



2021 FISA ANNUAL CONFERENCE

SHIFT TO TOMORROW

SEPTEMBER 16-19, 2021

HYATT REGENCY SCOTTSDALE RESORT & SPA
AT GAINNEY RANCH

SCOTTSDALE, ARIZONA



EDUCATING · NETWORKING · ENERGIZING

FISA 2021 ANNUAL CONFERENCE

WELCOME



To FISA family, friends and friends-to-be, Jennifer and I are so excited to see everyone again. This time in beautiful Scottsdale, Arizona. Please accept this invitation and join us for another great FISA Annual Conference. September is a beautiful time to be in Arizona, and this year's event is a great educational opportunity as well as enjoyable. The four- star resort is ideally designed with open air venues and plenty of room to relax

and enjoy the beautiful scenery.

We've all been through a lot over the past year and need a little time to do some "normal" things again. For those who have attended FISA in the past, you know there is seemingly no better place to network with leaders in our industry. We are blessed to be welcoming more than a dozen new companies who have joined since we last met. Whether you are a first-time attendee or a veteran, you will find this year's event to be engaging and well worth attending.

We have an outstanding educational program with immediate take home value including Governor Tom Ridge, former Director of Homeland Security, who will be giving us invaluable insight on cyber security. As well, our speakers will help us gain insight on the economy, trends in distribution, and how to attract and retain our most valuable resource, talent. We will learn about tax credits from our friends at alliantgroup, who have saved our members over \$38 million in the past few years.

Please also consider bringing your spouse or guest, as this event has much to offer with many social opportunities you will not find elsewhere. If you know someone who would benefit from this event, please invite them to attend and remind them of our First-Timer's reception where they can meet the Board of Directors and learn more about FISA.

The FISA Annual Conference is truly a unique opportunity to improve your knowledge, your business, and your relationships. We urge you to make your travel plans soon. As well, start contacting people you'd like to meet at the Conference. An updated membership list is on the FISA website at www.fisanet.org.

We sincerely hope you can join us. We are making all appropriate efforts to make this a safe and enjoyable time for everyone. The venue provides for plenty of open-air space and FISA will be following all CDC guidelines for your continued health and safety. Jennifer and I look forward to seeing you in September.

Best Regards

*Bryan Downer, Sani-Matic, Inc.
2021 Conference Chairman*

CONFERENCE AGENDA

WEDNESDAY, SEPTEMBER 15

- 4:00 pm– 5:00 pm Conference Committee
- 5:00 pm– 6:30 pm FISA Board of Directors Meeting

THURSDAY, SEPTEMBER 16

- 7:00 am – 9:00 am Hiking
- 8:00 am Golf Tournament –
Gainey Ranch Golf Club
- 9:00 am–1:00 pm Scottsdale Highlights Tour
- 5:00 pm–6:00 pm First-Timer's Meeting
- 6:00 pm–7:30 pm Cocktail Reception – Terrace Court

FRIDAY, SEPTEMBER 17

- 7:15 am–8:15 am Breakfast & Program
- 8:30 am–9:30 am Spouse Breakfast
- 8:30 am–10:00 am **Update on the Economy**
– Dr. Chris Kuehl
- 10:15 am–11:00 am **Tax Credits for Members**
– Tracy Lustyan
- 11:00 am – 12:00 pm **Employee Retention**
– Jenny Mangone, SPHR, SHRM-SCP
- 12:30 pm – 4:30 pm Sporting Clays – Ben Avery Center
- 12:30 pm – 4:30 pm Desert Jeep Tour
- 12:30 om – 4:30 pm Old Town & Museum of the West
- 6:00 pm – 7:30 pm Cocktail Reception – Palm Court

SATURDAY, SEPTEMBER 18

- 7:15 am – 8:15 am Breakfast Presentation
- 7:30 am – 8:15 am **Cybersecurity**
– Governor Tom Ridge
- 8:30 am – 10:00 am **Latest Changes in Distribution**
– Ian Heller
- 10:30 am -12:00 pm **Leadership for Tomorrow**
– Dirk Beveridge
- 12:30 pm – 3:30 pm Cosanti Tour
- 1:00 pm – 5:00 pm Hummer Tours of Desert
- 1:30 pm – 4:30 pm Taliesen West Tour
- 6:30 pm – 9:30 pm Cocktails/Annual Meeting/ Dinner –
Gainey Ranch Golf Club

SUNDAY, SEPTEMBER 19

- 7:00 am – 9:00 am Grab & Go Breakfast

REGISTRATION INCLUDES

- All Meeting Materials
- Three Breakfasts & Receptions
- Saturday Evening Cocktails/Dinner
- Two Spouse/Guest Breakfasts

THINGS TO KNOW

Throughout the Conference, dress in comfortable resort attire. Collared shirts for the men and slacks, Bermudas or skirts for the ladies would be appropriate. Comfortable shoes are in order because cocktail receptions will be outdoors and Saturday night, we will be walking a short distance to the Gainey Ranch Golf Club for cocktails and dinner. Expect very warm temperatures in September with average high's in the high 90's and low's in the mid 70's.

