

National Association of
Wholesaler-Distributors
ANNUAL REPORT | 2018



knowledge education networking advocacy



N · A · W

NATIONAL ASSOCIATION OF
WHOLESALER-DISTRIBUTORS

OUR MISSION STATEMENTS



National Association of Wholesaler-Distributors

To advocate its members' interests on national public policy issues that affect the entire wholesale distribution industry. NAW assists merchant wholesaler-distributors to be the most efficient channel for bringing goods to market through benchmarking, strategic management information, networking, and high-level conferences. NAW serves as a mechanism, through its Association Executives Council, for the sharing of ideas, programs, and skills among the organization's member national and international associations.



NAW Political Action Committee

To advance the election of pro-business candidates to federal office. The NAW Political Action Committee seeks to mobilize the involvement of wholesaler-distributors in the federal electoral process through financial contributions and political education activities, including candidate endorsements and get-out-the-vote programs.



NAW Institute for Distribution Excellence

To sponsor and disseminate research into strategic management issues affecting the wholesale distribution industry. The NAW Institute for Distribution Excellence aims to help merchant wholesaler-distributors remain the most effective and efficient channel in distribution.



NAW Service Corporation

To sponsor industry-wide service and product offerings that benefit wholesaler-distributors.

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LEADERSHIP MESSAGE

NAW continues to deliver for best-in-class wholesaler-distributors within our \$6.01 trillion industry. This organization is uniquely positioned to be your connection with other leading wholesaler-distributors in many lines of trade across the industry and across the country.

If your company is already a member of NAW, you can count on NAW to provide you with knowledge, education, networking, and advocacy opportunities so your business can thrive and wholesale distribution can continue to be the most efficient and effective channel in the supply chain.

If you're considering membership in NAW, please know that NAW provides real value to your business in so many ways. In serving your business, NAW

- is your strong voice before the government in Washington, DC
- convenes high-level roundtables and conferences where you and your peers from across the industry can candidly discuss the business challenges that keep you up at night
- produces groundbreaking, distribution-specific research and high-caliber thought leadership to help you drive higher levels of performance and profitability, and maintain your competitive edge
- gives you access to superior business services that are valued by your industry peers.

This Annual Report is in part a recap of the past 12 months. It is also full of ideas, opportunities, and promise to keep you engaged with NAW for the remainder of 2019.



Watch Dan Blaylock, CEO of TriMark Adams-Burch, talk about the profound impact NAW has had on the professionalism and profitability of his company.

Joseph C. Nettemeyer
NAW 2018
Chairman of the Board

George A. Pattee
NAW 2019
Chairman of the Board

Dirk Van Dongen
NAW President



Joseph C. Nettemeyer, President and CEO of Valin Corporation (standing left) served as NAW 2018 Chairman of the Board; George A. Pattee, Chairman of the Board of Parksite Inc. (seated) serves as NAW 2019 Chairman of the Board; and Dirk Van Dongen is NAW President and CEO.

Take a little time to read through this Annual Report and learn about all the areas of opportunity and involvement that are available to NAW members, including:

- Best-in-Class Peer Networking
- Government Relations and Political Action
- Premier Industry Intelligence and Thought Leadership
- Cost-saving and Highly Valued Business Services.

Within these covers, you'll find many ways where NAW can assist your company so you and your team can capture the full benefits of NAW membership. Bookmark the NAW website and visit it often at <https://www.naw.org>.

Please stay connected with NAW. We look forward to working with you.

State of the WHOLESALE DISTRIBUTION INDUSTRY

OVERVIEW

Generally speaking, wholesaler-distributors probably experienced good growth in their top lines and some growth in profits in 2018. Most segments of the industry experienced record-high levels of activity. Wholesale distribution in total reached a record-high \$6.01 trillion for 2018, up 7.5% from 2017. Our industry is a truly impressive 29% of GDP.

But before we get carried away with the good news, it is important to note that slowing growth is now occurring in the industry and will characterize all of 2019, extending into early 2020. The current 12-month growth rate (12/12 rate-of-change) is 7.5%, but the quarterly growth rate is a smaller 4.7%, confirming that the industry is on the back side of the business cycle.

Distributors need to be very cautious in their sales-growth expectations for 2019; it will not be a repeat of 2018. In general, expect a smaller year-over-year growth rate with all the attendant implications for inventory management and cash flow.

Wholesale Trade of Durable Goods, which accounts for 48.4% of the industry, has been in Phase C (slowing rate of rise) since a July 2018 business-cycle peak. That deceleration in the rate of rise will be the defining characteristic through the near term, with increased negative pressures likely later this year and in early 2020.

Relative to the 7.9% year-over-year growth in the Durable Goods segment, Wholesale Trade of Nondurable Goods is a slightly smaller 7.0% above this time last year (12/12 basis). The Nondurable segment experienced a rate-of-growth peak in October, and the growth rate is falling quickly. The Nondurable Goods 12MMT stands at \$3.102 trillion, 51.6% of Total Wholesale Trade, but the Nondurable Goods dollar trend stopped rising in November 2018 and pulled back slightly in December. More downward business-cycle pressure for the Nondurable Goods segment is indicated in 2019 and into 2020.

MARKET SEGMENTS

Figure 1 provides a more detailed look at the industry. Please note that eight of the 13 industry segments shown are in Phase C, Slowing Growth. That means these eight segments' 12/12 rates-of-change are moving lower, and sales growth at the company level will be harder to achieve.

Motor Vehicles, Parts, and Supplies; Hardware, Plumbing, Heating Equipment and Supplies; and Chemicals and Allied Products have slipped lower off November record-high levels. Lumber and Construction Materials began to descend off an August 2018 record high. More downside pressure is anticipated for 2019.

The slowdown in the wholesale distribution industry is occurring in conjunction with the general economic slowdown as shown in Figure 2. The fact that the slowdown was coming was clearly signaled by our ITR Leading Indicator™, which leads the Total Wholesale Trade 12/12 through highs and lows by eight months. The fact that our leading indicator is still declining means that distributors should expect the Wholesale Trade rate-of-change to move lower into at least late this year.

