

# **OIL AND GAS COMMERCIAL COMPETENCY DEVELOPMENT PROGRAM**

**(JOINT VENTURING, CASH CALLS, FINANCE,  
FINANCIAL ANALYSIS & BUDGETING,  
MARKETING, TRANSPORTATION,  
BUSINESS PROCESSES, ETC)**

## **Eftex Energy Services, LLC**

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## CASH CALLS IN OIL & GAS JOINT VENTURE OPERATIONS

Course Length: 5 Days  
Course Dates: May 22 - 26, 2017 or later  
Course Venue: Houston, Texas, USA  
Min Attendance: 7

### Overview

Upstream oil and gas projects can be too immense for a single company (even a super-major) to finance on their own. Many of the larger Deepwater and liquefied natural gas projects fall into this category. The risk profile attached to large-scale exploration and production projects is such that no single company would want to take on full exposure. In an increasingly cost-focused climate, economies of scale are critical to success and partnering may help to achieve this. This partnership often requires the operator of joint venture assets to make cash calls for anticipated future capital and operational expenditures from non-operating partners. Operations often suffer immensely whenever any of the partners' lack capacity to raise capital to finance its share of the joint venture cash calls due to financial struggles.

This course presents oil and gas joint venture principles covering contract types that includes unincorporated joint ventures ("UJVs") and incorporated joint ventures ("IJVs") contracts. The course also highlights critical issues relating to implementing oil and gas joint venture accounting, budgeting and auditing processes. This course will also present overview of cash calls for joint venture operations, principles of cash call accounting and reporting; types of cash calls in joint venture contract's fiscal policy; fundamentals and workflows for cash calling in joint venture contracts; outstanding cash calls and repayment options; impact of cash default on joint venture operations and profitability. Both the structural aspects of cash calling as well as well as real-world case studies will be discussed to illustrate the field application of the concepts in the course.

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## Who Should Attend?

This course is designed for managing directors, executive directors, assets managers, operation managers, cost controllers, accounting executive/managers, financial reporting managers, financial executives /managers/controllers/directors, budgeting officers/executives/managers, auditors / auditing managers, treasurers, taxation and reporting executives/managers, JV/Production Sharing executives/managers/advisors, business/investment analysts & managers, asset officers/managers, economists, regulatory compliance officers, business development executives & managers, commercial analysts, oil and gas operators, joint venture operators, joint venture non-operators, joint venture accountants, government regulators, and others

## What You Will Gain:

- Understanding the key attributes of the joint venture business structure as well as the risks and benefits associated with forming joint ventures
- Knowledge of basic processes in oil and gas joint venture accounting, budgeting and auditing. Describing the elements that constitute master data in joint venture accounting
- Explaining the processes performed periodically in oil and gas joint venture accounting and reporting. Explaining the key steps for updating elements of master data in joint venture accounting and integrating with other SAP processes
- Understanding and exploring cash call types for oil and gas joint venture operations
- Applying practical tools and skill sets to analyze cash calling in joint venture contracts and evaluating impact of cash default on joint venture operations and profitability
- Using case studies & interactive work/group discussion to apply the skills and knowledge acquired during the training course

## Instructor (s):

This course will be taught by globally respected international oil and gas joint venture financial accounting experts with decades of industry and technical advisory experience

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## Course Content

- Overview of the oil and gas contract agreement types; and oil and gas joint venture principles
- Oil and gas project financing fundamentals along the joint venture value chain
- Incorporated joint venture and un-incorporated joint venture contract types in oil and gas industry
- Joint venture contract's fiscal regimes resulting in cash calls
- Overview of cash call types in oil and gas joint venture operations
- Processes for cash call funding and account reconciliation
- Recoverable and non-recoverable costs in joint venture operations
- Fundamentals of joint venture budgeting
- Basic processes in oil and gas joint venture cash call accounting and reporting
- Processes performed periodically in oil and gas joint venture cash call accounting
- Outstanding cash calls (deficit) and repayment options
- Entitlement oil/gas of joint venture partners & accounting for deficit cash calls
- Carried interest in cash call payment
- Modified carry arrangement and impact of cash default on operations and profitability
- Case studies
- Group exercises to identify and offer solutions to specific problems associated with cash calls in oil and gas joint venture operations

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## OIL & GAS JOINT VENTURE PROJECT FINANCING

<b>Course Length:</b>	<b>5 Days</b>
<b>Course Dates:</b>	<b>June 12 - 16, 2017 or later</b>
<b>Course Venue:</b>	<b>Houston, Texas, USA</b>
<b>Min Attendance:</b>	<b>7</b>

### Overview

The global Oil and gas industry faces a major funding challenge. Despite the industry's immense appetite for capital, compared to other capital intensive industries, it has been relatively conservative when it comes to financial structuring. In addition to traditional sources of capital, more creative financing techniques and new sources of finance will need to be explored to ensure that sufficient and efficient funding is available to finance projects in the future. In response to heightened political and economic instability, companies have begun to diversify their sources of funding. This has involved a shift from bank-led financing to non-bank and capital markets-based funding.