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HYATT REGENCY SCOTTSDALE RESORT & SPA AT GAINNEY RANCH

TWO CLICKS WILL DO IT!

**CLICK TO REGISTER WITH FISA.
CLICK TO BOOK YOUR HOTEL ROOM.**

1 To register for the conference **CLICK HERE** or go to **www.fisanet.org** and click on Meetings tab, then click on To Register. Registration is online this year however you may pay by either credit card or check. Be sure to register yourself first and choose your activities; then register your spouse/guest and then if you want to be a sponsor of the 2021 Conference, include your sponsorship.

2 To book your hotel room, **CLICK HERE** or go back to the Meetings tab and click the link To Book that takes you directly to the Hyatt Regency Scottsdale Resort & Spa at Gainney Ranch to book your room.

TRANSPORTATION

Phoenix Sky Harbor International Airport, the main facility serving Scottsdale travelers, offers nonstop service to more than 100 cities worldwide. And Phoenix-Mesa Gateway Airport offers additional regional flights. The Hyatt Regency Scottsdale Resort & Spa at Gainney Ranch is located approximately 18 miles from the airport. Transportation from the Sky Harbor Airport is available through Uber, Lyft, taxi service or by calling Transtyle at 480-948-6131 a couple of days before your arrival to arrange pick up. Another option is Super Shuttle at <https://www.supershuttle.com/>

ABOUT SCOTTSDALE, AZ

Scottsdale's lush Sonoran Desert setting and more than 330 days of annual sunshine allows you to enjoy the outdoors and

the unique scenery. When ready to take a break, explore Old Town Scottsdale with several blocks of shops, art galleries and restaurants. Museums and upscale shopping centers also are close by and beckon visitors. Plus, Scottsdale is recognized as one of the nation's safest, cleanest and most vibrant cities.



ABOUT THE RESORT

Set amidst flowering cactus and framed against the majestic McDowell Mountains, this four-star Arizona destination resort located on 27 acres is surrounded by adventures and miles from the ordinary. Splash into their 2.5-acre water playground complete with a sand beach and 3-story, high speed waterslide.

Hyatt Regency Scottsdale Resort & Spa at Gainney Ranch features 493 rooms and suites with balconies and terraces offering breathtaking sunsets, mountain, or golf course views.



All accommodations include the plush Hyatt Grand Bed®, free Wi-Fi, large-screen HDTVs, iHome stereos with iPod® docking stations, and a refrigerator.



SPA AVANIA

Spa Avania's amenities include 19 treatment rooms including three rooms dedicated to couples visiting the spa together and five garden side treatment rooms

with private entrances. Other luxuries include a French-Celtic mineral pool, relaxing lotus pond, trellis covered outdoor relaxation areas, steam room, sauna, hot and cold plunges, and full-service salon. Explore their holistic approach to every spa treatment offered at their luxurious indoor-outdoor oasis. Spa Avania offers personalized treatment offerings. Identify yourself as a FISA member for a 10% discount. To book appointments, call (480) 483-5558 or book online at <https://www.hyatt.com/en-US/spas/Spa-Avania/home>



SEPTEMBER 16–19 • SHIFT TO TOMORROW

Post Pandemic Economy: Be Careful What You Wish For

This year has started out far more robustly than anybody had anticipated but with all that growth come challenges. Inflation has become an issue for the first time since the early 1990s, interest rates may be climbing fast enough to end the “easy money” era, labor shortages are more acute than ever and the wide differences between US and global growth present their own complications.



DR. CHRIS KUEHL is a Managing Director of Armada Corporate Intelligence. He provides forecasts and strategic guidance for a wide variety of corporate clients around the world and is the chief economist for several national and international organizations as well as the economic analyst for several state accounting societies. Dr. Kuehl’s dry wit and insight into the complexities of global economies make him a popular speaker.

Tax Breaks for FISA Members

Hear from alliantgroup’s technical director. Tracy Lustyan, as she walks you through the Research and Development (R&D) Tax Credit and Employee Retention Credit, why they apply to you, the latest changes to the tax code from the IRS and how you can qualify for these critical credits and incentives. To date, alliantgroup has helped FISA members uncover nearly \$38 million in credits and cash refunds.



TRACY LUSTYAN is alliantgroup’s Managing Director for the Great Lakes region and is based in alliantgroup’s Chicago office. Tracy has a vast knowledge of government sponsored incentive programs that are designed for the benefit of US businesses including her work with the Employee Retention Credit, R&D Tax Credit, IC-DISC, DPD and hiring incentives. Tracy has worked with more than 225 CPA firms acquiring more than \$380 million in tax credits and incentives for more than 900 businesses.