Figure 1: Industry Segments

NAICS	Description	12/12	Phase	12-Month Moving Total in Billions of Dollars
4247	Petroleum and Petroleum Products	25.0%	C	\$734.43
4242	Drugs and Druggists' Sundries	5.4%	B	\$711.54
4238	Machinery, Equipment and Supplies	13.9%	C	\$474.00
4244	Grocery and Related Products	-1.1%	D	\$640.33
4236	Electrical and Electronic Goods	7.5%	C	\$623.08
4234	Professional and Commercial Equipment	5.5%	B	\$510.08
4231	Motor Vehicles, Parts and Supplies	5.7%	C	\$492.97
4241	Paper and Paper Products	1.8%	B	\$ 99.22
4235	Metals and Minerals (Ex. Petroleum)	18.5%	C	\$189.25
4248	Beer, Wine, Distilled Alcoholic Beverages	4.8%	B	\$156.03
4237	Hardware, Plumbing, Heating Equipment and Supplies	4.4%	C	\$143.58
4233	Lumber and Other Construction Materials	4.3%	C	\$144.01
4246	Chemicals and Allied Products	9.5%	C	\$133.27

THREE FACTORS TO CONSIDER

There are three factors driving the slowdown in the economy and in our industry.

1. RETAIL SALES

Retail Sales have shifted to the back side of the business cycle (Phase C) as shown in Figure 3. The Retail Sales 12/12 has started to move lower, and the ongoing descent in our ITR Consumer Activity Leading Indicator™ shows that Retail Sales will continue in Phase C into at least the third quarter of 2019.

2. NONDEFENSE CAPITAL GOODS NEW ORDERS

Nondefense Capital Goods New Orders (excluding aircraft) have also moved into Phase C, as shown in Figure 4. A look at Copper Futures Prices, also shown on the chart, shows that the downward pressure on capex spending will likely last until at least late 2019.

3. EXPORTS

Many clients of distributors participate in exports in one form or another. **Figure 5** shows that growth in U.S. Exports, currently at 7.6% year over year, is slowing. What you cannot see is that the 12MMT (not shown) stopped rising in November and edged lower in December. Distributors will find growth through exports to be extremely difficult. The downward pressure on exports is coming from three sources: a stronger dollar (shown in Figure 5), weakening demand as the global economy cools, and reciprocal tariffs from other countries. This is especially true of exports to China, which saw fourth-quarter-2018 results come in 31.5% below the year-earlier quarter.

EMPLOYMENT

Employment in the wholesale distribution industry has reached a record high of 5.9 million people, up 51,000 from last year. The industry employs 4.6% of the total private workforce in the U.S. For comparison, Walmart employs 1.5 million people in the U.S. and Amazon employs 647,500 globally. Wholesaler-distributors are clearly a vital part of employment in this country.

The 12/12 shows a 0.9% rate of growth in employment in the industry over the last 12 months, which is the fastest we have seen in three years. The quarterly growth rate (3/12) is even higher at 1.5%. Expect the very tight labor market to continue through 2019 and for years to come.

Wage pressure may ease slightly in 2019, but the upward pressure will still be there (see the definition at the end of this article). Wages in this industry are 3.2% ahead of this time last year (3/12 basis) with a record-high 3MMA of \$31.11 per hour. Distributors must plan on increased efficiencies to offset the higher labor content as it will be difficult to arbitrarily raise prices in 2019 unless tariff surcharges can be put in place. Wages are going up faster in the Nondurable Goods segment of the wholesale distribution industry (3/12 at 4.4% compared to 2.8% for Durable Goods). Annual average job openings in the industry are a record high 211,833, so competition – and upward pricing pressure on wages – will be with us for the foreseeable future.

CONCLUSION

Distributors should compute their own rates-of-change and compare them against industry trends to gauge internal performance. A comparison to leading indicators will also indicate when you are approaching the next low in the business cycle (or, if you have yet to reach your peak, the next high). You should be very aware by now of a slowing rate of inventory turn in C items, even as you balance concern regarding an inventory build-up against the need for quick delivery on A and B items. The ability to anticipate a slowdown in demand will enhance your bottom line and cash flow. This is also a great time to evaluate which products have sold best in previous Phase C situations, and then concentrate your marketing and sales messages on those items.

Definition for U.S. Average Hourly Earnings for Wholesale Trade: Average dollars per hours worked for employees in wholesale trade. The National Compensation Survey defines hourly earnings as the straight-time hourly wages or salaries paid to employees. They include incentive pay (commissions, piece rate payments, and production bonuses), cost-of-living adjustments, hazard pay, and payments for income deferred due to participation in a salary reduction plan. Excluded are premium pay for overtime, holidays, and weekends, shift differentials, draws, nonproduction bonuses, tips, and uniform and tool allowances. NAICS code: 42. Source: US Bureau of Labor Statistics (BLS). Measured in dollars per hour, not seasonally adjusted (NSA).



This article was written by Alan Beaulieu, NAW Senior Economic Advisor, and President of ITR Economics.

For additional information, please call 603-796-2500 or visit <https://www.itreconomics.com>.