This course presents the fundamentals of oil and gas joint venture project finance, techniques for financing Incorporated Joint Venture and Un-incorporated Joint Venture and the parameters that influence the financial aspects of oil and gas joint venture projects in developing countries. The course also addresses the rationale for capital and operational project financing, and examine project risk analysis, risk mitigation strategies, financing options, commercial and legal frameworks. This course will also provide a framework for analyzing complex petroleum capital and operational projects from first principles and present a practical and quantitative approach to understanding petroleum project finance transactions in developing countries. This course is intended to be very interactive using case studies such as Petroleum Development Oman (PDO), Pemex/Schlumberger, Strategic Alliance Financing, etc. The course will be supplemented by practical and up-to-date case work designed to consolidate and reinforce learning. In addition to a core case study built specifically to drive home the techniques and tools taught during the 'toolkit' sessions, other cases will be drawn from oil and gas joint venture value chain as the Workshop proceeds.

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## Who Should Attend?

This course is designed for accomplished leaders who drive growth in every corner of their organizations - managing directors, executive directors, assets managers, operation managers, cost controllers, accounting executive/managers, financial reporting managers/executives managers / executives / managers / controllers /directors, budgeting officers/executives/managers, auditors/auditing managers, taxation and reporting executives/managers, business/investment analysts & managers, economists, regulatory compliance officers, business development executives & managers, commercial analysts, oil and gas operators, joint venture operators, joint venture non-operators, joint venture accountants, government regulators, and others

## What You Will Gain:

- Identifying and exploring key aspects of financing for oil and gas joint venture capital project, potential sources of funding as well as basic financial metrics
- Explaining clearly and in detail, project financing techniques and structures typically used in oil and gas joint venture operations
- Providing oil and gas joint venture project financing toolkit incorporating project risk appraisal and mitigation, project qualitative analysis and debt sizing structures, project finance loan documentation
- Understanding how different oil and gas joint venture project finance models are built and used to determine loan values, balance equity against debt, optimize debt amounts, maturity and repayment
- Analyzing why and when sponsors use project financing techniques, and method of incorporating appropriate financing into decision making pertaining to petroleum capital projects
- Analyzing and interpreting how debt and equity are balanced within project financing structures
- Using case studies, group exercises and interactive group discussion to identify and offer solutions to specific problems associated with oil and gas joint venture project financing

## Instructor (s):

This course will be taught by a globally respected oil and gas joint venture project finance practitioner with decades of lending and advisory experience

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## Course Content

- Overview of oil and gas contract agreement types. Oil and gas joint venture principles
- Fundamentals of oil and gas joint venture capital and operational project financing techniques
- Overview of cash calls types for oil and gas joint venture operations
- Incorporated joint venture and un-incorporated joint venture oil and gas project financing
- Project finance modeling in different oil and gas joint venture operations
- Oil and gas project financing toolkit (1): qualitative risk identification, analysis and mitigation
- Oil and gas project financing toolkit (2): quantitative risk analysis and debt sizing /structuring
- Types of loan documents which govern financing of Incorporated joint venture and un-incorporated joint venture projects
- Case studies - studies such as Petroleum Development Oman (PDO), Pemex / Schlumberger, Strategic Alliance Financing, etc.
- Group exercises to identify and offer solutions to specific problems associated with oil and gas joint venture project financing

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# FUNDAMENTALS OF OIL AND GAS FINANCIAL ANALYSIS AND CAPITAL BUDGETING

**Course Length:** 5 Days  
**Course Dates:** June 5 - 9, 2017 or later  
**Course Venue:** Houston, Texas, USA  
**Min Attendance:** 10

## Overview:

This course will present an overview of the key economic principles and financial concepts to evaluate investment opportunities – new business, expansion of existing business, modernization, backward and forward integration, etc. The course will provide an overview of economic valuation tools that are needed for optimizing petroleum project selection requiring investments with equity or debt capital under uncertainty. It will also highlight various financial analysis and capital budgeting techniques to evaluate investment opportunities, authorize capital spending and ongoing operations' innovation and growth. It will demonstrate the value of following the financial analysis and capital budgeting process, and introduce the three stages in that process – project identification and screening, quantitative assessment, and capital allocation and rationing. Case studies will be provided to illustrate the field applications of financial analysis and capital budgeting tools on the basis of value-added to the corporation over an applicable period of time (future)

