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LETTER FROM THE PRESIDENT

Greetings everyone. I invite you to visit the Coal Institute's newly updated web site at thecoalinstitute.org. Ron Whalen and his team have made many improvements recently and the site contains a lot of useful information. Here you will find the latest NCCI news, as well as presentations, pictures and attendance lists from past meetings. For upcoming meetings you will find the complete information packet, online registration forms and a current registration list.

The Spring Meeting was a great success. Many thanks to Ted Patterson and Andy Cox for their hard work putting together an exceptional slate of speakers. If you were not able to attend, check out the recap of the meeting on page 3 to see what you missed.

Also see page 2 for a preview of the Summer Trade Seminar in Myrtle Beach. Donnie Peake and Nathan Boone have put together an impressive line-up of speakers. The Kingston Plantation is a great family venue and is always a terrific seminar. You don't want to miss this one. Hope to see you at the beach! Please visit our [website](#) for more information.

As you are probably aware, we lost a revered member of the NCCI family when B. T. Price passed away last month. I did not have the privilege of knowing B. T. during his professional career. My relationship with B. T. was entirely in the context of the NCCI, which he served for over 40 years. My fondest memory of B. T., as I expect it was for many NCCI members, was his installation of the officers, directors and administrative staff each year at the fall meeting. I know that some may have thought the ceremony was a little long. However, for those of us who he inducted, it carried a lot of meaning. In charging us with our responsibilities, he made it clear that the stewardship of the NCCI was a serious responsibility. He let us know that we had work to do and he inspired us to do it. It is amazing that he could instill such a strong sense of duty in what, I always thought, was a short ceremony. B.T. will be greatly missed.

Sincerely,

Jim Beauvais
President

MEMBERSHIP COMMITTEE

Please welcome our three newest members, who were approved at the Spring 2013 meeting:

- » Mississippi Lime Company
- » Strategic Energy Resolutions, Inc.
- » ISS Marine Services, Inc.

Currently we have 167 member companies. Frankly 26 are delinquent so if that's you please get your check in as soon as possible! Also please feel free to contact anyone on the Membership Committee <http://www.thecoalinstitute.org/committees> if you are aware of a company who may be interested in joining.

Barbara Cappola
Chair

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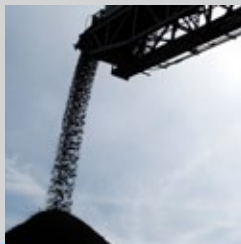
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SPRING MEETING RECAP

We had a great spring meeting where we heard from speakers representing coal markets both domestically and worldwide. We also heard about gas and its affect on the coal markets. We heard about utility coal procurement strategies and the complexities today in the procurement of coal while keeping a keen eye on natural gas pricing and how they affect procurement strategies, the coking coal markets, a view of opening a new mining operation and what it takes to open a new coal mining operation, and, U.S. river operations and the intricacies of our river system in which we move coal for both domestic usage and for export. Thanks to our speakers:

- » **Ted O'Brien**, Doyle Trading Consultants
- » **David Owens**, TVA
- » **Jeff Wozek**, Sun Coke
- » **Scott Spears**, White Oka Resources, LLC
- » **Michael Gipson**, AEP River Operations

You can view PDFs of the presentations on our Website [here](#). We also played a little golf. Pictures of our programs and golf outing are at the end of the newsletter.

SUMMER MEETING

Hopefully everyone has enjoyed their spring thus far and we look forward to seeing you this summer at The Coal Institutes Summer Trade Seminar in Myrtle Beach, SC July 14-16 at the Kingston Plantation.

Again this year, The Coal Institute will be offering a deep sea fishing trip and a golf tournament to go along with our great lineup of speakers.

The speakers for our business meeting include:

- » **Caryl Pfeiffer**, Director of Fuels for LG&E.
- » **Finn Host**, Executive Vice President of T. Parker Host
- » **Will Browning**, Coal Product Team Leader of Kinder Morgan Terminals
- » **Chris Hamilton**, Senior Vice President of West Virginia Coal Association

In addition to our industry speakers, The Coal Institute is proud to welcome as our motivational speaker **Dr. Benjamin Carson**, Director of Pediatric Neurosurgery at the Johns Hopkins School of Medicine. Some career highlights include the first and only successful separation of craniopagus (Siamese) twins joined at the back of the head in 1987, the first completely successful separation of type-2 vertical craniopagus twins in 1997 in South Africa, and the first successful placement of an intrauterine shunt for a hydrocephalic twin.

In June, 2008, he was awarded the Presidential Medal of Freedom by the President, which is the highest civilian honor in the land. Carson was recognized in November, 2008 by U.S. News & World Report and Harvard's Center for Public Leadership, as one of "America's Best Leaders."

The link below provides some clips of Dr. Carson giving speeches.

