

# **AutoCPA Group**

## **Spring Meeting**

### **May 13 – 14, 2010**



## **Vallarta Palace, Puerto Vallarta, Mexico**



# AutoCPAGroup

Spring Meeting Agenda  
May 13 – 14, 2010

Vallarta Palace  
Puerto Vallarta, Mexico

Chairman: Kevin Allison  
206-382-7703

Vice Chairman: Jeff Jensen  
801-262-4554

Program Chairman: Donny Kretschmar  
480-839-4900

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Thursday – May 13<sup>th</sup>

7:30 a.m.	Breakfast
8:00 a.m.	Business Meeting
8:45 a.m.	Michael Giarrizzo, Jr. <a href="mailto:mgiarrizzo@dcrsystems.net">mgiarrizzo@dcrsystems.net</a> DCR Systems – Body Shop 888-DCR-9902
10:30 a.m.	Break
10:45 a.m.	Carl Woodward <i>GM Reporting Standards</i>
12:00 p.m.	Lunch
1:30 p.m.	Erin O'Brien – <a href="mailto:eobrien@l2tmedia.com">eobrien@l2tmedia.com</a> L2T Media – <i>Internet Sales</i> 773-330-3556
3:00 p.m.	Break
3:30 p.m.	Roundtable
6:00 p.m.	Reception

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Friday – May 14<sup>th</sup>

7:30 a.m.            Breakfast

8:30 a.m.            Eric Chase – [echase@bressler.com](mailto:echase@bressler.com)  
Bressler, Amery & Ross – *Auto Legal Issues*  
973-514-1200

10:00 a.m.           Break

10:15 a.m.           Roundtable

12:00 p.m.           Lunch

1:30 p.m.            Roundtable

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# AutoCPAGroup

## Meeting History

	<b>Date</b>	<b>City</b>	<b>State</b>	<b>Host</b>	<b>E/W</b>
1	May - 88	Rolling Meadows	Illinois	DeFillips	E
2	September - 88	San Francisco	California	McCall	W
3	May - 89	Florence	Kentucky	Bressler	E
4	October - 89	Scottsdale	Arizona	Santostefano	W
5	May - 90	Denver	Colorado	Tanner	W
6	October - 90	St. Petersburg Beach	Florida	Bond	E
7	May - 91	St. Louis	Missouri	Woodward	E
8	October - 91	San Diego	California	Bob Hull	W
9	May - 92	Tulsa	Oklahoma	Bachle	W
10	October - 92	Baltimore	Maryland	Cohen	E
11	May - 93	Las Vegas	Nevada	Santostefano	W
12	October - 93	Charleston	South Carolina	Betty	E
13	May - 94	Rosemont	Illinois	Woodward	E
14	September - 94	Portland	Maine	Randall	E
15	May - 95	New Orleans	Louisiana	Hulsey	E
16	September - 95	Seattle	Washington	Owens	W
17	May - 96	New York	New York	Winiarz	E
18	September - 96	Sacramento	California	Deering	W
19	May - 97	Cleveland	Ohio	Hayes	E
20	October - 97	Lake Buena Vista	Florida	Bond	E
21	May - 98	Las Vegas	Nevada	Heisey / Santostefano	W
22	September - 98	Hershey	Pennsylvania	Thompson	E
23	May - 99	San Diego	California	Weinhold	W
24	September - 99	Charleston	West Virginia	Galloway	E
25	May - 00	Salt Lake City	Utah	Jensen	W
26	September - 00	Denver	Colorado	Heider	W
27	May - 01	Cancun	Mexico	Rosenfield	-
28	October - 01	Nashville	Tennessee	Vaughn	E
29	May - 02	Fort Worth	Texas	Green	W
30	October - 02	Scottsdale	Arizona	Kretschmar	W
31	May - 03	Nassau	Bahamas	Nelson	-
32	October - 03	Big Fork	Montana	Deering	W
33	May - 04	Cabo San Lucas	Mexico	Bachle	-
34	October - 04	Ogunquit	Maine	Haag	E
35	May - 05	Key West	Florida	Bond	-
36	October - 05	Charleston	South Carolina	Porter	E
37	May - 06	Cancun	Mexico	Bressler	-
38	September - 06	Carmel	California	Deering	W
39	May - 07	Siesta Key	Florida	Bond	E
40	September - 07	Seattle	Washington	Allison	W
41	May - 08	West Palm Beach	Florida		E
42	September - 08	Chicago	Illinois		E
43	May - 09	Puerto Vallarta via Las Vegas	Mexico Nevada	Deering	W
44	September - 09	Washington, DC	51 <sup>st</sup> State	Thompson	E
45	May - 10	Puerto Vallarta	Mexico	Deering	W

