



**DEEP SOUTHERN**  
EQUIPMENT DEALERS ASSOCIATION

## 2022 Summer Conference Topics/Speakers

### Understanding Your Financial Health - Sarah Frantanovich, CPA & Wendi Berthelot, CPA – LaPorte CPAs & Business Advisors

Your financial health is just as important as your physical health. When was the last time you assessed your Company's financial health? How well do you understand your financial statements? This presentation will cover key ratios and indicators that can be useful in assessing the health of your Company. It will also provide insight on best practices in financial reporting and discuss what readers of your financial statements might be looking for. Finally, the latest accounting standards that may affect your business will be discussed.

### Mergers, Acquisitions & Gifting Strategies for Dealerships & Family-Owned Farms – Ryan Patton, JD, MBA, Nationwide Retirement Institute

Global Merger and Acquisition activity surpassed \$4.9 trillion in 2021. North America saw over \$2.8 trillion of that total spread across a diverse range of industries. Understanding the benefits of tax-free mergers and acquisitions or reorganizations is a powerful tool for preparing for what the future may hold. This presentation provides insights and examples for both you as the dealership as well as your clients with family-owned farms.

### Effective Retention Strategies for Your Best Employees – Recruiting Tools for Top Talent - John Weaver, JD, Evans & Davis, LLP.

Have you ever lost a promising employee? What are you doing today that will give you a better assurance that your best employees will continue to work in your business? Yes, you may offer a retirement plan, health insurance, or other benefits that are standard in the industry. But are you doing anything that is different or unique that gives you a better sense that those key employees will want to continue to be part of the future of your organization? Rewarding key employees and letting them know how important they are to your business could mean the difference between keeping or losing a valued employee. But, to do that, you need benefits that work well, both short- and long-term. During this session, you will learn different ways your fellow dealers are using to successfully recruit and train top talent.

### Updates on Employment Law Developments for Dealers – Amy McIntire, JD & Rosalie Haug, JD, Chaffe McCall, LLP.

This year has seen several developments in labor and employment law with the Biden Administration proposing a variety of executive and legislative changes and courts issuing nationwide rulings which have effects on every workplace. The developments have created new, complex workplace issues for employers regarding discrimination and accommodation laws, vaccinations, teleworking, wage and hour obligations, medical accommodations and other labor and employment law issues. Dealers should be mindful of these ever - evolving employment issues while continuing to manage their workplaces. This presentation will examine some common workplace issues, the new laws and guidance and best practices for dealers.

### Risk Financing 101: Fully Insured, Level Funded & Self Funded Medical Insurance – Colin Shea, MBA, Gilsbar

The current health insurance landscape has a confusing market of different insurance structures & policies. Learn what these types of medical insurance are, what are the differences and what may be a suitable option for your dealership. Certain risk structures may allow employers access to data, flexibility and tools to better control cost. Expect to learn all the nuances about level funding, partial self-insurance and Captives and what successful plans are doing to control medical insurance expenses.

### Dealership Sustainability – Zack Pinto & Marc Johnson, CPA, KCoe Isom

Dealerships haven't put a lot of thought into this yet, but it will be coming soon and there are some ways that dealers might benefit now - certainly it is never too early to start planning for the inevitable. This won't be a session of global warming or any of the controversial politics that come up when different factions worry about it, but rather what are we seeing farmers, OEMs, packers and retailers doing (or heading towards doing) and how can the dealership help (or not get left out). This presentation will provide practical tips, timely information, and will include experts who deal with these issues (including carbon, water issues, etc) that will guide you through what to be thinking about today.