

From: Rickert, Annelise
Sent: Tue, 10 Jun 2025 16:32:21 +0000
To: Lamanna, Isabelle; Hebert, Ashley
Cc: McGregor, Ruby; Craig, Tom
Subject: RE: [EXTERNAL] RE: Duke Energy June Board of Director Meeting - Speaking Request
Attachments: Harry Board invite Wright_Letter 05.12.2025.pdf, Sec. Chris Wright_Event Request Form COMPLETE.docx

Thank you Izzy – here is the form and the letter we sent.

From: Lamanna, Isabelle <Isabelle.Lamanna@hq.doe.gov>
Sent: Tuesday, June 10, 2025 12:08 PM
To: Rickert, Annelise <(b) (6)>; Hebert, Ashley <ashley.hebert@hq.doe.gov>
Cc: McGregor, Ruby <ruby.mcgregor@hq.doe.gov>; Craig, Tom <(b) (6)>
Subject: RE: [EXTERNAL] RE: Duke Energy June Board of Director Meeting - Speaking Request

Hi Annelise!

I'm so sorry for the delay on my end! Can you please confirm the dates being requested again?

My apologies, trying to catch up on some emails and can't seem to find the form you sent back.

Izzy

From: Rickert, Annelise <(b) (6)>
Sent: Monday, June 2, 2025 2:57 PM
To: Lamanna, Isabelle <Isabelle.Lamanna@hq.doe.gov>; Hebert, Ashley <ashley.hebert@hq.doe.gov>
Cc: McGregor, Ruby <ruby.mcgregor@hq.doe.gov>; Craig, Tom <(b) (6)>
Subject: RE: [EXTERNAL] RE: Duke Energy June Board of Director Meeting - Speaking Request

Hi Izzy – I wanted to circle back on this and see if you have any updates?

Thanks,
 Annelise

From: Lamanna, Isabelle <Isabelle.Lamanna@hq.doe.gov>
Sent: Monday, May 12, 2025 2:43 PM
To: Rickert, Annelise <(b) (6)>; Hebert, Ashley <ashley.hebert@hq.doe.gov>
Cc: McGregor, Ruby <ruby.mcgregor@hq.doe.gov>; Craig, Tom <(b) (6)>
Subject: RE: [EXTERNAL] RE: Duke Energy June Board of Director Meeting - Speaking Request

Hi Annelise!

Thank you for the follow up and I hope you had a great weekend!

We are still waiting to finalize the end of June, thank you so much for your patience as we work to get back to you.

Izzy

From: Rickert, Annelise <(b) (6)>
Sent: Monday, May 12, 2025 12:02 PM
To: Lamanna, Isabelle <Isabelle.Lamanna@hq.doe.gov>; Hebert, Ashley <ashley.hebert@hq.doe.gov>
Cc: McGregor, Ruby <ruby.mcgregor@hq.doe.gov>; Craig, Tom <(b) (6)>
Subject: RE: [EXTERNAL] RE: Duke Energy June Board of Director Meeting - Speaking Request

Thank you again Isabelle – I just wanted to circle back and see if you had any updates.

Thanks,
Annelise

From: Lamanna, Isabelle <Isabelle.Lamanna@hq.doe.gov>
Sent: Wednesday, April 30, 2025 12:14 PM
To: Rickert, Annelise <(b) (6)>; Hebert, Ashley <ashley.hebert@hq.doe.gov>
Cc: McGregor, Ruby <ruby.mcgregor@hq.doe.gov>; Craig, Tom <(b) (6)>
Subject: RE: [EXTERNAL] RE: Duke Energy June Board of Director Meeting - Speaking Request

Thanks so much, Annelise!

We will make sure to bring this to our team and get back to you once we have our schedule confirmed for June.

Have a great rest of your week!

