



# Annual Meeting Agenda - Tentative

## Saturday, February 24, 2018

10:00 AM to 5:00 PM Registration/Information  
6:00 PM to 10:00 PM Board Dinner

## Sunday, February 25, 2018

7:30 AM to 11:45 AM Board of Directors' Meeting  
10:00 AM to 5:00 PM Registration/Information  
5:00 PM to 6:00 PM First Timers'/Emerging Leaders Reception (Invitation Only)  
6:00 PM to 7:00 PM **Welcome Reception**  
7:00 PM to 9:00 PM **Dinner**



## Monday, February 26, 2018

6:45 AM to 1:00 PM Registration/Information  
9:30 AM to 11:00 AM Spouse Breakfast  
6:45 AM to 7:45 AM Continental Breakfast - **Manufacturer/Affiliate Showcase**  
7:45 AM to 12:30 PM **General Session**  
7:45 AM to 8:00 AM **President's Report** - Ted Finn, *Gardner Inc.*  
8:00 AM to 8:15 AM **Treasurer's Report**  
8:15 AM to 8:30 AM **Election of Directors** - Steve Purdy, *Oscar Wilson Engines & Parts Inc.*  
8:30 AM to 8:45 AM **Naming Sponsors Update** - *Sheffield Financial and Wells Fargo*  
8:45 AM to 9:45 AM **Industry Update** - Jean Hlay, President and COO, *MTD Products*  
9:45 AM to 10:15 AM **The Current Presidency and it How Impacts You** - Jade West, SVP - Government Relations, *National Association of Wholesaler-Distributors*  
10:15 AM to 10:30 AM Break  
10:30 AM to 12:00 Noon **What in the World is Going on in the World** - Herb Meyer, Founder & President, *Storm King Press*  
12 Noon **Announcements**  
1:00 PM **Golf Tournament Sponsored by Sheffield Financial & Tours**  
Evening on your own

## Tuesday, February 27, 2018

7:00 AM to 2:00 PM Registration/Information  
7:30 AM to 8:45 AM Continental Breakfast with **Roundtable Session**  
9:00 AM to 10:30 AM **The True Meaning of Value Added Selling** - Paul Reilly, Founder and President, *Reilly Sales Training*  
10:30 AM to 10:45 AM Break  
10:45 AM to 12:00 PM **Trends and Issues That Will Impact Your Cash Flow-Millennials, Trump and Amazon.com** - Gene Marks, Columnist and Small Business Expert, *Gene Marks*  
12:00 Noon to 12:45 PM Lunch for Break Out Sessions  
1:00 PM to 2:30 PM **Breakout Sessions (choose one)** - Paul Reilly or Gene Marks  
5:30 PM to 6:30 PM Past Presidents' Reception (Invitation Only)  
6:30 PM to 7:30 PM **Closing Reception Sponsored by Wells Fargo**  
7:30 PM to 10:00 PM **Closing Night Dinner**

## Wednesday February 28, 2018

7:00 AM to 8:00 AM Continental Breakfast  
8:00 AM to 8:15 AM **President's Remarks** - David Dollard, *KPM Exceptional*  
8:15 AM to 9:45 AM **Economic Update** - Alan Beaulieu, Economist, *ITR Economics*  
9:45 AM to 10:00 AM Break (This is a good time to check out of your room)  
10:00 AM to 11:30 AM **The New Tax Laws and How They Could Impact Your Business**  
Roman Basi, *Economist, MBA, CPA, President of the Center for Financial, Legal, and Tax Planning*  
11:30 AM to 11:45 AM **2019 Meeting Preview & Closing Remarks**  
12 Noon to 2:30 PM Board Meeting

## Industry Update

Monday - 8:45 a.m.

**Jean Hlay, President and Chief Operating Officer, MTD Products**

Jean H. Hlay, President and Chief Operating Officer of MTD Products, Inc. will be providing our Industry Overview. Hlay was the first woman to serve as the Outdoor Power Equipment Institute's chair of the board.



Hlay joined MTD in 1994 and was previously the senior executive vice president of sales, marketing and service. In her years with MTD, Hlay has also served as vice president of corporate development and finance, as well as controller. Before joining MTD, Hlay was vice president and CFO for Crossville Rubber Products, Inc. She obtained her bachelor's degree in business administration from Bowling Green State University in Bowling Green, Ohio, and is a CPA. MTD is a worldwide leader of outdoor power equipment with facilities in Europe, North America, Asia, Australia and South America producing equipment for residential and commercial markets. Visit the website at [mtdproducts.com](http://mtdproducts.com)

## The True Meaning of Value Added Selling

Tuesday - 9:00 a.m., 1:00 p.m Breakout Session

**Paul Reilly, Founder & President, Reilly Sales Training**

For more than 11 years, Paul Reilly was an outstanding outside salesperson for a variety of diverse companies and he won sales awards with each company he represented.

