

The Casey Research Energy & Special Situations Summit

Westin Tabor Center, Denver
September 18 - 20, 2009

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Energy & Special
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AGENDA

Schedule as of September 10, 2009 (Subject to change)

Friday, September 18, 2009

- 2:00 pm – 6:00 pm..... **Meet the Map Room**
Hear the latest developments from the select companies asked to present in this Summit's Map Room, most of whom are currently being followed in a Casey Research service. This unique session allows you to hear a quick overview from each company and take notes for follow up one-on-one over the course of the Summit.
- 3:00 pm **Registration Open**
- 6:00 pm **Cocktail Reception in the Map Room**

Saturday, September 19, 2009

- 7:30 am **Registration Open, Continental Breakfast** - Map Room
- 8:30 am – 8:45 am..... **Welcome, Speaker Introductions**
Marin Katusa
- 8:45 am – 9:15 am..... **Energy Investing: A Portfolio Approach**
Rick Rule
- 9:15 am – 9:55 am..... **Getting Real with Geothermal**
Ross Beaty
- 9:55 am – 10:25 am..... **Special Situation: How to Play Potash**
Paul Matysek
- 10:25 am – 10:55 am... **Refreshment Break** - Map Room
- 10:55 am – 11:25 am... **Tapping into North American Oil**
Keith Hill
- 11:25 am – 11:55 am... **What's Next for Uranium**
Ron Hochstein
- 11:55 am – 12:35 pm... **Energy, a Global Perspective**
Rick Rule & Lukas Lundin
- 12:35 pm – 1:05 pm..... **Questions & Recommendations**
Marin and the morning's panelists
- 1:05 pm – 2:00 pm..... **Lunch** - sponsored by RMB Group - Map Room
- 2:00 pm – 2:40 pm..... **What You Need to Know About Natural Gas**
Dr. Marc Bustin

(continues)

- 2:40 pm – 3:00 pm..... **Outlook for Canadian Oil Sands**
Marin Katusa
- 3:00 pm – 3:30 pm..... **Opportunities in Lithium**
Louis James
- 3:30 pm – 3:45 pm..... **Stretch Break**
- 3:45 pm – 4:20 pm..... **The Politics of Energy**
Doug Casey
- 4:20 pm – 4:50 pm..... **Special Situation: Rare Earths**
Clint Cox
- 4:50 pm – 5:45 pm..... **Questions & Recommendations, Day One**
Marin Katusa & Panelists
- 5:45 pm – 7:00 pm..... **Break, Cash Bar - Map Room**
- 7:00 pm – 7:45 pm..... **Reception - Map Room**
- 7:45 pm – 9:45 pm..... **Banquet - Introductory Remarks** by Amir Adnani, President, Uranium Energy Corp., **Keynote Speaker** - Dr. Marc Faber: **Could Expansionary Monetary Policies and Large Deficits Lead to High Inflation Rates?**

Sunday, September 20, 2009

- 7:30 am..... **Registration Open, Continental Breakfast - Map Room**
- 8:30 am – 9:10 am..... **Green Energy: What Works, What Doesn't**
Adrian Veidt
- 9:10 am – 9:40 am..... **Spotlight on Solar**
Harry Fleming
- 9:40 am – 10:10 am..... **Investing in Run of River**
Miles Thompson
- 10:10 am – 10:40 am... **Questions & Recommendations**
Marin and the morning's panelists
- 10:40 am – 11:10 am... **Refreshment Break - Map Room**
- 11:10 am – 11:40 am... **Reality Check on Coal**
Dr. Marc Bustin
- 11:40 am – 12:10 pm... **Global Energy Supply/Demand**
Frank Holmes
- 12:10 pm – 12:40 pm... **Using Options to Hunt Big Gains in Energy, Carefully**
Dave Hightower
- 12:40 pm – 1:40 pm..... **Lunch Break - Map Room**
- 1:40 pm – 2:10 pm..... **What's Next for Real Estate**
Andy Miller
- 2:10 pm – 2:40 pm..... **Global Royalty Plays**
Joe Hung
- 2:40 pm – 3:40 pm..... **Energy Investment Roundtable**
Marin Katusa, Rick Rule, Ben Johnson, Frank Holmes, Dave Hightower, Adrian Veidt, Bob Bishop and Louis James
- 3:40 pm – 4:30 pm..... **Questions and Summit Recap**