

**BEFORE THE STATE CORPORATION COMMISSION
OF THE STATE OF KANSAS**

**TESTIMONY IN SUPPORT OF UNANIMOUS SETTLEMENT AGREEMENT
OF
KIMBERLY H. WINSLOW**

**ON BEHALF OF
EVERGY METRO, INC., EVERGY KANSAS CENTRAL, INC.
AND EVERGY KANSAS SOUTH, INC.**

IN THE MATTER OF THE APPLICATION OF EVERGY METRO, INC., EVERGY KANSAS
CENTRAL, INC., AND EVERGY KANSAS SOUTH, INC. FOR APPROVAL OF ITS PHASE
2 TRANSPORTATION ELECTRIFICATION PORTFOLIO.

DOCKET NO. 25-EKCE-169-TAR

1 **I. INTRODUCTION**

2 **Q. Please state your name and business address.**

3 A. My name is Kimberly H. Winslow. My business address is 1200 Main Street, Kansas City,
4 Missouri 64105.

5 **Q. Did you provide Direct Testimony in this docket?**

6 A. Yes. I provided Direct Testimony in this docket on behalf of Evergy Metro, Inc. d/b/a Evergy
7 Kansas Metro (“EKM”), and Evergy Kansas Central, Inc. and Evergy South, Inc., collectively
8 d/b/a as Evergy Kansas Central (“EKC”) (collectively “Evergy”), on September 30, 2024.

9 **Q. What is the purpose of your current testimony?**

10 A. The purpose of my current testimony is to support the Unanimous Settlement Agreement
11 (“Settlement Agreement”) executed by the Parties in this docket and appended hereto as
12 **Attachment A.** The Parties in this docket are Evergy, the Staff of the State Corporation
13 Commission of the State of Kansas (“Staff”), and the Citizens’ Utility Ratepayer Board
14 (“CURB”) (collectively referred to as the “Parties”).

15 **II. SETTLEMENT BACKGROUND AND OVERVIEW**

16 **Q. Please summarize the terms of the unanimous settlement reached among the Parties?**

17 A. The terms of the unanimous settlement are fully set forth in the Settlement Agreement. In
18 general, the Parties have agreed that the programs described in Evergy’s Application,
19 specifically the Fleet Advisory Services (“FAS”) Program and a Residential Managed
20 Charging (“RMC”) Pilot, should be approved and implemented with the revisions and
21 clarifications set forth in the Settlement Agreement.

1 **Q. Is this a unanimous settlement agreement among all Parties to the docket?**

2 A. Yes. In addition to Evergy, the only other Parties to this docket are Staff and CURB. All
3 Parties have assented to and are signatories on the Settlement Agreement.

4 **Q. Please describe the issues that led to the current docket being filed.**

5 A. In this docket, Evergy sought an order from the Commission allowing the Company to
6 implement its Phase 2 Transportation Electrification (“TE”) Portfolio (“Portfolio”),
7 comprised of a FAS Program and an RMC Pilot. These programs are intended to build on
8 the first phase of Evergy’s programs approved by the Commission in Docket No. 21-
9 EKME-320-TAR¹ (“21-320 Docket”). The 21-320 Docket identified potential benefits of
10 managed charging and other efforts to incentivize and shift EV charging activity to off-
11 peak periods. However, with few EVs in the market at the time and limited industry
12 experience with managed charging, only limited educational efforts were planned, and the
13 benefits of managed charging were not included in the associated benefit-cost analysis.
14 While grid management activities were deferred in the 21-320 Docket, pending further
15 information and the development of supporting technologies, new data from Evergy’s
16 portfolio and the broader utility industry now enables Evergy to effectively pursue and
17 assess the incremental benefits of managing the system impacts of TE. Although a growing
18 number of fleets have signaled their intent to begin electrifying, Evergy has learned through
19 industry studies and implementation of the Company’s Commercial EV Charging Rebate
20 Program that few customers are prepared for a successful transition that right-sizes
21 infrastructure and includes charge plans to minimize grid upgrades. In response to this growing
22 need, Evergy is proposing a new, five-year FAS Program that will provide technical assistance

¹ *In the Matter of the Application of Evergy Kansas Metro, Inc. and Evergy Kansas Central, Inc. for Approval of Transportation Electrification Portfolio*, Commission Order issued December 6, 2021.

