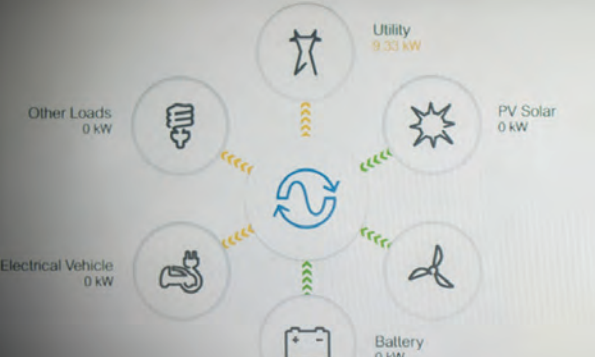




THE GRID FOR THE FUTURE



Ameren Illinois
Strategic Energy Plan
2027–2031



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LETTER FROM AMEREN ILLINOIS CHAIRMAN AND PRESIDENT PATRICK SMITH

Every day, millions of people across Illinois depend on reliable and affordable energy to power their homes, businesses and communities. At Ameren Illinois, we take that responsibility seriously. That's why we're focused on making smart investments today that will strengthen reliability, support economic growth and continue powering the quality of life.

At Ameren Illinois, we believe resilient energy delivery, including the electric grid and natural gas infrastructure that enables it, is the foundation for a safer, stronger, more competitive Illinois.

Every hospital that operates around the clock, every manufacturer that expands its workforce, every family that turns on the heat in winter or powers a home office depends on a resilient, modern grid.

As Illinois grows and innovates, we must continue to advance the infrastructure that supports it. The best value for our customers will be achieved through steady, proactive investment that prevents higher-cost failures, reduces outage impacts, supports economic growth, and protects customers from future bill volatility. This Ameren Illinois Strategic Energy Plan outlines our steps to building a reliable, resilient, and affordable energy future for our customers and our state.

Modernizing the Grid for a Stronger Future

Grid modernization is essential to delivering the reliable and resilient energy our communities and customers expect. We are investing in smarter technologies, hardened infrastructure, and advanced monitoring systems that:

- Reduce outages and improve restoration times.
- Strengthen resilience against severe weather.
- Enable faster integration of renewable energy resources.
- Deliver long-term affordability by improving system efficiency.
- Facilitate economic growth and new business development.

A modern grid enables the attraction of new businesses and investment, supports the growth of existing employers, and ensures Illinois remains a national hub for innovation and economic growth.

Electric and Natural Gas Distribution is Critical for Resource Adequacy

Ameren Illinois delivers electricity and natural gas to millions of homes, businesses, and communities across central and southern Illinois. The 2027-2031 Ameren Illinois Strategic Energy Plan reflects the scope of that critical work now and lays out the road-map for the future. It encompasses distribution infrastructure, programs, and investments that aim to meet the needs of Illinois' economic future.

Electric transmission and utility-scale generation assets fall outside the scope of our plan, as they are managed separately, but transmission expansion timelines are a recognized energy challenge in the region. These challenges underscore why distribution-level investments matter. A stronger, smarter distribution system helps Illinois adapt to and manage regional energy delivery as usage needs change over time.

Managing Costs While Building for Tomorrow

We recognize that affordability matters. Families and businesses are navigating real financial pressures. Our responsibility is to balance near-term, mid-term, and long-term investments with disciplined cost management to create long-term affordability.

By phasing investments strategically, leveraging operational efficiencies, and working closely with Illinois leadership, we work to keep customer bills stable while making the improvements necessary to prevent costly disruptions in the future. Reliability and affordability go hand in hand, and they give Illinois a foundation for economic growth.

Sustainability and Clean Energy Leadership

Illinois has set ambitious clean energy goals, and distribution utilities like Ameren Illinois play an important role in achieving them. Through continued grid upgrades and advanced technologies, we are strengthening the system to support enhanced capabilities, including:

- Greater renewable energy adoption.
- Electric vehicle growth.
- Battery storage and emerging technologies.

We are implementing comprehensive clean energy plans and are committed to aligning with state policy to reduce carbon emissions while maintaining system reliability and managing costs.

Empowering Customers Through Energy-Saving Opportunities

Ameren Illinois offers a variety of programs to our residential and business customers that can help control costs and reduce environmental impacts.

We encourage residents and businesses to take advantage of these programs, including home energy assessments, home upgrades, rebate opportunities on appliances and smart thermostats, programs and offerings such as virtual power plants, community solar rebates on solar panel installation, and home battery storage opportunities. When customers actively manage their energy use, they reduce costs, strengthen grid reliability, and contribute to sustainability goals.

At the same time, our role is to ensure participation is accessible and supported by reliable infrastructure. We are committed to making these programs easy to understand and beneficial for all communities, including those historically underserved.

Jobs, Workforce Development, and Economic Competitiveness

Energy drives economic development. Modern infrastructure signals to employers that Illinois is ready for investment. Our energy plan supports:

- Construction and skilled trade jobs.
- Long-term operations and technology careers.
- Community development in urban and rural areas.
- Strategic site readiness for major employers.

Reliable, resilient energy systems are often the deciding factor for companies choosing where to grow. By modernizing our grid, we help Illinois compete nationally and globally.

Working with the Illinois Commerce Commission

Progress does not happen in isolation. We value our close collaboration with the Illinois Commerce Commission and other regulatory bodies. Transparent engagement, data-driven decision-making, and accountability are essential to advancing thoughtful energy policy.

We are working collaboratively to ensure Illinois leads the way in reliability, sustainability, and innovation while protecting consumers and maintaining fiscal responsibility.

A Shared Commitment

Grid modernization and sustainability are practical steps toward building a safer, more resilient, and more prosperous state. We remain committed to investing prudently, partnering broadly, and putting customers first as we move Illinois into the next chapter of its energy future.

Our responsibility is clear: provide the reliable energy our customers need today while building a stronger system for tomorrow. By investing thoughtfully, working collaboratively and keeping customers at the center of every decision, we can build an energy future that is reliable, resilient and affordable for generations to come.



Sincerely,
Patrick E. Smith
Patrick E. Smith
Ameren Illinois Chairman and President



Executive Summary

Across the country, the energy landscape is evolving quickly, and for Illinois to stay competitive and grow, the state needs to keep pace.

Across the Midwest and within the Midcontinent Independent System Operator (MISO) region, electricity demand is accelerating after years of relative stability. Industrial reshoring, electrification of transportation and heating, digital infrastructure growth, data centers, advanced manufacturing, and agricultural processing expansion are driving load increase projections through the next decade.

AT THE SAME TIME:

- MISO is forecasting tightening reserve margins.
- Generator retirements are outpacing new additions.
- Transmission expansion timelines extend years beyond projected demand increases.
- Interconnection queues are continuously congested.



Today, Illinois policy decisions intersect directly with regional resource adequacy realities. Increasingly, what happens in Springfield affects reliability outcomes across the broader MISO footprint, and vice versa.

In January 2026, Ameren Illinois submitted its 2028–2031 Integrated Grid Plan (IGP) to the Illinois Commerce Commission to respond to this new reality of growing demand, constrained regional capacity, and rising reliability expectations.

The IGP lays the foundation for a safer, more reliable and resilient Illinois grid that advances the state’s clean energy goals while focusing on customer value and affordability. The plan also stresses the importance of modern energy infrastructure and systems that can support long-term economic growth and prepare for future energy demands.

Ameren Illinois is committed to proactive planning and being a leader in this energy evolution. The IGP brings together strategic programs and phased investments designed to improve grid performance, enhance customer benefits, and build on the solid foundation of the current distribution system’s capabilities.