He has noted that sales organizations are providing similar solutions using the same message. Too many sales organizations fail to stand out. Organizations are too quick to say, "Me too," instead of "Surprise, we're different." Customers are left thinking all the solutions are the same.

To be different and succeed, sales organizations have to compete on the total value of their solution.

Whether selling propane, tools and fasteners, medical equipment, or training programs he is guided by the Sales and Service 101 Philosophy. "Sell customers what they need and give them the service they want."

Visit the website at [reillysalestraining.com](http://reillysalestraining.com)



## The Current Presidency and How It Impacts You

Monday - 9:45 a.m.

**Jade West, SVP - Government Relations for NAW**

Many people were surprised at the outcome of the election, and President Trump has made some crucial changes that may impact how you run your business, particularly non-legislative issues.

Jade will talk about national sentiment, actual legislative and non-legislative changes, ACA, and other regulatory issues.

She will also address how the NAW will work to be sure wholesaler-distributors are fairly represented when legislation is created and more importantly, implemented.

In addition to her position as Senior Vice President, Jade is Executive Director of the NAW Political Action Committee (NAW-PAC) and works to keep key issues affecting the distribution industry in front of our political leaders.

Visit the website at [naw.org](http://naw.org).



## Trends and Issues That Will Impact Your Cash Flow

Tuesday - 10:45 a.m., 1:00 p.m Breakout Session

**Gene Marks, Columnist & Small Business Expert**

Want to increase your cash flow and profits over the next four years? You need to be thinking ahead and taking action now.

**Millennials**—How will you sell to them? What do you need to know to find, hire, and compensate this very different group of people so that they are happy, productive, motivated and profitable?

**Trump Presidency**—How will the policies of the Trump Administration affect your business over the next four years? What actions should you take now to profit from it?

**Amazon.com**—Thanks to the cloud, there are many great technologies and applications that could change your business. What technologies are smart business owners and managers investing in to ensure that their companies stay profitable, productive and attractive to Millennials and others?

Visit the website at [genemarks.com](http://genemarks.com)



## What in the World is Going on in the World

Monday - 10:30 a.m.

**Herb Meyer, Founder and President, Storm King Press**



Top-level executives need to understand what is going on in the world. Key trends in politics, economics and culture have an impact on every business, and to manage effectively, executives must know what these trends are, how they will affect our economy, and what opportunities these trends may generate.

Today's execs are also leaders in their communities—and people look to you for guidance. Herb will talk about national security, economic, and cultural issues such as:

- What lies behind the astounding—and under-reported growth of the global economy, which is bringing between 50 million and 100 million people out of poverty every year?
  - What opportunities will this growth provide in the decades ahead for American businesses?
  - What's going on in India and China and how will that affect us?
- Visit the website at [stormkingpress.com](http://stormkingpress.com).

## Economic Update

Wednesday - 8:15 a.m.

**Alan Beaulieu, Economist, ITR Economics**

As past attendees know, one word of insight can mean a world of difference to your business. Alan Beaulieu's presentation offers easy-to-apply solutions, audience-specific strategies, and insightful suggestions that can change the course of a business or give attendees the kind of take-away value that produces timely results.



ITR's analysts have been quoted in the *Wall Street Journal*, *The New York Times*, *Business Week*, *USA Today*, by the Knight Ridder News Service and the Associated Press.

ITR's staff not only predict future economic trends with 94.7% accuracy—they give you clear, comprehensive action plans for capitalizing on business cycle fluctuations and outperforming your competition.

Visit the website at [itreconomics.com](http://itreconomics.com)

## Roundtable Session

Tuesday - 7:30 a.m.

by OPEESA Members

Networking among members is always one of the highlights of the Annual Meeting. We are presenting you with another opportunity to “pick the brains” of your colleagues and friends. You will pick up your continental breakfast as usual; however, when you head into the meeting room, each table will feature a different topic.