1 to fleets and shape their charging plans for many years ahead. Similarly, Evergy's existing
2 TE Portfolio offerings have encouraged some residential customers to adopt time-of-use
3 ("TOU") rates and to charge off-peak, but it is evident that other customers need more
4 guidance and support. With the RMC Pilot, Evergy proposes a pilot program that will test
5 two promising methods for residential managed charging to reveal how each can be used
6 to provide cost effective load shaping. The new, three-year pilot program will incentivize
7 residential customers to charge their EVs at home during off-peak periods. The pilot's goal
8 is to gather information about customer preferences related to managed charging and to
9 quantify the load-shaping impacts of different approaches on different customer groups.
10 These pilot learnings will inform the decision whether to offer future residential-focused
11 managed charging programs and, if so, the design of those programs.

12 **Q. What has Evergy proposed in this docket?**

13 A. Evergy has proposed to launch the second phase of TE programs in the form of the RMC Pilot
14 and the FAS Program. Evergy requests approval of the RMC Pilot and FAS Program as
15 described in the Application, my Direct Testimony, and other documents and exhibits, and
16 implementation of those programs as the second phase of its TE programs.

17 **Q. Please briefly describe the two programs set out in Evergy's Application, which are**
18 **the subject matter of the Settlement Agreement.**

19 A. The RMC Pilot is a program to test methods used to optimize the charging patterns of
20 residential EV drivers who charge at home and to provide information and data regarding
21 the effectiveness of certain incentives on the charging behaviors of program participants.
22 The three-year pilot was designed to test two methods of load shaping, passive and active.

1 Insights from this pilot will inform Evergy's approach to a future full-scale program related
2 to RMC.

3 The FAS Program provides fleet electrification customers with the information and
4 insights needed to implement optimized charging infrastructure and charging strategies for
5 their EV fleets. These optimizations will benefit fleet customers by informing charging
6 strategies and procedures, and will ultimately benefit all Evergy customers by reducing
7 overall system costs related to fleet charging.

8 The Application seeks an Order from the Commission allowing the Company to (1)
9 implement tariffs that authorize and enable the RMC Pilot and the FAS Program, and (2)
10 authorize use of a deferral accounting mechanism to track all related program costs for
11 recovery in future rate cases through expense amortization over a period of five years.

12 **Q: What Parties intervened and participated in this docket?**

13 A. Staff and CURB were the only Parties that participated in this docket. There were no other
14 intervenors.

15 **Q. What was CURB's stated position with respect to the programs proposed by Evergy**
16 **in this docket?**

17 A. CURB submitted Direct Testimony from Joshua Frantz on January 23, 2025. In his Direct
18 Testimony, Mr. Frantz recommended the Commission approve both the FAS Program and
19 the RMC Pilot as proposed by Evergy in this docket.

20 **Q. What was Staff's stated position with respect to the programs proposed by Evergy in**
21 **this docket?**

22 A. Staff submitted Direct Testimony from Lana Ellis, also on January 23, 2025. Ms. Ellis'
23 Direct Testimony recommended approval of Evergy's Application and the RMC Pilot and

1 FAS programs addressed therein with certain recommended modifications. Specifically,
2 Staff recommended the following:

3 (a) With regard to the RMC Pilot program, Staff recommended the Commission
4 require Evergy to (1) increase the number of charging days to five days each month
5 as a condition of receiving the monthly incentive for participation in the program,
6 and (2) develop a detailed Communications Plan to address Staff's program design
7 concerns discussed in Ms. Ellis' Direct Testimony.

8 (b) With regard to the RMC Pilot reporting structure, Staff recommended that the
9 Commission require Evergy to (1) file a detailed EM&V methodology in this
10 docket, giving Stakeholders sufficient time to review the methodology, then work
11 collaboratively to develop an implementation plan for the methodology to address
12 Staff's reporting concerns discussed in Ms. Ellis' testimony; and (2) collaborate
13 with Staff to create a more detailed research methodology plan and instrumentation
14 to addresses Staff's reporting concerns discussed in Ms. Ellis' testimony.