In addition to its proposed near-term, mid-term, and long-term grid investments, Ameren Illinois is focused on modernizing its natural gas infrastructure to ensure safe, reliable storage and delivery of natural gas, while keeping rates dependable and affordable for its residential and business customers.

To provide the best value for customers, we cannot delay needed infrastructure work. Those delays could risk failures and outages that create significant cost burdens and threaten the safety of our residents. Customer value is achieved through steady, proactive investment that prevents higher-cost failures, reduces outage impacts, including safety concerns, supports growth, and protects customers from future bill volatility.

As a distribution utility, Ameren Illinois delivers electricity and natural gas safely and reliably to homes and businesses across central and southern Illinois. When customers flip a switch, Ameren Illinois ensures they can charge an electric vehicle, run an appliance, or heat/cool their homes. We enable the infrastructure behind safe and consistent energy.

Being a distribution utility also means planning for future energy needs. Ameren Illinois works within a regulated framework to make prudent investments that balance affordability with resiliency, safety, and modernization. Changes in customer demand, economic development opportunities, electrification, distributed energy resources like rooftop solar, and evolving reliability expectations will drive these investments and decisions.

Customers need a grid that is reliable, affordable, and ready. Ameren Illinois’ grid plan is the practical way to reduce outage risk, avoid higher emergency repair costs, support cleaner energy choices, and keep Illinois communities ready for jobs, growth, and severe weather.

Resource Adequacy and the Distribution Grid

To power a competitive economy, Illinois energy producers and policymakers are working together to ensure we can meet tomorrow's energy needs. At a basic level, resource adequacy means having enough power to reliably meet customer demand, especially during peak load periods. It requires balancing the capacity of different resource types, including thermal generation, renewables, demand response, and storage against projected customer demand.

Illinois is entering a new phase of formal resource adequacy evaluation. A statewide Resource Adequacy Study completed in 2025 at the direction of the Illinois Commerce Commission, assessed long-term capacity conditions, resource retirements, and evolving system needs under the state's clean energy policies. Building on those findings, the Clean and Reliable Grid Affordability Act (CRGA), enacted in January 2026, established statewide planning and coordination requirements to support long-term reliability as Illinois advances its clean energy transition. CRGA mandates that the ICC, the Illinois Power Agency, and the Illinois Environmental Protection Agency work together to develop solutions.



As a distribution utility, Ameren Illinois does not own or operate generation resources and does not manage generation or capacity procurement. However, we do support statewide resource adequacy from the distribution side.

That role is more important than it might appear.

Distribution-level investments and programs contribute to adequacy on both sides of the equation.

On the supply side, it enables solar and storage to reliably connect to the grid.

On the demand side, it reduces and shifts load through energy efficiency efforts, demand response, voltage optimization, and flexible load management.

We support resource adequacy through several programs, including:

- Expanding the grid's ability to host distributed energy resources like solar and battery storage.
- Advancing proactive capacity investments.
- Creating managed charging, demand response, and VPP offerings.
- Implementing flexible interconnection options.

A phased Distributed Energy Resource Management System (DERMS) roadmap is underway, moving from near-term improvements in operational data to medium-term forecasting and integration enhancements, and long-term capabilities for real-time control and dispatch. Performed in conjunction with prudent grid investments, a Virtual Power Plant program, demand response programs, and voltage optimization plans will also help strengthen statewide capacity.

Strategically integrated solutions, such as Ameren Illinois' Peak Load Reduction performance metric, provides a direct way to offset peak load periods through demand-side programs.

We will continue to monitor resource adequacy developments and provide distribution-level data and technical support to the ICC, IPA, IEPA, and MISO ensuring the distribution grid is ready to power Illinois' long-term economic growth.



Economic Development in Illinois

Illinois is experiencing increased energy demand driven by economic growth, business attraction, industrial expansion, technological innovation, and the electrification of transportation and building heating. These industries depend on reliable, safe, and resilient energy service. To maintain economic competitiveness and support customer needs, the distribution system must be prepared to provide reliable, cost-effective service across the state.

Economic development is linked to energy policy. Companies make business attraction, retention, and expansion decisions in regions where they are confident that the energy system can accommodate load growth without compromising reliability or long-term affordability.

In an era where companies evaluate grid capacity, interconnection timelines, and infrastructure certainty before committing capital, energy readiness is a decisive competitive factor. Illinois' ability to attract advanced manufacturing, agricultural processing, data-driven industries, and clean energy innovation depends directly on the strength and predictability of its electric and gas systems.

As the energy delivery provider for more than 130,000 businesses, Ameren Illinois delivers safe, reliable, affordable power for business operations and community growth. The strength of our portfolio lies in its diverse mix of industries, including manufacturing, alternative energy, agriculture and bioprocessing, and aerospace/defense. These sectors drive innovation and position Illinois for long-term regional competitiveness.

Ameren Illinois plays a critical role in attracting and retaining businesses by providing:

- Reliable and resilient energy service.
- Infrastructure that supports industrial growth, manufacturing, and data-driven industries.
- Collaboration with state and local economic development partners to support thoughtful energy policy.

A reliable and resilient grid is essential to economic development. **We recognize energy costs influence business decisions**, and Ameren Illinois' grid plan focuses on making strategic system investments to help stabilize energy costs and facilitate economic growth in the state.

OUR APPROACH SEEKS TO:

- Support growth without shifting undue costs to existing customers.
- Align infrastructure investments with actual demand.
- Maintain Illinois' competitiveness by strategically investing in grid improvements.

Economic development is integrated into our capacity planning and portfolio development processes, allowing us to prioritize projects that meet system needs and support broader economic benefits.

Building on this foundation, the IGP introduces a Proactive Economic Development Initiative that would dedicate targeted funding to upgrade grid infrastructure at high-potential sites in coordination with state partners such as the Illinois Department of Commerce and Economic Opportunity (DCEO) and the Illinois Economic Development Corporation. These investments are designed to attract new businesses to Illinois, support inclusive growth in Equity Investment Eligible Communities and other communities, and place downward pressure on rates over time by expanding the customer base that shares fixed delivery costs.

Grid modernization strengthens Illinois' ability to attract and retain major employers while accelerating innovation ecosystems. Energy reliability and capacity are decisive factors for business attraction, retention, and expansion across a wide range of industries. At the same time, a stronger, more flexible grid enables distributed energy resources, battery storage, electric vehicle infrastructure, and renewable integration to create a platform for new markets and entrepreneurial growth.

By ensuring site readiness and supporting testing, scaling, and commercialization of new technologies, Ameren Illinois can position communities for large-scale investment, long-term expansion, and sustained economic progress.

These opportunities extend to both urban and rural communities. Downstate Illinois requires more infrastructure per customer, which makes proactive maintenance and storm hardening even more important. Grid investments improve reliability for small businesses, support agricultural operations, and open the door for new development in historically underserved areas. Through coordination with policymakers and the Illinois Commerce Commission, modernization efforts can align workforce development programs, apprenticeship pipelines, and economic incentives to ensure Illinois residents are prepared to fill the jobs created. A modernized grid is an engine for inclusive economic growth.



Our Core Investment Principles: Equity and Cost Effectiveness

Equity and cost effectiveness are principles that inform every infrastructure investment decision. In an environment defined by increased load demands, tightening supply, and rising infrastructure expectations, these principles must be engineered into the system from the start.

AMEREN ILLINOIS' IGP APPROACH BALANCES:

- Grid modernization
- Decarbonization goals
- Reliability performance
- Safety standards
- Long-term cost stability

As distributed energy resources (DERs) scale and the Clean and Reliable Grid Affordability Act (CRGA) implementation advances, the grid must evolve to optimize resources without creating volatility or stranded cost risk to customers.



