



CAPITAL LINK'S

**2nd Annual
Master Limited Partnership
Investing Forum**

Thursday, March 5, 2015 - New York City



LEAD SPONSORS



7:00 AM – 7:55 AM		REGISTRATION	
MORNING SESSION			
WEST LOUNGE – 1 ST FLOOR			LIBRARY – 2 ND FLOOR
7:55 AM – 8:00 AM	Welcome Remarks	Nicolas Bornozis, <i>President</i> – Capital Link, Inc.	
OPENING KEYNOTE ADDRESS			
8:00 AM – 8:20 AM	“The State of the MLP Sector 2015”	Jim Baker, <i>Executive Vice President, Publicly Traded Funds; Senior Managing Director</i> - Kayne Anderson Capital Advisors, LP	
INDUSTRY PANELS			LIBRARY – 2 ND FLOOR MLP PRESENTATIONS
8:25 AM – 9:00 AM	Tax/Legislation/ Regulatory Panel <i>Legal & Regulatory Developments</i>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> Edward Horton, <i>Partner</i> – Seward & Kissel LLP <p><u>Panelists:</u></p> <ul style="list-style-type: none"> Timothy Urban, <i>Washington Council</i> – EY Mary S. Lyman, <i>Executive Director</i> – National Association of Publicly Traded Partnerships Paul Blank, <i>Managing Director, Strategy/Public Affairs</i> - Kayne Anderson Capital Advisors, LP Gregory M. Bopp, <i>Partner</i> - Bracewell & Giuliani LLP 	SEE SCHEDULE BELOW
SPANNING THE ENERGY VALUE CHAIN – Sector Panels			MLP PRESENTATIONS
9:00 AM – 9:40 AM	Upstream Panel – Exploration & Production <i>Developments, Trends & Sector Outlook</i>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> Nathan Judge, <i>Managing Director, MLPs & Energy Infrastructure</i> – Janney Montgomery Scott <p><u>Panelists:</u></p> <ul style="list-style-type: none"> Richard Robert, <i>EVP & CFO</i> – Vanguard Natural Resources LLC (NASDAQ:VNR) Robert L. Stillwell, Jr., <i>VP & CFO</i> – Memorial Production Partners LP (NASDAQ:MEMP) Michael Peterson, <i>Vice President & CFO</i> – Mid-Con Energy Partners LP (NASDAQ:MCEP) Clay P. Jeansonne, <i>Vice President – Investor & Public Relations</i> - LINN Energy LLC (NASDAQ:LINE) Daniel Spears, <i>Partner & Portfolio Manager</i> – Cushing Asset Management 	SEE SCHEDULE BELOW

<p>9:40 AM – 10:20 AM</p>	<p>Midstream Panel – Gathering & Processing <i>Developments, Trends & Sector Outlook</i></p>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> • Bernie Colson, <i>Managing Director and Senior Analyst – Oppenheimer & Co. Inc.</i> <p><u>Panelists:</u></p> <ul style="list-style-type: none"> • David M. Khani, <i>CFO – CONE Midstream Partners LP (NYSE:CNNX)</i> • Ryan Smith, <i>Director of IR – Plains All American Pipeline L.P. (NYSE:PAA)</i> • Tim A. Knox, <i>President – CSI Compressco LP (NASDAQ:CCLP)</i> • Mandy Bush, <i>CFO – Marlin Midstream Partners LP (NASDAQ:FISH)</i> • Jay Hatfield, <i>President – Infrastructure Capital Advisors; Portfolio Manager – InfraCap MLP ETF</i> 	<p>SEE SCHEDULE BELOW</p>
<p>10:20 AM – 10:45 AM COFFEE BREAK</p>			
<p>10:50 AM – 11:30 AM</p>	<p>Midstream Panel – Pipelines Transportation & Storage <i>Developments, Trends & Sector Outlook</i></p>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> • Selman Akyol, <i>Managing Director – Stifel</i> <p><u>Panelists:</u></p> <ul style="list-style-type: none"> • Randy Crawford, <i>Chief Operating Officer – EQT Midstream Partners LP (NYSE:EQM)</i> • Mark A. Maki, <i>President – Enbridge Energy Partners LP (NYSE:EEP)</i> • Frederick Boutin, <i>CEO – TransMontaigne Partners LP (NYSE:TLP)</i> • Mike Krimbill, <i>CEO – NGL Energy Partners LP (NYSE:NGL)</i> • Tyler Rosenlicht, <i>Portfolio Manager – Cohen & Steers</i> 	<p>SEE SCHEDULE BELOW</p>
<p>11:30 AM – 12:10PM</p>	<p>Downstream Panel <i>Developments, Trends & Sector Outlook</i></p>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> • Ethan Bellamy, <i>Senior Research Analyst - RW Baird</i> <p><u>Panelists:</u></p> <ul style="list-style-type: none"> • Joe Topper, <i>CEO – CrossAmerica Partners LP (NYSE:CAPL)</i> • Taylor Hudson, <i>Managing Director, IR – Sprague Resources LP (NYSE:SRLP)</i> 	<p>SEE SCHEDULE BELOW</p>
<p>12:10 PM – 12:50 PM</p>	<p>LNG & Maritime Panel <i>Developments, Trends & Sector Outlook</i></p>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> • Matthew Phillips – <i>Clarksons Platou Securities</i> <p><u>Panelists:</u></p> <ul style="list-style-type: none"> • Andrew J. Orekar, <i>CEO – GasLog Partners LP (NYSE:GLOP)</i> • Tony Lauritzen, <i>CEO – Dynagas LNG Partners LP (NYSE:DLNG)</i> • Graham Robjohns, <i>CEO - Golar LNG Partners LP (NASDAQ:GMLP) & Seadrill Partners LLC (NYSE:SDLP)</i> • Richard Tyrrell, <i>CEO & CFO – Hoegh LNG Partners LP (NYSE:HMLP)</i> • Tyler Rosenlicht, <i>Portfolio Manager – Cohen & Steers</i> 	<p>SEE SCHEDULE BELOW</p>
<p>LUNHEON KEYNOTE ADDRESS</p>			

