

# INSIGHTS. KNOWLEDGE. CONNECTIONS.



**ORLANDO**  **2018**  
**SEMINAR & TRADE SHOW**  
**MARCH 18-21, 2018**

The only event of its kind dedicated to  
those who buy, sell and manage surplus assets.

OVERVIEW

# INSIGHTS. KNOWLEDGE. CONNECTIONS.



**Join the Conversation** about the value Investment Recovery (IR) brings to your corporation's bottom line. IR reinforces your company's sustainability commitment to the community where you operate and to your investors. IR's focus has always been on the people, planet, and profit through initiatives conducted by the department and its employees. This isn't new.

The Investment Recovery Association's 7Rs are reinforced throughout the education

offered during the 2018 Investment Recovery Association conference held in Orlando, Florida on March 18-21 at the *Caribe Royale Orlando*.

If you are not familiar with the 7Rs, that is reason enough to register today. This conference is the only educational conference planned by Investment Recovery professionals for Investment Recovery professionals. If you can only attend one conference, this is the conference you must attend.

## The annual event with your company's bottom-line in mind.

The conference begins early and continues until well after 6 p.m. each day while keeping attendees engaged with valuable education and professional speakers while providing attendees along the way with plenty of food, drink and valuable conversation with those who get what you do every day. The registration fee is nominal compared to the value you will return to the office with.

## The conference is designed to:

- Demonstrate how to use the 7Rs to manage your surplus and idle assets
- Hear and learn about plant remediation from beginner to advance skills
- Improve and develop your leadership and interpersonal skills
- Learn how technology is being leveraged in IR departments
- Integrate communication tactics and learn how to incorporate Investment Recovery as part of your corporation's vision
- Understand the environmental implications IR professionals need to know
- Acquire key negotiating skills from a world leader in negotiating programs
- Interact with the instructor on understanding the analysis and appraisal report
- Hear from a variety of industry members about how they manage their surplus
- Visit with more than 50 vendors, in one location, to learn, meet potential vendors and understand the value of how a 3rd party can enhance your business
- Allow yourself time to share a challenge or even share something new you have discovered with your fellow IR professionals

# MONDAY, MARCH 19

MONDAY TRADE SHOW: 3:00PM – 5:30PM



## SAFETY

For any company, safety first is a key priority. Tennessee Valley Authority (TVA) is no exception. Bill Cronin will share with the audience how TVA used two fatalities as an opportunity to review what led up to these accidents, what they learned and what changes they made to help prevent these incidents in the future.



**Bill Cronin,**  
*Director of Safety,  
Tennessee Valley Authority*

## NEGOTIATION SKILLS

The strength of your agreements, understandings and relationships can mean the difference between success and failure, profit and loss. Weak agreements with other companies and individuals bring nagging dissatisfaction and aggravation. Strong

agreements help you reach and exceed your own objectives and at the same time, leaves the other party gaining more satisfaction.

### This is true whether you are:

- Determining the price and terms of what you buy and/or sell
- Persuading others to work with and not “against” you
- Setting or meeting budgets
- Finalizing and administering simple or complex contracts
- Breaking or avoiding a serious impasse

### You should attend if you:

- Negotiate agreements, price, terms, delivery or service of any kind that affects profits regionally or nationwide
- Have walked away from a negotiation and wondered if you could have, or knew you could have, done better

- Want effective skills and strategies to help you create more value in your deals—for everyone involved
- Want to learn how to anticipate your next negotiation



**Dennis Bain,**  
*Karrass*

## CUSTOMER SERVICE

Lenn Millbower spent 25 years working in Operations, Entertainment and Training at Walt Disney World. He ran attractions; stage managed parades and shows; designed and trained ride operations, fireworks safety, and even taught people how to be Snow White.

In his last role before leaving Disney, he was one of the leaders responsible for writing theme park training and operating guidelines.

He has written several books on learning, taught college and speaks frequently at major learning conferences. As president of Offbeat Training he will deliver Disney inspired customer service skills.

From ride operator to operations trainer, from character lead to entertainment stage manager, from instructional designer to training leader, Lenn will help you apply Disney’s science and sense methods.



**Lenn Millbower,**  
*The Learnertainment® Trainer*

# TUESDAY, MARCH 20

TUESDAY TRADE SHOW: 11:00AM – 1:00PM

## PANEL DISCUSSION: Gathering Around the Table

*Supply Chain Leaders from Cox Communications, Duke Energy, and Entergy*

Learn how leading companies have recognized and incorporated Investment Recovery as part of their metrics and sustainability reporting. How did this transformation occur? How can Investment Recovery champion their value in data or words that will capture the attention of leadership?

