certification tools evolve, nuclear energy is positioned to capture more of the value it delivers. This panel will explore how producers, crediting platforms, and large energy buyers are shaping the next generation of contracting and valuation for clean, firm power.

Moderator

Will Graham
Manager, Environmental Markets
Intercontinental Exchange

Panelists

James Critchfield
Head of Registry and Market Integrity
CleanCounts

John Herter
Principal, Power Development
Amazon Web Services

Brian Megali
Director, Clean Energy Policy
Constellation Energy

12:15 – 1:30 p.m.
Lenox Ballroom

Lunch

Provided to all attendees

1:30 – 2:15 p.m.
Empire Ballroom

Building at Scale: The Supply Chain Behind Nuclear's Global Expansion

Tripling global nuclear capacity will demand a supply chain transformation on an unprecedented scale. Engineering, procurement, and construction firms—along with component suppliers—are facing both opportunity and pressure to deliver



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faster, cheaper, and smarter. This session examines the challenges, innovations, and partnerships shaping the next generation of nuclear construction worldwide.

Moderator

Pete Carlone
Vice President
MPR Associates

Panelists

Gary Wolski
Vice President, Nuclear
Curtiss-Wright

Timothy Williamson
Vice President, Nuclear
NOV

Ahmet Tokpinar
Principal Vice President
General Manager, Nuclear Power
Bechtel

2:15 – 3 p.m.
Empire Ballroom

Nuclear Powering the World

This session will examine how commercial nuclear projects are being developed and financed across key global markets. Speakers will discuss region-specific approaches to project development, policy support, and investment structures, highlighting how local market conditions shape risk, capital deployment, and timelines. The session will also consider how international institutions and cooperation can align standards, mobilize investment, and support the global expansion of nuclear energy.

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Moderator

Carol Berrigan
Executive Director of International Government Affairs & Supply
Chain
Nuclear Energy Institute

Panelists

Tom Greatrex
Chief Executive Officer
UK Nuclear Industry Association

Rafal Kasprów
Chief Executive Officer
SGE and ORLEN Synthos Green Energy

Yuki Shimazu
Special Advisor
Japan's Ministry of Economy, Trade, and Industry

Dr. Henri Paillere
Head of Planning and Economic Studies Section
International Atomic Energy Agency

3 – 3:30 p.m.
Lenox Ballroom

Break

3:30 – 4:15 p.m.
Empire Ballroom

Structuring the Future: Innovative Capital for Nuclear Projects

Financing the next generation of nuclear projects will require new thinking about risk, returns, and capital structure. From government-backed credit programs to private equity participation and novel project finance models, innovation in financial structuring is unlocking new investment pathways. This panel brings together investors, developers, and financial



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experts to explore strategies that can accelerate deployment while managing cost and complexity.

Moderator

James T. Tynion III, Partner, Morgan Lewis

Panelists

Julie Kozeracki

Acting Chief Investment Officer
Officer of Energy Dominance Financing
U.S. Department of Energy

Allen Otto

Managing Director
Guggenheim Securities

Mike Scott

Managing Partner, Founder
Pelican Energy Partners

4:15 – 4:45 p.m.

Empire Ballroom

Afternoon Keynote

Jared Woodard, Ph.D
Managing Director
Head of the Research Investment Committee
Head of ETF and Closed-End Fund Research
Bank of America Securities, Inc.

5 – 6 p.m.

Lenox Ballroom

NEI Reception

6 – 7:30 p.m.

*Ocean Prime
123 W 52nd Street
New York, NY 10019*

Morgan Lewis Sponsored Reception

This offsite reception is open to NEI Nuclear Financing Summit attendees (registration required)



NUCLEAR FINANCING SUMMIT

January 28, 2026

7:30 a.m. – 4 p.m. **Registration**
Empire Foyer

7:30 – 8:30 a.m. **Coffee and Breakfast**
Lenox Ballroom

8:30 – 8:35 a.m. **Welcome**
Empire Ballroom
Ellen Ginsberg
Senior Vice President and General Counsel
Nuclear Energy Institute

8:35 – 9:15 a.m. **Partnerships and Progress: A Fireside Chat with
Vistra and Meta**
Empire Ballroom

Moderator
Ellen C. Ginsberg
Senior Vice President and General Counsel
Nuclear Energy Institute

Speakers
Kris Moldovan
Executive Vice President and Chief Financial Officer
Vistra Corp.

Chris Rees
Manager, Clean Technology Innovation
Meta Platforms

9:15 – 10 a.m. **Beyond the Grid: Nuclear Energy for Industrial
Markets**
Empire Ballroom
As industrial energy demand grows, reliability and stability
are becoming critical competitive advantages. Nuclear
energy is emerging as a powerful solution for industries that



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require continuous, high-quality heat and power. This session explores how direct use of nuclear energy can support industrial production, strengthen energy security, and attract long-term investment. Panelists from leading industrial companies and investment firms will discuss the business models, infrastructure needs, and partnerships driving this next phase of nuclear deployment.