Izzy

From: Rickert, Annelise <(b) (6)>
Sent: Tuesday, April 29, 2025 8:57 AM
To: Lamanna, Isabelle <Isabelle.Lamanna@hq.doe.gov>; Hebert, Ashley <ashley.hebert@hq.doe.gov>
Cc: McGregor, Ruby <ruby.mcgregor@hq.doe.gov>; Craig, Tom <(b) (6)>
Subject: RE: [EXTERNAL] RE: Duke Energy June Board of Director Meeting - Speaking Request

Hi Isabelle – Please see attached form – please let me know if you have any questions. Below is my cell.

Thanks,
Annelise
(b) (6)

From: Lamanna, Isabelle <Isabelle.Lamanna@hq.doe.gov>
Sent: Thursday, March 27, 2025 1:16 PM
To: Hebert, Ashley <ashley.hebert@hq.doe.gov>; Rickert, Annelise <(b) (6)>
>
Cc: McGregor, Ruby <ruby.mcgregor@hq.doe.gov>
Subject: [EXTERNAL] RE: Duke Energy June Board of Director Meeting - Speaking Request

***** CAUTION! EXTERNAL SENDER *** STOP. ASSESS. VERIFY!!** Were you expecting this email? Are grammar and spelling correct? Does the content make sense? Can you verify the sender? If suspicious report it, then do not click links, open attachments or enter your ID or password.
Hi Annelise!

Thank you so much for thinking of us and the invitation for the Secretary to join y'all in June! I've attached an event request form here and if you could fill that out and send it back to the.secretary@hq.doe.gov at your earliest convenience, that would be great.

Just as a heads up, we are confirming the Secretary's attendance about a month out so thank you for your patience as we work to get back to you.

Have a great rest of your week.

Izzy

From: Hebert, Ashley <ashley.hebert@hq.doe.gov>
Sent: Thursday, March 27, 2025 12:47 PM
To: Rickert, Annelise <(b) (6)>
>
Cc: Lamanna, Isabelle <Isabelle.Lamanna@hq.doe.gov>; McGregor, Ruby <ruby.mcgregor@hq.doe.gov>
Subject: RE: Duke Energy June Board of Director Meeting - Speaking Request

Hi Annelise,

Thanks for reaching out and for the invitation! Looping in our scheduling team to carry this request forward.

Warm regards,
Ashley

Ashley Hébert
Director of Scheduling & Advance
Office of the Secretary | U.S. Department of Energy
Office: (202) 586-5534
Cell: (b) (6)

From: Rickert, Annelise <(b) (6)>
Sent: Thursday, March 27, 2025 8:03 AM
To: Hebert, Ashley <ashley.hebert@hq.doe.gov>
Subject: [EXTERNAL] Duke Energy June Board of Director Meeting - Speaking Request

Hi Ashley -Hope you are having a great Thursday. I don't know if we've had the chance to meet yet, but my name is Annelise Rickert, and I am with Duke Energy. Our CEO, Harry Sideris was hoping Secretary Wright would be available to speak at Duke Energy's Board of Directors meeting here in DC in June. He thought it would be a great opportunity to meet and hear more about the great things the Secretary is doing.

Currently these are the slots we had in mind but understand that the Secretary's schedule is very busy so we can be flexible if that does not work.

- Wednesday, June 25 between 4:30 PM to 5:15 PM
- Thursday, June 26 at 8:00 AM to 8:45 AM

Look forward to hearing from you and hope you have a great rest of your day. Below is my cell number so feel free to reach out if you would like to discuss.

Thanks,
Annelise

Annelise Rickert
Director, Federal Government Affairs
Duke Energy Corporation
C: (b) (6) | (b) (6)



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Use caution if this message contains attachments, links or requests for information.



Harry K. Sideris
President and
Chief Executive Officer

Duke Energy Corporation
525 South Tryon Street
Charlotte, NC 28202

May 12, 2025

Secretary Chris Wright
U.S. Department of Energy
1000 Independence Ave SW
Washington, DC 20585

Dear Secretary Chris Wright:

Thank you for your leadership at the United States Department of Energy.