## Spring 1988 - Rolling Meadows, IL

Speaker		Organization	Topic
Jim	Thomas		What is expected of an audit dealer's CPA
Willard	DeFilipps		Uniform capitalization for audit dealers
Dan	McCall		Dealers compensation programs
John	Dobson		Operational Audits (1)
Ken	Hayes		Operational Audits (2)

## Fall 1988 - San Francisco, CA

Speaker		Organization	Topic
Carl	Woodward		Dealership acquisitions and valuations
Tony	Palukaitis		Working with the new statement of cash flows
Daniel	McClory	Auto Equities Group	Developments in dealership syndications
Willard	DeFilipps		Uniform capitalization update
Chuck	Swift	Swift Dodge	Dealer guest speaker

## Spring 1989 - Florence, KY

Speaker		Organization	Topic
John	Gochenouer	Computer Consultants	Problems and opportunities in negotiating auto dealer computer contracts
Robert	Reichert	Kenwood Dealer Group	Dealer guest speaker
Willard	DeFilipps		Technical update - Section 89, S Corps, IRS audits, cost cap and LIFO
Chris	Groff	LIFO Systems, Inc.	LIFO and cost cap: Perspectives from major marketer of LIFO
Kevin	Woodruff	First Extended Services	How extended service agreement programs work and can be fitted to maximize dealer

## Fall 1989 - Scottsdale, AZ

Speaker		Organization	Topic
Carl	Woodward		Managing an automobile dealership CPA firm practice
Dan	McCall		What's wrong with dealership prepared (factory) financial statements
Raymond	Tanner		Dealer guest speaker
Betty	DeVanney		Software efficiency tools for the auto dealer
George	Williams	Signet Bank	Banker's perspective of auto dealer financial statements
Lloyd	Gearhart	Western Diversified	Changing association perspective
Stan	Wilson	AADA	Dealer Association perspective

## Spring 1990 - Denver, CO

Speaker		Organization	Topic
Joe	Moran	Dealer Commercial	Banker's perspective on auto retailing industry in the 1990s and what commercial service
Tony	Palukaitis		Bank loan packages for dealership purchases and financing
Jim	Suss	Suss Pontiac GM	Dealer guest speaker
John	Pico	PICO Corporation	Consultant's view of accountant's role in sale or purchase of dealership
Bill	Barrow	Colorado Auto Dealer	Summary of activities of local dealer association
Willard	DeFilipps		Update on LIFO and uniform cap
Frank	Bolen		Broker's experience with auto dealership transactions
John	Madison	John S. Madison & Co	Property & casualty insurance consulting for auto dealers

## Fall 1990 - St. Petersburg Beach, FL

Speaker		Organization	Topic
Ken	Berry	WPI Communications	Dealer newsletter as a service of AutoCPA Group
Barry	Fink	Christensen, White	Recent IRS attacks on LIFO, reasonable compensation, demonstrators and other tax services
Steve	Couey	Northgate Lincoln	Dealer guest speaker
Willard	DeFilippo		Update on LIFO
Hank	Santostefano		Estate planning and passing the baton on the family-owned dealership
Ron	Parks	Greater Tampa Bay	Summary of activities of local dealer association
Joe	Gandolfo	Author, Pay Zero Taxes?	Overview of estate planning and family succession for automobile dealers