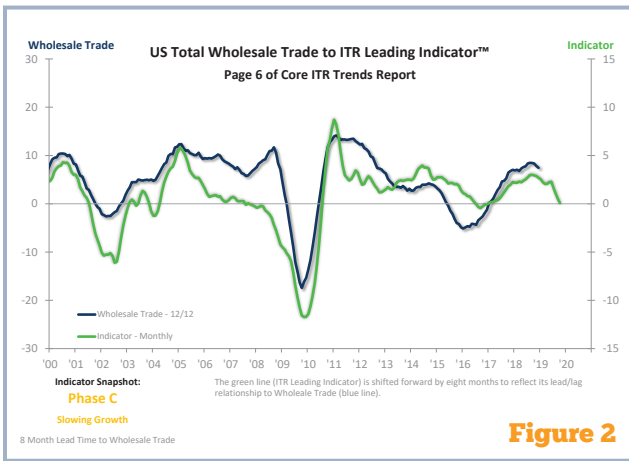


Figure 2

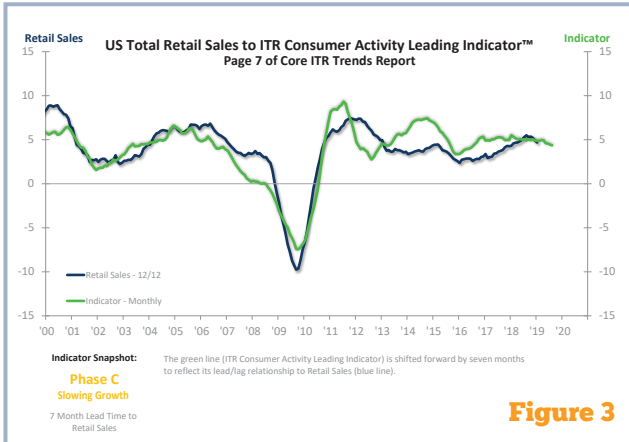


Figure 3

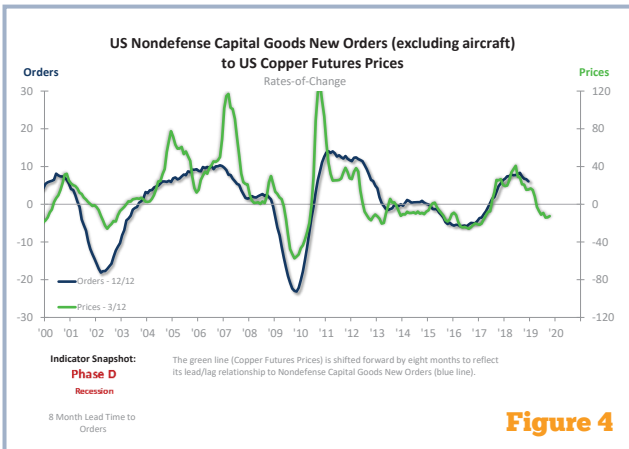


Figure 4

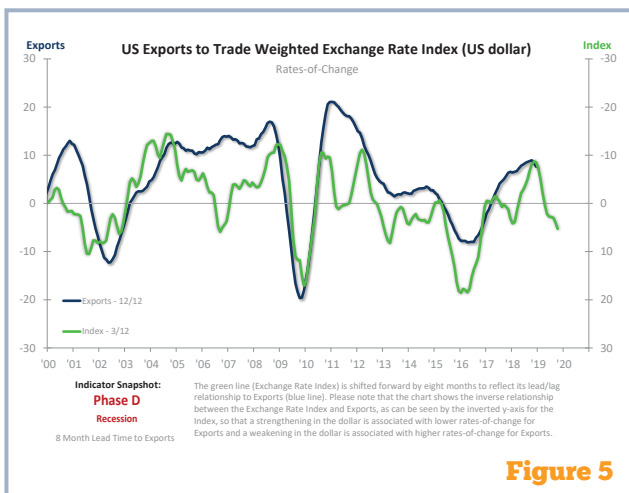


Figure 5

NAW Networks You with BEST-IN-CLASS PEERS

As a federation of associations representing all lines of trade in the wholesale distribution industry, NAW is uniquely positioned to be your gateway to a comprehensive and cooperative exchange of invaluable intelligence and services among noncompeting peers within the NAW membership. What makes NAW so different from other associations are the dynamic programs that are individually designed to promote networking and benchmarking for you and your peers across the entire industry.

Understanding wholesaler-distributors' focus on growth, profitability, and operational excellence, NAW provides "best-in-class peer networks," which are designed to find innovative solutions to today's business problems. It is through these NAW networking opportunities that wholesale distribution executives can meet with and learn from noncompeting peers.

To learn more, visit <https://www.naw.org/why-join-naw/>.



Watch Charles Cohen, Managing Partner of Benco Dental, discuss why his company has been a Member of NAW for 30 years.

"Why I am a NAW Member" Video Insights from Wholesale Distribution Top Executives

NAW recognizes that the most valuable perspectives come directly from the wholesale distribution leaders who participate in NAW programs and can explain the value they receive from membership. The Membership Insights page is a prime resource to hear directly from wholesale distribution CEOs and other C-suite executives on the value they have found throughout their NAW membership experience.

To learn more, visit: <https://www.naw.org/why-join-naw/#Billion-Dollar-Company-Members>.

Executives from NAW's largest companies talk about the challenges and opportunities they tackle every day. Pictured left to right are Rick Schwartz, Chairman of the Board, Winsupply Inc.; Larry Stoddard, President and CEO, RelaDyne LLC; and George Pattee, Chairman of the Board, Parksite Inc.



Graybar has been a member for decades...NAW is one of the most valuable organizations that my company belongs to...

KATHY MAZZARELLA, CHAIRMAN, PRESIDENT AND CEO OF GRAYBAR ELECTRIC

Targeted Roundtables Promote Networking and Benchmarking

NAW members consistently rate "peer exchanges" and "information sharing" with the best minds in the industry as two of the most valuable benefits of NAW membership. To address the needs of the senior executive leadership from our largest members is why NAW created the Billion Dollar Company Roundtables (companies with sales of \$1 billion or greater) and Large Company Roundtables (companies with sales of \$100 million to \$1 billion). NAW members consider benchmarking and peer exchanges with noncompetitors from other lines of trade as strategic advantages to improving efficiency and effectiveness while driving innovation for their distribution enterprises. This is why your senior executive peers rely on NAW events for practical, industry-wide knowledge and information from experts who focus on the distribution industry. NAW saves you time and money by not reinventing the wheel.



I attend almost every year. It's a terrific way to connect with other distribution executives and learn about new trends.

CHUCK COHEN, MANAGING DIRECTOR OF Benco Dental Co.

Making the Most of Your Valuable and Limited Time

Something wholesale distribution executives tell us they have the least of is “time.” NAW events are short and information packed so that a time commitment is minimal. There is enough time built in at NAW events for both learning and networking in a friendly setting that welcomes information exchange. Our Billion Dollar Company and Large Company Roundtables take place at the Hilton O’Hare in Chicago, which allows for quick in-and-out access for Roundtable participants.



Watch Patrick McKune, CFO of M. Holland Company, talk about the value he gets from being a member of the NAW Billion Dollar Company CFO Roundtable.



Sharing ideas are left to right: Scott Teerlinck, President, Werner Electric Supply Co.; Gerry Helbig, President, Curbell Plastics Inc.; and Chip Hornsby, CEO, MORSCO.

NAW Billion Dollar Company Executive Roundtables

In 2018, NAW held 11 24-hour events for the most-senior executives from our billion dollar member companies. The programming in NAW’s networking roundtables allows industry executives to overcome today’s business obstacles and tackle tomorrow’s challenges. Our members find our unique and exclusive roundtables invaluable, because they gain business intelligence and value real networking with peers who are not competitors. They tell us NAW events are “burned into their calendars” because of the ROI they receive from being an active participant. Many roundtable members also say that access to resources at our meetings has resulted in their companies saving thousands of dollars. These are the reasons why NAW Roundtables are the desired destination among best-in-class billion dollar company executives.