At Duke Energy, we're executing an \$83 billion strategy, investing in critical energy infrastructure. These investments are aimed at ensuring our Nation can re-shore manufacturing and win the global AI race – all while preserving customer reliability and keeping prices as low as possible.

To succeed in this time of historic transformation, we need to continue our strong partnerships with leaders like you. We want to learn more from you about the energy policy landscape and collaborate on key enablers to achieve the nation's goals of energy dominance and low energy prices.

This year, Duke Energy is having its annual Board of Directors strategy retreat on June 24-26, 2025, at the Four Seasons Hotel in Washington, D.C.

We would appreciate your consideration to speak to our Board of Directors, which includes existing and former CEOs of major Fortune 500 companies and leaders in and outside of the energy industry, to share your insight on how we can meet this unique moment in time.

Your perspectives on the Administration's Energy Dominance agenda – from supporting technology and economic growth aspirations to keeping costs as low as possible for all Americans – will provide significant value to our Board and outline the necessary background as we discuss changes to our enterprise strategy and capital plan investments for future years.

Please let me know if you will be able to join us at any point on June 24-26. Thank you for your consideration. If you or your team have any questions, please contact me or Tom Craig at (b) (6)

Sincerely,

Harry Sideris



Event Information Request Form

Thank you for your interest in hosting the U.S. Secretary of Energy at your event. To ensure that the appropriate individual within the Department of Energy is participating in your event and because the Office of the Secretary is committed to maintaining the highest ethical standards, we need the information requested below before we can agree to confirm a speaker.

Please respond to the questions below and send your response to the.secretary@hq.doe.gov.

If you have any questions you may contact the Secretary's Scheduling Office at 202-586-5534.

Title of the Event (please note if the event is a weekly, monthly, annual, etc.):	Duke Energy Corporation Board of Directors (BOD) Strategy Retreat
Date of Event (please note if the date is flexible):	Wednesday, June 25, 2025 from 4:30pm-5:15pm Thursday, June 26, 2025 from 8:00am-8:45am (dates are not flexible; times are somewhat flexible)
Event Location (venue, address, city and state/country):	Four Season Hotel 2800 Pennsylvania Avenue NW Washington, DC
Point(s) of Contact (Name, Email, Phone):	Annelise Rickert, Director, Federal Government Affairs (b) (6) (b) (6)
Briefly describe the event in detail including the purpose and desired role of the Secretary (i.e. deliver keynote remarks, attend an event, meet with attendees etc.):	We are interested in the Secretary speaking to Duke Energy's board of directors. Duke Energy is a fortune 125 company, the directors comprised of several current and former CEOs.
Is the event a fundraiser? If yes, please explain who it is benefiting (i.e. specific charity, a political candidate, etc.):	No
Audience	
Approximately how many people are expected to attend the event?	~40 people – 14 directors, ~26 management
Please describe the target audience of the event (elected officials, local community leaders, academics, industry representatives, public sector representatives, etc.).	The audience will consist of the Board of Directors (including the President and CEO), and key executives of Duke Energy.
Will the attendees at the event include persons with a diversity of views or interests, or representatives from throughout an industry or profession, or the range of persons interested in a matter? (If yes, please describe.)	Our Board is a distinguished group of professionals with a wide array of experiences from various industries (see attached bios). All those in attendance are responsible for Duke Energy's operation and management.