## Spring 1991 - St. Louis, MO

Speaker		Organization	Topic
Jacob	Cohen		Automobile dealer financial statement analysis
Gene	White	Automotive Management	Internal control in parts and service dept
John	Bearce	Owner of 3 dealerships	Dealer guest speaker
Bob	Johnson	Bob Johnson Consulting	Dealership consulting services
Betty	DeVanney		Computer usage in the accounting practice
Pete	Sanders	Illinois New Car	Local dealer association
Willard	DeFilippo		Update on LIFO/questionnaire

## Fall 1991 - San Diego, CA

Speaker		Organization	Topic
Joseph	Greenspan	O'Conner & Drew	Operational reviews
Phil	Mossey	Mossey Group	Dealer guest speaker
Jim	DeVoe	Jim DeVoe Auto Group	Buy here / pay here
Barry	Fink	Christensen, White	Internal Revenue Service update
Jim	Tanner	Tanner, Dirks & Co.	Demonstrator regulations update
Paul	Doyle	Doyle & Hull, CPA	Automobile leasing - financial statement and tax consequences
James	Rauschkolb	Cash Management	Cash management in the automobile dealership

## Spring 1992 - Tulsa, OK

Speaker		Organization	Topic
Carl	Woodward		Dealer fraud
Don	Chalmers	Chalmers Chevrolet	Dealer guest speaker
Scott	Norman	NCM Associates	Profit skills - cost control
Jim	Norton	Jim Norton Buick	Mechanics of buy here / pay here
H.J.	Cole	Summit Business	LIFO double extension software
Don	Owens	Peterson, Sullivan	Leasing company financial and tax case problem historical application
Thomas	Marsh		Legal matters affecting dealerships
David	Lane	Walpert, Smullian	Revenue Procedure 92-20

## Fall 1992 - Baltimore, MD

Speaker		Organization	Topic
Rick	Beckman	Credit Acceptance	Used vehicle financing
Stephen	Picarde	Predictive Index	Personality profile index
			Personal financial planning for the auto dealer
Brian	Merritt	Walpert, Smullian	
William	Hurwitz	Fox Chevrolet	Dealer guest speaker
Thomas	Webb	NADA Industry	Economic and dealership outlook
H.J.	Cole	Summit Business	LIFO software
Clint	McGhee	GO, Inc.	New vehicles sales and motivation
Willard	DeFilipps		Revenue Procedure 92-79
Ken	Berry	WPI Communications	Newsletter
Leslie	Schneider	Ivins, Phillips & Bar	Various IRS topics
Bob	Gallaway	Simpson & Osborn	Estate planning for the auto dealer

## Spring 1993 - Las Vegas, NV

Speaker		Organization	Topic
			Sex, drugs, rock 'n roll and other employment tunes
Robert	Bekken	Fischer & Phillips	
Paul	Fields	Fields & Company	Dealership appraisals
			Extended service contracts - different approach
Gary	Sparks	Pomares & Company	
Bud	Fazone	Automotive Equipment	Why body shops in the 90s
David	Culiver	Culiver Team	Dealer guest speaker
			Too many dealers? Trends and ramifications from a franchise law attorney's perspective
John	Oyler	McNees, Wallace	
Marv	Cronberg	AADA	Local dealer association views
Kenneth	Shaw		Controller's view from the inside

## Fall 1993 - Charleston, SC

Speaker		Organization	Topic
Peter	Kitzmilller	Chief Legal Counsel	NADA legal views and update
Jerry	Bressler		Marketing your automotive practice
Bob	Brockman		Universal Computer Systems, Inc.
Larry	LaFon	L & S Chevrolet	Dealer guest speaker
Chris	Mazur	AtCon	Seven controllables in the service dept
Jack	Ford	Southern Masters	Select dealer 50/50 insurance program
Diane	Weinhold		Sources of frozen capital
Dennis	Frankeberger		Fraud and embezzlement investigations