15 (c) With regard to the FAS Program parameters, Staff recommended the Commission
16 require Evergy to (1) limit its Rightsizing of Charging Advice to Small Private and
17 Public Entities to address Staff's policy concerns discussed in Ms. Ellis' testimony, (2)
18 provide Grid-Friendly Advice to all Fleet Customers to address Staff's policy concerns
19 discussed in Ms. Ellis' testimony, (3) provide a List of Third-Party Advisors to all Fleet
20 Customers to address Staff's policy concerns discussed in Ms. Ellis' testimony, (4)
21 provide Stand-Alone Program Levels with Clear On-Ramps and Off-Ramps to address
22 Staff's Program Design Concerns discussed in Ms. Ellis' testimony, and (5) offer the

1 Program as a Pilot with Detailed EM&V to address Staff's modeling concerns
2 discussed in Ms. Ellis' testimony.

3 (d) With regard to the FAS Program Reporting Structure, Staff recommended that the
4 Commission require Evergy to develop a Detailed EM&V plan to address Staff's
5 reporting concerns discussed in Ms. Ellis' testimony.

6 **Q. Are Staff's concerns and recommendations addressed in the Settlement Agreement?**

7 A. Yes. Staff's concerns and recommendations are addressed in the Settlement Agreement.
8 Evergy has agreed to collaborate with Staff, as well as with CURB and other stakeholders,
9 to develop communication programs and specific evaluation frameworks for both programs
10 with specific timelines in order to address concerns expressed in Staff's testimony. In
11 addition, Evergy has agreed to a compromise with respect to certain issues raised by Staff
12 including but not limited to agreeing to raise the minimum charging events to qualify for
13 the incentive payment under the RMC program from one day per month to two days per
14 month, agreeing to limit Rightsizing of Charging Advice in the FAS program to Small
15 Private and Public Entities and providing a specific definition for "Small Private" entities,
16 and agreeing to develop a request for proposal ("RFP") form for Fleet Customers to access
17 third-party advisors offering fleet advisory services. The Parties' compromises and
18 agreements are all memorialized in the Settlement Agreement, which envisions approval of
19 the Application with the additional caveats set forth in the Settlement Agreement. As is
20 evident in the Settlement Agreement, the Parties have agreed to adopt certain of Staff's
21 recommendations while also reaching meaningful compromises and providing additional
22 information related to the two programs at issue to substantively address Staff's concerns.

1 **III. CONCLUSION**

2 **Q. Are you requesting that the Parties' settlement be approved?**

3 A. Yes. The settlement is supported by substantial competent evidence in the record, including the
4 Application and accompanying Direct Testimony as well as Rebuttal Testimony submitted by
5 Evergy, and by Direct Testimony submitted by CURB and Staff in this docket. In addition,
6 the settlement is in the public interest because, incentivized by numerous forces, the
7 transportation sector is rapidly electrifying, and Evergy customers are steadily transitioning
8 to EVs. It is Evergy's responsibility to ensure transportation electrification is efficient and
9 benefits all Evergy customers. The RMC Pilot and FAS Program detailed in this filing
10 explore strategies for managing this new and growing source of electric load. Evergy's
11 proposed approaches to fleet advisory and residential managed charging will lay the
12 groundwork for shaping how EVs interact with the electrical grid, with both near-term and
13 lasting benefits for all customers. Finally, the costs of the programs are reasonable and have
14 been fully reviewed by both CURB and Staff, and Evergy's proposal for recovery of
15 program costs through a deferral accounting mechanism and recovery in future rate cases
16 through expense amortization over five years is fair and reasonable. For these reasons, the
17 RMC and FAS programs² proposed in this docket, as amended and defined in the Parties'
18 Settlement Agreement, should be approved by the Commission.

19 **Q: Does this conclude your testimony?**

20 A: Yes, it does.

² As noted in the Settlement Agreement, although Evergy did not initially structure the proposed FAS Program as a Pilot program, the Parties have agreed that Evergy will offer the FAS Program as a five-year Pilot Program. *See* Settlement Agreement, p. 4, ¶ f.1.

ATTACHMENT A

BEFORE THE STATE CORPORATION COMMISSION OF THE STATE OF KANSAS

In the Matter of the Application of Evergy)
Metro, Inc., Evergy Kansas Central, Inc., and) Docket No. 25-EKCE-169-TAR
Evergy Kansas South, Inc. for Approval of its)
Phase 2 Transportation Electrification Portfolio.)

UNANIMOUS SETTLEMENT AGREEMENT

After conducting discovery and engaging in a series of settlement discussions, Evergy Kansas Central, Inc. and Evergy Kansas South, Inc. (together as “Evergy Kansas Central”) and Evergy Metro, Inc. (“Evergy Kansas Metro”) (collectively as “Evergy” or “Company”); the Staff of the State Corporation Commission of the State of Kansas (“Staff”); and the Citizens’ Utility Ratepayer Board (“CURB”) (all Parties referred to collectively as “Signatories”), the Signatories enter into this Unanimous Settlement Agreement (“Settlement Agreement”) intending to resolve all matters in this docket and agreeing to present this Settlement Agreement to the Commission for approval.

