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Public Utility Commission of Texas

Memorandum

TO: Interested Parties

FROM: Joseph Cooper, Infrastructure Division

DATE: May 22, 2025

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)**

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 49 Music Square West, Suite 505 Nashville, TN 37203	O: (615) 645-4846 M: (615) 477-6737	zwright@newgenstrategies.net
2	Grant Rabon	NewGen Strategies & Solutions 8140 North Mopac Expressway, Suite 1-240 Austin, TX 78759	O: (512) 900-8232 M: (512) 565-0123	grabon@newgenstrategies.net
3	Michael Lane	NewGen Strategies & Solutions 49 Music Square West, Suite 505 Nashville, TN 37203	O: (615) 970-7875 M: (615) 218-1509	mlane@newgenstrategies.net
4	Nancy Heller Hughes	NewGen Strategies & Solutions 20014 SE 19th St Sammamish, WA 98075	O: (425) 605-5332 M: (425) 922-2287	nhughes@newgenstrategies.net
5	Bret Fenner	B&D Environmental 200 Harbor Circle Georgetown, Texas 78633	(512) 917-7541	bretfenner@yahoo.com
6	Kyle Schroeder	Texas Values (Appraisal Services) 500 6th St San Antonio, TX 78215	O: (210) 545-1533 M: (512) 557-3837	kyle@texasvalues.com

No.	Name	Address	Phone	Email
7	Arthur L. Schwartz	Valbridge Property Advisors 2030 Dickory Ave, Ste 200 New Orleans, LA 70123	O: (504) 541-5101 M: (504) 460-6440	aschwartz@valbridge.com
8	Robbie Wilson	Advance Appraisal Group 13901 Midway Rd, Ste 102-210 Dallas, TX 75244	(469) 569-3595	rwilson@advanceappraisalgroup.com
9	Joseph Batis	Utility Valuation Experts, Inc. 313 N Chicago St Joliet, IL 60432	O: (888) 416-3797 M: (815) 545-7197	joe@utilityvaluationexperts.com
10	Anthony Festa	Marshall & Stevens Inc. 350 5 th Avenue, Suite 4100 New York, NY 10118	O: (212) 575-2487 M: (201) 803-0702	afesta@marshall-stevens.com
11	J. Fernando Sosa	Marshall & Stevens, Inc. 125 S. Wacker Drive, Suite 850 Chicago, IL 60606	(312) 964-4718 M: (310) 508-6524	fsosa@marshall-stevens.com
12	Gregory E. Schcig	Stout 2200 Ross Avenue, 46th Floor Dallas, TX 75201	O: (214) 254-4801 M: (214) 336-5097	gschcig@stout.com
13	Steven McDonald	Raffelis 341 N Maitland Ave, Ste 300 Maitland, FL 32751	O: (407) 961-6705 M: (407) 450-5545	smcdonald@raffelis.com
14	John Mastracchio	Raffelis 40 British American Blvd, 2nd Flr Latham, NY 12110	O: (518) 391-8944	jmastracchio@raffelis.com
15	Dylan D'Ascendis	ScottMadden, Inc. 1900 West Park Dr, Ste 250 Westborough, MA 01581	O: (215) 463-2019 M: (609) 680-8695	dlascendis@scottmadden.com
16	Matthew Howard	ScottMadden, Inc. 1900 West Park Dr, Ste 250 Westborough, MA 01581	O: (508) 202-7924 M: (847) 732-4714	mhoward@scottmadden.com
17	Gerald C. Hartman	Hartman Consultants, LLC 637 North Park Ave Winter Park, FL 32789	(407) 341-0970	gerry@hartmanconsultant.com
18	Lee Dorf	Cushman & Wakefield of Pennsylvania, Inc. 1650 Market Street, 48th Floor Philadelphia, PA 19103	(215) 963-4097	Lee.Dorf@cushwake.com
19	Kevin Zanni	Miller Cooper & Co., Ltd. 1751 Lake Cook Road, Suite 400 Deerfield, IL 60015	O: (847) 205-5000 M: (847) 400-9306	kzanni@millercooper.com

No.	Name	Address	Phone	Email
20	Scott Pemberton	Stout 2200 Ross Avenue, 46 th floor Dallas, TX 75201	O: (214) 389-3483 M: (214) 288-8218	spemberton@stout.com
21	Mark Rodriguez	MR Valuation Consulting, LLC 5 Professional Circle, Suite 208 Colts Neck, NJ 07722	O: (732) 780-6000 M: (732) 780-6010	MRodriguez@MRValuation.com
22	Scott McMahon	MR Valuation Consulting, LLC 5 Professional Circle, Suite 208 Colts Neck, NJ 07722	O: (732) 780-6000 M: (732) 780-6007	SMcMahon@MRValuation.com
23	Diana Ting	Raffelis 227 W. Trade Street, Suite 1400 Charlotte, NC 28202	M: (407) 640-4494	dting@raffelis.com
24	Karsten Greil	CBRE Valuation & Advisory Service Grp. 2100 McKinney Avenue, Suite 700 Dallas, TX 75201	M: (469) 226-1112	Karsten.greil@cbre.com