## Spring 1994 - Rosemont, IL

Speaker		Organization	Topic
Linda	Steichweh	Reynolds & Reynolds	Reynolds & Reynolds
Larry	Foster	Universal Underwriters	Insurance and the automotive industry
Jon	Dokmo	Downers Grove	Dealer guest speaker
Karl	Singer	The Ryan Group	
Robert	Dilmore	Management Performance	Future shock - where is auto industry headed
			Estate planning - dealership valuation techniques and opportunities
Jack	Fisher		
Robert	Zweres	Internal Revenue Service	
James	Williams		Brokering the deal - team approach

## Fall 1994 - Portland, ME

<u>Speaker</u>		<u>Organization</u>	<u>Topic</u>
Tony	Graham	Automatic Data Processing	ADP
Tim	Christian		Practitioner's guide to buy here / pay here
Jacob	Cohen		AutoCPA Project
Shepard	Lee	Lee Group	Dealer guest speaker
Bill	Graham	Nichols, Campbell	Dealership composites

## Spring 1995 - New Orleans, LA

<u>Speaker</u>		<u>Organization</u>	<u>Topic</u>
John	Dobson		Purchase contracts in dealerships
			Contracts and negotiations with computer vendors
Jane	Copeland	API International	
Gene	White	Automotive Mangement	Trends in fixed operations
Joe	Mallard	Joe Mallard Ford	Dealer guest speaker
Dick	Taylor	Louisiana Dealer Services	Trends in finance and insurance
Jay	Goldman	Walpert, Smullian	Discussion of computer online transfers

## Fall 1995 - Seattle, WA

<u>Speaker</u>		<u>Organization</u>	<u>Topic</u>
John	Hayes	Hausser & Taylor	New developments in subprime lending
			Quick LIFO - software solution to alternative LIFO
Jim	Burke	Chrome Data Corp	
Marty	Rood	Dealer Net	Selling cars on the Internet
Bob	Byers	Ravenna Motors, Inc.	Dealer guest speaker
			Understanding the hunter's vision: successful work with entrepreneurial and family firm
Peter	Williams	Interact	
Dennis	Haydon	Nationwide Automotive	Used car leasing

## Spring 1996 - New York, NY

<u>Speaker</u>		<u>Organization</u>	<u>Topic</u>
Gerald	Neunier		Ford Motor Credit
			Financing opportunities in the subprime auto market
Paul	Goblet		Computer and telecommunications opportunities
Charles	Shamblee		Ford dealer alliance issues
Edwin	Mullane		
Joseph	Aboyoun		Know your rights with the factory

## Fall 1996 - Sacramento, CA

<u>Speaker</u>		<u>Organization</u>	<u>Topic</u>
John	Travis	Fremont Companies	Compensation - America's workers' compensation company
Scott	Lang	Brown, Gibbons, Lang	Capital acquisitions for dealers
Jim	Blick		Dashboard
Bob	Creedon	Senator Ford	Dealer guest speaker
Steve	Gandara	The Pacific Institute	Jones attitude toward change
Hub	Kelsh		Fraud in dealerships

## Spring 1997 - Cleveland, OH

Speaker		Organization	Topic
Jack	Matthews	University of Wisconsin	Franchise agreements
Paul	Gillrie	Paul Gillrie Institute	Computer negotiating
Steve	Dockins	Sierra Pacific Management	Profit plus - equipment rental
Tom	Lapointe	AutoMall, USA	Automotive web sites
Bill	Vogelsang	Brown, Gibbons	Fast paced public market
Ben	Plymale	B/P - Business Consultants	Manufacturer audits of dealer operations
Rick	Vonk	Bank of America	Financing: changing climates in dealerships

## Fall 1997 - Lake Buena Vista, FL

Speaker		Organization	Topic
Jim	Ziegler	Ziegler Supersystem	New vehicle sales programs
Paul	Gillrie	Paul Gillrie Institute	Computer system seminar
Charles	Prophet	Dedicated Dealer	Autosoft computer system
Jeanette	Garretty	Bank of America	Economic outlook of the automobile industry
Dan	Myers	Myers, Forehand &	Public corporations: Legal aspects
John	Bachle	Sartain, Fischbein	Chrysler Five Star Program

