

SIGMA EXECUTIVE LEADERSHIP CONFERENCE EDUCATION

Sunday	Monday 1/23	Tuesday 1/24	Wednesday 1/25
Arrivals	<p>8:00 a.m.-9:00 a.m.</p> <p>Domestic Drilling Opportunities and the Future of U.S. Refining What does this mean to us? U.S. crude production could double in the next 10 years, reducing our dependence on imports by 40%; Vehicle efficiency and fuels regulations could result in a loss of 15% of the U.S. refining capacity; The introduction of E 85 could cost retailers over \$6 billion. Come listen to industry expert Lynn Westfall share his views for 2012 and beyond.</p> <p><i>Lynn Westfall</i></p>	<p>8:00 a.m.-8:45 a.m.</p> <p>The Changing Face of U.S. Refiners and Implications for Fuel Supply</p> <p><i>Nancy Yamaguchi</i></p>	<p>8:00 a.m. -10:15 a.m.</p> <p>Optimizing Your Business Processes For the Future</p> <p><i>Ken Gunn</i></p>
	<p>9:00 a.m.-10:00 a.m.</p> <p>Top 10 Elements Overlooked in an Acquisition</p> <p><i>Al Alfano, Bassman, Mitchell & Alfano</i></p>	<p>8:45 a.m. -9:30 a.m.</p> <p>Electric Car Stations are Here—Are They Real and Will They Last?</p> <p>What are the facts? What remains to be seen? Jay Tankersly will talk about some key issues: Transition to electric vehicles will take years, if not decades; Ability to re-fuel at home is a huge cultural shift and early signs show that EV owners are "filling-up" less at public locations; How to charge for a charge?" To date there has been no clear winner emerge for business owners related to how charge customers to "fill-up"</p>	

		<p>Should I get involved? Options to and a path to engage with your city, utility, charging station provides and other NGO's to effectively plan for the arrival of electric vehicles.</p> <p><i>Jay Tankersly, Rocky Mountain Institute</i></p>	
	Break 10:00-10:15	Break 9:30-9:40	
	<p>10:15 a.m. -11:30 a.m.</p> <p>Executive Marketer Panel</p> <p>The economic challenges the last few years will pale the efforts needed to navigate a new economy the next 10 years. Being nimble and diverse is a mantra for our panel. Listen in as they tell about their strategic efforts and ask questions on how they made always looking forward, a business strength.</p> <p><i>Mike Mansfield, Tom Schmidt, Tom Gresham, and Kerry Oliver</i> <i>Moderated by Tod Butler</i></p>	<p>9:40 a.m. -10:35 a.m.</p> <p>New Leaders Panel</p> <p>Running a business has its challenges. When new leaders are poised to take executive roles, views and perspectives can be very different from the business as usual. Learn how new leaders are bridging the communications gap to effectively lead the change while keeping all stakeholders engaged.</p> <p><i>Brad Douglass, Ryan McNutt, Erin Robinson</i></p>	
		<p>10:35 a.m. -11:35 a.m.</p> <p>Marginalization of the Oil Industry Strategically Speaking: The Energy (Fuels) Market, Security of Supply, Evolving Consumer Demand and What are a Forward Thinking Strategies to Consider for Marketers</p>	

		<p>Strategically Speaking: The Energy (Fuels) Market</p> <ul style="list-style-type: none"> • Security of Supply • Evolving Consumer Demand • What are a Forward Thinking Strategies to Consider for Marketers <p><i>Phil Verleger</i></p>	
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Keynote Speakers

Philip K. Verleger

During his long and distinguished career, Dr. Verleger has correctly anticipated most of the major structural changes occurring in the oil industry over the last 25 years. For example, in 1986 he became the first economist to fully comprehend and explain the appearance and development of energy commodity markets. Since then, Dr. Verleger has chronicled the evolution of these markets in The Petroleum Economics Monthly. Over a quarter century, he has examined many developments and anticipated the outcomes of a number of market manipulation strategies, including Metalgesellschaft’s disastrous trading program in 1992. More recently, Dr. Verleger was one of the first to examine and again correctly predict the impact of outside investment in commodities.

Lynn D. Westfall

Executive Vice President, Turner & Mason

Mr. Westfall graduated from The University of Texas with BSChE (1975) and the University of Houston with MBA (1978). He is a retired Sr. Vice President & Chief Economist of Tesoro Corporation and former Vice Chairman of the Western States Petroleum Association. He is considered an expert in refining economics with extensive experience in mergers and acquisitions, economic and strategic analysis, government relations and media relations.

Dr. Nancy Yamaguchi

President and CEO, Trans Energy Research

Dr. Nancy Yamaguchi is President of Trans-Energy Research Associates, Inc., a small, computer-oriented firm specializing in advanced analytical techniques in energy issues. Her work focuses on a wide spectrum of issues relating to energy, economics, and the environment, particularly the areas where these three areas interact. She has a strong interest in the global oil industry, including supply, demand and trade, transport, refining, product blending, alternative and reformulated fuels, product quality, and

price behavior. Dr. Yamaguchi has written extensively on the dynamics of the Asia-Pacific, Western Hemisphere, Middle Eastern and international energy markets. She has had dozens of international public speaking engagements. She is a Contributing Editor to the UK-based International Journal of Hydrocarbon Engineering. She is a regular contributor to the Education Program of the Society of Independent Gasoline Marketers of America. Prior to founding Trans-Energy Research, Dr. Yamaguchi held faculty and research positions at the East-West Center in Honolulu, Hawaii and the California Energy Commission in Sacramento, California.