Topics are:

- Supporting Dealer Health-What Works?
- Channel Management (Internet/Big Box/Dealers)
- Succession Planning
- EETC-How it Can Help You and Your Dealers
- The Distributor of the Future
- Emerging Leaders

You will be asked to select a topic on the registration form, so we can have the proper number of tables prepared. There will also be a Table Captain to keep the conversation flowing. This will be an excellent opportunity for our members and we encourage everyone to attend.

## The New Tax Laws and How They Could Impact Your Business

Wednesday - 10:00 a.m.

**Roman Basi, CPA, MBA, President of the Center for Financial, Legal & Tax Planning**

Honestly, this will be a fluid presentation as our speaker could be addressing the House Ways and Means Committees' proposed tax proposals, unless we have actually new tax laws by the meeting date.

Either way, there will be much to discuss.

Roman has worked on many business transactions and his work is in high demand for his expertise in legal, financial, and tax matters.

He is a recognized expert on matters of:

- business succession
- retirement and estate planning
- strategic planning
- mergers and acquisitions
- tax aspects of business decisions
- financial decision making

Visit the website at: [taxplanning.com](http://taxplanning.com)



## Welcome to The Westin Mission Hills Resort

### Opening Reception/Dinner

Sunday, February 25

Reception-6:00 p.m. • Dinner-7:00 p.m.

Reunite with old friends during the reception and dinner. The dress is Business Casual.

### Spouse Breakfast/Program

Monday, February 26 - 9:30 a.m.

### Closing Reception Sponsored by



### Closing Night Dinner

Tuesday, February 27

'Reception-6:30 p.m. • Dinner-7:30 p.m.

Join old and new friends for an evening of great food, great fun, and some surprises!

### All Days

#### Spa

At the Westin Mission Hills, their full-service spa is the perfect place to relax, be pampered and unwind. Go to [www.spaاتمmissionhills.com](http://www.spaاتمmissionhills.com) to view their services and book your appointment online. Or, contact them directly at 760-770-2180.

#### Tennis

Treat yourself to the finest Palm Springs tennis experience at The Westin Mission Hills Golf Resort & Spa, named one of The Top 100 Tennis Resorts in the World by Tennis Resorts Online.

#### Walk - Run - Hike

Designed and certified by *Runner's World Magazine*, Runner's World Maps are available to guests and feature 3-mile and 5-mile jogging/walking routes as well as local running tips.

### Optional Tours and Activities

Monday, February 26, 2018

#### Golf Tournament Sponsored by Sheffield Financial

##### Pete Dye Course Course - 1 p.m.

Golf Digest recently named The Westin Mission Hills Golf Resort & Spa as one of the top 50 golf resorts in North America.

Two championship courses are available to guests, the Pete Dye course is adjacent to the resort and there is an optional Gary Player Signature Course. We will be playing the Pete Dye Course for the tournament.

Golf Tournament - \$199.00 per player

### Monday, February 26, 2018 - Tour Options

#### San Andreas Fault Tour - 1 - 5 p.m.

Extraordinary scenery abounds as your Big Red Jeep winds its way through the labyrinth of geological cuts and canyons of the San Andrea Fault Zone as your naturalist guide entertains you with stories about the plants, animals, geology, and history of the California desert.

On this exciting adventure you will experience the twisted and tortured landscape of an active earthquake fault system as your guide describes the geology of the area and you explore the skeleton of the earth.

Includes:

- Round-trip transportation
- Bottled water during activity
- Granola snack
- All applicable taxes and gratuities
- Uniformed staff assistance

Cost \$145.00 per person  
(min. of 15)

#### Palm Springs Aerial Tramway - 1 - 5 p.m.

The Palm Springs Aerial Tramway—the world's largest rotating tram car—travels over two-and-one-half miles along the breathtaking cliffs of Chino Canyon, transporting riders to the pristine wilderness of the Mt. San Jacinth State Park. During your approximately ten-minute journey, tram cars rotate slowly, offering picturesque and spectacular vistas of the valley floor below.

Once you reach the Mountain Station—elevation 8,516 feet—enjoy two restaurants, observation decks, natural history museum, two documentary theaters, gift shop and over 50 miles of hiking trails.

Includes:

- Round-trip transportation
- Bottled water
- All applicable taxes and gratuities
- Uniformed staff assistance

Cost \$155.00 per person  
(min. of 15)

## Welcome to Palm Springs

Enjoy a perfect escape in Palm Springs with championship golf, picturesque mountain views and a secluded location. Lounge by the pool or unwind at the spa during your desert retreat. Listed as one of Golf Digest's® Top 50 Golf Resorts in North America, The Westin Mission Hills Golf Resort & Spa is truly a golfer's dream. The Palm Springs golf resort features two championship Troon golf courses that are available to guests, the Pete Dye course adjacent to the resort and the Gary Player Signature Course.