Background

1. On September 30, 2024, Evergy filed with the Commission an Application requesting approval to implement its Phase 2 Transportation Electrification Portfolio (“Phase 2 Portfolio”),¹ which is comprised of a Fleet Advisory Services (“FAS”) Program and a Residential Managed Charging (“RMC”) Pilot.

¹ Evergy Application (Sept. 30, 2024).

2. Concurrently with its Application, Evergy is also filing supporting testimony from Company witness Kimberly H. Winslow.²

3. CURB was granted intervention on November 5, 2024.³ No other parties petitioned to intervene in this docket.

4. On December 3, 2024, the Commission issued an Order Setting Procedural Schedule (“Procedural Order”) setting forth, inter alia, the dates for responsive testimonies, settlement discussions, a prehearing conference, and an evidentiary hearing.⁴

5. On January 23, 2025, CURB and Staff each filed direct testimony in this docket. Josh Frantz, testifying on behalf of CURB, recommended the Commission approve the Phase 2 Portfolio as proposed in Evergy’s direct filing.⁵ Lana Ellis, testifying on behalf of Staff, recommended the Commission approve the Phase 2 Portfolio as proposed in Evergy’s direct filing with certain suggested modifications. Staff’s suggested modifications were addressed during settlement discussions and are fully resolved by the terms of this Agreement, as set forth below.

6. On February 20, 2025, Evergy filed rebuttal testimony from three witnesses: Julie Dietrich, Tim Nelson, and Wendy Marine.⁶

Terms of Settlement Agreement

The Signatories hereby agree that Evergy’s Phase 2 Portfolio shall be consistent with the Phase 2 Portfolio proposed in the Company’s direct filing with the following modifications:

I. Fleet Advisory Services (“FAS”) Program

a. Program Levels and Design

1. The Program Description shall be as follows: This program meets the diverse needs of customers electrifying their fleets with a multi-level service offering. As shown

² Direct Testimony of Kimberly H. Winslow (filed September 30, 2024).

³ Order Granting CURB’s Petition to Intervene; Protective and Discovery Order (Nov. 5, 2024).

⁴ Order Setting Procedural Schedule (Dec. 3, 2024).

⁵ Direct Testimony of Josh Frantz on Behalf of CURB and Direct Testimony of Lana Ellis on Behalf of the KCC (filed January 23, 2025).

⁶ Rebuttal Testimony of Julie Dietrich on Behalf of Evergy, Rebuttal Testimony of Tim Nelson on Behalf of Evergy, and Rebuttal Testimony of Wendy Marine on Behalf of Evergy (filed Feb. 20, 2025).

in the table below, Level 1 offers one-on-one advisory assistance and leverages Everygy's Online Tool. Levels 2 and 3 include the offerings from Level 1, plus customized analysis and calls with an advisor when more support is needed.

FAS PROGRAM OFFERINGS	LEVEL 1	LEVEL 2	LEVEL 3
Customer Readiness			
Application Review and Acceptance	✓	✓	✓
Fleet Advisory Introductory Call	✓	✓	✓
Fleet Advisory Data Summary Review Call	✓	✓	✓
Total Cost of Ownership (TCO) Data Input Call	✓	✓	✓
Data Analysis & Fleet Assessment			
High-Level TCO with Everygy Online Tool (Includes General Incentives Info and Rate Education)	✓		
Customized TCO Analysis (Evaluate Vehicle Types, Routes, and Usage Patterns)		✓	✓
Detailed TCO Review Session		✓	✓
Conceptual Site Designs			✓
Preliminary Construction Cost Estimates			✓
Supplemental Fleet Advisory Call(s) (As-Needed)		✓	✓
Final Report Delivery			
Preparation of Summary Report	✓	✓	✓
Custom Fleet Assessment Report			
Custom TCO (Includes Charger and Rate Recommendation)		✓	✓
Charger Utilization and Load Management		✓	✓
Available Incentives		✓	✓
Fleet Advisory Project Walkthrough Call		✓	✓
Supplemental Fleet Advisory Call(s) (As-Needed)		✓	✓
Project Close-Out Call	✓	✓	✓