<http://vimeopro.com/user11042050/benjamin-carson-md>

Donnie Peake Jr.
Chair Summer Trade Seminar

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SUMMER MEETING CONTINUED

"Time keeps on slipping, slipping, slipping into the future..." Steve Miller Band

As always "time" is getting away from us and Summer Trade is here already. Time to see friends, their families, colleagues, and the ocean!

» Time to celebrate another year, another handmade quilt raffle, and another round of golf that you always swear you'll never participate in again.

» It's time to take time to appreciate our coal people and The Coal Institute.

» Time to become "motivated" better us as agents of our industry which supports our heritage and family roots.

» We have enjoyed the time we watched our children grow-up through the years with Summer Trade memories, dancing with them after dinner. Now if you are lucky, the time has come for grandchildren at Summer Trade.

» It's time for our coal people families to meet on the beach, dine at our favorite restaurant, and slip away for a round of golf with our favorite foursome.

» Time to participate in the conference as attendees to learn more about today's coal challenges and the remedies for improving our business.

"This time like all times, is a very good one, if we but know what to do with it." Ralph Waldo Emerson

"There is time for everything." Thomas Edison

"Good times, bad times" Led Zeppelin

"Does anybody really know what time it is?" Chicago

"It's Summer Time at the Summer Trade."

Rick Meade

NCCI SPONSORSHIP OPPORTUNITIES

Myrtle Beach here we come! I am excited and looking forward to the 2013 NCCI Summer Trade Seminar. You may know that in addition to our full lineup of energy industry speakers, we will have Dr. Benjamin Carson as our motivational speaker. We are looking for sponsors for Dr. Carson's presentation, as well as for the Sunday Poolside Reception, Monday and Tuesday Coffee Service as well as General Sponsorships. As always, we greatly appreciate your past support of NCCI sponsorship and hope we can count on your continued generosity as we go forward in this challenging business climate. Let me know if you have any questions about the sponsorship opportunities.

If any of you have any ideas on how to improve the NCCI's sponsorship service to our membership, please do not hesitate to let me know. I look forward to seeing each of you at the NCCI Summer Trade Seminar in Myrtle Beach. If you are a prospective member who is considering joining the NCCI, come talk to us and let us show you why it makes sense for your company to become an NCCI member.

Tim Carr

NCCI Sponsorship Chairman

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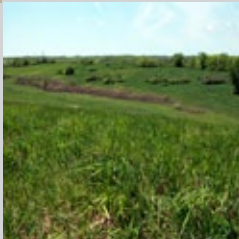
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SCHOLARSHIP UPDATE

This upcoming week is an important week for the Educational Funding Committee. It is the time in which we send the scholarship checks to the various colleges that were approved during the fall Board of Directors meeting. The funding for CEDAR and the Challenger Learning Center takes place in late fall and early winter, but we send the money to the colleges shortly after the spring semester has concluded. The checks they receive next week will be applied to scholarships during the 2013-2014 school year.

Recently, you received the notice and registration form for the 2013 Summer Trade Seminar and on the form are options to purchase mulligans, sponsor a golf hole, and purchase the Condo raffle tickets. The money for our educational funding program comes from these three sources as well as our membership dues. As you register for the STS, please consider purchasing these and let's keep our educational funding strong. As always, your support of this program is greatly appreciated.

Thanks, and we look forward to seeing you at Myrtle Beach in July!

Joe Frye

MARK YOUR CALENDAR

2013

- June 14** Kingston Plantation room block ends
- July 1** Early registration for Summer Trade Seminar ends
- July 5** Membership fees invoiced for 2014-2015
- July 14-16** Summer Trade Seminar – Kingston Plantation
- September 24** Mid Pines room block ends
- October 24-26** Fall Meeting at Mid Pines

2014

- April 2-4** Spring Meeting – Ballantyne
- July 13-15** Summer Trade Seminar – Kingston Plantation
- October 22-24** Fall Meeting – 1 Mid Pines

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I wanted to take a little time to draw attention to some of the details of this newsletter. NCCI is thrilled that Cleveland-based Culey Design is contributing their talents to make Coal Matters slick, professional, and easy to read. Culey Design has extensive experience with our industry, with Oxford Resource Partners and the Ohio Coal Association as current clients.

Having worked with Culey Design over the last three years on Oxford's website, investor relations collateral, and other communications materials, I can tell you that not only is the final product always well conceived, visually impressive and on time, but the experience of working with Shane Culey is easy and enjoyable. Culey Design is truly a communications Partner with Oxford, not just another vendor.

If you think that you might benefit from Culey Design's services, I encourage you contact Shane at shane@culeydesign.com or 216.570.8424 or feel free to contact me about them.

Ed Spiker

Editor Coal Matters

Coal Matters welcomes member comments or observations about our coal industry. Feel free to email **Ed Spiker** at espiker@oxfordresources.com for inclusion in a future edition of *Coal Matters*.

Please direct any comments, questions or concerns about *Coal Matters* to either:

Jim Beauvais

NCCI President
james.beauvais@constellation.com

Ed Spiker

Editor
espiker@oxfordresources.com

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