Average High in Feb./March 76 degrees  
Average Low in Feb./March 51 degrees

A standard room at The Westin Mission Mills is \$254.00. Current applicable taxes are 13.25% room tax.

**Rooms must be booked by January 12, 2018. Also, you must cancel your room reservations at least 72 hours prior to your check-in date or you will be charged one night stay plus tax. If you do cancel with the hotel directly, be sure to keep a record of your cancellation number in a safe place.**

### Reduced Resort Fee

The Westin Mission Hills Resort Fee has been reduced for OPEESA for \$16.00 per room per day, and includes the following:

- Overnight self-parking
- Guest room wireless internet
- Complimentary newspaper (Monday-Friday)
- Wireless internet in public spaces excluding meeting rooms
- Access to Westin WORKOUT 24 hours a day
- 15% Off merchandise from the Pete Dye Pro Shop
- 15% off tennis court fees and merchandise from the pro shop

## Before Leaving Home

1. Please visit [www.tsa.gov](http://www.tsa.gov) to obtain updates about items that can be packed or carried-on.
2. Your room charges will be your responsibility, therefore, you will need to complete the enclosed Credit Card Authorization Form and fax it to Travel Plus. This will serve as a credit card guarantee for your hotel room. If we do not receive this form, we cannot confirm your hotel room.

## When You Arrive

1. Taxi fares are posted as approximately \$32.00 with tax, and Uber rates vary. Car rental rates begin at \$30.00 per day. The hotel is 7 miles from the Palm Springs International Airport.
2. Upon arrival at The Westin Mission Hills Resort, you will check-in at the front desk. **Check-in time at the hotel is 4:00 pm.** You can store your luggage with Bell Services until your room is ready. Look for the signs to OPEESA Registration.
3. At the end of your stay, you can check-out using the in room service and leave your keys in the room, or you may check-out at the front desk. Please note – early check-out fees may apply.
4. While staying at The West Mission Hills Resort, Jackie Rummage of Travel Plus will be your onsite coordinator. If you have any questions please feel free to contact her room at the hotel or at the meeting registration area.

While you are away you may be reached at:

**Westin Mission Hills Resort**  
**71333 Dinah Shore Drive**  
**Rancho Mirage, CA 92270**  
**Phone: 760-328-5955**

*We hope you have a wonderful time in the Palm Springs area at Westin Mission Hills Resort.*



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### Wells Fargo

Wells Fargo Commercial Division Finance (CDF) is a global inventory financial provider dedicated to delivering best in class solutions, service, and market intelligence to its customers. To learn more visit: <http://cdf.wf.com>

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### Synchrony Financial

Synchrony Financial is built from GE heritage, tracing our roots to 1932. Today, we're the largest provider of private label credit cards in the United States, based on purchase volume and receivables, and that's just the beginning.

## Diamond Sponsors



### American Honda

Honda is the world's largest manufacturer of engines. Annually, Honda produces and markets more than 23 million units globally for a diverse array of products.



### TD Retail Card Services

TD Retail Card Services has more than 65 years in the business and has the expertise to start and administer your private label credit card program.

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## Gold Sponsors

### Black Ink Technologies

Black Ink is designed for premier equipment manufacturers, distributors, territory managers, and dealers to deliver more advanced professional customers' insights.



### Blount International

Blount is a global manufacturer and marketer of replacement parts, equipment, and accessories for the forestry; lawn and garden; farm, and agriculture markets.



### Briggs & Stratton

Briggs & Stratton Corporation is the world's largest producer of gasoline engines for the outdoor power equipment market.



### Greenworks

The company is a leader in providing battery-powered outdoor tools for professionals, using a best-in-class 82 volt battery platform.



### Husqvarna

The world's largest producer of outdoor power products including chainsaws, trimmers, lawn mowers and garden tractors.



### SnowEx/TurfEx

SnowEx has been a leader in snow and ice control since 1993. TurfEx provides a new school of thought to the turf care industry with innovative products.



## Silver Sponsors

### MTD

MTD has been a leader in designing and building durable, easy-to-use outdoor power equipment. Our family of brands offers many award-winning products.