You Can’t Afford to Lose Your Best Employees: Secrets to Successful Employee Retention

In the war for talent, competition for limited resources continues to heat up. Now more than ever it is critical to keep the talent you have. Surveys show that nearly one-third of people are job searching within less than six months of employment. What are the secrets to retention? Your workforce strategy must be aligned with reality and focused on the things that matter.



JENNY MANGONE, SPHR, SHRM-SCP Certified as a Senior Professional in Human Resources (SPHR) and as a SHRM Senior Certified Professional (SHRM-SCP), Jenny is an accomplished human resource professional with over 20 years of comprehensive human resource and management experience in dynamic environments. Her expertise includes extensive knowledge of employee relations, training and development, employee engagement strategies, performance management initiatives, coaching, recruitment and retention, and organizational change initiatives. Jenny earned a bachelor’s degree from the University of Wisconsin-Madison.

Cybersecurity’s Impact on FISA Members

Hackers have changed who and how they attack ever since the COVID-19 pandemic began. Cyber-attacks are up 25 percent, and we are increasingly seeing that bad actors are breaching businesses by probing for vulnerabilities up and down their supply chain.

Many manufacturers and distributors are being used to unwittingly infect their customers. This can lead to suppliers, distributors and manufacturers not only being breached themselves but also open them up to legal liability if their customers are damaged from a vulnerability that originated with the vendor.



TOM RIDGE, former Pennsylvania Governor, and alliantgroup’s Chairman of Cybersecurity and Technology, leverages his experience defending the United States, including from sophisticated cyber-attacks, to now helping our clients defend their businesses from cyber related threats as well as helping to guide the firm’s outreach on the various tax credits and incentives available to clients. After September 11, 2001, Tom Ridge was appointed by then-President George W. Bush as the first Director of the newly formed Office of Homeland Security. In January 2003, the Office of Homeland Security was designated by the Bush administration as an official Cabinet-level Department and Ridge was appointed the nation’s first Secretary of Homeland Security. Prior to his time in the Bush administration, Ridge served as the Governor of Pennsylvania from 1995 to 2001.

Artificial Intelligence, Genuine Disruption, and the Future of Distribution Channels

Manufacturers, distributors and their end customers face a dizzying array of forces threatening to upend relationships, change the value equations for channel players and demand that B2B companies rewrite strategies and overhaul their business models. Distribution strategy expert Ian Heller will explore what this means to food industry suppliers and provide specific advice on how your company should formulate strategy during a time of disruption.



IAN HELLER is the Co-Founder and Chief Strategy Officer for Distribution Strategy Group, a research, consulting, analytics and thought leadership firm that provides marketing and strategic planning expertise to the distribution industry. Ian started his career as a truck unloader at a Grainger branch and left fifteen years later as the VP Marketing. Since then, Ian has served in marketing and eCommerce leadership roles at GE Capital, HD Supply, Corporate Express and Newark Electronics. Ian holds an MBA from the Kellogg School of Management at Northwestern University.

Shift to Tomorrow!

As the pandemic unleashed itself upon the world and our businesses, Dirk Beveridge wrote an open letter to distributors titled: Shift to Tomorrow. The message, as leaders we have been called to lead our organizations and our customers to the uncertain future. In this passionate presentation, Dirk will share inspirational stories of those lifting their eyes to the future.



DIRK BEVERIDGE is a visionary entrepreneur and the founder of UnleashWD, a premier design, strategy and innovation firm in wholesale distribution. With his one-of-kind perspective on the future of wholesale distribution, Dirk has been leading major change to advance growth, relevance, and transformation. He has authored four books including the best-selling, INNOVATE! How Successful Distributors Lead Change in Disruptive Times.

2021 FISA CONFERENCE ACTIVITIES

PLEASE NOTE: The number in parentheses next to a tour is the minimum number of participants needed.

THURSDAY, SEPTEMBER 16

FISA GOLF TOURNAMENT

8 am • \$175 • Includes green fees, cart, box breakfast, tax & gratuity.



Amid the beauty of the Sonoran Desert, Gainey Ranch Golf Club provides three distinctive championship nine-hole courses designed by Michael Poellot, the former chief architect for Robert Trent Jones Jr. His craftsmanship has more than lived up to his reputation in designing each of Gainey Ranch's golf courses with beautiful mountain views. The Golf Club is just a short walk from the Hyatt Regency Scottsdale Resort. Your clubs will

be delivered to the Golf Club for you and on your cart when you arrive for the FISA scramble format tournament. Come early and enjoy your boxed breakfast before the start of play. At the conclusion of play, you are welcome to stay, pay individually, and order lunch in the beautiful clubhouse. Rental clubs are \$70.00 and may be reserved by calling (480) 930-1555 before August, 26th.