There are five semi-annual Billion Dollar Company Executive Roundtables and one annual Billion Dollar Company CEO Roundtable. Here are the 2019 dates and all events are held at the Hilton O’Hare in Chicago:

- Billion Dollar Company CEO Roundtable, October 2–3, 2019
- Billion Dollar Company CFO Roundtable, June 4–5, 2019 and December 3–4, 2019
- Billion Dollar Company CIO Roundtable, June 4–5, 2019 and December 3–4, 2019
- Billion Dollar Company Chief Legal Officer Roundtable, May 14–15, 2019 and November 19–20, 2019
- Billion Dollar Company CHRO Roundtable, May 14–15, 2019 and November 19–20, 2019
- Billion Dollar Company Operations Roundtable, May 14–15, 2019 and November 19–20, 2019

To learn more about the Billion Dollar Company Executive Roundtables, visit <https://www.naw.org/billion-dollar/>.

NAW Large Company Executive Roundtables

NAW Large Company Executive Roundtables (for NAW member companies with sales of \$100 Million to \$1 Billion) attract wholesale distribution executives looking to augment peer exchanges beyond their traditional industry segment.

The NAW Large Company CEO Roundtable is the leading event for companies of this size, and the CEO community has a vested interest in the roundtable’s content, since they pick the topics for the roundtable. This investment in content selection ensures that roundtable members are fully engaged and the issues of highest priority are addressed.

NAW also holds the Large Company CFO Roundtable, which focuses on specific needs of CFOs and the most senior financial executives, and the Large Company Operations Roundtable, which tackles the pressing issues of improving warehouse and logistics operations.

The Large Company CEO Roundtable is held annually, and the Large Company CFO and Operations Roundtables are held semi-annually. Here are the 2019 dates and all events are held at the Hilton O’Hare in Chicago:

- Large Company CEO Roundtable, September 17–18, 2019
- Large Company CFO Roundtable, April 30–May 1, 2019 and November 5–6, 2019
- Large Company Operations Roundtable, April 30–May 1, 2019 and November 5–6, 2019

To learn more about the Large Company Executive Roundtables, visit <https://www.naw.org/large-company/>.

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BEST-IN-CLASS PEERS (continued)

“AskNAW”®: Bring the Value of Peer Networking to Your Desktop or Mobile Device

AskNAW is a members-only online platform that enables distribution executives to receive clear answers quickly from other top executives within the wholesale distribution industry. The advantages of AskNAW over other “online forums” include:

- Questions are asked and answered anonymously.
- You quickly identify who you would like to receive your question (for example, HR Executives / CFOs / CIOs / Sales, etc.).
- You select a sales volume range similar to your company to ensure relevance in the answers you receive.
- The answers to your question come directly to your inbox almost instantly.

NAW members who use AskNAW tell us it is one of their most valuable “need-to-know” tools for getting comparison data and real-time information beyond their traditional lines of trade.

To learn more, visit <https://www.naw.org/asknaw/>.



In discussion left to right are Robert Taylor, President Emeritus, Do it Best Corp.; and David Rawlinson, President-Online Business, Grainger Inc.



Grainger has been a member of NAW for 30 years...NAW gives Grainger the ability to network with peers that are not in our space but know distribution, and that allows us to have conversations at a level you rarely get to have...

D.G. MACPHERSON, CHAIRMAN AND CEO OF GRAINGER INC.

Here are typical questions posed by distribution executives who used AskNAW to get answers:

- I am looking for warehouse consultants who can help us in planning/upgrading/improving our current physical facilities to improve our operations. I especially want to talk with folks who have experience with difficult items (bulky, large) mixed with ordinary conventional items. If you could please share contact information and recommendations that would be most appreciated. Also indicate if you distribute bulky and large items.
- Do you permit your senior executives to serve on outside boards of directors? If yes, what types of boards are permitted? Public company boards, private company boards, not-for-profit boards or other (specify)? Is permission from the company required? Does your company have guidelines or restrictions for when an executive is permitted or not permitted to serve on an outside board of directors?



Single best source of information on innovation. Great place to network.

CHARLIE MERINOFF, CO-CHAIRMAN OF BREAKTHRU BEVERAGE GROUP



NAW Networks You with GOVERNMENT AND THE ELECTORAL PROCESS

Your Voice in Our Nation's Capital

A principal benefit of your NAW membership is the networking NAW conducts on your behalf with the federal government. NAW engages the legislative, regulatory, and judicial processes through direct and grassroots advocacy, coalition leadership and participation, and involvement in legal actions in the federal courts. All of these efforts connect the wholesale distribution industry with federal policy makers whose decisions impact the everyday operations of wholesale distribution companies.

Direct Advocacy

The mission of the NAW government relations team is to convey the wholesale distribution industry's views to the legislative and executive branches of the federal government, and to identify opportunities for the advancement of NAW's federal public policy agenda.

Despite having a Republican President sitting in the White House and GOP majorities in both the House and Senate, opportunities to advance NAW's pro-business agenda during the Second Session of the 115th Congress were limited by three realities:

- A Republican majority in the Senate that fell eight votes short of the 60-vote supermajority needed to limit debate and complete action on legislation
- Ideologically splintered Republican conferences in both houses of Congress, particularly in the House
- Partisan polarization in the nation's capital on a crippling scale.

Despite the continuing challenges, some legislative progress was made in 2018. The increasingly difficult to clear hurdles on Capitol Hill, exacerbated by an unconventional and unpredictable Trump Administration, combined to require NAW to play on both defense and offense in 2018.



NAW's rack of advocacy positions makes the group a lobbying clearinghouse for Washington industry groups and a key member of any pro-business coalition inside the Beltway...

In recent years, the group has become a behind-the-scenes force in business policy debates and major legislation...

[CEO UPDATE](#)

(continued on next page)

GOVERNMENT (continued)

Coalitions: Using the Strength of Our Industry

NAW is a leader in organizing and managing coalitions to address the wholesale distribution industry's national public policy priorities. Wholesale distribution's economic and political "footprint" is national in scope: NAW-affiliated companies and their employees are present in all 50 states and 435 congressional districts, a uniquely formidable constituency when fully and effectively engaged. When allied through NAW with other like-minded organizations and their networks, the potential for success multiplies several fold.