Affordability is connected to reliability and resilience because a system that fails under stress increases costs for all customers.

Affordability and Long-Term Planning

Customers want two things most: power they can count on and bills they can manage. The grid plan is about protecting both. True affordability must be evaluated across time horizons, and underinvesting in the near-term creates the potential for costly repairs and service interruptions that reduce affordability. Short-term rate restraint without long-term infrastructure planning can increase exposure to:

- Emergency procurement costs.
- Capacity auction volatility in MISO.
- Congestion-driven energy price spikes.
- Deferred maintenance failures.
- Accelerated asset replacement under crisis conditions.

Delaying grid investment does not avoid costs. It often makes them higher, more disruptive, and harder for customers to manage.

Affordability is achieved through disciplined, phased modernization that:

- Prevents high-cost reliability events.
- Reduces system volatility.
- Aligns capital investment with forecasted load growth.
- Expands the customer base responsibly to distribute fixed costs.
- Avoids reactive spending.

Demand-Side Resources

Energy efficiency (EE), demand response (DR), and distributed energy resources (DERs)/Virtual Power Plants (VPPs) are foundational affordability strategies embedded in our planning framework.

By using these tools, we can:

- Reduce peak demand growth.
- Mitigate upward pressure on supply costs.
- Improve system utilization.
- Lower participant bills.
- Enhance equitable access to energy savings.

As a long-term resource, EE remains the lowest cost means of meeting incremental demand. Every kilowatt reduced through efficiency avoids more expensive infrastructure additions or market purchases in the future.

DR and managed load, including electric vehicle charging management, provide system flexibility during peak periods and reduce exposure to supply constraints.

By lowering peak demand, EE and DR:

- Support resource adequacy.
- Reduce customer exposure to volatile capacity markets.
- Improve system resilience during stress events.
- Stabilize energy costs for all customers.



Intelligent Integration

Residents and businesses are taking control of their energy future with investments in rooftop solar and home battery systems. As these programs grow, the cost structure of the grid becomes more dynamic. Intelligent integration helps mitigate this potential risk.

Without advanced intelligent integration capabilities, unmanaged DER growth can:

- Increase operational complexity.
- Shift cost burdens.
- Create localized reliability constraints.
- Drive reactive infrastructure spending.

Our investments in advanced distribution management systems (ADMS), distributed energy resource management systems (DERMS), dynamic hosting capacity analysis, and real-time grid modeling ensure DER growth enhances system performance rather than increase cost volatility.

Implementing strategic pacing of grid upgrades protects customers from future bill shocks. There is no question the grid will need investment. The question is whether customers benefit from planned investment now or pay more later through failures, outages, and emergency repairs.

Equity

Affordability also includes equitable access to electricity and recognizes the economic reality of vulnerable customers. Ameren Illinois integrates affordability into planning through:

- Low-Income Discount Rate implementation (Rider ESDA).
- Enhanced identification of income-eligible customers.
- Targeted program outreach.
- Outcome tracking to improve program delivery.
- Integration of CRGA's expanded affordability expectations.

These measures ensure modernization benefits are shared broadly and vulnerable customers are protected as infrastructure evolves.

Managing Long-Term Costs

With nearly 900,000 wood poles already 30 years old or older, a fix-it-after-failure strategy is not a customer-value strategy. Cost effectiveness requires making strategic investments that deliver the greatest long-term value for customers. By planning ahead, prioritizing projects based on system need, and using new technologies to optimize existing infrastructure, Ameren Illinois can improve reliability and resilience while helping manage long-term costs.

Every Ameren Illinois investment strategy is evaluated for both its operational benefits and for how it supports affordability over the life of the investment.

Modernization allows the Company to reduce unnecessary maintenance, target investments where they deliver the greatest benefit, and avoid more costly emergency repairs and system upgrades in the future.

Managing costs in the long term goes hand in hand with investments in reliability, resilience, and safety.

- Reliable systems reduce outage-related economic losses while keeping homes, businesses, and critical facilities powered.
- Resilient systems limit emergency repair expenditures and help communities recover more quickly from severe weather and other disruptions.

- Secure systems prevent costly cyber or operational disruptions that could jeopardize public safety and critical infrastructure.
- Coordinated gas-electric planning stabilizes winter demand exposure.

Ultimately, an unstable system is an expensive and unsafe system.

Illinois is experiencing load growth driven by industrial expansion, electrification, and digitization of the economy. Infrastructure lead times mean decisions made in the next 24–36 months will determine cost stability for the next decade.

Without timely, strategic investments:

- Capacity prices rise.
- Congestion increases.
- Emergency procurements will become more likely in the future.
- Economic development projects face delays.
- Costs concentrate rather than distribute.

Proactive investment helps to mitigate these challenges and protects affordability. Delaying decisions will only compound risk.

Ameren Illinois Commitment

As a leading regional energy provider, we are committed to:

- Phased, disciplined capital investment.
- Integrating demand-side resources into system planning.
- Aligning grid investments with MISO's regional planning and market framework.
- Implementing CRGA affordability provisions responsibly.
- Protecting customers from long-term volatility.
- Aligning electric and natural gas planning to stabilize winter peak exposure.



The most durable affordability strategy Illinois can pursue is a modern, reliable, resilient, and secure grid.





Grid Vision and Strategy

The IGP reflects our commitment to being a recognized leader in helping the state reach its decarbonization and economic goals. Modernizing the electric grid and ensuring that investments deliver meaningful value to customers and communities are how we meet that commitment.

We are committed to the foundational pillars of affordability, equity, and cost-effectiveness. These principles guide how we deliver value to our customers and address the increasingly complex and dynamic demands on the electric grid.

Specifically, we address grid demands through these four strategic pillars:

- 1

SAFETY & RELIABILITY
- 2

RESILIENCY
- 3

CLEAN ENERGY TRANSITION
- 4

CUSTOMER EXPERIENCE

1 SAFETY & RELIABILITY

Delivering Stable Performance in a Time of System Stress

A stronger grid means fewer outages, faster restoration, and safer communities when severe weather hits. Energy reliability is the foundation of economic competitiveness and quality of life in Illinois. Ameren Illinois operates across approximately 43,700 square miles, serving diverse communities, industries, and load profiles. The system is exposed to:

- Severe weather events.
- Tree and vegetation impacts.
- Aging infrastructure.
- Peak usage periods.
- Rapid need for interconnecting with other systems.

The 2022 Baseline Grid Assessment identified equipment failures, vegetation, and weather as leading causes of power outages. Without sustained asset renewal and modernization, reliability performance would decline as infrastructure ages and demand grows.

At the same time, system stress is increasing due to:

- Sustained industrial and electrification-driven load growth.
- Increasing peak volatility.
- Tightening regional resource margins within MISO.

Reliability today requires building an intelligent distribution system capable of managing two-way power flows and real-time grid dynamics. Ameren Illinois is committed to improving reliability across the system through prudent investments to reverse negative reliability trends.



Severe Weather: A Safety Risk and a Cost Driver

Severe weather is a recurring operational reality with direct consequences for public safety and system costs. Storm hardening is customer protection: it reduces outage risk, shortens restoration, and helps avoid higher emergency repair costs.