## Spring 1998 - Las Vegas, NV

Speaker		Organization	Topic
Jim	Ziegler	Ziegler Supersystem	Problems in F & I dept and how to fix them
Craig	Nelson	Vichow, Krouse &	Unique problems of the multi franchise, multi location dealership group
Tom	Hudson	Hudson, Cook, LLP	Legal issues involving vehicle financing and leasing
Robert	Bekken	Fischer & Phillips	Employee problems in the dealership revisited
Carl	Woodward	Hundman & Woodward	Valuation of dealerships
Butch	Williams	Williams - Taym	Valuation of dealerships
Jeanette	Garretty	Bank of America	New look at the dealership

## Fall 1998 - Hershey, PA

Speaker		Organization	Topic
Bob	Corbin	Western Auto Insurance	Retro service contracts
Mary	Baker	Internal Revenue Service	Current dealer automotive topics
Brook	Tucker	American Express	Valuing a dealership - another approach
Russ	Mullin	Creative Contracts	Database marketing
Linda	Steichweh	Reynolds & Reynolds	Certification on the Reynolds & Reynolds program
Rex	Sloan	Universal Underwriters	How to manage subprime business
Mike	Riley	ADAM Sales	ADAM computer system - PC based
Jim	Barrington	Henry & Horne	Auto watch program, how to approach audits

## Spring 1999 - San Diego, CA

Speaker		Organization	Topic
Joe	Manahan		Future of the body shop
Ken	Rosenfield		Dealer financial statement benchmarks for profitability consulting purposes
Brian	Neill	Lithia Automotive	Lithia's perspective on public companies
Ed	Witt	Auto Collection Lin	San Diego Ford Motor Company auto collection
George	Berger	Allen, Matkins, etal	Lessons learned from the Honda litigation
Kip	Prahl	Kip Prahl Associate	Toxic problems in the dealership
Karen	Dillon	Lease Marketing	"Lease Link" leasing program

## Fall 1999 - Charleston, WV

Speaker		Organization	Topic
Bob	Steenbergh	Wizard Consulting	Wizard secondary finance
Chris	Mazur	ATCon, Inc.	Controlling expenses in the service dept.
Terri	Harris	Internal Revenue Service	Current IRS hot topics
Bob	Egan	Sonic Automotive	Sonic perspective of public components
Susan	Harwood	Hulsey, Harwood	War stories re: Buy-Sell Agreements

## Spring 2000 - Salt Lake City, UT

Speaker		Organization	Topic
Steven	Mailho	Mailho Company	Evolution of reinsurance
Larry	Miller	Larry H. Miller Group	Large dealership topics
Jerry	Carmody	Sagemark Consulting	Succession planning and wealth preservation
Steve	Trapp	ABRA Auto Body &	Auto body industry
J. Michael	Vaughn	Lattimore, Black	Tax issues
Robert	Taylor	National Profession	Another look at tool rental program

## Fall 2000 - Denver, CO

Speaker		Organization	Topic
Scott	Mahl	Falcon Financial	Dealership financing
Don	Lecher	NADA - Twenty Group	NADA Twenty Groups
Gerry	Green	Green & Miller, PC	Buy here, pay here analyzation
Greg	Weeks	Kodata Solutions	Secure record storage systems
Carl	Woodward	Woodward & Associates	Fraud in the dealership
Bob	Massengill	Menke & Associates	ESOPs in an automobile dealership
Stephen	DeBlois	Welch & Company	Differences in analyzing American and Canadian automobile dealers
Mike	Shaw	Mike Shaw Chevrolet	Dealer perspective in the Denver market

## Spring 2001 - Cancun, Mexico

Speaker		Organization	Topic
Ken	Culver	FBD Consulting	Deferred compensation revisited
Loula	Fuller	Myers & Fuller PA	Very latest on the Oldsmobile fiasco
Jim	Mudd	The Mudd Group	Marketing solutions for the automobile dealership
Bob	Brown	Progressive Marketing	Winning as an auto dealer