NAW's political operation is vast and powerful, tackling issues from health care reform to taxes.

THE HILL NEWSPAPER



Watch Kathleen Mazzarella, Chairman, CEO and President of Graybar Electric Company, discuss what NAW's Government Relations efforts provide for her company and all distribution firms across the industry.

Grassroots Advocacy: Constituents Back Home Speak to Congress

Timely involvement in the legislative process from wholesaler-distributors "back home" in the states and districts of Senators and Representatives is indispensable to the achievement of favorable legislative results under the Capitol dome. NAW's principal grassroots advocacy tool is the internet-based E-Alert Program through which NAW communicates with senior management of both NAW member companies and member companies of cosponsoring NAW-affiliated member associations. They, in turn, communicate with their federal legislators on important issues moving through the legislative process. Distributors can easily identify appropriate federal legislators, conveniently craft a written advocacy message to them, and deliver it quickly when it is needed the most.

The Washington Action Network (WAN) catalogs the personal relationships that exist between individual wholesaler-distributors and Members of both houses of Congress. WAN enables the NAW government relations team to tap the distribution industry's top-level "grass tops" contacts with Representatives and Senators at the most critical points in legislative initiatives. Participation in WAN is also open to NAW member associations that opt to cosponsor the WAN program.



Bret Baier, FOX News Chief Political Anchor and Host of "Special Report with Bret Baier," closed out the NAW Executive Summit with an entertaining assessment of Washington politics.

Political Action: Because Elections Have Consequences

**N · A · W
PAC**

NATIONAL ASSOCIATION OF
WHOLESALE-DISTRIBUTORS
POLITICAL ACTION COMMITTEE

Pro-business legislative victories depend first and foremost on having women and men in Congress who will cast pro-business votes and lead on business issues. The NAW Political Action Committee (NAW-PAC) exists to make the presence of the wholesale distribution industry distinctly felt in the political process by providing distribution executives with an important avenue for political action on behalf of business-friendly candidates for the Senate and the House.

NAW-PAC maintains both a Political Action Fund (PAF) and a Corporate Political Education Fund (CPEF). The corporate contributions that CPEF receives fund wholesaler-distributor voter registration and get-out-the-vote ("GOTV") initiatives, enabling NAW-PAC to contribute to federal candidates every cent of every "hard dollar" that PAF raises.

Given its purpose, PAF may accept only personal money voluntarily contributed (individuals may contribute up to \$5,000 per year to a trade association's political action committee). PAF will contribute to as many pro-business candidates for federal office as the provided resources will allow. NAW-PAC was committed as always to the election of pro-growth, pro-free enterprise candidates in the 2018 national election cycle with the goal of electing the pro-business majorities in both houses of Congress.



Giving special remarks during the NAW-PAC dinner was Republican Senator **Richard Burr** who has represented North Carolina in the U.S. House of Representatives then U.S. Senate since 1994. Senator Burr is Chairman of the Senate Select Committee on Intelligence. Before his election to the House, he worked at Carswell Distributing Company.

Policy Agenda Serving Our Members' Interests

Although Republicans controlled both houses of Congress and the White House in 2018, the GOP was not able to produce many legislative victories. After the major tax overhaul enacted in December, 2017, Congress did little on the tax front in 2018; instead, most of the year was spent working with the Treasury Department as they promulgated regulations implementing the 2017 Tax Cuts and Jobs Act. But there were critical transportation and health care issues on the table.

NAW worked with the House and Senate to pass transportation language that would exempt motor carriers from complying with separate state regulations on paid driver meal and rest breaks. While this language was stripped from the final legislation, the Federal Motor Carrier Safety Administration (FMCSA) subsequently granted a NAW-supported petition filed by the American Trucking Association, which determined California's meal and rest break rules were preempted by federal law. A court challenge to this FMCSA ruling was filed by the Teamsters Union, and NAW is closely monitoring the case to determine if we need to work with our industry partners to participate in court actions.

NAW, and the health care coalitions we help manage, advocated for employer-sponsored coverage and lobbied Congress to repeal and/or delay several health care tax measures that are problematic to the more than 181 million Americans enrolled in employment-based health coverage. In January, 2018, Congress passed and President Trump signed into law a Continuing Resolution (CR) to fund government agencies. That CR delayed several health care

taxes created by the Affordable Care Act, including the Cadillac tax, the Health Insurance Tax (HIT) and the medical device tax. Both the medical device tax and the HIT are delayed through December 31, 2019, and the Cadillac tax is delayed until January 1, 2022.



NAW has exceeded my expectations and is probably one of the best values for the money that we've invested in a long time.

W. GRADY ROSIER, PRESIDENT AND CEO,
MCLANE COMPANY INC.

Rulemaking and the Regulatory Agenda

After almost a decade of hard-fought battles against the aggressive regulatory agenda of the Obama Administration, in 2018 NAW supported an equally aggressive and notably successful regulatory reform agenda advanced by the Trump Administration. Of particular note, and importance to NAW members, Congress, the Department of Labor, and the National Labor Relations Board moved quickly to roll back, rescind, repeal, or rewrite dozens of workplace regulations.

To learn more about all of NAW's Government Relations programs, go to <https://www.naw.org> and click on the "Government Relations" tab in the navigation menu.

NAW Networks You with INDUSTRY INTELLIGENCE AND THOUGHT LEADERSHIP

Only NAW regularly connects you with the finest industry intelligence and thought leadership so you can benefit from the best thinking about wholesale distribution.



Watch Ralph Suppa, President and General Manager, Canadian Institute of Plumbing & Heating, talk about the value his association members get from NAW Institute Publications.

NAW Institute for Distribution Excellence



The NAW Institute for Distribution Excellence is a leading provider of research exclusively for and about the wholesale distribution industry. The NAW Institute conducts research into strategic management issues

with best practice distributors, and we publish leading-edge studies, reports, white papers, and other publications with practical application for wholesale distribution firms of all sizes and across all lines of trade. No other organization can replicate across all lines of trade what the NAW Institute offers. To see all NAW Institute publications, visit <https://www.naw.org/publications/>.



Watch Jeff McLendon, President and CEO of U.S. Lumber Group, talk about the value and ROI benefits his company receives from NAW Institute Publications.