## Who Should Attend?

This course is designed for petroleum engineers, business planner & analysts, senior/ executive managers, strategy specialists, market intelligence experts

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### What You Will Gain:

- Understanding how reserves are classified and the process of exploring, appraising and producing
- Understanding basic financial and capital budgeting concepts in relation to the oil and gas industry
- Exploring how to identify opportunities for capital investment based on preliminary screening, alignment with organizational strategy and dependence on other projects.
- Demonstrating how to use net present value, internal rate of return, discounted payback period and profitability index for capital investment projects
- Understanding the process of allocating capital based on qualitative assessment factors, incorporating other qualitative factors (such as the priority of projects), monitoring and post-monitoring auditing

### Course Outline:

- Exploration & production fundamentals. Overview of accounting basics, cost accounting, financial statement analysis, financial ratio analysis, investment decisions & profitability. Upstream petroleum economics, risk and fiscal analysis. Overview of current regulatory regimes. Financing the corporation.
- Valuation of a company. Oil and gas economic valuation tools (simple payback period, accounting rate of return, net present value, discounted payback period and profitability index). Distinction between cash flow and profit. Net cash flow analysis and tax. Cash flow & Incorporating inflation into cash flow projections. Real and nominal cash flow analysis. Depreciation. Cash flow and risk analysis concepts. Discounting and time value of money. Valuation of risky assets and portfolios
- Fundamentals of cost analysis & control. Financial analysis, audit & management. Project financing
- Capital investment planning and analysis. Capital budgeting processes. Capital allocation. Creating and analyzing an operating budget. Ins and outs of capital budgeting. Effective budget management
- Basics of decision analysis & investment decisions. Developing decision policies. Decision making process. Investment proposal ranking methods. Capital management. Decision under uncertainty & risk. Risks and uncertainties in economic evaluation. Field case studies

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## NATURAL GAS MARKETING AND TRANSPORTATION

**Course Length:** 5 Days  
**Course Dates:** June 26 - 30, 2017 or later  
**Course Venue:** Houston, Texas, USA  
**Min Attendance:** 10

### Overview:

This course provides an overview of the natural gas supply chain fundamentals – natural gas resources, production, transportation, purification processes, marketing, economic and contractual aspects. The course will also cover the valuation of natural gas. Natural gas transportation and freight as well as overview of terminals and pipelines will be highlighted. The structure of natural gas processing (highlight gas compression, dehydration, acid gas removal and tail gas cleanup, sulfur recovery, cryogenic extraction of natural gas liquids as well as LNG production, storage and transportation) will be explained in the context of the need to produce marketable products. Key aspects of product quality will be covered together with the major processing workflows to achieve them. The course will also cover fundamentals of natural gas supply & demand, regulation, pricing, price risk management, purchase and sales contracts. Case studies will be provided to illustrate the field application

### Who Should Attend?

This course is designed for professional personnel inside and outside petroleum industry who interface with supply, processing, transportation and trading functions of natural gas (engineers, planning and development analysts, business planner, senior/executive managers, market intelligence specialists, Oil & Gas value chain decision makers)

### What You Will Gain:

- Evaluating the importance of natural gas in the world energy balance, and the strategies of the main industry actors
- Identifying the outlets of natural gas and the new trends in gas industry

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- Identifying the main technical, economic and contractual features of the natural gas value chain, from the production well to the final consumer
- Understanding the framework of liberalization of natural gas markets and its impact on natural gas contract and prices
- Understanding natural gas contracting principles

**Course Outline:**

- Importance of natural gas in the world energy balance. Outlets for natural gas. Reserves, production and development processes. Natural gas storage. Price natural gas purchase and sales contracts
- International gas markets. Natural gas supply and demand. Natural gas regulation and pricing. Impact of unconventional gas on the world demand/supply and on gas prices. Natural gas risk management
- Description of the natural gas chain and associated costs. Natural gas conditioning, processing and transportation. Storage costs and distributions costs. Liquefied natural gas (LNG), FLNG, FSRU, small scale LNG. Prices in the different markets. Financial contracts and hedging strategies
- Contractual-framework of exploration-production. Structure and principles of a long-term contract. Principles of take-or-pay, netback, indexation and gas price formulas. Tolling agreements
- Spot and forward natural gas markets. Why and how to access those markets? Drivers and concepts of liberalization. Role of the regulator, network development, transport, tariffs, etc. Contractual aspects of suppliers, transporters and distributors
- Multiple examples and field case studies

