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# *Public Utility Commission of Texas*

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## **Memorandum**

**TO:** Interested Parties

**FROM:** Heidi Graham, Infrastructure Division

**DATE:** March 2, 2022

**RE: Project No. 49818, List of Experts Qualified to Conduct Economic Valuations under Texas Water Code § 13.305 and 16 Texas Administrative Code § 24.238(c)**

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Texas Water Code § 13.305(b) and the Commission's associated rule, 16 Texas Administrative Code § 24.238(c), require the Commission to maintain a list of utility valuation experts qualified to determine the fair market value of a selling utility or the facilities to be sold for which the Commission has received notice under those statutory and rule sections. The current list is contained in the following table:

No.	Name	Address	Phone	Email
1	Zak Wright	NewGen Strategies & Solutions 112 Westwood Pl, Ste 165 Brentwood, TN 370271	O: (615) 645-4846 M: (615) 477-6737	<a href="mailto:zwright@newgenstrategies.net">zwright@newgenstrategies.net</a>
2	Grant Rabon	NewGen Strategies & Solutions 8140 North Mopac Expressway Ste 1-240 Austin, TX 78759	O: (512) 900-8232 M: (512) 565-0123	<a href="mailto:grabon@newgenstrategies.net">grabon@newgenstrategies.net</a>
3	Michael Lane	NewGen Strategies & Solutions 112 Westwood Place, Ste 165 Brentwood, TN 37027	O: (615) 970-7875 M: (615) 218-1509	<a href="mailto:mlane@newgenstrategies.net">mlane@newgenstrategies.net</a>
4	Nancy Heller Hughes	NewGen Strategies & Solutions 20014 SE 19th St Sammamish, WA 98075	O: (425) 605-5332 M: (425) 922-2287	<a href="mailto:nhughes@newgenstrategies.net">nhughes@newgenstrategies.net</a>
5	Bret Fenner	B&D Environmental 200 Harbor Circle Georgetown, Texas 78633	(512) 917-7541	<a href="mailto:bretfenner@yahoo.com">bretfenner@yahoo.com</a>
6	Kyle Schroeder	Texas Values (Appraisal Services) 500 6th St San Antonio, TX 78215	(210) 545-1533	<a href="mailto:kyle@texasvalues.com">kyle@texasvalues.com</a>

No.	Name	Address	Phone	Email
7	Arthur L. Schwertz	Valbridge Property Advisors 2030 Dickory Ave, Ste 200 New Orleans, LA 70123	(504) 541-5101	<a href="mailto:aschwertz@valbridge.com">aschwertz@valbridge.com</a>
8	Robbie Wilson	Advance Appraisal Group 13901 Midway Rd, Ste 102-210 Dallas, TX 75244	(469) 569-3595	<a href="mailto:rwilson@advanceappraisalgroup.com">rwilson@advanceappraisalgroup.com</a>
9	Joseph Batis	Utility Valuation Experts, Inc. 313 N Chicago St Joliet, IL 60432	(888) 416-3797	<a href="mailto:joe@utilityvaluationexperts.com">joe@utilityvaluationexperts.com</a>
10	Anthony Festa	Cushman & Wakefield of New Jersey, LLC One Meadowlands Plaza, 7 <sup>th</sup> Flr. East Rutherford, NJ 07073	O: (201) 508-5271 M: (201) 803-0702	<a href="mailto:anthony.festa@cushwake.com">anthony.festa@cushwake.com</a>
11	J. Fernando Sosa	Cushman & Wakefield, Inc. 225 W Wacker Rd, Ste 2800 Chicago, IL 60606	(312) 338-7852 M: (310) 508-6524	<a href="mailto:fernando.sosa@cushwake.com">fernando.sosa@cushwake.com</a>
12	Gregory E. Scheig	Vantage Point Advisors, Inc. 180 State St, Ste 225 Southlake, TX 76092	(214) 254-4801	<a href="mailto:gscheig@vpadvisors.com">gscheig@vpadvisors.com</a>
13	Steven McDonald	Raftelis 341 N Maitland Ave, Ste 300 Maitland, FL 32751	(407) 961-6705	<a href="mailto:smcdonald@raftelis.com">smcdonald@raftelis.com</a>
14	John Mastracchio	Raftelis 40 British American Blvd, 2nd Flr Latham, NY 12110	(518) 391-8944 O: (407) 961-6705 M: (407) 450-5545	<a href="mailto:jmastracchio@raftclis.com">jmastracchio@raftclis.com</a>
15	Dylan D'Ascendis	ScottMadden, Inc. 1900 West Park Dr, Ste 250 Westborough, MA 01581	(609) 680-8695	<a href="mailto:ddascendis@scottmadden.com">ddascendis@scottmadden.com</a>
16	Matthew Howard	ScottMadden, Inc. 1900 West Park Dr, Ste 250 Westborough, MA 01581	(508) 202-7924 (847) 732-4714	<a href="mailto:mhoward@scottmadden.com">mhoward@scottmadden.com</a>
17	Gerald C. Hartman	Hartman Consultants, LLC 637 North Park Ave Winter Park, FL 32789	(407) 341-0970 Fax (407) 909-9882	<a href="mailto:gerry@hartmanconsultant.com">gerry@hartmanconsultant.com</a>