Council for Research on Distributor Best Practices

The NAW Institute for Distribution Excellence and Texas A&M University are engaged in an alliance dedicated to furthering

the understanding and application of best practices in wholesale distribution. This alliance created the Council for Research on Distributor Best Practices (CRDBP). Its mission is to create strategies for competitive advantage for distributors through development of research, tools, and education. To learn more, visit <https://www.naw.org/naw-institute-for-distribution-excellence/#CRDBP>.



COUNCIL FOR RESEARCH
ON DISTRIBUTOR BEST PRACTICES

An Alliance of the NAW Institute & Texas A&M University

Powered by



INDUSTRIAL DISTRIBUTION
PROGRAM
TEXAS A&M UNIVERSITY

Next-Gen Distribution Professional Development Programs

NAW and Texas A&M University expanded their offerings in 2018 by bringing more than 60 years of distribution knowledge and a decade of industry research together to create two new breakthrough programs, which help distributors enhance their training and educational offerings:

NAW Micro Degree in Project Leadership

Designed for a team or individual working on a crucial company project, this on-campus course, combined with five months of distance mentoring, helps leaders develop the skills and knowledge they need to create, execute, and manage internal projects. To learn more, visit <https://www.naw.org/micro>.



Hear from Ron Calhoun, President and CEO of Palmer-Donavin Mfg. Co., discuss the value that his company receives from sending people to the NAW Micro Degree in Project Leadership Program.

NAW Certificate in Distribution Management

Designed for current and upcoming leaders responsible for enhancing profitability and generating growth, this Certificate program features three unique week-long on-campus programs: Optimizing Distributor Profitability, Generating and Managing Growth, and Distributor Capability Development. While courses may be taken individually, only those completing all three offerings are awarded the NAW Certificate in Distribution Management. To learn more, visit <https://www.naw.org/certificate>.



Watch Kevin Short, Former President and CEO of Polymershapes, discuss the value that Polymershapes employees gain by attending the NAW Certificate in Distribution Professional Management Program.

Distributing Ideas

THE NAW BLOG

Another channel where NAW shares thought leadership with wholesale distribution executives is the NAW Blog Distributing Ideas. Guest bloggers, NAW Institute Fellows, NAW Institute authors, and NAW staff discuss a variety of hot topics specific to wholesale distribution. Get the latest thought leadership on human capital trends, digital transformation, wholesale distribution trends, value creation, sales management, and much more. Catch up on all NAW blog posts by visiting here, <https://www.naw.org/blog/>. Better yet, subscribe here: <http://info.naw.org/subscribe-digital-era-blog-series> so that you don't miss a single post.

Daily E-newsletter

NAW SmartBrief



NAW SmartBrief is the smarter way to stay on top of wholesale distribution news and trends. This is the free e-newsletter that more than 22,000 distribution executives depend on for the latest industry information. Delivered daily to your inbox, each issue contains links to full-length business strategic management and trends articles. Sections cover Top Industry Story,

Operations and Technology, Sales and Marketing, Hot Topics, The Business Leader, Policy Watch, NAW Insider, and the NAW Career Center. To subscribe, visit <http://www.smartbrief.com/naw>.

NAW Webinars, White Papers, and Coming Soon... Podcasts

NAW Webinars are a short-form method to educate and share valuable industry information with wholesaler-distributors of all sizes and lines of trade on important topics of the day. NAW webinars cover a wide range of topics, including the science of pricing, digital investments, credit management, e-commerce, profitability, sales management, and more. NAW Webinars feature industry subject matter experts and are free, interactive, and available for viewing live or on demand. Watch archived webinars anytime at <https://www.naw.org/upcoming-webinars/>.

The NAW Institute produces informative, research-based White Papers on topics as diverse as reducing selling costs in distribution, digital transformation, and strengthening the manufacturer-distributor partnership. To learn more, visit <https://www.naw.org/publications/>.

NAW Podcasts will be unveiled in 2019. Stay tuned!

Who Are Your Distribution Rising Stars?



Professional development is a vital component for your company's success and your own success. When you gain new tools and knowledge, you add to your entire team's knowledge and boost your own job satisfaction.

The NAW Distribution Program for Rising Stars, in partnership with The Ohio State University's Fisher College of Business, provides a comprehensive look at the principles of distribution management with a focus on finance, marketing, supply chain management, human resources, strategy, and improving productivity. For more than 60 years, this program has trained current and future distribution leaders who have already assumed or will soon assume greater department, branch, or corporate responsibility.

To learn more about NAW 2019 Distribution Program for Rising Stars, June 17-21, at The Ohio State University in Columbus, Ohio, visit <https://www.naw.org/risingstars19>.



Hear from Tom Goldsby, Faculty Director of the NAW Distribution Program for Rising Stars..



During the NAW Distribution Program for Rising Stars every June, dozens of high-potential leaders come together for one week of comprehensive study with award-winning Ohio State faculty on the business of wholesale distribution.

New Career Center—Find the Best

Built on a state-of-the-art recruitment platform, the NAW Career Center will help you meet your recruitment goals and attract top talent. Commercial job boards can't provide the level of targeted exposure or experienced advisor guidance. You'll post your jobs online quickly and easily, search the resume database, set up alerts to be e-mailed to you, and receive valuable reporting information. To learn more, visit <http://careers.naw.org/employers/>.

NAW Networks You with BUSINESS SERVICES



Insurance | Risk Management | Consulting

NAW networking also means connecting wholesaler-distributors with business services that reduce their operating costs.

The NAW Service Corporation offers the wholesale distribution industry high-quality business services designed to meet the specific needs of wholesaler-distributors. To learn more, visit <https://www.naw.org/business-naw-service-corporation/>.

Health Care Benefits and Business Insurance

NAW offers a partnership that brings innovative employee benefits, and property and casualty insurance solutions to firms in the wholesale distribution industry through its strategic partnership with Gallagher, one of the largest insurance brokerages in the world. The NAW/Gallagher partnership offers 100+ employee firms benefit solutions that incorporate unique products designed exclusively for wholesaler-distributors. Participating companies will be able to provide their employees benefit options that best suit their individual needs, while better managing the associated costs. To learn more, visit <https://www.naw.org/private-healthcare-exchange/> and <https://www.naw.org/employee-benefits/>.

The NAW/Gallagher Partnership also provides you with property and casualty insurance options typically available only to large companies. By leveraging the power of Gallagher's marketplace relationships, NAW offers custom solutions to firms of all sizes, and particularly mid-market firms, which describes the vast majority of the nation's wholesaler-distributors. To learn more, visit <https://www.naw.org/property-casualty/>.



