

A large, abstract graphic in the background consisting of a swirling, particle-like trail of light blue dots that forms a circular shape. Overlaid on this is a white square frame containing a white upward-pointing arrow. The word "ELEVATE" is written in large, white, sans-serif, uppercase letters across the middle of the arrow, and "2025" is written in a similar font below it.

ELEVATE 2025

March 23-25, 2025

ATTENDEE BROCHURE

INTERCONTINENTAL BUCKHEAD ATLANTA

PowerPlan's ELEVATE 2025 Conference

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MORE ABOUT
ELEVATE 2025

ABOUT POWERPLAN'S

Premier User Conference

ELEVATE provides an in-depth, in-person user conference that brings together accounting, tax and IT professionals from the energy industry to network and share ideas.



The conference focuses on best practices, training, product demonstrations, customer case studies and thought leadership – all designed to help you connect with peers and maximize PowerPlan's value.

Attendees can also earn CPE credits!



INTERCONTINENTAL BUCKHEAD

Atlanta, GA

ELEVATE 2025 will be held in Atlanta, the hometown of PowerPlan, at the prestigious InterContinental Buckhead.

u.s. News
& WORLD REPORT

Forbes

CONDÉ NAST

This hotel, recognized by US News, Forbes, and Conde Nast as a top Southern destination, offers stunning skyline views of Buckhead and features The Americano, Atlanta's only Italian-inspired steakhouse.

FUN FACTS

About Atlanta



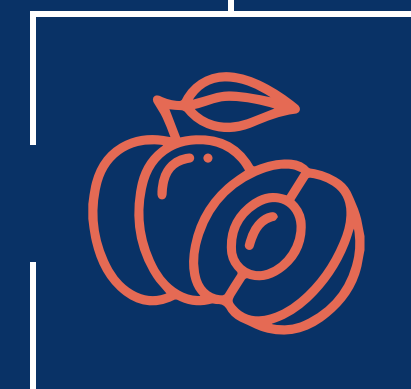
Pharmacist John Pemberton created Coca-Cola in Atlanta in 1886.



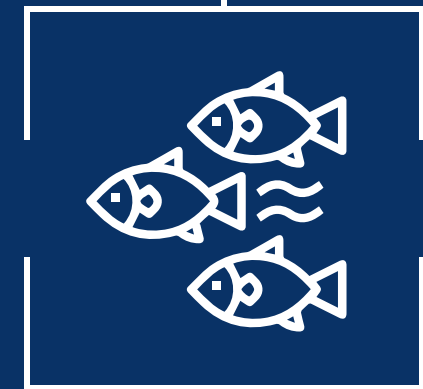
Atlanta is known as a "city in a forest" because 36% of the city is covered in trees.



Atlanta, Georgia is known as the "cradle of the Civil Rights Movement" because it was a focal point from 1940 to 1970. It's also the birthplace of Martin Luther King, Jr.



Peachtree - Atlanta has more than 71 roads with "Peachtree" in the name, including Peachtree Avenue and Peachtree Plaza. Oddly enough, there is only one Peachtree Street!



The Georgia Aquarium is the largest aquarium in the world, with more than 11 million gallons of water!

GUEST KEYNOTE

Jason Dorsey

Jason Dorsey is a generations and behavioral researcher and speaker. He has led pioneering generational research on four continents in multiple languages and has been featured in the New York Times, Forbes, TIME, and NPR among others.

"Generations are not boxes. Instead, they are powerful clues that help us better understand, connect with, build trust, and influence people of different ages."

Generational behaviors, differences, change, and emerging trends are transforming our world.

This is true with Gen Z, Millennials, Gen X, and Baby Boomers. Jason and The Center for Generational Kinetics have led more than 120 generational research studies. They are on a mission to separate generational myth from truth through research. Every generation brings value and that, together, we can unlock the potential of every generation.



ELEVATE 2025 provides nonstop opportunities for continuing education, both on industry hot topics and PowerPlan's latest innovations.

An education sampling is included below!

Did you know? 50 of our breakout sessions offer the chance to earn CPE credits! Sessions marked with  are CPE eligible.

Case Study: TFA Adoption Ahead of an ERP Transformation

Transitioning to PowerPlan's Tax Fixed Assets (TFA) solution can seem daunting amidst competing organizational priorities. Join us to hear how one of the country's largest utilities successfully migrated to TFA on an accelerated timeline, all while preparing for an ERP transformation. Discover the strategies and insights that made this rapid transition possible.

ERP Transformation Demystified: Case Studies & Q&A Session

Join us to hear key learnings from our customers' ERP transformations, including questions you should be asking before starting one at your organization. We'll also have an open Q&A session with the audience to discuss your most burning concerns around how to be successful with an ERP transformation.

Case Study: Adopting FERC 898 - Lessons Learned from Dozens of Customers

Attend this session to hear how PowerPlan prepared and helped organize the customers' initiative for compliance, with key challenges faced and lessons learned.

Income Tax Fundamentals

This series of breakout sessions provides the opportunity to develop skills and understanding of basic concepts and general configuration of PowerPlan's tax modules, including Tax Deferred, Tax Depreciation, Provision, and Tax Repairs.

