



# NUCLEAR FINANCING SUMMIT

January 27, 2026

8 a.m. – 4 p.m.

**Registration**

7:30 – 8:30 a.m.

**Coffee and Breakfast**

8:30 – 9 a.m.

**Welcome and Opening Keynote**

Maria Korsnick

President and Chief Executive Officer

Nuclear Energy Institute

*Speaker announcement forthcoming*

9 – 9:45 a.m.

**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, NEI

**Panelists**

David Brown

Senior Vice President, Federal Government Affairs and Public Policy

Constellation Energy Corporation

Reed Clay



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President  
Texas Nuclear Alliance

*Additional speakers forthcoming*

9:45 – 10:15 a.m.

## **The True Cost of Power: Why Reliability Makes Nuclear Competitive**

### **Speaker**

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

10:15 – 10:45 a.m.

## **Networking Break**

10:45 – 11:30 a.m.

## **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**

Robert Coffey  
Executive Vice President and Chief Nuclear Officer  
NextEra



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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 – 12:15 p.m.

## **Beyond the Megawatt: Accounting for Nuclear's Full Value**

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.

### **Panelists**

James Critchfield  
Head of Registry and Market Integrity  
CleanCounts

*Additional speakers forthcoming*

12:15 – 1:30 p.m.

### **Lunch**

*Provided to all attendees*

1:30 – 2:15 p.m.

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



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

*Additional speakers forthcoming*

2:15 – 2:45 p.m.

## **Keynote Speaker**

2:45 – 3:30 pm

## **Allies in Energy: Perspectives on the Global Landscape**

### **Panelists**

Tom Greatrex  
Chief Executive Officer  
UK Nuclear Industry Association

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

Robert Rudich  
Chief Business Development Officer  
Synthos Green Energy

3:30 – 3:45

## **Break**

3:45 – 4:30 p.m.

## **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



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financial structuring is unlocking new investment pathways. This panel brings together investors, developers, and financial experts to explore strategies that can accelerate deployment while managing cost and complexity.

## **Moderator**

Morgan Lewis

## **Panelists**

Julie Kozeracki

Acting Chief Investment Officer

Officer of Energy Dominance Financing

U.S. Department of Energy

James Schaefer

Senior Managing Director

Guggenheim Securities

Mike Scott

Managing Partner, Founder

Pelican Energy Partners

4:30 – 5 p.m.

## **Afternoon Keynote**

## **Closing Remarks**

5 – 6 pm

## **Reception**



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January 28, 2026

8 a.m. – 4 p.m.

## Registration

7:30 – 8:30 a.m.

## Coffee and Breakfast

8:30– 9:00 a.m.

## Welcome & Keynote

Ellen Ginsberg

Senior Vice President and General Counsel

Nuclear Energy Institute

9:00 – 9:30 a.m.

## Powering Renewal: State Leadership and Private Investment in the VC Summer Completion

The restart of the VC Summer nuclear project marks a turning point for the industry and the region. This session will share insights on how public-private collaboration is reviving one of the most significant nuclear projects in the United States. The discussion will highlight the strategic role of state policy, capital deployment, and stakeholder engagement in enabling nuclear growth.

9:30-10:15 a.m.

## Beyond the Grid: Nuclear Energy for Industrial Markets

As industrial energy demand grows, reliability and stability are becoming critical competitive advantages. Nuclear energy is emerging as a powerful solution for industries that 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.



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**Moderator:**

Hilary Lane

Senior Director, Strategic Partnerships

Nuclear Energy Institute

**Panelists:**

Mohan Kalyanaraman

Technology Acquisition Advisor

ExxonMobil

Matthew Guyton

Director, Energy and Power

Piper Sandler

Hollie Mitchell

Manager of Clean Energy Procurement & Carbon Accounting

Steel Dynamics

10:15 – 10:40

**Networking Break**

10:40 – 11:25

**Licensing the Future: Emerging Pathways for Nuclear Deployment**

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



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processes, reduce uncertainty, and create regulatory clarity for industry and investors alike.

## **Moderator:**

Travis Chapman  
Director Licensing and Regulatory Affairs  
BWX Technologies

## **Panelists:**

Jeremy Groom  
Acting Director for the Office of Nuclear Reactor Regulation  
U.S. Nuclear Regulatory Commission

*Additional Speakers forthcoming*

## **Financial Presentation**

11:25 – 11:45

### **Speaker**

Peter Haynes  
Head of Index and Market Structure Research  
TD Securities

11:45 – 12:30

## **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



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companies, and what trends may shape future opportunities for public investment in the sector.

## Panelists

Allyson Satin

Partner and Chief Operating Officer Ares Acquisition Corp II  
Ares Management corporation

Mark Sowinski

Executive Director  
Morgan Stanley

Ryan Nielson

Director, Investment Banking  
Citi

## Moderator

Deloitte

12:30 – 1:45 p.m.

## Lunch

1:45 – 2:30 pm

## New Capital Pathways into Nuclear

## Moderator

Monika Kochhar

Venture Partner and Investment Committee Member  
Disruptive Founders Fund

2:30 – 3:15 pm

## 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



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examines the commercial drivers behind its renewed momentum.

## **Panelists**

Seth Grae  
CEO  
Lightbridge Corporation

3:15 – 4:00

## **Capitalizing Innovation: How new technologies come to market**

### **Panelists:**

Samuel Gibson  
Hadron Energy

### **Moderator**

Benton Arnett  
Senior Director  
Nuclear Energy Institute

## **Closing Keynote and Remarks**