1:00 PM – 2:30 PM	KEYNOTE ADDRESS Kyri Loupis, <i>Managing Director of Head of Energy & Infrastructure Team</i> – Goldman Sachs Asset Management		
AFTERNOON SESSION			MLP PRESENTATIONS
2:45 PM – 3:45 PM	<p>MLP Closed End Funds & ETFs Panel</p> <p><i>The Investor Perspective</i></p>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> • Gary J. Wolfe, Partner – Seward & Kissel LLP <p><u>Panelists:</u></p> <ul style="list-style-type: none"> • Doug Bond, EVP, Portfolio Manager – Cohen & Steers • Matthew Cooper, Vice President, Portfolio Manager - Goldman Sachs Asset Management • Jim Baker, Executive Vice President, Publicly Traded Funds; Senior Managing Director - Kayne Anderson Capital Advisors, LP • Daniel Spears, Partner & Portfolio Manager – Cushing Asset Management • Matt Sallee, Managing Director and Portfolio Manager - Tortoise Capital Advisors • Jay Hatfield – President – Infrastructure Capital Advisors, Portfolio Manager – InfraCap MLP ETF 	SEE SCHEDULE BELOW
3:45 PM – 4:05 PM	<p>Real Property Infrastructure MLPs</p>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> • Michael Gyure, Senior Analyst – Janney Montgomery Scott <p><u>Panelists:</u></p> <ul style="list-style-type: none"> • George Doyle, CFO - Landmark Infrastructure (NASDAQ:LMRK) • Timothy Yost, CFO - StoneMor Partners LP (NYSE:STON) 	SEE SCHEDULE BELOW
4:05 PM – 4:45 PM	<p>Oilfield Services</p> <p><i>Developments, Trends & Sector Outlook</i></p>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> • Ethan Bellamy, Senior Research Analyst – RW Baird <p><u>Panelists:</u></p> <ul style="list-style-type: none"> • Peter C. Boylan III, Co-founder, President & CEO – Cypress Energy Partners LP (NYSE:CELP) • Robert Rasmus, Co-CEO – Hi-Crush Proppants LLC (NYSE:HCLP) • Rick Shearer, President & CEO – Emerge Energy Services LP (NYSE:EMES) • Kristian Kos, Chairman and CEO – New Source Energy Partners LP (NYSE:NSLP) 	SEE SCHEDULE BELOW

4:45 PM – 5:35 PM	Raising Capital for MLPs Capital Markets & Bank Financing	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> • Greg Matlock, <i>Partner/Principal – EY</i> <p><u>Panelists:</u></p> <ul style="list-style-type: none"> • Joseph Culley – <i>Co-Head of Investment Banking – Janney Montgomery Scott</i> • James Georgiow, <i>Managing Director – Stifel</i> • Frank Murphy, <i>Managing Director, Co-Head of Energy Group – RW Baird</i> • Nicholas Stillman – <i>Clarksons Platou Securities</i> • Charles H. Still, Jr., <i>Partner - Bracewell & Giuliani LLP</i> 	SEE SCHEDULE BELOW
5:35 PM – 6:15 PM	<p>Analyst Panel</p> <p><i>Analyst Perspective</i></p>	<p><u>Moderator:</u></p> <ul style="list-style-type: none"> • Matt Sallee, <i>Managing Director and Portfolio Manager - Tortoise Capital Advisors</i> <p><u>Panelists:</u></p> <ul style="list-style-type: none"> • Selman Akyol, <i>Managing Director - Stifel</i> • Ethan Bellamy, <i>Senior Research Analyst – RW Baird</i> • Bernie Colson, <i>Managing Director and Senior Analyst – Oppenheimer & Co. Inc.</i> • Nathan Judge, <i>Managing Director, MLPs & Energy Infrastructure – Janney Montgomery Scott</i> • Matthew Phillips – <i>Clarksons Platou Securities</i> 	SEE SCHEDULE BELOW
6:15 PM – 7:00 PM	COCKTAIL RECEPTION		