## INTERNATIONAL SALES AND REPORTING

*C.H. Robinson*

As more and more assets find their way overseas, IR needs to be aware of new sales and reporting requirements tied to these shipments. We don't want you to get surprised after you think an asset is sold to find roadblocks to closing the deal. A representative from C.H. Robinson will share the important information you need to know to finalize the sale.

## DEMO FOR DUMMIES

*Fred Maier, Panther Technologies  
Mike Mitchum, CMIR, AECOM*

Introduction to key items to know and understand your demolition and remediation project. After this session you will learn:

- Determining the Best Closure Option and Contracting Strategy
- Hazard/Risk Assessment and Mitigation
- Safety Communications, Planning & Management
- Scope Development

- Prequalification of Contractors and Development of Bidders List
- RFP Development and Bid Solicitation
- Bid Evaluation and Contractor Selection
- Work Plan Development and Review
- Project Management During Execution
- Project Closeout and Records Retention

## ENVIRONMENTAL CONCERNS

*Fred Maier, Panther Technologies  
Mike Mitchum, CMIR, AECOM*

### In this session you will learn:

- Critical aspects of D&D process, performing Environmental Assessments

**Project organization** (schedule, permits, material disposition, site utilities, weather)

### Materials Management:

- ID and characterization of waste
- Record keeping
- Transportation
- Cradle to grave

### Determination of Recycling Benefits:

- The four R's
- Types of materials
- Green demolition

### Pre Demolition Activities:

- Inspections of vessels
- Lead paint utilizing existing personnel

### Air Quality Issues

### Avoid Incidents

Take it up a notch and learn about the environmental concerns that are, or could be hiding on your next project.

## HOW TO SELL THE HARD TO DISPOSE OF ASSET

*Small Group Session*

This is the session for everyone to participate. You can bring the concept of the hard to dispose of asset you recently had a challenge with or one that you are now struggling with. Using the collective minds in a small group, various ideas will be discussed and shared.

To participate, please contact Jane (jmale@westerneda.com) and provide your hard to dispose of asset to be considered during this session.

## HOW TO READ APPRAISALS

*Lee Robinette, ASA, Collateral Evaluation*

In your job description, you may not need to know how to do an asset appraisal, but you certainly may have to request an appraisal for a piece of equipment. Do you understand the report you receive? What should you look for in a report about your asset? Are there key words or phrases that may change the value?

Learn from Lee Robinette, ASA who will provide valuable information on how to understand your asset's value!

## DISPOSITION OPTIONS

*Stacey Elliott, CMIR, Andeavor*

What is the first thing you do in IR? ANSWER: Identify the assets no longer needed. Now what? You know where the asset is and you know how it can get to the buyer. Now how do you get the best value for the asset.

The 7Rs are the basis for your business and understanding your disposition options for your idle or surplus asset. Learn the successful and proven practices to gain the most for our business enterprise.

## WAREHOUSING, LOGISTICS AND SALES

*Kim Selby, CMIR, DowDuPont*

Critical elements for an Investment Recovery department is "Where is the asset?" Kim takes you through the skills you need to know to sell and market, and how you can efficiently get your asset to the buyer, and much more.



# WEDNESDAY, MARCH 21



## PANEL: HAZARDOUS WASTE PRODUCTS

**Chris Bruner**, *Emerald Transformer*  
**Bob Novelly**, *EPC*  
**Matt Wicichowski**, *Strategic Telecom Solutions*  
**Dane Zumbahlen**, *United Scrap Metal*

Learn from four suppliers of our industry about the recycling byproducts, the hidden hazards, the steps to identify and eliminate the hazards we recycle and the best practices they follow to eliminate your concerns.

## TECHNOLOGY IN YOUR BUSINESS

**Christi Roorda**, *CMIR, Praxair*  
**Steven Ekin**, *Georgia Department of Services*

How has technology helped or hindered moving Investment Recovery forward? Learn from members about the technology introduced in their department, lessons learned and what they plan for the future.

## PRESENTING THE RIGHT METRICS

### IT IS ALL IN THE DATA

**Orson Wong**, *Ernst & Young*

How do you get the C-suite to notice your results? It is all in the data. Learn the numbers that make an impact on the Chief Financial Officer or your CEO. What do they pay attention to? Learn how to collect your data to make the impact your company appreciates.

