

AGENDA

2024 Spring

Renewable Energy Tax

Credits Conference

2023 Spring Renewable Energy and Environmental Tax Credits Conference Agenda

May 16-17, 2024

*All times PST

Wednesday, May 15, 2024

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 16, 2024

9:30-10:45 a.m.

Washington Report

Learning Objective(s): Identify the potential impact of the upcoming presidential election on existing and proposed regulations

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: 1.5

11 a.m.-Noon

Understanding the ITC Equity Market

Learning Objective(s): Evaluate the effects of credits created by the IRA of 2022 on the ITC equity market and assess the impact of transferability on equity investors and pricing

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: Economics

Recommended CPE credit: 1

1:30-2:30 p.m.

Unwrapping the Complexity of Financing

Learning Objective(s): Compare and contrast financing options for clean energy properties

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: Finance

Recommended CPE credit: 1

2:45-3:45 p.m.

Getting Up to Date on Storage

Learning Objective(s): Identify best practices for energy storage

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.

Clean Energy Tax Matters

Learning Objective(s): Analyze guidance from the IRS to ensure compliance and optimize available benefits

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 17, 2024

9-9:55 a.m.

Monetizing Your PTCs

Learning Objective(s): Identify challenges and opportunities in monetizing PTCs

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.

Development Details

Learning Objective(s): Identify trends and challenges in clean energy development

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

11-11:55 a.m.

Understanding Adders

Learning Objective(s): Identify best practices for compliance with IRA adders

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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