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## UPSTREAM OIL AND GAS BUSINESS PROCESSES

Course Length:	5 Days
Course Dates:	July 3 - 7, 2017 or later
Course Venue:	Houston, Texas, USA
Min Attendance:	12

### Overview:

This course will present an overview of the upstream oil and gas industry, business processes and its value chain (exploration, drilling, formation evaluation, well completions, reservoir depletions mechanisms, oil and gas production facilities, transportation, maintenance of oil and gas facilities, oil and gas reserves, and reservoir management). It will also highlight oil and gas terms, legal framework of the industry, project economics, oil price risk management, business planning, new business – opportunities and risk taking, marketing and retailing as well as high performing assets. It will cover domestic and cross-border state of the art petroleum industry supply chains as well as typical requirements of the hydrocarbon and product logistic of multinational, national and independent oil and gas companies. This course is built on case studies, interactive presentations, exercises and team games to illustrate the field applications of strategic management in oil and gas business

### Who Should Attend?

This course is designed for leaders who drive growth in every facet of their organizations. Appropriate experience levels include executive and senior leadership including managing directors, C-level executives, project directors and assets/operations managers.

### What You Will Gain:

- Understanding the main economic, market, physical, environment and political forces driving energy demand, supply and prices. Connecting the key links and terms of the oil and gas industry, from the exploration well to the final products.
- Best practices in managing the oil & gas industry's strengths, weaknesses, opportunities & threats

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- Understanding the fundamentals management tools and decision processes in an international oil and gas company. Quantifying the risk and opportunity exposures of different stakeholders
- Applying practical decisions and experience to the risk of doing business in the global oil and gas industry using SWOT analysis, excel simulator, case studies, videos and discussions

**Course Outline:**

- Overview of business processes, drivers and terminology relevant to oil and gas industry – from exploration and production to midstream and downstream. Oil and gas business terms. Understanding the exploration and production value chain. Legal and fiscal framework for exploration-production (concessions, joint ventures, production sharing contracts, service contracts, etc)
- Energy demand and supply. Crude oil reserves and production. Role of main actors – OPEC, NOCs, INOCs and IEA. Oil price evolution and long-term scenarios. Present and future constraints of the oil and gas industry (renewable and alternative energies, investments, etc)
- Understanding how reserves are classified and the process of exploring, appraising and producing. Main gas & crude oil markets as well as their structures & constraints. Liquefied natural gas chain, economics & trade. Long term sales & purchase gas contracts. Take or pay provisions & gas price formulas. International trade & shipping of crude and products. Various types of markets and contracts
- Basics of decision analysis & investment decisions. Decision making processes. Investment proposal ranking methods. Capital management. Decision under uncertainty & risk. Risks and uncertainties in economic evaluation. Alternative futures for the industry.
- Field case studies

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## OIL AND GAS FINANCE

<b>Course Length:</b>	<b>5 Days</b>
<b>Course Dates:</b>	<b>May 15 – 19 and/or July 10 - 14, 2017 or later</b>
<b>Course Venue:</b>	<b>Dubai, UAE and/or Houston, Texas, USA</b>
<b>Min Attendance:</b>	<b>10</b>

### Overview:

This course will present an overview of the key financial concepts, economic principles, risk analysis, decision making, hedging, treasury management, financial standards, business systems, tools and technology solutions and transformation, pricing and smart tendering, etc. The course will provide an overview of valuation tools that are needed for decision making under uncertainty. It will also highlight various financial analysis and capital budgeting techniques to evaluate investment opportunities, authorize capital spending and ongoing operations' innovation and growth. It will demonstrate the value of thorough risk and decision analysis and introduce the key stages in that process – risk identification and screening, quantitative analysis, qualitative evaluation, risk treatment and decision making. Case studies will be provided to illustrate the field applications of financial functional analysis on the basis of value-added to the business over an appreciable timeframe.

### Who Should Attend?

This course is designed for finance functional resources, engineers, business planner & analysts, project managers, project controls officers, senior managers, strategy specialists, market intelligence experts, operation specialists, etc

### What You Will Gain:

- Understanding basic financial and capital budgeting concepts in relation to the oil and gas industry

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- Understanding of fundamental financial modeling – portfolio valuations, investment appraisals, including current trends and techniques
- Understanding of Risk assessment and management, encompassing risk identification and screening, quantitative analysis, qualitative evaluation, risk treatment and decision making
- Exploring identification of opportunities for capital investment based on preliminary screening, alignment with organizational strategy and dependence on other projects.
- Demonstrating how to use net present value, internal rate of return, discounted payback period and profitability index for capital investment projects
- Understanding the process of allocating capital based on balanced assessments of quantitative and qualitative factors
- IFRS/US GAAP update – including convergence between financial standards
- The mechanics of Hedging and Treasury Controls/Management
- Familiarization with latest trends in Finance Functional Transformation, business systems and information technology solutions
- Financial cost control and commitments restructuring
- Pricing and smart tendering fundamentals
- The future of the Finance Function in Oil and Gas business