On June 17, 2026, two waves of severe storms, including high winds and



tornadoes, swept across the service territory, at one point leaving approximately 48,000 customers without power. More than 400 utility poles were damaged, with the hardest-hit communities concentrated in the North

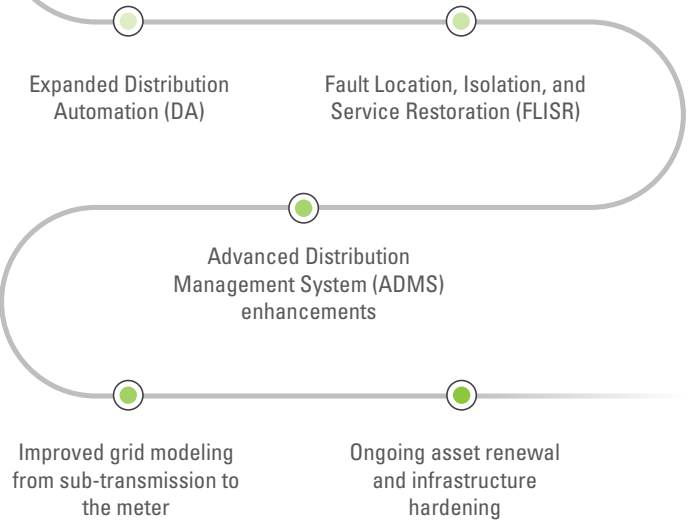
and East regions, including Galesburg, Decatur, Charleston, and Mattoon. More than 1,500 crews and support personnel mobilized and worked through the night, restoring service to roughly half of affected customers within 24 hours and to approximately 93% within 48 hours.

There were more than 200 tornadoes in Ameren Illinois service territory in the first half of 2026, which caused outages that impacted over a million customers. When the grid fails, the costs show up in canceled surgeries, spoiled food, closed businesses, delayed production, and disrupted families. An extended outage in a Peoria hospital forced the cancellation of hundreds of surgeries, and a series of outages at an East Central Illinois food processor caused significant food spoilage and required \$1 million in remediation costs.

Events like this illustrate why sustained investment in grid hardening and resiliency is a safety strategy as much as a reliability strategy. Downed lines and hundreds of damaged poles create immediate hazards for crews and communities, and the scale of emergency response required to restore service, including overnight crew mobilization, expedited material procurement, and mutual aid support, carries cost premiums well above planned, phased infrastructure investment. Proactive reliability work reduces exposure on both fronts: it helps protect communities from storm-driven safety hazards, and it helps protect customers from the price volatility that reactive, storm-driven repairs create.

Near-Term SAFETY & RELIABILITY Plans (Through 2027)

Ameren Illinois is strengthening core reliability capabilities through:



These investments reduce outage duration, limit affected customers, improve restoration speed, and have long-term cost volatility.

Reliability is achieved through disciplined modernization that prevents large-scale disruption, not reactive spending.

2 RESILIENCY

Designing for Recovery and Adaptation

Resiliency is the system's ability to withstand, adapt to, and recover from disruption, particularly as climate variability intensifies and electrification increases the consequences of outages.

As transportation and building heating electrify, outages have broader economic and public safety implications, and the grid must evolve accordingly.

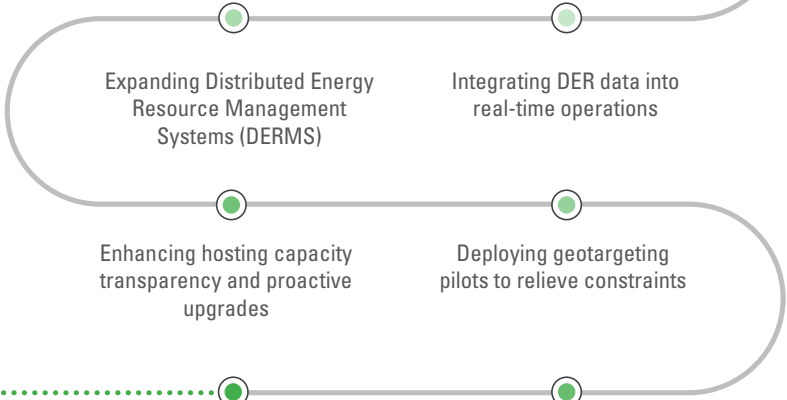
These measures enable the system to absorb load growth and DER expansion without degrading performance.

A RESILIENT GRID IS A COST-STABLE GRID.

These improvements reduce long-term costs by limiting emergency repair spending, minimizing outage duration, and reducing cascading system failures.

Mid-Term RESILIENCY Plans (2028–2030)

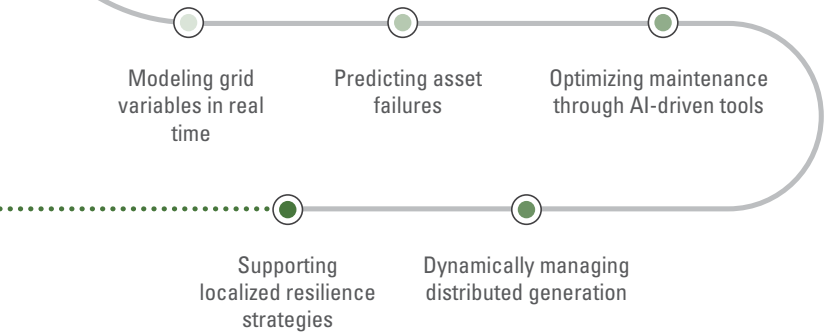
Ameren Illinois plans to advance resilience by:



Expanding system sensing and outage situational awareness

Long-Term RESILIENCY Plans (2031 and Beyond)

As Ameren Illinois transitions to a highly automated, analytics-enabled grid, the system aims to be capable of:





3 CLEAN ENERGY TRANSITION

Enabling Decarbonization Without Sacrificing Reliability or Affordability

Clean energy can lower customer costs, but only if the grid is strong enough to connect it, manage it, and deliver it reliably. Illinois' clean energy transition is accelerating under the Climate and Equitable Jobs Act (CEJA) and CRGA. Ameren Illinois' role is to ensure that transition is operationally feasible, economically responsible, and reliability informed.

The Clean Energy Transition pillar focuses on:

- Facilitating DER integration.
- Supporting and expanding beneficial electrification.
- Advancing pilots and innovation.
- Enabling equitable participation in renewable growth.

- Exploring non-wire alternatives to replace or defer traditional investments.
- Strengthening energy efficiency (EE) and demand response (DR).
- Supporting economic development and load growth.

Energy efficiency remains the lowest-cost resource for meeting incremental demand. Demand response and managed load reduce peak pressure, mitigate capacity price exposure within MISO, and enhance affordability.

Advanced grid capabilities, including DERMS, dynamic hosting capacity analysis, and integrated planning tools, ensure that clean energy growth enhances system performance.

To keep costs stable, the clean energy transition must align with regional resource adequacy realities. Ameren Illinois integrates distribution planning with MISO forecasts and state policy implementation to avoid timing risk between load growth and firm capacity additions.

The Role of Natural Gas

Natural gas is still central to how millions of Illinois families and businesses heat their homes and run industrial processes. As the state's third largest natural gas distribution company, we serve more than 800,000 natural gas customers through a delivery system of more than 18,700 miles of transmission and distribution mains, 12 underground storage fields and a total capacity of approximately 24 billion cubic feet. Our system supplies connections to 10 interstate pipelines. That infrastructure is essential to regional reliability, especially during extreme winter demand when the electric and gas systems work together to keep customers safe and warm. Further, because of our storage planning, we save customers millions of dollars in the winter by avoiding peak pricing on the coldest days when demand rises. For example, during Winter Storm Fern in 2026, Ameren Illinois saved its customers nearly \$80 million by delivering stored gas that was purchased at summer rates.