### Schiller Grounds Care

Our mission is to make it easier for grounds care professionals and serious do-it-yourselfers to care for their landscapes and achieve superior results.



### Wright Manufacturing

An innovative leader in commercial lawn maintenance technology, dedicated to manufacturing the safest and highest quality lawn equipment in the world.

## Bronze Sponsors



### Bluebird

We provide commercial, rental and residential customers with some of the most reliable turf equipment in the industry.



### FIRMAN

We have produced more than 10 million portable generators for the worldwide market, including private label.



### Kohler

Kohler is a global manufacturer of small gasoline, diesel and petrol engines, serving the lawn & garden, industrial, transportation, agriculture, and construction markets.



### PECO

PECO specializes in the design and manufacture of outdoor power equipment. For over thirty-five years, PECO has been the lawn vac leader.



### Stens - The Parts Company

Stens is a leader in its industry, priding itself on innovative products, fast service, and great customer support. Stens is committed to helping your business run better.



### Worldlawn Power

Worldlawn Power Equipment manufactures outdoor power equipment that includes professional commercial mowers, residential lawnmowers and snow throwers.

We thank our sponsors for their substantial contributions which ensure that we can provide outstanding speakers and an informative program at a reasonable cost to our members.

## Registration Information

Register and pay by December 15, 2017 and save on early bird registration fees. Rooms must be booked by January 12, 2018. **NOTE: This hotel has a 72 hour cancellation policy or you will be charged a one night stay.** If you choose to cancel your rooms directly with the hotel, they will provide you with a cancellation number. Please record this number in a safe place, should a question arise later.

Return the enclosed sheets to OPEESA:

- Registration Form
- Product Showcase Form (if applicable)
- Golf Tournament Form (if applicable)

Return the following forms to Travel Plus:

- Credit Card Authorization and Hotel Form

Your meeting registrations must be received no later than January 12, 2018, to be included in the official printed program for the meeting. **The program books will not be mailed.**

**Member registration fees include:**

- general sessions
- breakout sessions
- continental breakfasts
- roundtable discussion
- coffee/soda breaks
- the opening and closing nights' meals, and receptions

**Spouse's registration fees (any guest 18 or over) include:**

- spouse breakfast
- the opening and closing nights' meals, and receptions

## CANCELLATION POLICY

Because the Association incurs certain expenses prior to the conference, it is necessary for us to have the following cancellation policy: **ALL CANCELLATIONS MUST BE IN WRITING AND BE RECEIVED BY 5:00 PM EST, February 2, 2018.** (Please mail or fax your cancellation to OPEESA Headquarters.)

1. Cancellations received prior to February 2, 2018, will be charged \$50 for administrative handling.
2. Due to vendor commitments, no refunds can be issued after February 2, 2018.

## Entertainment Policy

OPEESA recognizes that our Annual Meeting should provide distributors the opportunity to meet with manufacturers/affiliates in informal settings. We can assist you in planning your event should you wish to invite attendees to dinner, a reception or other program.

At the same time, we ask that you do not schedule any formal company meetings or training sessions. Meetings or entertainment must not be scheduled at the same time as an official OPEESA business or social event. Except for the Monday Morning Continental Breakfast/Showcase which is FREE for manufacturers and affiliates, please keep all meetings informal with no products, displays or official presentations.

If your company would like to plan some special entertainment, we request that you schedule it prior to or just after the official meeting events. Should you decide to schedule an event during one of the "free evenings," you are asked to keep any on-site entertainment to two hours in length, so members will have time for their own social activities with friends and family. If you would like assistance, please contact Jackie Rummage at 877.644.5888. She will help you make arrangements.

Travel Plus of NC, Inc. and their respective parent subsidiary and affiliated companies and organizations, shall not be liable for any injury, damage, loss, expense, accident, delay, inconvenience, or irregularity which may be caused or contributed to (1) act or omission on the part of any person or entity not under the direct control of Travel Plus of NC, Inc., respectively, or (2) by any defect in or failure of any vehicle, equipment, instrumentality, service, product or accommodations which is owned, operated, furnished, or otherwise used by any of these suppliers, (3) by any other cause, condition or event whatsoever beyond the direct control of Travel Plus of NC, Inc., respectively.

During the trip, the participant(s) may have the opportunity to participate in various optional activities, such as contests, excursions, or shows. Their respective parent subsidiary and affiliated companies and organizations shall not be liable for any injury, damage, loss, expense, accident, delay, inconvenience, or irregularity arising out of or relating to said participation.

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