



WEBBER
RESEARCH | ADVISORY

Strategic Advisory & Technical Consulting

Energy & Utility Infrastructure • Renewables • LNG • EPC Risks

Unparalleled Insight. Comprehensive Solutions.



We Speak Your Language

Webber R|A integrates finance, risk, technology, engineering, & capital project execution into a comprehensive strategy to mitigate risk & increase stakeholder value.

We separate our consulting services into two distinct practices: **W|EPC** Technical Consulting, & Strategic Advisory through **Armistead Street Partners**.

Each practice leverages our extensive expertise across the entire energy supply chain, with a deep understanding of commercial, technical and financial dynamics putting us in position to add unique insight, context, and clarity for our clients.

Whether it's long-term due diligence on hard asset investments, independent engineering services, bespoke valuations, fairness opinions, or corporate & strategic consulting, our unique position in the market – **sitting at the nexus of Energy, Industrials, & Renewables** – gives us a valuable and unique perspective.

**Strategic
Consulting &
Advisory**

The diagram features three white-outlined hexagons on a dark blue background. The first hexagon is on the left and contains the text 'Strategic Consulting & Advisory'. It is connected to a second hexagon on the right by a horizontal line. The second hexagon contains the text 'Energy Engineering'. Below the second hexagon is a third hexagon, connected to it by a vertical line. This third hexagon contains the text 'Investment Due Diligence'.

**Energy
Engineering**

**Investment
Due Diligence**



ARMISTEAD STREET PARTNERS

Armistead Street Partners provides Strategic Consulting & Advisory services for institutional investors, corporates, project developers, private equity, and family offices. We focus on providing unparalleled results for our clients across the Renewables, Hydrogen, LNG & Energy Infrastructure, & Marine industries.



Strategic Consulting & Advisory Services



We are committed to adding value through a mosaic of context, insight, thought leadership, hard work, and diligence – creating unparalleled results and tailored, bespoke solutions for our consulting clients. **Our Services Include:**

- Strategic Consulting & Advisory Services
- Capital Connections & Private M&A
- Emerging Energy Tech Screening & Sourcing
- Investment Due Diligence
- PE & Family Office Consulting
- Bespoke Valuations, Fairness Opinions





Consulting

Our consultants use our deep reservoir of experience, unique perspective, and our proprietary project database to ramp up quickly and provide thoughtful solutions – saving our clients both time and money.



Clean Energy Transition

We passionately support the transition to a low-carbon global energy mix, providing solutions for H2 & Renewable Projects, Carbon Capture, LNG & Energy Infrastructure, and Transportation & Logistics.



Hydrogen

We develop H2 production, midstream, and application strategies, including a focus on methanol and ammonia.



Project Management

Our teams have engineering, project, & construction management experience with an intense focus on developing risk mitigation strategies to successfully meet project goals.



Procurement & Contracts

Having materials/subcontracts on site per the schedule sets the project up for success. Our contract managers support clients from a single, stand-alone purchase order up to multi-billion dollar EPC contracts.