Simultaneously, Illinois is pursuing decarbonization, which includes a carbon-free electric sector, while the long-term role of natural gas is under evaluation through the Illinois Commerce Commission's Future of Gas proceeding which is ongoing. Future of Gas is

currently exploring legislative, regulatory, and policy options for decarbonizing the gas distribution system. The outcome of that process could shape how utilities like Ameren Illinois plan and invest in gas infrastructure in the years ahead.

This creates a short-term planning challenge. Investment in the gas system is necessary to serve customers safely and reliably. But as policy evolves, the balance between gas and electric demand will change.

As the largest dual-fuel utility in the state, Ameren Illinois is uniquely positioned to evaluate the interactions between the electric and natural gas distribution systems as customer energy needs evolve. As an initial step, Ameren Illinois is conducting a territory-level analysis to better understand how electrification, customer adoption patterns, infrastructure conditions, and local system characteristics may influence future energy needs and investment strategies. The insights gained through this work will help identify opportunities, challenges, and future capabilities that may support more integrated gas and electric planning over time. As technologies, customer preferences, and policy frameworks continue to evolve, Ameren Illinois will use these learnings to inform data-driven decisions that prioritize reliability, affordability, customer choice, and long-term system value..

As both a natural gas and electric provider, we remain committed to leading this work responsibly in close coordination with the ICC, state agencies, and the communities we serve.

The path forward for natural gas will continue to evolve with regulatory decisions, technology development, and customer adoption of alternatives like heat pumps and battery storage. Throughout the energy transition, Ameren Illinois continues to put customer needs first, recognizing that maintaining a diverse and reliable energy portfolio supports affordability, strengthens systems resilience, and gives customers more options to serve their energy needs.

Strategic approaches, including hybrid heating solutions that combine electric and natural gas technologies, can help reduce emissions and preserve customer choice while maintaining reliable service during periods of peak demand and extreme weather. We recognize that non-pipeline alternatives, including zonal electrification, are being discussed, and we will take a thoughtful, data-driven approach to evaluating these options. Our investments will continue to be guided by customer value, system reliability, affordability, and long-term performance and cost-effectiveness.

4 CUSTOMER EXPERIENCE



Empowering Participation While Protecting Long-Term Affordability

Customer experience extends beyond service quality. It includes cost and delivery transparency, empowering customers to choose the energy services that align with their needs, and giving them access to programs that make energy more affordable.

We are committed to making energy work better for every customer by:

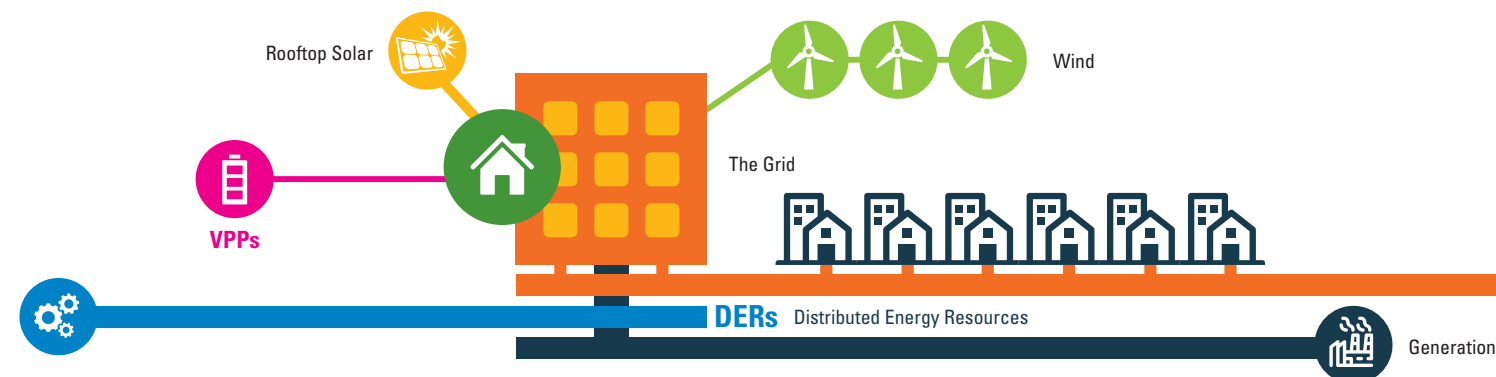
- Helping households and businesses reduce energy costs through efficiency programs and flexible usage options.
- Connecting income-eligible customers with discounts and financial assistance they may not know they qualify for.
- Putting more information in customers' hands with clearer data and greater visibility into how energy is used and billed.
- Removing barriers for customers who want to add solar panels, home batteries, or other clean energy technology.
- Communicating proactively when something affects their service before they have to call customer support for details.

Grid modernization will enable more personalized energy engagement while protecting system stability and data security.

On that front, cybersecurity and secure data frameworks are foundational to customer trust. As digital connectivity expands across the distribution system, Ameren Illinois is strengthening:

- Secure data access platforms.
- Network monitoring.
- Customer privacy protections.
- Real-time anomaly detection.

Our mission to power the quality of life focuses on the more than one million individuals and businesses in Illinois who rely on Ameren Illinois to deliver reliable electric and natural gas services day in and day out. We aim to empower those customers without sacrificing system integrity or data security.



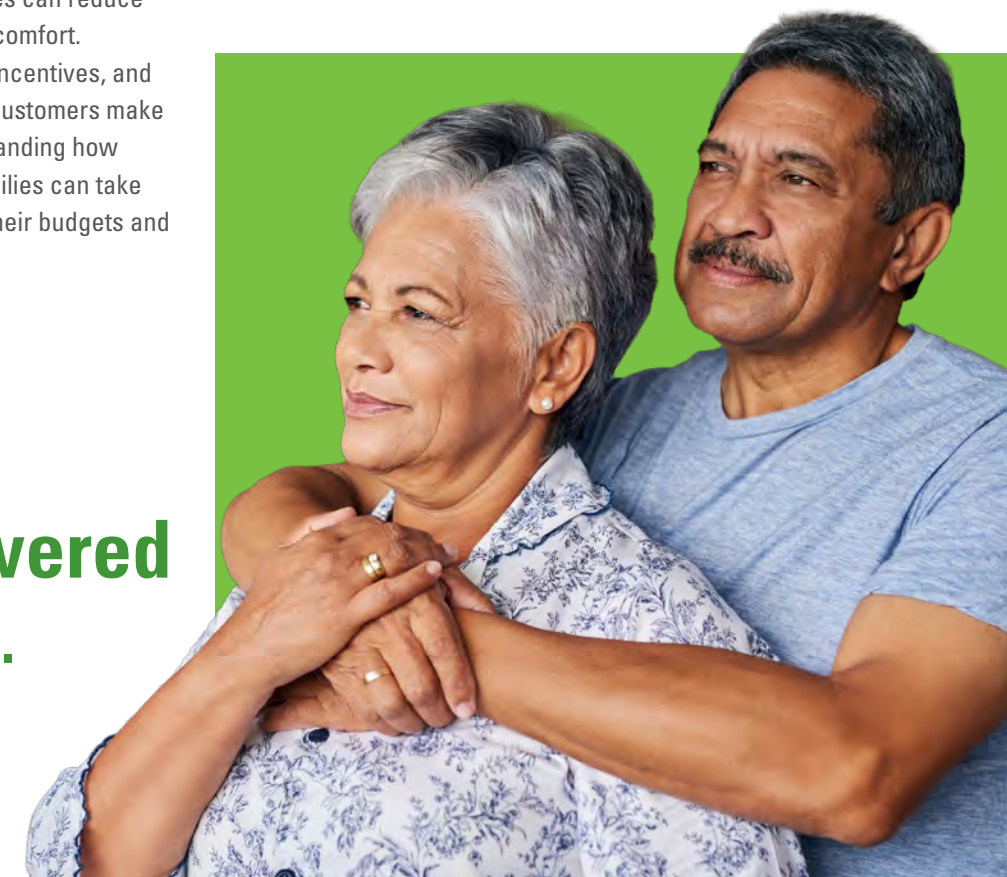
Customer Choice

Energy choice and participation play a key role in shaping Illinois' energy future. Customers today have more opportunities than ever to manage how and when they use electricity and natural gas. Programs that support distributed energy resources and electric vehicles, in addition to emerging technologies such as Virtual Power Plants, allow households to contribute to grid reliability while potentially lowering their own costs. Participation is voluntary, and customers can explore options that align with their financial goals, comfort level, and sustainability priorities.