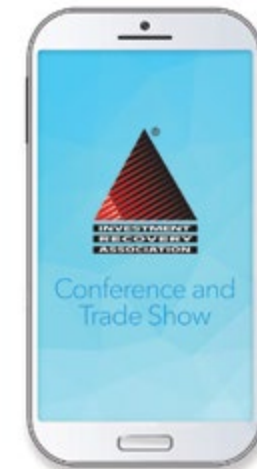
Orson Wong, a consultant with Ernst and Young deals with the leaders of Fortune 500 companies and will share the data that means the most.

## ANNUAL MEETING

### Recognition and Prizes

The final event of our conference will be the annual meeting, recognition of our new CMIRs, Board elections and the opportunity to win prizes, including cash, as well as great gifts. Don't miss this final networking session. Don't leave early, the parks are open late and there are plenty of flights out of Orlando in the afternoon that will let you touch down before dark and be ready to go and implement at least one or two items you have pickup up during this fast pace, extensive conference and trade show.

*\*Speakers and topics subject to change*



## Investment Recovery Association Conference mobile App

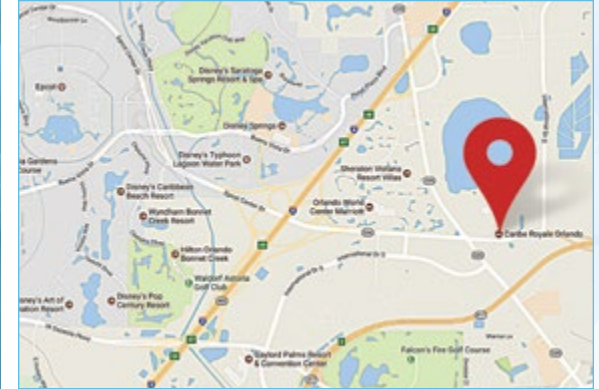
Join the conversation before, during and after the meeting. The exclusive app, *WhoVa*, can be downloaded at the Apple Store. Once you register and pay the fee, you may establish your profile and begin networking, asking questions and just stay in the loop of what's happening.