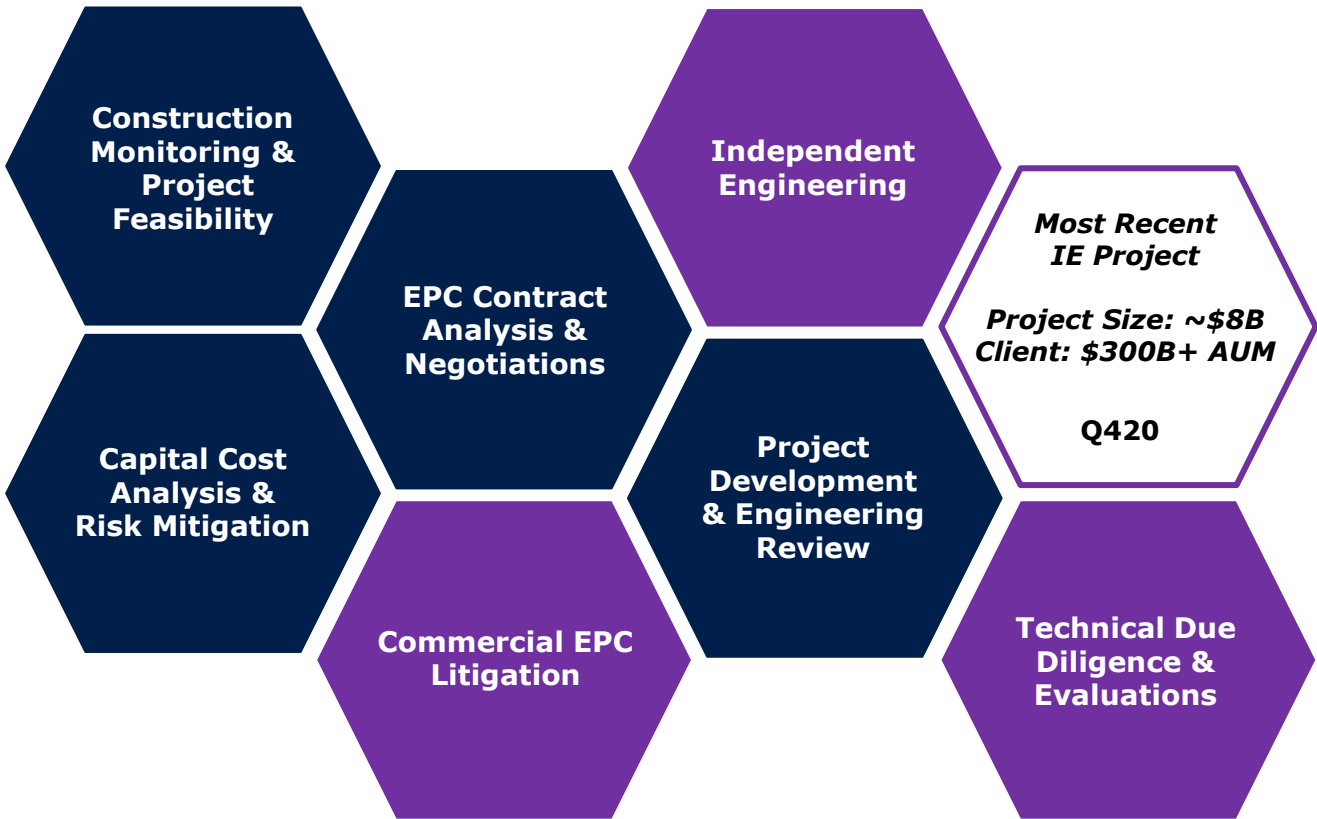
Project Controls

The foundation of any project is a cost & quantity loaded schedule, highlighting the critical path while integrating risk management strategies. Our teams use Primavera P6 & 4D Scheduling.

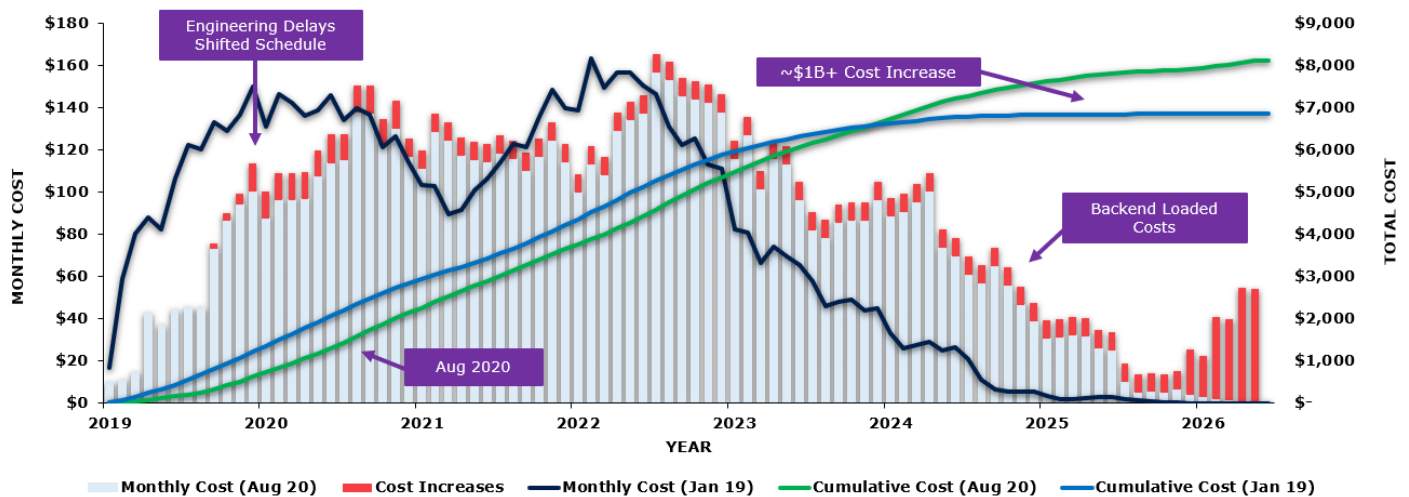


Independent Engineers That Speak Your Language

W|EPC’s team members technical and project consulting services have been used to support more than \$30B of committed capital. Our core strengths include:

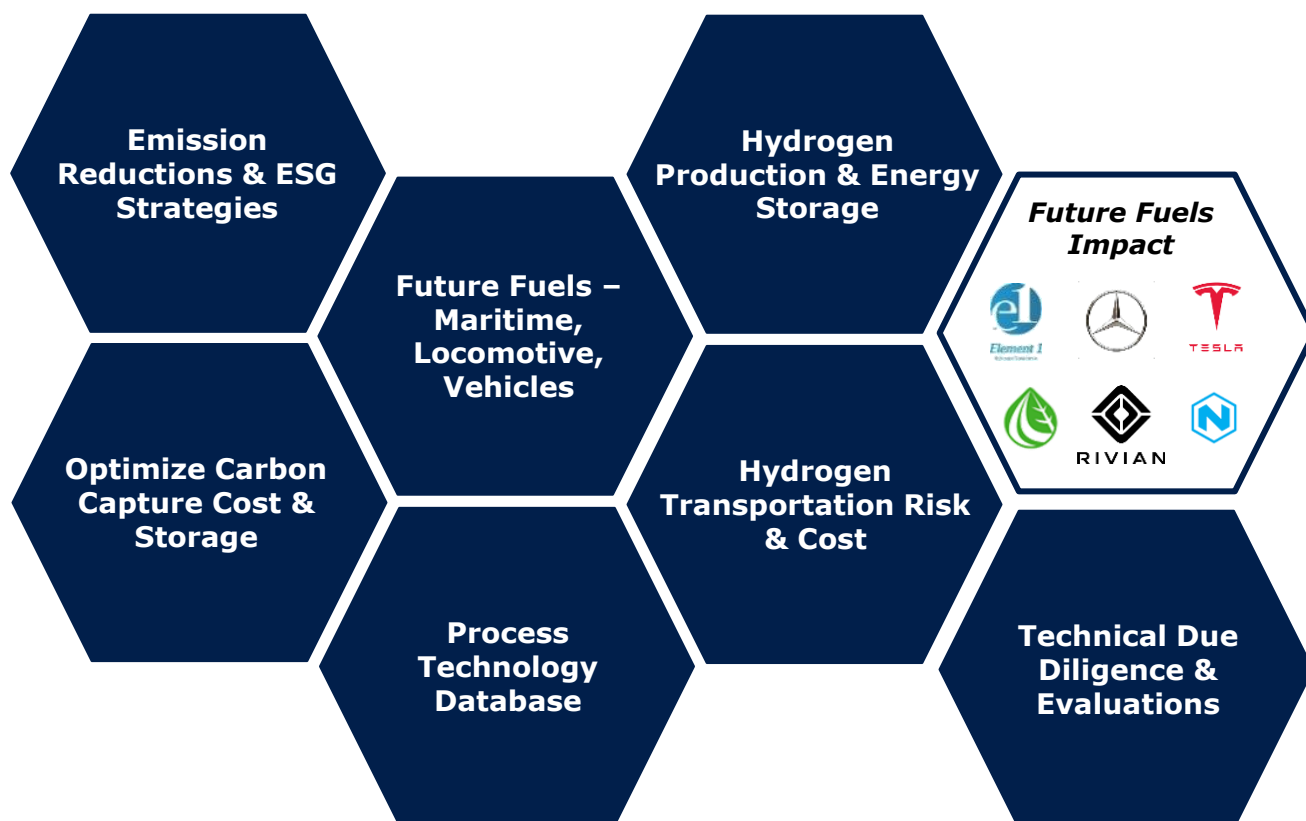


Protect Balance Sheets With W|EPC’s Cost & Schedule Forecasting

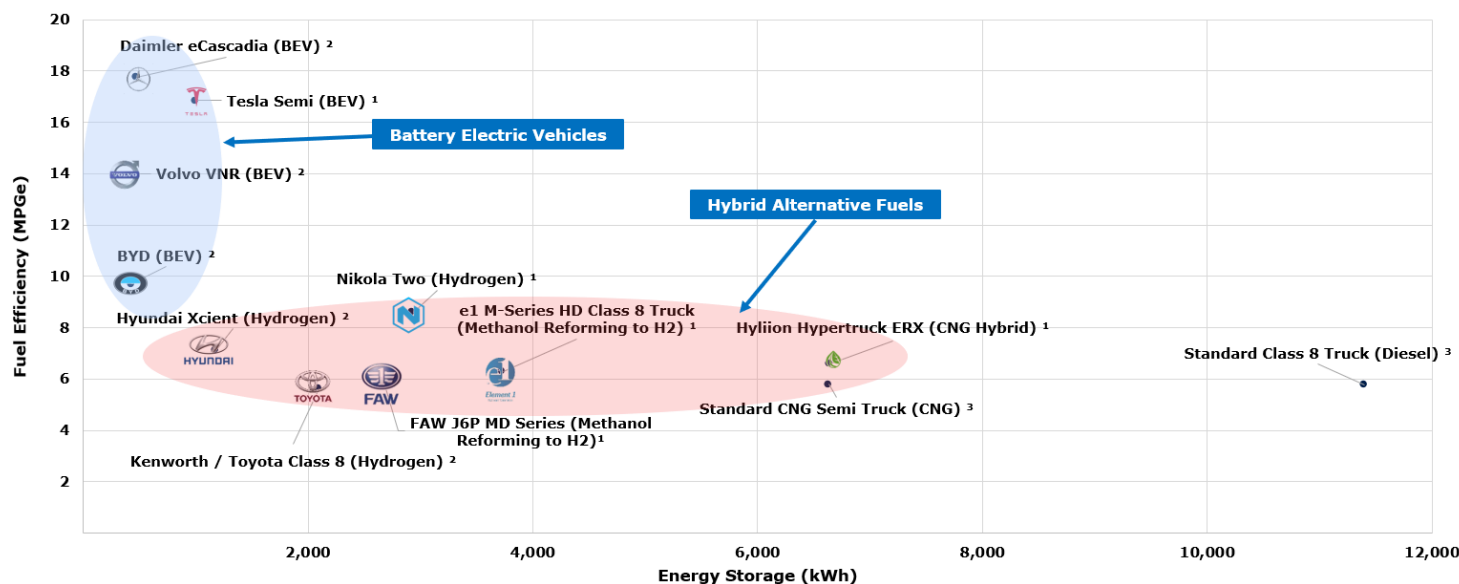


The Leading Edge Of Clean Energy Transition

Webber R|A simplifies complex risks & identifies opportunities related to the transition to lower emission fuels & down stream market impact (i.e., vehicles, marine, locomotive, etc.).



An Analytical & Comprehensive Approach To Alternative Fuels





Trusted Clients & Partners:



Disclaimer: COPYRIGHT AND DISCLAIMER FOR USE OF © Webber Research & Advisory, LLC Clients only. No portion of this report may be produced, reused, or otherwise distributed in any form without the prior written consent or as further outlined in your subscription agreement between client and Webber Research & Advisory, LLC. The information and analysis contained herein is generated from public sources considered reliable, but the accuracy and completeness are not warranted. The opinions and analyses below are for informational purposes only. Webber Research & Advisory, LLC is not responsible nor liable for any errors, omission, loss, damage, or expenses associated with reliance on the information.

Pricing & Engagement Overview

Technical Consulting



Renewable Tech Screening & Diligence: Quarterly retainers & bespoke engagements

Technical Project Due Diligence: Quarterly retainers and bespoke engagements

Please contact:

Walter Lobo: Walter.lobo@webberresearch.com

Eric Smith: Eric.smith@webberresearch.com

Webberresearch.com

Strategic Consulting & Advisory



Armistead Street Partners: Bespoke engagements

Please contact:

Michael Webber: Mike@armisteadstreet.com

Greg Wasikowski: Greg@armisteadstreet.com

Armisteadstreet.com





WEBBER
RESEARCH | ADVISORY



Key Team Members



Mike Webber, Managing Partner

Michael.Webber@webberresearch.com – (646) 993-0693

Mike co-founded Armistead Street Partners and Webber Research & Advisory in 2019, before which he spent 15-years in finance and equity research roles covering Renewables, LNG & Energy Infrastructure, Shipping, & Transportation at Wells Fargo & Deutsche Bank. Mike was Institutional Investor's #1 ranked LNG & Shipping Analyst for 5 consecutive years (2015, 2016, 2017, 2018, 2019). Mike finished as runner-up in 2020, while guiding Webber Research to become the only new U.S. research firm to receive ranked recognition in any sector.