Moderator

Jeff Tillery
Chief Operating Officer
Veriten

Panelists

Matthew Guyton
Director, Energy and Power
Piper Sandler

Kate Fowler
Global Head of Nuclear
WTW

Hollie Mitchell
Manager of Clean Energy Procurement & Carbon Accounting
Steel Dynamics

10 – 10:20 a.m.
Lenox Ballroom

Networking Break

10:20 – 11:05 a.m.
Empire Ballroom

Licensing the Future: Emerging Pathways for Nuclear Deployment

From advanced reactor licensing to microreactor demonstrations, U.S. agencies are pioneering innovative approaches to nuclear regulation. This panel examines how the Nuclear Regulatory Commission and Department of



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Energy are working to align processes, reduce uncertainty, and create regulatory clarity for industry and investors alike.

Moderator

Travis Chapman
Director Licensing and Regulatory Affairs
BWX Technologies

Panelists

Jonathan Grieves
Director, Division of Advanced Nuclear Reactors and Non-
Power Production and Utilization Facilities
U.S. Nuclear Regulatory Commission

Dr. Kenneth Michael Goff
Principal Deputy Assistant Secretary
U.S. Department of Energy

11:05 – 11:35 a.m.
Empire Ballroom

The Path to Nth of a Kind: Derisking AP1000 Deployment

Moderator

John Kotek
Senior Vice President, Policy Development and Public Affairs
Nuclear Energy Institute

Speakers

~~Wyatt Hartley~~
~~Managing Partner and Co-President~~
~~Brookfield Renewable Power and Transition~~



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Sam Meyers
Senior Vice President
Brookfield Renewable

John E. Cogan
Partner
Centerview Partners LLC

11:35 a.m. –
12:20 p.m.
Empire Ballroom

Market Momentum: Nuclear's Emergence in Public Markets

Public markets are signaling renewed interest in nuclear energy. Recent SPACs, IPOs, and equity offerings have introduced a new generation of nuclear technology firms to investors. This panel of financial analysts will examine current market sentiment, the performance of listed nuclear companies, and what trends may shape future opportunities for public investment in the sector.

Moderator

John O'Brien
Managing Director
Deloitte Sustainability,
Deloitte & Touche

Panelists

Allyson Satin
Partner and Chief Operating Officer Ares Acquisition Corp II
Ares Management Corporation

Nick Cunningham
Managing Director, Equity Capital Markets
Societe Generale

Ryan Nielson
Director, Investment Banking, Citi



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12:20– 1:35 p.m.
Lenox Ballroom

Lunch

1:35 – 2 p.m.
Empire Ballroom

Secondary Markets: Index Implications for Nuclear Companies

Speaker

Peter Haynes

Head of Index and Market Structure Research

TD Securities

2 – 2:45 p.m.
Empire Ballroom

New Capital Pathways and High-Alpha VC bets in the Nuclear Ecosystem

As the nuclear industry transitions from design certification to physical deployment, the role of private capital is evolving. While government frameworks provide the foundation, venture and growth-stage investors are identifying high-alpha opportunities across the broader nuclear tech stack—from advanced fuel cycles and supply chain resilience to AI-driven operational workflows.

This session will examine how early-stage capital evaluates the "first-of-a-kind" (FOAK) hurdle and the specific signals that make a nuclear startup "venture-ready." Panelists will discuss what venture investors look for in a founding team, how they value long-cycle assets, and the emerging pathways for private capital to bridge the gap toward industrial-scale deployment.

Moderator

Monika Kochhar

Venture Partner and Investment Committee Member

Disruptive Founders Fund



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Panelists

Jon Ylvisaker
General Partner
CrossCut Ventures

Sean Hoge
Founder & GP
Starship Ventures

Elina Teplinsky
Partner
Pillsbury Winthrop Shaw Pittman LLP

2:45– 3:30 p.m.
Empire Ballroom

The New Nuclear Fuel Cycle: Technology, Supply, and Recycling Opportunities

Advanced reactor deployment will depend on a modernized fuel ecosystem. Emerging technologies for enrichment, fabrication, and recycling are redefining supply chains and investment opportunities. This session introduces investors to the fundamentals of the advanced nuclear fuel cycle and examines the commercial drivers behind its renewed momentum.

Moderator

Arkady Gevorkyan
Commodity Strategist
Citi Research

Panelists

Seth Grae
CEO
Lightbridge Corporation



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Dominic Kieran
Global Managing Director
Cameco UK

Craig Bealmear
Chief Financial Officer
Oklo

3:30 – 4:15 p.m.
Empire Ballroom

Capitalizing Innovation: How technologies come to market

There are many approaches to moving technologies from conceptualization to commercialization across industries. This panel will explore the different approaches being taken with the nuclear industry as advanced reactors race to deployment.

Moderator

Benton Arnett
Senior Director, Markets and Policy
Nuclear Energy Institute

Panelists

Simon Irish
Chief Executive Officer
Terrestrial Energy

Samuel Gibson
President and CEO
Hadron Energy

Steve Hellman
Chief Financial Officer
TerraPower



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Juan Carlos Puente
Head of Finance
Blue Energy

Closing Remarks

4:30 – 7 p.m.

Pillsbury Winthrop

Shaw Pittman

31 West 52nd Street

New York City

New Nuclear Mixer

This offsite reception is open to NEI Nuclear Financing Summit attendees (pre-registration required)