Energy efficiency is one of the most effective and accessible tools for managing customer costs. Simple steps like upgrading insulation, installing smart thermostats, sealing air leaks, or replacing outdated appliances can reduce energy use without sacrificing comfort. Ameren Illinois offers rebates, incentives, and educational resources to help customers make informed decisions. By understanding how energy is used in the home, families can take practical actions that support their budgets and broader grid reliability.

By combining utility-supported programs with individual participation, Illinois households can play an active role in building a safer, more resilient energy future.

Informed customers are empowered customers.





Customer Assistance Programs

For residential customers, reliable and affordable energy starts with understanding the tools and programs available to them. Ameren Illinois offers a range of bill payment assistance options, flexible payment plans, and energy efficiency programs designed to help customers experiencing financial strain. Customers can access resources that provide real support while maintaining reliable service.

We understand that affordability matters now more than ever. That's why we offer year-round support programs designed to connect customers with the help they need before financial challenges escalate.



EXAMPLES

Electric Service Discount (2026):

Ameren Illinois' Electric Service Discount program goes live October 2026. This innovative program is a result of a strong partnership between Ameren Illinois and the Illinois Department of Commerce and Economic Opportunity (DCEO). With this program Ameren will provides significant bill discounts necessary to achieve the Commission-approved target energy burdens based on individual household income.

Market Development Initiative (MDI):

Efforts like MDI demonstrate Ameren Illinois' focus on removing barriers to participation in the clean energy transition and supporting the equitable distribution of benefits. MDI brings together efforts previously under separate initiatives, including the Clean & Equitable MDI and the Energy Efficiency MDI, integrating these efforts into a single, unified strategy designed to deliver holistic clean energy solutions to customers. The MDI plays a critical role in supporting energy investment in communities by funding partnerships with local businesses, educational institutions, nonprofits, and government agencies. Through this initiative, Ameren Illinois is enabling workforce development programs, internships and scholarships for local job seekers, and capacity-building for local vendors, especially those rooted in Equity Investment Eligible Communities.



Illinois Community Assistance:

Local agencies (e.g., Salvation Army, churches, Urban League) may provide eligible customers with grants to help manage their energy bills.

Supplemental Arrearage Reduction Programs (SARP):

SARP offers an opportunity to reduce or eliminate arrears with timely payments.

Warm Neighbors Cool Friends (WNCF):

Administered by the Energy Assistance Foundation, WNCF provides year-round grants to help income-eligible households through a network of local agencies. The program is funded through Ameren Illinois employee and customer donations and matches customer payments to help with bill obligations.

Low Income Discounts, including Home Energy Assistance Program/ PIPP (LIHEAP/PIPP):

This long-standing, state-administered program supports income-eligible customers through Direct Vendor Payments, Reconnection Assistance, and the Percent of Income Payment Plan, which also includes its own Arrearage Reduction Program.

Deposit/Late Fee Waiver:

Eligible customers with incomes up to 80% AMI by county can have security deposit and late payment charges waived by demonstrating income eligibility through Ameren Illinois' third party vendor, Transaction Services, Inc.

Integrated Safety and Security

Safety and security are embedded across each strategic pillar, and they are an operational priority at the company level.

Operational safety measures include:

- Infrastructure inspections.
- Vegetation management.
- Substation modernization.
- Automation that reduces manual switching exposure.

As a combined electric and natural gas utility, Ameren Illinois coordinates gas-electric planning to:

- Support winter peak reliability.
- Stabilize system demand during extreme cold.
- Reduce strain on electric winter capacity.

Our safety planning includes compliance, proactive risk modeling, cyber protection, and forward-looking system design.



Aligning Policy and Practice

Every sector of Illinois' economy depends on reliable, affordable power. The strength of that economy is directly tied to the strength of our energy infrastructure.

Responsible legislation makes that strength possible. Thoughtful, balanced energy policy provides regulatory clarity, encourages innovation, protects consumers, and enables long-term infrastructure planning. Our vision is rooted in our mission to "power the quality of life" for the communities we serve. Our work across our four pillars (safety and reliability, resiliency, clean energy transition, and customer experience) aligns with and helps to advance the goals of CEJA and CRGA, while also supporting the achievement of performance metrics.

By working constructively with the Illinois Commerce Commission and state leaders, we aim to align investments with public policy goals, including modernizing infrastructure, integrating clean energy resources, and supporting affordability. Prudent investments and predictable policy frameworks attract private capital and signal that Illinois is committed to sustainable growth.

Effective policy must align with operational realities, and we serve as an implementer and advisor, providing data-driven insights that inform the evolution of Illinois energy policy.

The IGP aims to advance Illinois' clean energy transition while staying reliable, affordable, and centered on customers. This includes supporting customer affordability and choice, strengthening grid reliability and resilience, expanding customer participation in clean energy programs, and improving transparency in how investments are planned and implemented.

Ameren Illinois as a Policy Partner

Ameren Illinois operates at the intersection of energy policy and operational reality. As the entity responsible for delivering safe and reliable energy across central and southern Illinois, we bring practical system insight into the policy development process while serving as a trusted partner to the communities, customers, and leaders who depend on our energy infrastructure every day.

We contribute to Illinois' energy policy framework by:

- Providing real-world grid performance data that informs regulatory decision-making.
- Sharing forward-looking load forecasts and cost modeling to support long-term planning.
- Identifying operational considerations related to resource adequacy, interconnection timelines, and distribution system impacts.
- Supporting pragmatic policy refinement that supports evolving implementation realities.
- Advocating for informed legislation that balances clean energy goals with affordability and system stability.



Next Steps: Investment and Implementation

Reliable energy is economic infrastructure; communities cannot attract jobs and investment if the grid cannot support growth. Illinois is in a period of load and infrastructure transition. Decisions made over the next several years will shape the state's economic competitiveness and system reliability for decades. The IGP is a disciplined, phased approach to navigating this complexity responsibly.

The infrastructure in Ameren Illinois' approximately 43,700 square miles of service territory is aging, and the largely overhead delivery system is susceptible to climate impacts. The 2022 Ameren Baseline Grid Assessment conducted by Liberty Consulting Group found that "the greatest causes of customer interruption (CI) and customer minutes of interruption (CMI) were equipment malfunctions, trees, and weather." That continues to be true. Without continued investment in the system, reliability performance will decline over time.

Investments made to date have laid a solid foundation for Ameren Illinois to meet the demands of the clean energy transition. Deployments in distribution automation, advanced distribution management systems, communications infrastructure, and advanced metering infrastructure, together with traditional reliability and resiliency improvements, are strengthening the grid and preparing it to meet evolving customer expectations.

By expanding distribution capacity, integrating flexible load management, and modernizing infrastructure, we enable growth while mitigating upward pressure on supply costs. These investments preserve service for today's customers and position communities to support local economies.

