

Kentucky Utilities Company

Case No. 2025-00113

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21	807 KAR 5:001 Section 16(7)(h)	Financial forecast information corresponding to three (3) forecasted years included in capital construction budget	Metts
22	807 KAR 5:001 Section 16(7)(h)(1)	1. Operating income statement (exclusive of dividends per share or earnings per share);	Metts
23	807 KAR 5:001 Section 16(7)(h)(2)	2. Balance sheet;	Metts
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25	807 KAR 5:001 Section 16(7)(h)(4)	4. Revenue requirements necessary to support the forecasted rate of return;	Conroy
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27	807 KAR 5:001 Section 16(7)(h)(6)	6. Access line forecast (telephone);	Conroy
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29	807 KAR 5:001 Section 16(7)(h)(8)	8. Mix of gas supply (gas);	Conroy
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34	807 KAR 5:001 Section 16(7)(h)(13)	13. Gallons of water projected to be sold (water);	Conroy
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38	807 KAR 5:001 Section 16(7)(h)(17)	17. A detailed explanation of any other information provided	Conroy
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40	807 KAR 5:001 Section 16(7)(j)	Prospectuses of most recent stock or bond offerings	Burgos
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41	807 KAR 5:001 Section 16(7)(k)	Most recent FERC Form 1, FERC Form 2	McCombs
42	807 KAR 5:001 Section 16(7)(l)	Annual report to shareholders and statistical supplements	McCombs
43	807 KAR 5:001 Section 16(7)(m)	Current chart of accounts	McCombs
44	807 KAR 5:001 Section 16(7)(n)	Latest twelve (12) months of monthly managerial reports providing financial results of operations in comparison to forecast	Metts
45	807 KAR 5:001 Section 16(7)(o)	Monthly budget variance reports for twelve (12) months prior to base period, each month of base period, and any subsequent months	Metts

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46	807 KAR 5:001 Section 16(7)(p)	Securities and Exchange Commission annual reports (Form 10-Ks), Form 8-Ks, and Form 10-Qs	McCombs	
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48	807 KAR 5:001 Section 16(7)(r)	Quarterly reports to stockholders for most recent five (5) quarters	McCombs
49	807 KAR 5:001 Section 16(7)(s)	Summary of utility's latest depreciation study with schedules by major plant accounts	Spanos
50	807 KAR 5:001 Section 16(7)(t)	List of all commercially available or in-house developed computer software, programs, and models	Conroy
51	807 KAR 5:001 Section 16(7)(u)	Information related to any amounts charged, allocated, or paid to utility by an affiliate or general or home office	McCombs
52	807 KAR 5:001 Section 16(7)(v)	Cost of Service Study and incumbent local exchange carriers	Lyons
53	807 KAR 5:001 Section 16(7)(w)	Cost of Service Study and incumbent local exchange carriers	Conroy
54	807 KAR 5:001 Section 16(8)(a)	Jurisdictional financial summary for base period and forecasted periods deriving amount of requested revenue increase	Fackler
55	807 KAR 5:001 Section 16(8)(b)	Jurisdictional rate base summary for base period and forecasted periods with schedules detailing analyses of the rate base;	Fackler
56	807 KAR 5:001 Section 16(8)(c)	Jurisdictional operating income summary for base period and forecasted periods with schedules detailing major/individual accounts	Fackler
57	807 KAR 5:001 Section 16(8)(d)	Summary of jurisdictional adjustments to operating income by major account with supporting schedules	Fackler
58	807 KAR 5:001 Section 16(8)(e)	Jurisdictional federal and state income tax summary for base period and forecasted periods with all supporting schedules	Fackler
59	807 KAR 5:001 Section 16(8)(f)	Summary schedules for base period and forecasted periods of membership dues, initiation fees, country club expenditures, etc.	McCombs / Metts
60	807 KAR 5:001 Section 16(8)(g)	Analysis of payroll costs including schedules for wages/salaries, employee benefits, payroll taxes, etc.	McCombs / Metts / Poplaski
61	807 KAR 5:001 Section 16(8)(h)	Computation of gross revenue conversion factor for forecasted period	Fackler
62	807 KAR 5:001 Section 16(8)(i)	Comparative income statements and revenue/sales statistics for the five (5) most recent calendar years from the application filing date, base/forecasted period, plus two (2) calendar years beyond forecast period	McCombs / Metts
63	807 KAR 5:001 Section 16(8)(j)	Cost of capital summary for base period and forecasted period with supporting schedules	Burgos / Fackler
64	807 KAR 5:001 Section 16(8)(k)	Comparative financial data for ten (10) most recent calendar years, base period, and forecast period	McCombs / Metts
65	807 KAR 5:001 Section 16(8)(l)	Narrative description and explanation of all proposed tariff changes	Hornung
66	807 KAR 5:001 Section 16(8)(m)	Revenue summary for base period and forecasted period with supporting schedules detailing billing analyses for all customer classes	Fackler / Lyons
67	807 KAR 5:001 Section 16(8)(n)	Typical bill comparison under present and proposed rates for all customer classes	Fackler
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Elizabeth J. McFarland, Vice President - Transmission, LG&E and KU Services Company - Direct Testimony	21-McFarland Direct Testimony
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