#### Course Outline:

- Understanding Oil and Gas Exploration & Production fundamentals. Overview of accounting basics, cost accounting, financial statement analysis, financial ratio analysis, investment decisions & profitability. Upstream petroleum economics, risk and fiscal analysis. Overview of current regulatory regimes. Financing the corporation.
- Financial modeling and valuation of a company's portfolio, investment appraisals, including current trends and techniques.
- Oil and gas economic valuation tools (simple payback period, accounting rate of return, net present value, discounted payback period and profitability index). Distinction between cash flow and profit. Net cash flow analysis and tax. Cash flow & Incorporating inflation into cash flow projections. Real and nominal cash flow analysis. Depreciation. Cash flow and risk analysis concepts. Discounting and time value of money. Valuation of risky assets and portfolios
- Fundamentals of cost analysis & control. Financial analysis, audit & management. Project financing
- Risk assessment and management, encompassing risk identification and screening, quantitative analysis, qualitative evaluation, risk treatment and decision making
- Capital investment planning and analysis. Capital budgeting processes. Capital allocation. Creating and analyzing an operating budget. Ins and outs of capital budgeting. Effective budget management
- Basics of decision analysis & investment decisions. Developing decision policies. Decision making process. Investment proposal ranking methods. Capital management.

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Decision under uncertainty & risk. Risks and uncertainties in economic evaluation. Field case studies

- Identifying opportunities for capital investment based on preliminary screening, alignment with organizational strategy and dependence on other projects.
- IFRS/US GAAP, including convergence between different financial standards
- Hedging and Treasury Controls & Management
- Familiarization with latest trends in Finance Functional Transformation, information systems and technology solutions
- Financial cost control and commitments restructuring
- Pricing and smart tendering fundamentals
- Finance functional roles on a Capital Investment/Project Team
- The future of the Finance Function in global Oil and Gas' upstream, midstream and downstream value chains

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## Our People

Our trainers and associates' impressive mix of sound academic backgrounds, industry knowledge, and hands-on experience in leadership roles within some of the largest asset intensive companies, provides our clients an uncommon blend of experience, leadership, and relentless pursuit of excellence.

And to supplement our internal knowledge base, we are constantly looking for subject matter experts and/or partners (<http://www.eftexenergyservices.com/our-partners-and-clients/>) who share our commitment to excellence, simplicity, action orientation and dedication to the values of honesty, openness, authenticity, tolerance and diversity – the central themes of our business.

## Leading the Charge



*Akin Oni, MBA, PMP, CPTM, CCP, is the **Principal and Chief Development Officer** at **Eftex Energy Services, LLC, USA**, where he leads a team of Subject Matter Experts that project-manages M&A opportunities, develops technologies (non-IT), consults for diverse project/business leadership teams and brings learning to their multi-industry audiences with a balanced mix of academic and industry experiences in a way that grows talents and helps businesses bring strategies to live.*

*Akin holds a Bachelor's degree in Mechanical Engineering, with First Class Honors from the OAU in Ile-Ife, and an executive MBA in Project Management from the Athabasca University in Canada. He is a certified Project Management Professional, a certified Cost Engineering Professional and a Certified Professional in Training Management. He writes and reviews project management papers, and delivers presentations at global forums.*

*Akin Oni has about 3 decades of international experience in project leadership, capital investment governance, project controls, contracts & procurement and business development, delivering oil, natural gas, LNG, refinery, mining and infrastructure engineering projects.*

*Recognized for implementing a strong focus on Leadership, People, Process, Technology, Deliverable and Sustainability, Akin has proven track record of leading and enhancing project support teams' effectiveness through leveraging internal cross-functional strengths. As a professional, he enjoys helping businesses bring strategies to live, in a manner that culminates in value creation and growth.*

*Akin is a member of several professional organizations, including the SPE, PMI, IPMA, ASME, TTI, AACEL and ACostE. He is active with the local PMI chapter and Toastmasters Club and volunteers at not-for-profit events, including sitting on the Board of a few.*

*Akin is married and blessed with children. He enjoys health & wellness programs, volunteering, writing, watching world class soccer, hiking and traveling with his family. [Email Akin](mailto:akin@eftexenergyservices.com).*

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