Watch Matt Holt, Vice President of Human Resources at Dot Foods, discuss his company's partnership with Gallagher.

E-Commerce Payments and Reporting

NAW's research shows that the growth of digital commerce is rapidly changing the way wholesaler-distributors run their businesses. NAW put together a partnership for B2B E-Commerce to guard wholesaler-distributors from the Amazon threat and transform with digital solutions to reduce days outstanding, unlock discounts, and protect margins.

Through the NAW/Unified Commerce Solutions Program, wholesaler-distributors receive exclusive technology and digital solutions for all payment types, including ACH, lock-box payments, mobile, remote deposit capture, checks, and even cash, to

- Unlock discounts on payment transaction fees and enhanced Level-3 data capability
- Protect margins with digital solutions to inefficient, traditional processes
- Reduce days outstanding and speed time-to-payment
- Integrate payment data directly into AR/ERP systems.

To learn more, visit <https://www.naw.org/e-commerce-solutions/>.



Freight and Air Shipping



NAW understands the importance of keeping operating costs down, which is why we are pleased to extend the NAW/UPS Savings Program to you. This program is designed specifically to meet your shipping needs and to offer a savings solution that helps increase your bottom line. Through this program, you have more service options, superior ground delivery coverage, more than 60,000 drop-off points, and overnight delivery by 10:30 a.m. to more zip codes than any other carrier. You will enjoy the convenience of the same drop-off location and the same driver for your air and ground packages, eliminating the need to separate your packages.

An exclusive service of the NAW/UPS Program, UPS offers Ground with Freight Pricing (GFP), which is ideal for multi-package shipments weighing over 151 lbs. By removing the pallet and transferring to the NAW partner UPS Ground network, you receive a day-definite delivery guaranteed for free, plus the cost savings and logistical services that come with GFP. It removes accessorials fees, fuel surcharges, and pallet weight to make your shipment cost effective.

Standard with the NAW/UPS Program are the most competitive rates available on shipping services, and there are no fees or minimum shipping requirements. Plus, you can receive these discounts even if you have an existing UPS account. To learn more, visit <https://www.naw.org/logisticshipping/>.

Financial Intelligence



Through the NAW/Cortera Program, you have access to the most accurate information about customers and business partners. Cortera provides the insights you need into your riskiest and most collectible accounts and lets you pinpoint areas of growth. Cortera PULSE, the flagship product, lets you see your entire customer portfolio through daily email alerts. It also shows you where there is growth within your existing customer base. Cortera's products and solutions provide powerful intelligence for wholesaler-distributors of all sizes. To learn more, visit <https://www.naw.org/financial-intelligence/>.

Car Rental



Under the NAW/Hertz Business Account Program, enrolled distribution firms receive special NAW-negotiated rates. In addition, your company will earn one Free Rental Day Certificate for every 15 days of qualifying rentals – in effect, earning an additional discount. In addition, Hertz is offering a one-year complimentary Hertz #1 Club Gold® membership for all employees who travel using your company's premier car rental service, a \$50 annual value per membership. Special added benefits, such as one-car class upgrades, are made available to NAW/Hertz customers. To learn more, visit <https://www.naw.org/car-rental/>.

Highlights from the NAW 2019 EXECUTIVE SUMMIT

One of the largest gatherings of leaders from diverse wholesale distribution lines of trade came together in Washington, DC, in late January for the NAW Executive Summit. Senior distribution executives attend every year to discuss industry issues with each other and with other leaders in business, government, and wholesale distribution.

The NAW 2020 Executive Summit will be held January 28–30, 2020, in Washington, DC. Add this meeting to your calendar: <https://www.naw.org/events/naw-2020-executive-summit/>.

Here are highlights from the NAW 2019 Executive Summit. To see more photos and view the speakers' presentations, visit <https://www.naw.org/es19/>.



Watch Joe Nettekeyer, President and CEO of Valin Corporation, deliver his NAW Chairman's Address.



Opening Speaker **Sekou Andrews** disrupted the NAW Executive Summit audience with an electrifying session in which he challenged everyone to “disrupt yourself so you can access your individual innovation and unlock greater possibilities for yourself and your company”!



Another big crowd attended the NAW Executive Summit.



Discussion Roundtables for distributors and manufacturers are rated by many attendees as the favorite part of the NAW Executive Summit.



Watch this session.

One general session featured a panel of industry human capital practitioners who shared their unique insights on talent planning, acquisition, management, development, and retention. Session leader, **Jia Wang**, author of NAW's *Optimizing Human Capital Development* research study, discussed strategies to optimize and innovate distributors' human capital development practices. Left to right: **Matt Holt**, Vice President of Human Resources, Dot Foods; **Kari Heerd**, Chief People Officer, MSC Industrial Supply Co.; **Sean Schubert**, Executive Vice President, Gallagher; and **Jia Wang**, Professor of Human Resource Development, Texas A&M University.



Alan Beaulieu, President of ITR Economics, and NAW Senior Economic Advisor, delivered the NAW Economic Forecast for 2019–2020.



Watch this session.

Back by popular demand, the distinguished Fellows of the NAW Institute for Distribution Excellence shared their perceptions on key issues in distribution today. Pictured left to right: **Mark Dancer**, President of Network for Channel Innovation; **Brent Grover**, Managing Director of Brent Grover & Co.; and **Mike Marks**, Managing Partner of Indian River Consulting Group.



Jade West, NAW's Chief Government Relations Officer, along with (left to right) **Seth Waugh**, NAW's Associate Vice President—Government Relations, and **Blake Adami**, NAW's Vice President—Government Relations, shared their insights and best guesses on what is in store for 2019 and what impact the 2018 mid-term elections have on Congress and the Administration.

NAW MEMBER NATIONAL and INTERNATIONAL ASSOCIATIONS



The NAW AEC Meeting is an event that I will always attend.

Rick Long, Executive Vice President and General Counsel, Petroleum Equipment Institute



Watch Rick Long.

