

Fwd: Draft Fair Hydro Investor Presentation

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Date: Fri, 29 Dec 2017 15:46:27 -0500
Attachments: Appendix 1 Fair Hydro Trust Draft Investor Presentation - Dec 21 to ARC.pdf (692.17 kB); ATT00001.htm (216 bytes); Fair Hydro Investor Presentation Comments - ENERGY - 20171229.docx (19.62 kB); ATT00002.htm (168 bytes)

Good Afternoon:

See below. Certainly one of the "transition watch files" I flagged last week for you to cope with early in 2018.

Atel/

Andrew Teliszewsky

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Subject: Draft Fair Hydro Investor Presentation

Hi Andrew,

Attached is OPG's Fair Hydro Trust investor presentation. Also attached is a word document with our comments on the deck .

In addition to the comments in the document we would like to flag that the references and tone related to the province as guarantor may be stretching the role of the province in the agreements. The presentation was also sent to the OFA. We will loop in with the OFA to see if they want to comment on this aspect of the presentation and to see if they have any other comments on the deck.

OPG has indicated that they are hoping to do the next turn of the presentation next week, and so would like to receive our comments by early next week.

Let us know if you're comfortable with the comments and we'll share these back with OPG.

Thanks,

Hillary

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