Economic opportunity doesn't stop at urban centers. We're building a grid that supports high-growth businesses in every region we serve.

Ameren Illinois is coordinating with state and local partners to align grid investments with business and community growth. Our investments will help ensure that **all regions, from rural towns to urban centers, and everything in between, share in economic opportunity.**

INFRASTRUCTURE INVESTMENTS

- Support local jobs in construction, engineering, and skilled trades.
- Drive local spending and tax base growth.
- Create long-term conditions for business expansion and job creation.

These investments circulate dollars within Illinois communities. This plan is a competitive strategy designed to ensure Illinois remains a reliable, investable, and economically resilient state in a rapidly evolving energy environment.

Ameren Illinois' grid vision is built around a deliberate, phased roadmap divided into near-term, mid-term, and long-term objectives.

Near-Term (through 2027) BUILDING THE FOUNDATION



In the near term, we are focused on strengthening core capabilities that directly affect affordability, reliability, and equitable access. Core infrastructure hardening, including poles, conductors, and substations, remains foundational to this work; deploying new grid technologies in weather-exposed areas will not hold up without it. Asset management is likewise foundational across the full planning horizon, not a near-term-only initiative, and that consistent framing carries through the mid- and long-term periods. Affordability efforts include implementing innovative rate designs to better support income-qualified customers.

On the operations side, we are modernizing distribution management through advanced distribution automation and Fault Location, Isolation, and Service Restoration. This enables faster outage response and a more automated system. Voltage optimization and increasingly correct grid modeling, from sub-transmission to the customer meter, help conserve energy and improve performance, while enhanced Advanced Distribution Management System applications further strengthen state estimation and restoration switching analysis.

In addition, we are preparing the grid for beneficial electrification and distributed energy resource growth. This includes managing residential EV charging to protect reliability, enhancing services for school bus electrification, and helping customers mitigate infrastructure upgrade costs needed for EV adoption. We are advancing dynamic hosting capacity maps and implementing DERMS, while improving interconnection processes through concurrent studies and greater flexibility.

VPP capabilities, which includes aggregating customer-owned devices such as batteries and smart thermostats into a single dispatchable resource, are a near-term priority to manage peak demand. A scheduled dispatch VPP is already underway, with a Comprehensive VPP scheduled mid-term. This reflects the rapid growth of customer-owned battery storage in our territory, which has nearly tripled from approximately 2,900 to more than 7,000 installations. We are strengthening equitable program delivery through improved identification of income-eligible customers and better outcome tracking.

Mid-Term (2028-2030)

INTEGRATING, SCALING, AND
AUTOMATING FOR A SMARTER GRID

From 2028 to 2030, the plan shifts toward integrating growing distributed energy resource (DER) adoption, leveraging increasing data availability, and supporting Illinois’ continued economic expansion. Affordability remains a central priority, with new rate designs focused on keeping costs stable over time while maintaining reliable electric service. Operationally, DER data becomes integrated into planning, forecasting, and real-time grid management, strengthening resource adequacy planning and enabling the system to respond more efficiently and effectively to changing customer demand and generation.

Ameren Illinois will move toward controlling and dispatching DERs in real time, including integration with regional wholesale markets such as those operated by MISO, allowing the grid to respond dynamically to changing system conditions and operate more efficiently.

The mid-term also emphasizes proactive hosting capacity investments and improved interconnection coordination. VPPs will evaluate how customer-owned resources can support resource adequacy, reduce peak demand, and defer more costly infrastructure investments where appropriate. Geotargeting pilots will identify where optimization of customer-owned assets can best alleviate grid constraints. Energy efficiency and demand response programs will become more targeted and focus on high-usage customers and affordability initiatives. Effectively leveraging these programs and integrating them into planning processes could offset or defer traditional investments in the future.

As DER adoption accelerates, and Illinois continues to evaluate policies that will shape the state’s energy future, Ameren Illinois will work closely with policymakers, regulators, customers, and industry stakeholders to support thoughtful implementation. Discussions surrounding CEJA and CRGA, resource adequacy, grid modernization, and the evolving role of DERs will continue to shape this work.

At the same time, implementation will be informed by evolving federal requirements, including FERC actions related to DER participation, interconnection, and regional transmission planning.

Ameren Illinois will continue engaging stakeholders throughout these proceedings to help ensure policy decisions support long-term reliability, affordability, and economic growth while maintaining the flexibility to adapt as regulatory requirements evolve.

Grid strengthening during this period builds on our proposed Grid Strengthening Program framework, combining near-term operational improvements with long-term infrastructure investments through a stakeholder-informed process that prioritizes future system needs. As policy discussions continue, this framework provides the flexibility to adapt investments as customer needs, technology, and regulatory requirements evolve.

Ameren Illinois aims to significantly expand data and asset management capabilities. Enhancements include overhead line inspection technologies, greater grid visibility for restoration and situational awareness, near real-time communications to field devices, and improved asset health tracking systems. We will use updated network models and improved cost and project tracking systems to strengthen financial oversight and investment transparency. Automated integration of DER and EV load into forecasting tools will mature our planning capabilities through integrated system planning and more advanced scenario analysis. All of this deepens reliability and resiliency analyses, improving asset risk identification and preparing the system for more extreme weather and evolving load patterns.

Long-Term (2031 and Beyond)

OPTIMIZATION, INTELLIGENCE, AND
RESILIENCE FOR A SUSTAINABLE GRID



Beginning in 2031, Ameren Illinois aims to transition to a highly advanced, data-centric grid. Advanced analytics will improve our understanding of energy usage and demand trends, enabling more effective customer programs, more informed rate design, and better long-term system planning. Appliance automation is expected to support new rate structures that drive customer savings and reduce peak demand. As interconnection processes become more automated and efficient, local capacity increases can support electrified load and distributed generation.

AI and enhanced analytics will continue to play a growing role in operational and investment decisions. Expanded system sensing and observability improve grid awareness, while AI-driven tools improve maintenance, asset management, and capital deployment. Field operations benefit from mobile dispatch, route optimization, and workforce productivity reporting, which creates a more responsive and efficient service model. Customers and authorized third parties gain greater access to interval meter data, supporting informed decision-making and new energy solutions.

This phase strengthens both
the transparency and the
intelligence of the grid.

Equity and affordability considerations continue to be more integrated in investment planning through structured analysis of how grid investments impact customers and communities. At the same time, enhanced system planning and power quality monitoring will improve visibility into DER performance, support resilience planning for severe weather, and enable more cohesive gas and electric system planning.

Together, these advancements will give operators better real-time awareness of grid conditions, improve outage management, and support more informed operational decisions.

A Cohesive Path Forward

Taken together, this strategic plan reflects a disciplined evolution, from strengthening foundational capabilities to integrating and scaling distributed technologies. This leads to a resilient, intelligent grid improved through advanced analytics and automation. At every stage, our focus is consistent: deliver affordability, reliability, equitable benefits, and the infrastructure necessary to support Illinois' growing electrification and economic future.

The Cost of Waiting

If we defer the investments laid out in this plan, it will not keep costs manageable. It will defer them and, potentially, increase them exponentially. Delayed maintenance carries consequences beyond repair costs. It can lead to more frequent and longer outages. Further, reacting to storm damage after it occurs is often far more expensive than strengthening the grid in advance. And the true cost isn't measured only in dollars. Every hour of disruption affects businesses, essential services, and families. From a manufacturing line going offline to a hospital relying on backup power or emergency responders working in more dangerous conditions, reliable energy helps protect our economy, our communities, and public safety.

Proactive investment is, in practical terms, the smarter, safer, and more affordable path.