- b. Each level provides increasing support, allowing customers to start at any level and advance as needed. Everygy will build on previous work, avoid unnecessary rework, and incorporate the results from tasks already completed by the customer. Everygy will use the first fleet advisory call as the entry point (on-ramp) to the program. During this call, Everygy will:
 - Assess program eligibility and suitability based on project scope, required effort, and alignment with program objectives using a standardized scoring

matrix (to be developed) during the first advisory call as an entry point to the program

- Determine the off-ramp based on customer qualifications, completed work at the time of application, and specific needs within the program offering.

c. Rightsizing of Charging Advice

1. Evergy will modify eligibility as follows:

- Level 1: Grid optimization education for all customers.
 - Levels 2-3: Public entities and small private entities will qualify for this level of service (includes “rightsizing”).
2. Small private entities’ eligibility criteria are < 500 employees. These eligibility criteria will be based on the Kansas Small Business Profile published by the U.S. Small Business Administration’s Office of Advocacy.⁷

d. Third-Party Advisors

1. Within 60 days following Commission approval, Evergy will collaborate with Staff and CURB to develop a Request for Proposal (“RFP”) template and a process for customers seeking third-party fleet advisory services.

e. Communications Plan

1. Within 90 days following Commission approval, Evergy will develop and present to the intervenors for stakeholder review and collaboration a Communications Plan for the FAS program. The plan will include the following:
- Details on messaging
 - Design
 - Delivery channels
 - Frequency of communications directed at participants for each level
 - Key performance indicators

f. Pilot Program with EM&V

1. Evergy will offer the program as a 5-year pilot.
2. Evergy will fulfill the following tasks within the proposed scope and budget:
- Annual report:
 - Marketing and outreach activities completed
 - Number of participants
 - Projected charging loads
 - Budget expenditure
 - Final evaluation:
 - Customer surveys to gather process feedback and assess program influence

⁷ The 2023 edition of this document is available at <https://advocacy.sba.gov/wp-content/uploads/2023/11/2023-Small-Business-Economic-Profile-KS.pdf>

- Data collection and benefit-cost analysis with a focus on program impact derived from planned electric vehicles and charging plans
- 3. Evergy will collaborate with Staff and CURB to establish any additional EM&V requirements, if needed, and determine the necessary budget adjustments to accommodate additional scope, if required within 12 months following Commission approval.

II. Residential Managed Charging (“RMC”) Pilot

a. RMC Pilot Parameters

1. Evergy will increase the number of charging days each month from one (1) day to two (2) days as a condition of receiving the program’s monthly participation incentive to achieve the objective of data adequacy.
2. After twelve (12) months of Active Managed Charging data becomes available, the parties agree to consider increasing the required number of charging events if the median charging days are actually less than five (5).

b. Communications Plan

1. Within six months following Commission approval, Evergy will develop, and present to the intervenors for stakeholder review and collaboration, a detailed Communications Plan for the RMC Pilot. The plan will include the following:
 - details on messaging
 - design
 - delivery channels
 - frequency of communication directed at participants in each group (except the control group)
 - key performance indicators

c. EM&V/Research Methodology

1. Evergy will develop a draft EM&V Plan within three (3) months of Commission approval of the RMC Pilot. The EM&V Plan will include the EM&V Methodology Plan, EM&V Methodology Implementation Plan, and Detailed Customer Research Methodology Plan excluding use of pre-pilot focus groups. Evergy will work collaboratively with Staff and interested stakeholders over the following month to refine the EM&V Plan. Evergy, Staff, and interested stakeholders will then jointly file the EM&V plan in this docket.

III. Miscellaneous Terms of General Applicability

- a. Unless otherwise specifically provided for herein, the Signatories agree that the budget and participation parameters proposed in Evergy’s direct filing will not be affected by the terms of this Settlement Agreement.
- b. The Signatories agree that each party has the right to file testimony in support of this Settlement Agreement per the Procedural Schedule established for this docket.

- c. The Signatories waive cross-examination on all testimony filed contemporaneously with or prior to the filing of this Settlement Agreement.
- d. The Signatories stipulate that this Settlement Agreement is a negotiated settlement that fully resolves all matters in this docket and constitutes a fair and reasonable resolution of this docket.

IN WITNESS THEREOF, the Signatories have executed and approved this Settlement Agreement by subscribing their signatures below.

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CERTIFICATE OF SERVICE

I do hereby certify that a true and correct copy of the foregoing document has been emailed, this 3rd day of March 2025, to all parties of record as listed below:

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