EARLY MORNING HIKE (5)

7:00 am - 9:00 am • \$132.00 • Includes guide, transportation, a backpack on loan with snacks and water, tax & gratuity.



The Phoenix Mountain Preserve is a beautiful area enriched with amazing Sonoran Desert flora and fauna. Get a close-up view and learn about the area from your knowledgeable guide. The terrain is rocky and the climb is gentle with amazing views of Phoenix, Scottsdale, Paradise Valley and many other parts of the Valley of the Sun. This is a beginning level hike. Sturdy closed toe shoes are required and don't forget a hat, sunscreen and sunglasses.

SCOTTSDALE HIGHLIGHTS TOUR (15)

9:00 am - 1:00 pm • \$140.00 • Includes guide, transportation, box lunch, tax & gratuity.



Ride through Scottsdale as your guide talks about the history of this beautiful area and points out interesting landmarks. You'll then have time to explore Old Town on your own and walk through the area shops and galleries. Your guide will tell you the local favorites not to miss. Plan on walking about a mile, reboard the bus, and enjoy your box lunch on the return trip to the Resort.

FRIDAY, SEPTEMBER 17

SPORTING CLAYS

12:30 pm - 4:30 pm • \$175.00 • Includes transportation, box lunch, 50 targets and ammunition, firearm rental, tax and gratuity.

This year, the Sporting Clays Event will be held at the Ben Avery Shooting Facility which is proud to have received a Five Star rating from the National Shooting Sports Foundation. It is approximately a 45-minute drive from the Resort and is located on 1650 acres surrounded by the Sonoran Desert Landscape. This year's venue will consist of a 50 Clay Target event on one of four available sporting clay courses.

JEEP DESERT TOURS (20)

12:30 pm - 4:30 pm • \$200.00 • Includes jeep tour, box lunch, tax & gratuity.

Explore the desert in a five-person jeep with your driver and guide who will share facts and folklore about what you are seeing. Stop for a short botanical nature walk and experience the unique beauty of the area. Closed toe shoes, hat, sunglasses and sunscreen recommended.

MUSEUM OF THE WEST & OLD TOWN (15)

12:30 pm - 4:30 pm • \$110.00 • Includes transportation, guide, box lunch, admission to Museum, tax & gratuity.

Ranked the number one Museum in Scottsdale, Western Spirit: Museum of the West, offers you outstanding art and exhibits highlighting the Western states. Enjoy a one-hour docent-led tour of the Museum and then you have time to walk on your own through Old Town and visit the shops and galleries that make this a favorite destination for tourists.

SATURDAY, SEPTEMBER 18

HUMMER TOURS OF THE DESERT (20)

1:00 pm - 5:00 pm • \$250.00 • Includes Hummer tour with 10-12 people per Hummer, box lunch tax & gratuity.



The Hummer H1 is bold, versatile, and badass—not to mention it's the closest a civilian can get to the US Military's M998 Humvee. If you're a rough-and-tumble tourist who prefers an up close and personal experience, you've made the

right choice. Mud, dirt, water, rocks—you'll coast along desert trails high above the ground, confident in the ability of this 4 x 4 to conquer any desert terrain. Come with us on the Bulldog Canyon trail, which winds through the Sonoran Desert, offering panoramic views of the Superstition Mountains. The land in this part of Arizona is wild and untamed, but rugged landscape is no problem when you're in the backseat of a Hummer H1. Get ready to check out nearly 20 miles of breathtaking desert views.

COSANTI TOUR (15)

12:30pm - 3:30 pm • \$115.00 • Includes transportation, box lunch, foundry tour, tax & gratuity.



Cosanti original bronze Windbells are known the world over. Made by artisans in the bronze foundry, each Windbell is its own unique piece of art, using one of the thirty-two original Soleri bell patterns to form a sand mold to hold the molten bronze poured from a crucible. Enjoy a one-hour private tour of Cosanti Originals Studio and time to browse the studio.

TALIESIN WEST TOUR (15)

1:30 pm - 4:30 pm • \$135.00 • Includes transportation, guided tour of Taliesin West, tax & gratuity.

Enjoy a 90-minute guided tour through Taliesin West, Frank Lloyd Wright's beloved winter home and desert laboratory established in 1937, and diligently handcrafted over many years into a world unto itself. Deeply connected to the desert from which it was forged, Taliesin West possesses an almost prehistoric grandeur. It was built and maintained almost entirely by Wright and his apprentices, making it among the most personal of the architect's creations. Taliesin West is a UNESCO World Heritage site and National Historic Landmark nestled in the desert foothills of the McDowell Mountains in Scottsdale, Arizona.