## Fall 2001 - Nashville, TN

Speaker		Organization	Topic
Sandi	Jerome	S. Jerome Comp Consultants	Using your clients' computers
John	Oyler	McNees Wallace & Nurick	Current topics in dealer-manufacturer relations and future trends in automotive retailing
Jim	Smith	Southwest Reinsure, Inc.	What's old and what's new in dealer owned insurance companies
Gus	Gustafson	Research Partners	Succeeding in your marketing research
Roy	Busse	ADP	Future of dealership computing
Lance	Helgeson	Car Dealer Insider	Industry as we see it

## Spring 2002 - Fort Worth, TX

Speaker		Organization	Topic
Randy	Barone		Used cars - got profit?
John	Madison		How to deal with bankrupt casualty carriers
Les	Schneider		Where we are now
John	Turner	Group One Automotive	How we got here and where we are going
Bart	Haag	Albin, Randall & Bennett	Where, when, whats of ESOPs and how it worked for us
Anthony	Freeman		Life insurance expense reduction audit

## Fall 2002 - Scottsdale, AZ

Speaker		Organization	Topic
Mike	Long	Universal Underwriters	State of automobile dealer's insurance industry
Bill	Bolash		F & I - new developments and how to deal with them
Ernie	Manuel		Demographic studies and other legal matters
Jonathan	Ord	Firesocket	What is CRM by Firesocket?
Mike	Ammon		LIFO - repricing, yes or no
Carl	Woodward		Trade discounts
Ben	Plymale	BP Automotive	Factory audits - Part 1
Ben	Plymale	BP Automotive	Factory audits - Part 2
Don	Archer		Cost segregation

## Spring 2003 - Nassau, Bahamas

Speaker		Organization	Topic
Joseph	Taussig	First International Capital	Reinsurance alternatives
Donny	Kretschmar		Used vehicle operations
Kevin	Allison		Applying FAS 142
Joe	Lescota	Northwood University	Dealership consulting
Gary	Quirke	Quebit Consulting	Dealership management
Gerry	Myers		Women's changing role in the auto industry
David	DeHaven	OneView	Document storage and data mining

## Fall 2003 - Bigfork, MT

Speaker		Organization	Topic
Keith	Watts	Fisher & Phillips	Prevention point: how to deal with new rules in human resources
Sandy	Jerome	Chase Manhattan Bank	Automotive industry, interest rates, purchasing retail paper, rate protection, etc.
Dan	Ware		Data extraction and related reports
Al	Tweedy	Allen Cadillac/GMC Truck	Everything you need to know about parts management How to get the most out of your people

## Spring 2004 - Los Cabos, Mexico

Speaker		Organization	Topic
Jan	Kelly	Kelly Enterprises	F & I review
Craig	Nelson		Update on technology solutions initiatives
Dave	Nathanson	PWC	Electronic dealer solutions
Andrew	Weill	Benjamin Weill & Mazer	Reinsurance programs, IRS challenges and opportunities
Bob	Zimora	Zimora Automotive Group	How to manage successful dealerships
John	Oyler	McNees Wallace & Nurick	Formation of AutoESQ; how can AutoCPA and AutoESQ mutually benefit

## Fall 2004 - Ogunquit, ME

Speaker		Organization	Topic
Mike	Michales		Privacy Act and "do not call" regulations
Don	Archer		Update on cost segregation studies
Gus	Gustafson		Automotive advertising trends
Don	Tipton		Service dept management - pick the low hanging What's new in tool programs
Greg	Porter		Performance measurements for dealerships
Jim	Goodwin		New opportunities in secondary finance

## Spring 2005 - Key West, FL

Speaker		Organization	Topic
Paul	Gillrie		CPAs role in reducing technology expense
Bill	Black		Combination retirement plans
Don	Simmons		ACES Update
Jay	Goldman		ValueMax
Sean	Wolffington	BZ Results	
Larry	Edwards		Body shop / service dept