Agricultural Retailers Association	ARA
American Supply Association	ASA
Associated Equipment Distributors	AED
Association for Hose & Accessories Distribution	NAHAD
Association for Manufacturing Technology (The)	AMT
Association for Print Technologies	APT
Auto Care Association	ACA
Bearing Specialists Association	BSA
Business Solutions Association	BSOL
Ceramic Tile Distributors Association	CTDA
Commercial Vehicle Solutions Network	CVSN
Convenience Distribution Association	CDA
Copper & Brass Servicenter Association	CBSA
Door & Hardware Institute	DHI
Education Market Association	EMA
Energy Equipment & Infrastructure Alliance	EEIA
Equipment Marketing & Distribution Association	EMDA
Fertilizer Institute (The)	TFI
Food Industry Suppliers Association	FISA
Foodservice Equipment Distributors Association	FEDA
Gases and Welding Distributors Association	GAWDA
Global Market Development Center	GMDC
Health Industry Distributors Association	HIDA
Healthcare Distribution Alliance	HDA
Heating, Airconditioning & Refrigeration Distributors International	HARDI
Industrial Supply Association	ISA
International Association of Plastics Distribution	IAPD
International Foodservice Distributors Association	IFDA
International Sanitary Supply Association	ISSA
Irrigation Association	IA
Material Handling Equipment Distributors Association	MHEDA
Metals Service Center Institute	MSCI
Motorcycle Industry Council	MIC

National Association of Container Distributors	NACD
National Association of Electrical Distributors	NAED
National Association of Flour Distributors, Inc.	NAFD
National Association of Sign Supply Distributors	NASSD
National Association of Sporting Goods Wholesalers	NASGW
National Beer Wholesalers Association	NBWA
National Fastener Distributors Association	NFDA
National Grocers Association	NGA
National Insulation Association	NIA
National Marine Distributors Association	NMDA
North American Association of Floor Covering Distributors	NAFCD
North American Association of Utility Distributors	NAAUD
North American Building Material Distribution Association	NBMDA
North American Wholesale Lumber Association, Inc.	NAWLA
NPTA Alliance	NPTA
Outdoor Power Equipment & Engine Service Association Inc.	OPEESA
Pet Industry Distributors Association	PIDA
Petroleum Equipment Institute	PEI
Power Transmission Distributors Association	PTDA
Professional Beauty Association	PBA
Secondary Materials and Recycled Textiles Association	SMART
Security Hardware Distributors Association	SHDA
Textile Care Allied Trades Association	TCATA
United Veterinary Services Association	UVSA
Water and Sewer Distributors of America	WASDA
Wholesale Florist & Florist Supplier Association	WF&FSA
Wine & Spirits Wholesalers of America, Inc.	WSWA
Woodworking Machinery Industry Association	WMIA
World Millwork Alliance	WMA



Absolutely hands down, the value I receive is hearing from other association executives about the initiatives they are implementing...

Michelle Korsmo, CEO, Wine & Spirits Wholesalers of America Inc.



Watch Michelle Korsmo.

NAW MEMBER ASSOCIATE ASSOCIATIONS

Associated Beer Distributors of IllinoisABDI
 Association of Ingersoll-Rand DistributorsAIRD
 Canadian Institute of Plumbing & HeatingCIPH
 Electro-Federation Canada, Inc.....EFC
 Heating, Refrigeration and Air Conditioning Institute
 of CanadaHRAI

Maryland Association of Wholesaler-Distributors, Inc MAW
 Midwest Distributors Association MDA
 Mississippi Beer Distributors Association..... MBDA
 New York State Beer Wholesalers Association..... NYSBW
 North Central Wholesalers Association.....NCWA
 Ohio Association of Wholesaler-Distributors.....OAWD
 Pacific Southwest Distributors AssociationPSDA
 Pacific-West Fastener AssociationPWFA
 Southern Wholesalers Association SWA
 Western Suppliers Association WSA
 Wholesale Beer Distributors of Texas WBDT
 Wholesale Beer & Wine Association of Ohio.....WBWAO
 Wholesalers Association of the Northeast..... WANE

Sharing ideas and gaining insights from other association executives are key reasons why NAW Association Executives Council (AEC) leaders come together for the NAW AEC Winter and Summer Meetings each year.


Watch Ralph Suppa, President and General Manager, Canadian Institute of Plumbing & Heating, discuss the value he receives from attending the NAW AEC Meetings.



Left to right: **Michelle Korsmo**, CEO of Wine & Spirits Wholesalers of America Inc.; **Chris Jahn**, President and CEO, The Fertilizer Institute; and **Carol McGlogan**, President and CEO of Electro-Federation Canada.

Left to right: **Kimberly Bolin**, President and CEO, Convenience Distribution Association, and **Elizabeth Novak**, Senior Director of Advocacy, International Association of Plastics Distribution.

Treasurer's Report: December 1, 2017 - November 30, 2018

Revenue Total:	\$7,819,000	
NAW:	\$6,367,000	Includes dues, publications, seminars, annual meeting, coalitions
NAW/SC:	\$973,000	Includes health and business insurance, car rental, freight and air shipping, cash management, other programs
NAW-PAC:	\$333,000	Includes Political Action Fund, Corporate Political Education Fund
NAW Institute for Distribution Excellence:	\$146,000	Includes contributions, publications royalties
Expenses Total:	\$7,819,000	
NAW:	\$6,184,000	Includes publications, seminars, annual meeting, operations, provision for reserves and government relations
NAW/SC:	\$1,118,000	Includes health and business insurance, car rental, freight and air shipping, cash management, other programs
NAW-PAC:	\$386,000	Includes candidate contributions, operations
NAW Institute for Distribution Excellence:	\$131,000	Includes project grants, operations

Richard W. Schwartz, NAW 2018 Treasurer



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JOHN TRACY
Dot Foods Inc.

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Heating

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Wholesaler-Distributors



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National Association of
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National Association of
Wholesaler-Distributors

ABOUT NAW

NAW STAFF

The National Association of Wholesaler-Distributors (NAW) is composed of wholesaler-distributors and a federation of international, national, regional, state and local associations and their member firms, which total more than 30,000 employers that have locations in all 50 states and the District of Columbia. NAW's constituency is at the core of our economy—a vital link in the supply chain between manufacturers, retailers, and commercial, institutional, and governmental end users.

Distribution firms vary widely in size, employ a record 5.9 million American workers, which is up 51,000 from the previous year. Our industry employs 4.6% of the total private workforce in the U.S. and accounts for a record-high \$6.01 trillion in annual U.S. economic activity, which is up 7.5% from the previous year. Our industry is an impressive 29% of GDP. Wholesaler-distributors are either publicly held or closely held, family-owned companies that have served their local communities and regions for decades and, in some cases, for more than a century.

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