Is the event open to the public (this includes ticketed individuals)? If not, please describe who is privately invited.	No, this is a closed event for the BOD and management of Duke Energy.
Who are other VIPs or speakers <u>confirmed</u> and in what role?	The Secretary would be the only guest speaker for the selected timeslot
Who are other VIPs or speakers <u>invited</u> ?	No other guest speakers will be invited for this timeslot
Remarks	
If you are requesting remarks, are there any specific issues you would like the Secretary to highlight/address in his remarks?	The Department's view towards developing new generation as demand continues to grow rapidly.
What is the desired format of his remarks (will he be delivering the keynote, sharing the stage, participating in a panel or roundtable, etc.)?	This is a relatively small group of senior leaders in the utility space and would benefit from Secretary's remarks with the ability to have a conversational Q&A session. We can organize it in a way that is more comfortable to the Secretary including but not limited to asking for questions in advance.
What is the public registration/ticket fee to attend/participate in the event?	Not applicable
Will there be a teleprompter available? Will there be a podium?	There will not be a teleprompter. The Secretary can sit at the table with the BOD or we can provide a podium, if that is what he prefers.
Communications/Press	
Is the event open or closed to press?	Closed
If open, are you expecting local, state, or national news coverage?	Not applicable
If this is an annual event, which news outlets typically cover the event?	Not applicable
Will you be advertising or live streaming the event on any social media outlets or websites? (If yes, please explain.)	Not applicable
Logistics/Other*	
If this invitation includes any gifts to the Secretary (e.g., waived registration/conference event fee; meals or refreshments; receptions or other entertainment; informational materials; award; transportation; memento or token of appreciation), please identify them and provide their monetary value. Please also identify how the	Not applicable

value was determined. (Please attach separate sheet if necessary.)	
Does the invitation extend to the Secretary's spouse or other guest? If yes, will others in attendance generally be accompanied by a spouse or other guest?	Not applicable
Will the Secretary be asked to sign a speaking/participation agreement or release related to this event? If so, please provide a copy.	Not applicable
If the Secretary is not able to attend, is a surrogate desired? If yes, anyone specific?	No
Any additional notes or information?	All participants are expected to attend in person; however, Microsoft Teams will be available if someone needs to attend remotely unexpectedly
Event Host and Sponsor	
Who is the event host? (Please identify and provide background on the Event host as well as any other organization involved in the Event.)	Duke Energy Corporation
Event host website/url.	www.duke-energy.com
Is the <u>event host</u> a registered lobbyist or lobbying organization, and/or registered under the Foreign Agents Registration Act? (If yes, please identify.)	This event is hosted by Duke Energy and the company employs lobbyists but this is board of directors meeting not a fundraising event. Registered lobbyist are not anticipated at the event.
Is the <u>event host</u> a partisan political candidate, a representative of a political party or a registered political action committee (PAC)? (If yes, please identify.)	No
Is the <u>event host</u> a 501(c)(3) organization or a media organization? (If yes, please identify.)	No
Is the <u>event host</u> seeking or currently have any business interests with the Department such as permits, contracts, litigation, grants, etc.? (If yes, please describe.)	Yes, we currently have grants with the Department.
Who are the <u>sponsors</u> of the event? Please identify and provide background information on the individual and/or entity.	No sponsors
Are any event <u>sponsors</u> seeking or do they currently have any business interests with the Department such as permits, contracts, litigation, grants, etc.? (If yes, please describe.)	Not applicable
With which Bureau or Agency does your agenda most align? Please list all, if more than one.	DOE offices including but not limited to: Office of Nuclear Energy; Office of Grid Deployment; Office

	of Manufacturing Energy and Supply Chains; Office of Fossil Energy and Carbon Management; Office of Cybersecurity, Energy Security, and Emergency Response; and Office of Electricity
Partisan Political Candidate or Elected Official Participation	
Will any partisan political candidate or elected official participate in the event? If so, please identify and explain role.	Other elected officials may be invited to attend as a guest speaker at a different day/time
Is the coordination of any elected official's involvement being handled solely by their official staff, or is there any campaign staff involvement or coordination?	Not applicable
If a candidate for office or elected official is participating in the event, is the event taking place in their respective district/jurisdiction, and will the entire delegation for the respective district/jurisdiction(s) been invited? If not, please explain.	Not applicable

***IMPORTANT NOTE: The purpose of these questions is to elicit information relevant to the ethics analysis and is not a solicitation or request for anything of value by the Department or any of its employees.**