Greg Wasikowski, Associate Partner

Greg.Wasikowski@webberresearch.com – (646) 993-0694

Greg co-founded Armistead Street Partners and Webber Research & Advisory in 2019, and leads the equity team for renewables & clean energy. Greg was a senior member of the #1 I.I. ranked Wells Fargo LNG, Shipping, & Equipment Leasing team from 2017-2019, prior to which he worked in Consulting for RSM US LLP.



Chris Tsung, Associate Analyst

Chris.Tsung@webberresearch.com – (646) 998-8920

Chris joined Webber Research & Advisory in 2019. Prior to joining Webber R|A, Chris was an AVP at DWS in Strategic Planning & Analysis for their Alternatives platform. Prior to that, Chris spent 6-years at Deutsche Bank in their private equity group as a key member of the investment management team overseeing \$4.9B in AUM.



Robert Meaney, Director | Engineering & Technology

Robert.Meaney@webberresearch.com – (832) 368-8456

Robert Meaney has spent the past 12 years of his career in the Government Infrastructure and O&G markets executing \$30 billion in Capital Projects from conceptual design through construction with deep expertise in process technology, project analysis, & construction.

**Eric Smith, Director | Energy & EPC Risk Management**

Eric.Smith@webberresearch.com – (346) 337-7788

For the last 12+ years, Eric has focused his career in the EPC sector of the energy industry concentrating on large scale energy, LNG, and petrochemical projects. His experience includes leading the commercial efforts for petrochemical and LNG business lines for a global engineering and construction company, supporting the development of a Gulf Coast LNG liquefaction company, and negotiating commercial LNG sales agreements with global LNG buyers.

**Qamer Iqbal, Engineering Manager Carbon Capture**

Qamer.Iqbal@sentinelcorellc.com – (713) 499-9159

For the last 17 years, Qamer has focused his career in the Technology Development and Engineering sectors of the Energy Industry concentrating on large scale Refinery, Midstream and Petrochemical projects. Qamer has a leading expertise in Process Design & Technology, Project Management and for multiple global Engineering and Construction companies.

**Toni Su, Engineering Manager H2 Midstream & Emissions**

Toni.Su@sentinelcorellc.com – (713) 499-9159

Toni Su has over 10 years of experience as a senior technical advisor and project manager for upstream and midstream field operations. Specifically, Toni has designed, constructed, and operated facilities ranging from gas processing and treating (CO₂ and Sulphur) to storage and pipeline systems across gas, NGL, and crude commodities.

**Dr. Bruno Cateni, Process Engineering | H2 & Ammonia**

Bruno.Cateni@sentinelcorellc.com – (832) 312-6820

Dr. Cateni has more than 25 years of work experience in downstream and midstream Energy Chemicals, Refining, O&G. His duties have included leadership and engineering support roles in all phases of projects, from conceptual design to detailed engineering and commissioning ISBL and OSBL, capital investment planning, project management, resource planning and financial justification for large scale engineering projects.





Brent Knapton, Project Engineering Manager

Brent.Knapton@sentinelcorellc.com – (832) 741-7141

Brent Knapton has more than 30 years of experience in the energy industry managing projects, leading large resource teams and innovating tools and systems to increase efficiency and productivity. He holds a patent entitled “Energy Recovery from Waste Heat Sources” and has managed diverse technical teams in the roles of Project Engineering Manager, Engineering Manager and Lead Engineer.



Walter Lobo, Director of Institutional Sales

Walter.Lobo@webberresearch.com – (646) 767-6425

Walter Lobo joined Webber Research in September 2020 as Director of Institutional Sales. From 2007 to 2017 Mr. Lobo was a Director of Institutional Sales at Wells Fargo Securities. While at Wells Fargo he managed a diverse book of institutional clients in Europe, New York and the Midwest.

Disclaimer: COPYRIGHT AND DISCLAIMER FOR USE OF © Webber Research & Advisory, LLC Clients only. No portion of this report may be produced, reused, or otherwise distributed in any form without the prior written consent or as further outlined in your subscription agreement between client and Webber Research & Advisory, LLC. The information and analysis contained herein is generated from public sources considered reliable, but the accuracy and completeness are not warranted. The opinions and analyses below are for informational purposes only. Webber Research & Advisory, LLC is not responsible nor liable for any errors, omission, loss, damage, or expenses associated with reliance on the information.

