



Schedule of Events

WEDNESDAY, JULY 20

6:00 pm – 7:30 pm

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Welcome Reception

It all started for IPAA at The Broadmoor 93 years ago, and we are thrilled to be back in-person to celebrate our history, welcome our members and colleagues and make new connections and future memories. Join us on Wednesday evening for an informal networking reception — we look forward to seeing you!



THURSDAY, JULY 21

9:00 am

IPAA's 93rd Annual Meeting Kick-off

Welcome and introductions followed by our morning Keynote Speaker and Capital Markets sessions. Thank you to IPAA's Capital Markets Committee Chair, David Baggett, Founder and Managing Partner of Opportune LLP for coordinating Thursday morning's panelists and speakers.

WELCOME

Steven Pruett, IPAA Vice Chairman

President and Chief Executive Officer, Elevation Resources LLC



Steven Pruett

9:05 am – 9:45 am

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Keynote Speaker

Alex Epstein

President and Founder, Center for Industrial Progress

INTRODUCTION

David Baggett, Founder and Managing Partner, Opportune LLP

FOSSIL FUTURE: WHY GLOBAL HUMAN FLOURISHING REQUIRES MORE OIL, COAL, AND NATURAL GAS – NOT LESS

Alex Epstein is an American author and industrial and energy policy commentator.

He is the founder and president of the Center for Industrial Progress, a for-profit organization in San Diego, California. Epstein is the author of *The Moral Case for Fossil Fuels*, a best-seller, in which he advocates the use of more oil, coal and natural gas. He has just released a new book, *Fossil Future: Why Global Human Flourishing Requires More Oil, Coal, and Natural Gas – Not Less*. Epstein has cast doubt on the degree of scientific consensus for climate change and the degree of human impact on the phenomenon.



David Baggett



Alex Epstein

10:00 am – 10:45 am

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THE PUBLIC MARKET ENVIRONMENT FOR E&P COMPANIES

The availability of public capital in the oil and gas sectors opens and closes based on the quest for yield, the macro stock market health and past and projected future performance. This panel will discuss the current appetite for investment in the public oil and gas sector including asset-based lending, traditional bond offerings, securitizations, equity raises, “mergers of equals” and the overall effect ESG is having on the markets.

MODERATOR

Doug Getten, Partner, Baker Botts LLP

SPEAKERS

Mike Kelly

Chief Strategy Officer, Northern Oil and Gas

Stephen M. Trauber

Vice Chairman & Global Co-Head of Natural Resources and Clean Energy Transition, Citi

Hallie Vanderhider

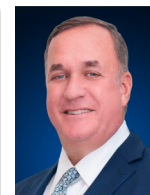
Investor and Board Member, SFC Energy Partners; Oil States International, EQT Corporation



Doug Getten



Mike Kelly



Stephen Trauber



Hallie Vanderhider

THURSDAY, JULY 21 CONTINUED

11:00am – 11:45 am

THE PRIVATE CAPITAL ENVIRONMENT FOR E&P COMPANIES

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WHITE & CASE

Many of the effects of the last oil and gas downturn are still with us, including fewer companies and limited access to capital. This panel will explore how the lingering effects of the last downturn, increased commodity pricing and costs and the current politics are affecting the private E&P companies' access to capital.

MODERATOR

Emery J. Choi, Partner, White & Case

SPEAKERS

Jason DeLorenzo

Managing Partner, EnCap Investments

Kristin Kelly

SVP, EIG Global Energy Partners

Stephen Kennedy

EVP, Head of Investment Banking, Amegy Bank



Emery Choi



Jason DeLorenzo



Kristin Kelly



Stephen Kennedy

12:00 pm – 1:15pm

Networking Luncheon

This casual lunch will give meeting attendees time to chat about the morning sessions while also discussing what's next amongst their tablemates while enjoying delectable food at The Broadmoor, a Forbes Five-Star and AAA Five-Diamond resort.

1:30 pm – 2:15pm

WAR, CLIMATE, AND THE INDEPENDENT PRODUCER

In 2021, global use of fossil fuels reached a new high. By their energy choices, the eight billion people of the planet gave governments and the World Economic Forum a massive vote of no confidence in their plan to eliminate those fuels. The Ukraine War has dramatically underscored the folly of restricting U.S. production in the near term. Poe Leggette will propose a message independent producers should deliver to fight global poverty, limit global warming, and provide the products the free nations of the world need.

SPEAKER

L. Poe Leggette

Partner, BakerHostetler LLP



L. Poe Leggette

2:30 pm – 3:15 pm

Keynote Speaker

Jason Pigott

Chief Executive Officer
Laredo Petroleum, Inc.

ENERGIZING THE FUTURE: Embracing a culture of technological innovation to deliver clean, reliable and affordable energy.



Jason Pigott

3:30 pm – 5:00 pm

IPAA Board Meeting

Barry Russell, President & CEO, IPAA

Jim Wilkes, IPAA Chairman

President, Director and Co-Owner
Texland Petroleum, L.P.

Steven Pruett, IPAA Vice Chairman

President and Chief Executive Officer
Elevation Resources LLC



Barry Russell



Jim Wilkes



Steven Pruett

6:00 pm – 8:00 pm

Lakeside Reception and Dinner

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 U. S. Steel Tubular Products

We all need to exhale from time-to-time and enjoy moments with our co-workers and industry friends. At the Lakeside Reception and Dinner we will be doing just that while enjoying remarkable food and breathing in that fresh mountain air.



FRIDAY, JULY 22 CONTINUED

9:00 am – 10:15 am

Legal Updates

SPEAKERS

Jim Elliott
Counsel, Spilman Thomas & Battle, PLLC

Mark Barron
Partner, BakerHostetler LLP



Jim Elliott



Mark Barron

10:25 am – 11:00 am

Steel Shortages

- Why are oilfield tubulars so tight?
- Why are they so expensive?
- How long will this cycle last?

SPEAKER

Byron Dunn
CEO and Founding Partner
Tubular Synergy Group, LP



Byron Dunn

11:10 am – 11:55 am

Supply and Demand

SPEAKER

Bob Fryklund
Vice President – Upstream Energy, IHS Markit/S&P Global

MAKING SENSE OUT OF CHAOS

Predicting the future of the oil and gas markets has never seen so many variables...Covid, the Ukrainian War, US-Iran sanctions, Venezuela sanctions, OPEC spare capacity, U.S. government indecisiveness and supply chain hiccups. The end result is some of the highest prices in decades but for how long? Moreover, how can we chart a path forward, and what does that mean to U.S. producers?



Bob Fryklund

12:00 pm – 1:45 pm

Membership Luncheon

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INTRODUCTION

Dan Gualtieri
Executive Director, ComboCurve

KEYNOTE SPEAKER

Scott Tinker
Director, Bureau of Economic Geology, The University of Texas at Austin



Dan Gualtieri



Scott Tinker

OIL AND GAS IN THE EMISSION TRANSITION

Emerging economies such as Africa and SE Asia seek *affordable* energy, dominated by coal, oil, and hydro to lift themselves from poverty to prosperity. Developing economies including China and parts of Latin America seek a transition from unreliable to reliable energy. Coal and oil feature prominently, along with hydro and natural gas. Developed economies see climate change as a leading challenge and suggest an “energy transition” to clean energy by eliminating coal, oil and natural gas. This results in an increase in the price of energy and reduced energy security, as is happening in Europe. The global focus should instead be on an “emission transition” by developing CCUS, hydrogen, geothermal, nuclear, natural gas replacing coal, and efficiency.

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