## Fall 2005 - Isle of Palms, SC

Speaker		Organization	Topic
John	Murphy	Merrill Lynch	
Carl	Woodward	Woodward & Associates	
Joe	Barber	AutoCFO	
Robert	Issenman	Leader Auto Resources	
Brett	Holst	Green Outsourcing	
Harry	Wolffington	The Wolffington Group	
Tony	Freeman	Premium Advisors	
Lon	Leneve	Compli	

## Spring 2006 - Cancun, Mexico

Speaker		Organization	Topic
Dave	Walters		Adams computer system Data mining and one view
John	Pico		Automotive advisors
Robert	Underwood		Dealership M/A issues - negotiations
Reid	Spangler		Dealership valuations
Jay	Ferriero		REITS
James	Hutmacher	aaXchange	Used vehicle management
John	Rickards	Rahal Automotive Group	Production process

## Fall 2006 - Carmel, CA

Speaker		Organization	Topic
Keith	Watts		HR Issues
Gilbert	VanOver	gvo3 & Associates	F & I Consulting
Steven	Couture		Dealer DNA
Duane	Goetz		Management reporting
Bill	Roberts		Deferred compensation

## Spring 2007 - St Pete Beach, FL

Speaker		Organization	Topic
Tim	Dietsch	Progressive Basics, Inc.	
Matt	Joffe	JMA Captives	
David	Reynolds		Web Demo
Steve	Mailho		Reinsurance
Paul	Gillrie		System issue
Rich	Holland	Arkona	
David	Dyer		Dealer / Investor and industry issues
		Foster & Dunhill	

## Fall 2007 - Seattle, WA

Speaker		Organization	Topic
Dale	Pollak	vAuto, Inc.	
Brian	Lombardi	F & I Direct Finance & Ins	
Dinos	Constantine	Dealer Track	
William	Palmer		
Larry	Rawls	The Rawls Group	Family planning
Scott	Allan	Oceanus Reinsurance	

## Spring 2008 - West Palm Beach, FL

<b>Speaker</b>		<b>Organization</b>	<b>Topic</b>
Gibbs	Tommy		The Used Car Magic Bullet
Russo	Bill		
Yanez	Armando	Lot Force	Online sales
			Managers Pay Plans in Changing Business Environment
Gordon	Ken		
Hosmer	John	Dealer Built Performance Management Group	
Williams	James	Automotive Incentive Specialists	
Peterson	Sherralyn		

## Fall 2008 - Chicago, IL

<b>Speaker</b>		<b>Organization</b>	<b>Topic</b>
Klier	Thomas	Federal Reserve Bank	Perspectives on the US Auto Industry
Comm	Jerry	J. Huell Brisco Associates	Actuaries & Management Consultants
		LBMC Employment Partners	
Perry	Ron	Ken Garff Automotive Group	
Kraatz	Tony	Leucadia National Capital	
VandenAkker	Cole	Dealermine, Inc.	Service Department CRM
Loughlean	Cheryl	McNess Wallace & Norick	Red Flag Rules
Olyer	John	The Paul Gillrie Institute	State of the DMS Industry
Gillrie	Paul		

## Spring 2009 - Las Vegas, NV

<b>Speaker</b>		<b>Organization</b>	<b>Topic</b>
Gillrie	Paul	The Paul Gillrie Institute	
Reise	David	Customer Followup Systems	
McCarney	Cliff	Employee Reimbursement	
Reed	Don	Dealerpro Training Solutions	
Roesner	Joe	Fontana Group	
Vanderbilt	Nancy	Automotive After Market Services	
Watts	Keith	Musick, Peeler & Garrett	Legal Update

## Fall 2009 - Washington, DC

<b>Speaker</b>		<b>Organization</b>	<b>Topic</b>
Lewis	Bob	RTSynergy	Controlling Dealer Transport Costs
Terek	Dave	Ethos Group	HR Compliance / F & I Support
		George Roach Litigation Consulting	
Roach	George		Legal and Accounting Litigation Support
Koblenz	Andy	NADA	Industry Update
Archer	Don		Green Cost Segs
Schnorbus	Bob	Federal Reserve Bank	
Esposito	Mike	Auto Mate	Dealership Systems