SEE BELOW FOR MLP PRESENTATION AGENDA

MLP PRESENTATIONS

Library – 2nd Floor

MIDSTREAM – GATHERING & PROCESSING

Introduced by: Bernie Colson, *Managing Director and Senior Analyst* – Oppenheimer & Co. Inc.

8:55 AM – 9:10 AM



David M. Khani, *CFO* - CONE Midstream Partners LP (NYSE:CNNX)

9:10 AM – 9:25 AM



Tim A. Knox, *President* - CSI Compressco LP (NASDAQ:CCLP)

MIDSTREAM – PIPELINES TRANSPORTATION & STORAGE

Introduced by: Selman Akyol, *Managing Director* - Stifel

9:25 AM – 9:40 AM



Mark A. Maki, *President* - Enbridge Energy Partners LP (NYSE:EEP)

9:40 AM – 9:55 AM



Frederick Boutin, *CEO* and Robert Fuller, *CFO* - TransMontaigne Partners LP (NYSE:TLP)

9:55 AM – 10:10 AM



Richard Robert, *EVP & CFO* - Vanguard Natural Resources LLC (NASDAQ:VNR)

10:10 AM – 10:25 AM



Mike Krimbill, *CEO* - NGL Energy Partners LP (NYSE:NGL)

DOWNSTREAM

Introduced by: Ethan Bellamy, *Senior Research Analyst* – RW Baird

10:40 AM – 10:55 AM



Joe Topper, *CEO* - CrossAmerica Partners LP (NYSE:CAPL)

10:55 AM – 11:10 AM



Taylor Hudson, *Managing Director, IR* - Sprague Resources LP (NYSE:SRLP)

UPSTREAM – EXPLORATION & PRODUCTION

Introduced by: Nathan Judge, *Managing Director, MLPs & Energy Infrastructure* – Janney Montgomery Scott

11:10 AM – 11:25 AM	 Eric D. Mullins, Co-Chief Executive Officer and Chairman - LRR Energy LP (NYSE:LRE)
11:25 AM – 11:40 AM	 William Scarff, President - Memorial Production Partners LP (NASDAQ:MEMP)
11:40 AM – 11:55 AM	 Michael Peterson, Vice President & CFO - Mid-Con Energy Partners LP (NASDAQ:MCEP)
11:55 AM – 12:10 PM	 Clay P. Jeansonne, Vice President – Investor & Public Relations - Linn Energy LP (NASDAQ:LINE)
<p align="center">REAL PROPERTY INFRASTRUCTURE MLPS Introduced by: Michael Gyure, Senior Analyst – Janney Montgomery Scott</p>	
12:10 PM – 12:25 PM	 Tim Brazy, CEO - Landmark Infrastructure (NASDAQ:LMRK)
<p align="center">1:00 PM – 2:40 PM LUNCH</p>	
<p align="center">MARINE TRANSPORTATION Introduced by: Matthew Phillips – Clarksons Platou Securities</p>	
3:45 PM – 4:00 PM	 Stratos Desypris, CFO - Navios Maritime Partners (NYSE:NMM)
4:00 PM – 4:15 PM	 Eri Tsironi, CFO - Navios Midstream Partners (NYSE:NAP)
4:15 PM – 4:30 PM	 Tony Lauritzen, CEO - Dynagas LNG Partners LP (NYSE:DLNG)
4:30 PM – 4:45 PM	  Graham Robjohns, CEO - Golar LNG Partners LP (NASDAQ:GMLP) & Seadrill Partners LLC (NYSE:SDLP)

OILFIELD SERVICES

Introduced by: Ethan Bellamy, Senior Research Analyst – RW Baird

5:00 PM – 5:15 PM



Rick Shearer, President & CEO - Emerge Energy Services LP (NYSE:EMES)

5:15 PM – 5:30 PM



Peter C. Boylan III, Co-founder, President & CEO and Les Austin, Vice President & CFO - Cypress Energy Partners LP (NYSE:CELP)