Behind each of the programs and investments laid out in this plan are tangible, everyday improvements (e.g., composite poles that resist the storm damage traditional wood poles cannot, or smart switching devices that automatically reroute power around a downed line so fewer customers lose service and outages end sooner). These are the kinds of investments that make grid modernization concrete for customers, investors, and communities alike.



Getting Involved

Every grid investment plan follows a specific planning cycle. It starts with utilities proposing a plan such as the IGP. From there, regulators and stakeholders review and respond to the plan through formal response and rebuttal testimony. All interested parties are able to discuss the plan at public meetings or by writing letters of support. Throughout the process, there are hearings and briefs that present opportunities for feedback, which allows multiple stakeholders to be heard before the plan is finalized.

It is worth noting the IGP proceedings do not set energy rates. Rates are set in a separate Rate Proceeding at a later date.

Stakeholders have multiple avenues to get involved, and together we can secure Illinois' energy future.

For Illinois Leadership

**Provide Policy Certainty.
Enable Smart Investment.
Protect Affordability.**

Grid modernization requires long-term planning, disciplined and proactive investment, and regulatory clarity. Stable policy frameworks reduce financial risk, attract capital, and allow utilities to invest at the pace needed to maintain reliability and affordability.

- Support stable, predictable regulatory frameworks that allow long-term infrastructure planning.
- Advance responsible energy legislation that balances reliability, clean energy goals, and consumer protections.
- Encourage cost-recovery structures that support grid modernization while keeping rate stability.

- Champion workforce development initiatives aligned with infrastructure investments.

- Partner with each other to ensure transparent, data-driven oversight that fosters innovation without unnecessary delays.

CALL TO ACTION

Prioritize pragmatic, forward-looking energy policy that strengthens reliability, attracts investment, and keeps Illinois competitive nationally and globally.



For Community Economic Development Partners, including Local Businesses

Engage Early.
Plan Strategically.
Grow Confidently.

Energy readiness is a critical component of site selection, expansion, and operational resilience. When determining the appropriate sites, industry readiness, and growth opportunities available, early coordination with Ameren

Illinois can reduce project risk and ensure infrastructure keeps pace with growth plans.

- Partner with Ameren Illinois early in site selection or expansion planning.
- Assess future energy capacity needs as part of capital investment decisions.
- Participate in demand response, energy efficiency, and distributed energy programs to reduce operational costs.

- Align corporate sustainability goals with available grid modernization initiatives.

- Advocate for infrastructure investments that strengthen Illinois' economic competitiveness.

CALL TO ACTION

Engage with Ameren Illinois to position your business for long-term success in a state powered by modern, reliable energy infrastructure.



For Municipalities, Unions, & Contractors

Build Together.
Respond Together.
Recover Together.

Every community depends on a reliable energy system, especially when severe weather or unexpected disruptions occur. Municipal leaders, labor unions, and contractors play an essential role in building, maintaining, and restoring the infrastructure that keeps critical services operating. From hospitals and water treatment facilities to schools, businesses, and emergency response,

a resilient grid helps protect public safety while supporting local economies.

By working together, Illinois can reduce long-term costs, strengthen storm resilience, and ensure the skilled workforce is in place to meet tomorrow's energy needs.

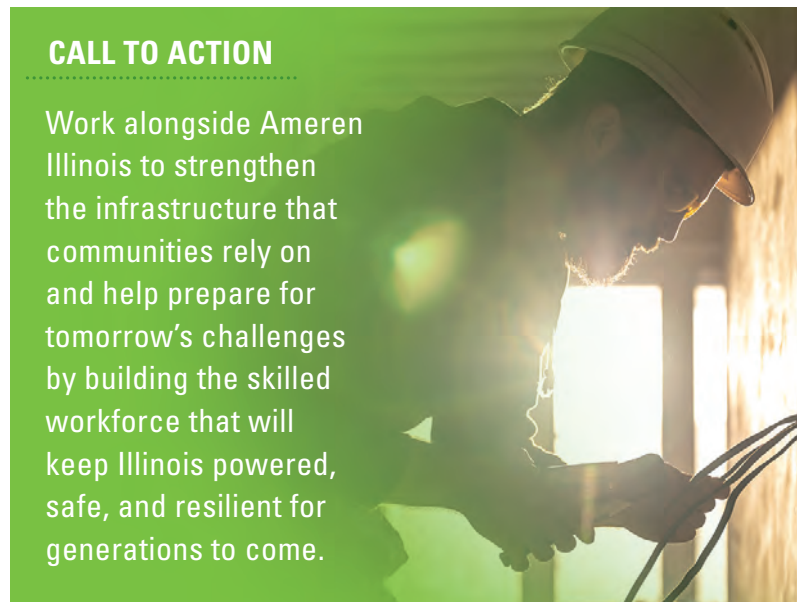
- Coordinate infrastructure planning to support municipal services, permitting, and future community growth.
- Expand apprenticeship and workforce development programs that prepare the next generation of skilled energy workers.

- Prioritize storm hardening and resilience investments that protect critical facilities and speed community recovery after major weather events.

- Share best practices and strengthen partnerships before emergencies occur, so communities can respond and recover more effectively.

CALL TO ACTION

Work alongside Ameren Illinois to strengthen the infrastructure that communities rely on and help prepare for tomorrow's challenges by building the skilled workforce that will keep Illinois powered, safe, and resilient for generations to come.



For Stakeholders, Nonprofits, Community Organizations, & Associations

Collaborate. Educate.
Amplify Impact.

Industry groups, nonprofits, community organizations, and economic development leaders play a critical role in aligning public understanding with infrastructure realities.

- Share accurate, data-driven information about grid modernization and its economic benefits.
- Facilitate member education around energy efficiency, distributed resources, and infrastructure planning.
- Provide feedback during regulatory and planning processes to ensure diverse perspectives are considered.

- Support policies that align environmental goals with reliability and affordability.

- Partner on workforce development and innovation initiatives tied to grid investments.

CALL TO ACTION

Serve as trusted conveners and advocates for balanced energy solutions that advance both economic and environmental priorities.



For Illinois Residents

Stay Informed.
Participate.
Take Advantage of
Available Resources.

Grid modernization is designed to improve reliability and expand customer choice; customer participation enhances its impact. Participating in energy-savings programs, including energy efficiency opportunities, virtual power plants, residential EV programs, and more, connect directly to the same grid strengthening and affordability work described throughout

this plan, delivering real value to residents beyond any single program requirement.

- Stay informed about supply and delivery costs to better understand your bill.
- Participate in energy efficiency programs to manage household costs.
- Consider voluntary programs such as distributed energy offerings, Power Smart Pricing, or Virtual Power Plants where appropriate.
- Learn about how grid modernization strengthens reliability in your community.

- Engage in public discussions about Illinois' energy future.

- Explore bill assistance and flexible payment programs if needed.

CALL TO ACTION

Use available tools, energy efficiency options, and stay informed. Your participation strengthens your household budget and the reliability of Illinois' energy system. Visit <https://www.ameren.com/efficiency/programs> to learn more about the opportunities available.





A Shared Commitment

GRID MODERNIZATION
AND SUSTAINABILITY ARE
PRACTICAL STEPS TOWARD
BUILDING A SAFER, MORE
RESILIENT, AND MORE
PROSPEROUS STATE.

We remain committed to investing prudently,
partnering broadly, and putting customers first as
we move Illinois into the next chapter of its
energy future.

Patrick E. Smith

Patrick E. Smith
Ameren Illinois Chairman and President



For more information, go to
www.ameren.com/reliability/illinois/energy-transition