



**Small Oil and Gas Committee/ Financial Reporting Committee
 Combined Spring Meeting
 Wednesday, April 26, 2023
 1:00 pm – 4:00 pm CST
 AGENDA**

TIME	AGENDA ITEM	DISCUSSION LEADERS
1:00	Welcome & Introductions COPAS Antitrust Statement and announcements	Ken Nollsch / Howard Hong
1:05	Small Oil & Gas Companies Committee Board Report	Kirk Foreman
1:15	Icebreaker and Vote	Ken Nollsch / Howard Hong
2:00	ESOPs: Continuing Legacy <u>Description:</u> Explore the continued legacy of ESOPs <u>Learning Objectives:</u> By the end of this presentation, you will be able to: <ol style="list-style-type: none"> 1. Describe ESOPs as a succession-planning vehicle and retirement plan 2. Explain the benefits of selling to an ESOP 3. Assess when an ESOP may be a good fit 4. Discuss current economic climate effects on ESOP transactions Program Level: Basic Pre-requisite: None Advance Preparation: None Delivery Method: Group Live Field of Study: Specialized Knowledge CPE Credits: 1	Angela Fischer
3:00	Break	
3:10	Risks and Opportunities in the Energy Industry in a Time of Volatility and Transition <u>Description:</u> Overview of commodity price earnouts including case study. Discussion on the Oil & Gas role in the transition into renewable energy. <u>Learning Objectives:</u> By the end of this presentation, you will be able to:	Adriana Saucedo & Akshaya Jaisankar

1. Describe earnout structures used in the oil & gas industry.
2. Engage in meaningful discussion regarding the energy transition.

Program Level: Basic
Pre-requisite: None
Advance Preparation: None
Delivery Method: Group Live
Field of Study: Specialized Knowledge
CPE Credits: 1

4:00

Adjourn



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