# SCHEDULE OF EVENTS



SATURDAY, 3/17	MONDAY, 3/19	TUESDAY, 3/20	WEDNESDAY, 3/21
<p><b>9:00 am</b> BOARD MEETING</p> <p><b>3:00 pm</b> <b>CMIR STUDY GROUP</b>  <i>A Q&amp;A session to help individuals prepare for the Sunday morning exam.</i></p>	<p><b>7:00 - 7:55 am</b> BREAKFAST</p> <p><b>8:00 – 8:15 am</b> WELCOME</p> <p><b>8:15 – 9:15 am</b> SAFETY                      Bill Cronin, <i>Director of Safety, Tennessee Valley Authority</i></p> <p><b>9:15 – 11:30 am</b> EFFECTIVE NEGOTIATION SALES                      Dennis Bain, <i>Karrass Group</i></p> <p><b>10:00 pm</b> BREAK</p> <p><b>11:30 – 1:15 pm</b> LUNCH/NETWORKING</p> <p><b>1:30 – 3:00 pm</b> CUSTOMER SERVICE                      Lenn Millbower, <i>The Learnertainment® Trainer</i></p> <p><b>3:00 – 5:30 pm</b> TRADESHOW</p> <p><b>5:30 – 7:00 pm</b> WELCOME RECEPTION</p>	<p><b>7:00 - 8:15 am</b> BREAKFAST</p> <p><b>8:20 – 9:30 am</b> PANEL DISCUSSION:  <b>Gathering Around the Table</b>                      Cox Communication, Duke, Entergy</p> <p><b>9:30 – 10:00 am</b> BREAK</p> <p><b>10:00 – 11:00 am</b> INTERNATIONAL SALES REPORTING                      C.H. Robinson Representative</p> <p><b>11:00 – 1:00 am</b> TRADE SHOW/LUNCH</p> <p><b>BREAKOUT SESSIONS: YOUR CHOICE</b></p> <p><b>1:15 – 2:15 pm</b>  <b>DEMO FOR DUMMIES</b>                      Fred Maier, <i>Panther Technologies</i>                      Mike Mitchum, <i>CMIR, AECOM</i></p> <p><b>HOW TO READ APPRAISALS</b>                      Lee Robinette, <i>ASA, Collateral Evaluation</i></p> <p><b>2:30 – 3:30 pm</b>  <b>ENVIRONMENTAL CONCERNS</b>                      Fred Maier, <i>Panther Technologies</i>                      Mike Mitchum, <i>CMIR, AECOM</i></p> <p><b>DISPOSITION OPTIONS</b>                      Stacey Elliott, <i>CMIR, Andeavor</i></p> <p><b>3:45 – 4:45 pm</b>  <b>WAREHOUSING, LOGISTICS, SALES &amp; MARKETING</b>                      Kim Selby, <i>CMIR, DowDuPont</i></p> <p><b>SMALL GROUP: How to Sell a Hard to Dispose of Items.</b> Open Group Discussion—Bring your latest challenge to share or get some advice.</p> <p><b>5:00 - 6:00 pm</b> NETWORKING RECEPTION:  <i>It's 5 O'Clock Somewhere</i></p>	<p>No Breakfast</p> <p><b>8:30 – 9:30 am</b> PANEL DISCUSSION:  <b>HAZARDOUS WASTE</b>                      Emerald Transformer, EPC, Strategic Telecom Solutions, United Scrap Metal</p> <p><b>9:30 – 10:15 am</b> PANEL DISCUSSION:  <b>How IR Professionals Use Technology</b>                      Steve Ekin, <i>GA Dept. of Services</i>                      Christi Roorda, <i>CMIR, Praxair</i></p> <p><b>10:15 – 11:00 am</b> PRESENTING THE RIGHT METRICS                      Orson Wong, <i>Ernst &amp; Young</i></p> <p><b>11:00 – Noon</b> LUNCH – ANNUAL MEETING</p> <p><i>*Speakers and topics subject to change</i></p>
<b>SUNDAY, 3/18</b>			
<p><b>9:00 am</b> BOARD MEETING</p> <p><b>9:00 - 11:30 am</b> EXAM                       For more information about CMIR visit:  <a href="http://invrecovery.org/knowledge-center/cmir">invrecovery.org/knowledge-center/cmir</a></p> <p><b>NOON</b> REGISTRATION OPENS</p> <p><b>1:00 - 3:00 pm</b> Committee Meetings</p> <p><b>3:30 - 4:30 pm</b> Board Meeting w/Committee Chairs</p> <p><b>5:00 - 6:00 pm</b> Navigating &amp; Networking at the Conference (<i>cash bar available</i>)</p> <p><b>6:00 pm</b> EVENING OPEN</p>			

# PLAN YOUR TRIP



CARIBE ROYALE  
ORLANDO

## HOTEL ACCOMMODATIONS

Reserve by February 18 to receive the special rate of \$189 single/double + tax.

The Headquarter Hotel is the Caribe Royale in Orlando, Florida. You may reserve your room by calling the Reservations Department at 1-888-258-7501 by February 18th at 5 pm to receive the special conference rate of \$189 single/double, plus applicable taxes. Be sure to state you are with the Investment Recovery Association 2018 Spring Conference. By securing your room in this block you will receive:

- Rate valid three days prior and three days after our Conference if available
- Internet in your guest room
- Complimentary parking
- Access to the fitness center

[CLICK HERE FOR HOTEL RESERVATIONS](#)

We've negotiated a special seminar rate at the hotel. The last several years, the hotel sold out completely, so book early. **Be sure to state you are with the Investment Recovery Association 2018 Spring Conference.**

## WEATHER/DRESS

The average daytime high in March is 78° and the average low is 54°. Dress during the Investment Recovery Association Conference is "business casual" attire.

## HOW TO HAVE A SUCCESSFUL CONFERENCE EXPERIENCE

- Guarantee your seat at the conference by pre-registering and paying the conference fee
- Establish your profile in our meeting app
- Plan to pick up your registration material (i.e. name badge) on Sunday afternoon, March 18th
- Schedule to attend the Navigating and Networking Session beginning at 5:00pm on Sunday, March 18th
- First time to our Conference? Let us know on the registration form and you will be assigned a host for the event (you must register two weeks in advance to be assured a host)
- Would you like to host a first timer? If so, contact Jane Male ([jmale@westerneda.com](mailto:jmale@westerneda.com))
- Make your hotel reservation well before the deadline
- Engage with others at meals, breaks and during the trade show

