

SENIOR CONSULTANT

- Regulatory, LDC and Retail electricity exposure
 - Over twenty years progressive experience in the Ontario electrical industry
 - Five years regulatory experience with the Ontario Energy Board
 - Strong knowledge and understanding of the energy industry
 - Knowledge of the various Ontario Legislature Acts and Bills affecting the energy industry
 - Strong working knowledge and application experience with OEB handbook rules, regulations, compliance orders and guidelines
 - Hands on electricity rate development and application experience
 - Hands on OEB electronic report filing
 - OEB hearings evidence preparation, interrogatory response, evidence review and interrogatory submissions
 - Proficiency in data collection for analytical processing, analysis, interpretation and reporting
 - Proficient in MS Office and multiple PC software applications
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PROFESSIONAL OVERVIEW

ELENCHUS

2010 – to present

Senior Consultant

Responsible for:

- Provide regulatory advice on issues and their implementation
- Participate in regular client meetings and teleconferences dealing with emerging regulatory issues
- Participate in all aspects of the preparation and defense of Electricity Distribution Rate rebasing applications
- Work with a wide range of utility team members including staff, management, executive and Board of Directors

ONTARIO ENERGY BOARD **Advisor, Electricity Rates**

2005- 2010

Responsibilities included:

- Participation on multi-disciplinary teams to ensure the effective and efficient processing of applications
- Coordinated certain aspects of application processing administration including the issuance of notices and procedural orders and timelines for proceedings
- Analysis of information including economic, technical and other information submitted in support of applications and other regulatory proceedings
- Preparation of requests for additional information from applicants and intervenors, and to develop submissions on behalf of Board staff

- Coordinated the preparation and filing of submissions on behalf of Board staff
- Participated in negotiations and settlements of issues with applicants and other stakeholders;
- Identified and consolidated issues negotiated by applicants and stakeholders and presents results for consideration
- Prepared materials to assist in cross examination of witnesses
- Prepared briefings on financial, regulatory and technical matters pertaining to applications and other regulatory proceedings
- Gathered and analyzed information from both internal and external sources to support issues resolution
- Acted as a point of contact with industry participants, including the general public
- Worked individually and on teams to develop and implement tools and processes for the efficient and effective processing of applications, including monitoring and reporting on those processes
- Designed and developed spreadsheets and other tools for the reporting, retention, and analysis of information filed by regulated industry participants
- Maintained current and accurate records of application status and processing for assigned applications.
- Worked with other OEB departments and responded to inquiries from and provided advice to industry and stakeholder representatives
- Responded to inquiries from internal and external clients
- Coordinated input from various areas and subject matter experts to develop responses to inquiries.
- Monitored developments and trends in the energy sector and analyzed implications for Board policy and energy sector participants
- Participated in and/or monitored industry conferences, meetings, working groups and stakeholder consultations
- Established and maintained business relationships with representatives of regulated entities, government, customer and other stakeholder groups and industry associations
- Briefed senior management, Board Members and other staff regarding existing and new developments, emerging issues and trends
- Maintained industry contacts to be knowledgeable of trends and issues
- Established and maintained relationships with the regulated industry, industry groups, customer groups and government branches.

ENERSOURCE CORPORATION

2003-2005

Rates and Regulatory

Responsibilities included:

- Preparation and submission of regular electronic report filings to the Ontario Energy Board
- Detailed monthly analysis and reporting on LDC Energy Revenue and OEB approved variance accounts
- Preparation and submission of rate applications to OEB
- Preparation and submission of OEB rate hearing evidence including legal counsel interaction
- Continuous multimedia surveillance, analysis and reporting on OEB and other energy sector related information
- Discussions and response to OEB staff queries
- Collection, comparison and reporting on other LDC rates
- Customer and LDC load data collection and analysis
- Attendance at OEB and other energy sector information sessions
- Corporate compliance reviews
- Participation in LDC and interested party groups advocacy discussions and submissions

FIRST SOURCE ENERGY CORP

2001-2003

Manager, Risk Management and Settlement

Martin Benum, Elenchus

Overall responsibilities encompass all financial aspects of the business.

- Instrumental in establishing the company’s risk and credit policies.
- Established both supply and market Value-at-Risk reporting, which led to our overall corporate hedging practices.
- Dealt in the negotiations with suppliers; Canadian and US, utilizing the ISDA contract for enabling agreements and financial swaps.
- Negotiated margin calls with the suppliers.
- Familiar with the Ontario Retail Settlement Code, dealings with the Ontario Energy Board, the Canadian Customs and Revenue Agency and the Ontario Ministry of Finance
- Designed and built financial settlement reporting structure to deal with over 60 LDC’s (Local Distribution Companies) on financial settlements
- Responsible for the company financial reporting, prudential management, cash control, dealings with both internal and external auditors, business planning and forecasting and other management and statutory reporting.

Note: First Source Energy Corp. was a joint venture retail electricity company. Enersource Corp. was majority shareholder. While First Source was highly successful, numerous external factors lead the shareholders to dissolve the business. My employment contract provided reversion rights to return to Enersource Corp.

ENERSOURCE CORPORATION	1986- 2001
Rates and Regulatory	1999-2001
Manager Reporting and Analysis	1993–1999
Accounting Supervisor	1986–1993

My scope of experience and responsibilities have been:

- Preparation of rates and regulatory submissions and other reporting requirements to the Ontario Energy Board
- Revenue and cost reporting, cost and variance analysis, project analysis.
- Coordination, preparation and presentation of annual corporate budgets, periodic financial and management reporting.
- Computer systems implementations.
- Taxation reporting and annual audit preparation.
- Banking relationships.
- Management of various accounting departments (i.e. Payroll, Accounts Payable)
- Participation in cross company multi-departmental committees.
- Participation on industry related committees.

BURLINGTON HYDRO	1985-1986
Accounting Supervisor	

My scope of experience and responsibilities were:

- Supervision of payroll and accounts payable
- Monthly financial reporting
- Inventory systems implementations.
- Banking relationships.

CREEDS	1983-1985
Assistant Controller	

PEAT MARWICK MITCHELL (KPMG)	1981-1983
External Auditor	

ACADEMIC ACHIEVEMENTS

- Certified Management Accountant CMA
- Bachelor of Business Management (BBM)