Accounting Fundamentals

This series of breakout sessions takes a deep dive into PowerPlan's various accounting modules. You'll have an opportunity to learn about new accounting functionality, CWIP and CCNC Backlog Analysis, peek "under the hood" at Asset Depreciation calculations, and more!

Roundtable Sessions

ELEVATE 2025 features a variety of panel discussions with PowerPlan, industry and customer experts to discuss today's hot topics. Roundtable themes include:

- » Accounting for Regulatory Needs
- » AI's Impact on Accounting, Tax and IT
- » Cloud Adoption
- » ERP Transformation
- » Evolving Workforce
- » Income Tax
- » Projects & Budgets
- » Women in Energy Leaders Panel



ELEVATE 2025 provides ample opportunity to enhance your knowledge on key tax issues.

Below is a sampling of the breakout sessions available to attendees.

Tax Talks

Unleashing Your Strategy for 2025

Next Generation Provision Preview

TFA is changing the game for Tax departments across the energy sector. In this session you will experience a preview of PowerPlan's next-generation Provision solution, which, like TFA, builds on the strengths of our classic product while adding a modern user experience, streamlined workflows, time-saving data validations, and curated insights to surface vital information quickly.

Modernizing and Supporting the Tax Department in the Face of Organizational Change

Looking for ways to modernize your tax department? Hear from a PowerPlan Tax Fixed Assets (TFA) customer on how their migration to the next-generation solution is working to support their organizational goals and stay ahead of change.

Migrating from PowerTax to the New Tax Fixed Assets Solution

PowerPlan has standardized the transition from PowerTax to our next generation solution, Tax Fixed Assets (TFA). Join us to learn about the data migration process and discover how TFA enhances usability and processing confidence. Find out what steps you can take today to streamline this future transition.

ITC & PTC

The IRA Act of 2022 provided Investment and Production Tax Credits for renewable energy projects, and proposed regulations provided in 2024 helped businesses better understand how they can effectively utilize these credits in their tax strategy. In this session, we'll discuss what PowerPlan is seeing in the industry and how our software can effectively assist in the tracking and calculation of these credits in Provision, PowerTax, and Tax Fixed Assets.

Your opportunities for learning continue with content related to many other topics.

Keep reading for a preview of additional breakout sessions.

Additional Areas of Focus

Accounting

Service Company Projects or Joint Owned Assets - Simplify Accounting with Work Order Allocations and Unitization

Anticipating key business functionality ahead of an ERP transformation is of special importance to any entity that is considering a future transformational effort.

Powerplan Connect™

Getting the Most Out of WPA

Learn how your industry peers are improving their practices with PowerPlan's Workflow Process Automation (WPA) solution. Learn how they are improving accounting process cycle times, increasing transparency, automating repetitive tasks, simplifying audits and more.

Lease

Understanding Functionality to Assist with Ongoing Lease Compliance

Despite adoption being in the rearview mirror, maintaining compliance is still top of mind. In this session, we will break down recent improvements to the solution to aid in the continued maintenance and accounting of your leased asset portfolios.

Regulatory

Preparing for SAP S4 Transformation

Organizations are transitioning to SAP S4, and there are many considerations that need to be considered. We will provide best practices to prepare for a transformation based on our experience in many successful transitions, including an overview of deploying the PowerPlan S4 Hana adapter (Adapter 101).

Hands On Sessions

You asked, and we listened! ELEVATE 2025 offers opportunities to get into the products and work with PowerPlan experts by your side.



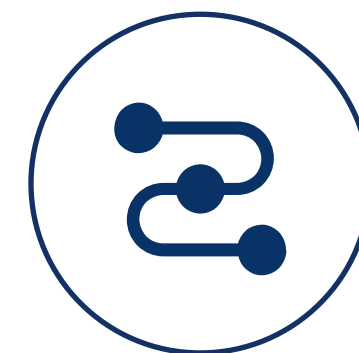
Property Tax Collaboration Room

It's the property tax busy season, and you're in the trenches. Join us in the Collaboration Room where PowerPlan Professional Services and Support experts will offer one-on-one guidance for your most pressing questions.



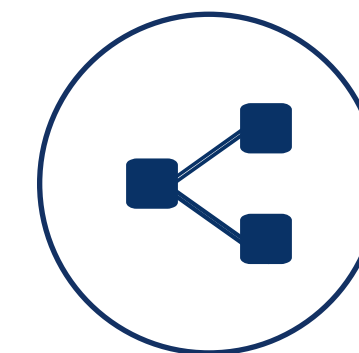
Tax Fixed Assets

Bring your own device to get hands-on experience with our next-generation Tax Fixed Assets solution.



Workflow Process Automation

Participate in this hands-on session to experience for yourself the ease of adding system controls and automation to your PowerPlan processes.



Data Hub

Participate in this hands-on experience to use Data Hub accounting libraries to build some of the high-value dashboards that can help you focus on optimizing data use across your organization.

CONFERENCE

Networking

Join us for a night under the sea!

Celebrate ELEVATE 2025 with dinner and drinks at the Georgia Aquarium. Our exclusive access includes after-hours tours of the venue, showcasing Atlanta's famous whale sharks, African penguins, and beluga whales. This is an event you won't want to miss!





ELEVATE 2025

REGISTER NOW ►