**QUESTIONS?** Please call 816.561.5323, or email:

Jane Male, Executive Director, [admin@invrecovery.org](mailto:admin@invrecovery.org)  
Or, Kim Weitzel, Asst. Director, [kweitzel@westerneda.com](mailto:kweitzel@westerneda.com)



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## ORLANDO 2018 SEMINAR & TRADE SHOW MARCH 18-21, 2018

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FAX, OR MAIL

CLICK HERE TO SUBMIT BY EMAIL  
[jmale@westerneda.com](mailto:jmale@westerneda.com)

OR PRINT TO FAX: 816-561-1991

OR MAIL: Investment Recovery Association  
P.O. Box 419264, Kansas City, MO 64141

### On-Site Registration and Pickup of Conference Materials:

On-site registration opens on Sunday, March 18, 2018, at noon. Preregistration is not required but is strongly encouraged for quick pickup of conference materials and for your own convenience. The seminar begins with a "Networking and Navigating 101" session on Sunday, March 18, at 5:00 p.m. Educational sessions begin Monday, March 19, at 8:00 a.m. Registration will open at 6:30 a.m. on Monday and will remain open throughout the day.

### QUESTIONS?

Please call 816.561.5323, or email:

Jane Male, Executive Director,  
[admin@invrecovery.org](mailto:admin@invrecovery.org)

Or, Kim Weitzel, Asst. Director  
[kweitzel@westerneda.com](mailto:kweitzel@westerneda.com)

### CONFERENCE REGISTRATION FEE:

Member / \$850    Non-member / \$1,100

### ONE-DAY REGISTRANT FEE:

Member / \$350, Non-member / \$550 : Check the day(s):

Monday    Tuesday    Wednesday

The one-day registrant fee includes the selected day's educational sessions, and refreshment breaks.

Your Name \_\_\_\_\_  
(as it should appear on badge)

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

E-mail \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

Emergency Phone (\_\_\_\_) \_\_\_\_\_

Emergency Contact (\_\_\_\_) \_\_\_\_\_

(Of someone not at the show)

This is my first conference.

**SPOUSE/GUEST, Registration Fee: \$275.** The companion registrant fee includes the breakfasts, Tuesday lunch, and reception. A Companion is a spouse or significant other, not involved in your investment recovery business or activities.

Guest Name \_\_\_\_\_

### ADDITIONAL REGISTRANT, Save \$50 for three or more.

COPY FORM FOR MORE THAN THREE ADDITIONAL REGISTRANTS.

Name \_\_\_\_\_  
(as it should appear on badge)

Company \_\_\_\_\_

E-mail \_\_\_\_\_

Emergency Phone (\_\_\_\_) \_\_\_\_\_

Emergency Contact (\_\_\_\_) \_\_\_\_\_

(Of someone not at the show)

This is my first conference.

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Name \_\_\_\_\_  
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Company \_\_\_\_\_

E-mail \_\_\_\_\_

Emergency Phone (\_\_\_\_) \_\_\_\_\_

Emergency Contact (\_\_\_\_) \_\_\_\_\_

(Of someone not at the show)

This is my first conference.

### PAYMENT

Register online, or if you prefer, return the form with a check payable to the Investment Recovery Association. We also accept MasterCard, Visa, and American Express. All fees must accompany the registration form

**Total for Registration: \$** \_\_\_\_\_

Enclosed is my check or money order for \$ \_\_\_\_\_ made payable to Investment Recovery Association (U.S. funds only)

Please charge my:    Visa    MasterCard    AmEx

Card # \_\_\_\_\_ Security Code \_\_\_\_\_

Expiration Date \_\_\_\_\_

C.C. Billing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Signature \_\_\_\_\_

### Important Notes on Completing This Form:

- Complete all fields. Duplicate the form as needed for additional registrants.
- List name and address as you wish them to appear on your badge and in the registration list.
- Indicate whether you are a first-time attendee.
- To make changes on your registration form, call 816.561.5323 or send e-mail to [jmale@westerneda.com](mailto:jmale@westerneda.com). Changes will not be reflected in the printed material if received after February 26, 2018.
- Refund of registration fee(s) and optional events, minus a \$100 administrative fee, will be made upon receipt of a written notice of cancellation, e-mail or fax no later than February 26, 2018.
- No refunds will be made for cancellations after February 26, 2018; however, personal emergencies will be addressed on a case-by-case basis for registration fee(s) only.
- No refunds will be honored for no-shows.
- Registrations will not be processed until payment is received.