



POWER-MOTION TECHNOLOGY  
REPRESENTATIVES ASSOCIATION

# FOCUS

## What We Learned

by Bob Newman, CPMR, Industri-Motion, Inc., Downers Grove, IL, PTR A President

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In our last Focus, I thanked you in advance for participating in a survey of member needs. We distributed the survey, via email, and received a high degree of response from both representative members and allied members. Again, thank you for your cooperation.

As I mentioned last time, the information we receive in the survey is important is assessing the Association and its focus. PTR A is here to provide service and value to its membership and it's important that we revisit, via surveys both formal and informal, what members are looking for from the membership in PTR A.

Five years ago, a

survey was funded by PTR A and conducted by a professional market research firm. This time, because of economics as well as us having a foundation from our last survey, the survey was conducted and compiled by PTR A members. Special thanks to Director Bob Lennon and our Webmaster Donna Frendt for their efforts and for getting this done at minimal cost to the Association.

We received a high degree of response – not as high a percentage as our last survey, but an excellent cross-section of our membership. The 'average' PTR A rep member firm hasn't changed much in the last five years –

about an even number 4-10 years (35%) and 11-20 years (32%) with the balance split evenly between less than 4 years and more than 20. Most members – allied and representative attend about 3 in 5 Conferences.

The top five benefits members – allied and representatives alike – remain unchanged:

- Access to representatives/allied
- Networking
- Education sessions at PTR A Conferences
- PTR A Locator
- PTR A Focus newsletter

Education programs that members look to PTR A

### PLEASE NOTE:

2004 Conference registration packets will reach you in December! Keep an eye out and register early to get in on the discounted "Early Bird" registration fees!

## April 28-May 1 2004 Conference Preview!

By Jim Mabrey, CPMR, 2004 Conference Chairman, PTS LLC, Kearney, MO

My goal for the 2004 program at Huntington Beach is to put together a program that will give us vital tools and information to carry on our sales businesses. We have a wonderful slate of speakers already committed for our

conference in Huntington Beach, April 28-May 1, who will provide us just that.

Our line up to date includes:

**Joe Miller**, President/CEO of the Manufacturers' Agents National Association

(MANA), is kicking off our conference with a speech on the *21st Century Trends in the Rep Industry and Their Impact on Reps & Manufacturers*. Joe will show how changes per-

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## 2004 Conference Preview . . . Continued from page 1

ceived by this horizontal trade association of reps in over 100 different industries will effect our profession and how we relate to our supply chain partners.

**Pat Cleary** of the National Association of Manufacturers spoke this past fall at the PTDA conference on the current state of American manufactures in relationship to foreign manufacturers. He has agreed to join us to present on the topic of *the status of manufacturing in the USA today*.

**Steve Cloud**, President and CEO of IBT, Inc., a

regional distributor servicing the Midwest with over 40 branches, will be speaking on *the status of the independent distributor and the situations faced by distribution*.

We are putting together a **panel to discuss the "hot potatoes" issues facing the industry**. Scheduled is a panel of Allied Members, Manufacturer's Reps and two guest panel members from the distribution segment of our business. The panel will debate pre-selected topics submitted by the attendees. These topics could include manufacturers and represen-

tative relationships, serving distribution and items affecting the relationship between manufacturers and their representatives.

**Workshops** are planned for the members to attend during the morning sessions. These workshops will be on topics of *business planning, new tax laws affecting reps and effective their management*.

The Conference Committee is looking forward to having you join us in April for an informative and exciting conference.

## The Case of the Disappearing Inventory

A Case Study by PTRA Legal Counsel Mitchell Kramer, Kramer & Kramer LLP



You can contact PTRA Legal Counsel Mitchell Kramer, Kramer & Kramer, LLP, at his new email address, [mkramer@kramerandkramer.com](mailto:mkramer@kramerandkramer.com), or by phone at 215/887-9030.

Bender and Williams were agents for Biomet, a manufacturer of orthopedic products, mostly total knees and hips. They had a long term written contract with Biomet which Biomet terminated prematurely, claiming, improperly as the Judge found, that my clients had breached their contract by not meeting quota.

For strategic reasons and because the facts favored us (the termination wiped out my clients' business) we moved to enjoin (stop) the termination rather than sue for damages. Injunction cases come to trial in weeks rather than the years it usually takes to get a damage

case heard. There are no juries in injunction actions. We tried the case in Federal Court in Indianapolis, Indiana. After a one day trial, the Judge ordered our client reinstated. Biomet immediately started negotiating a settlement which involved dollars, not reinstatement. My clients preferred a money settlement rather than representing a company they no longer trusted.

As an aside, my clients had kept good records, including notes of meeting and correspondence between them and Biomet, which were invaluable in winning the injunction case.

When we started

discussing settlement, Biomet, which had consigned a huge inventory of implants for warehousing at my clients' facility, claimed that over \$300,000.00 in inventory was missing. In any settlement, Biomet wanted credit for missing inventory.

Since I had handled matters involving Biomet for years, I knew that its computerized inventory records seemed to be in a shambles. Sales, credits and returned items were often not removed from inventory records and what was shipped was also inaccurate.

We agreed to a settlement in dollars, less

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## *Well...We're Going to Surf City, Gonna Have Some Fun...*

Wax down your boards, dudes! Surf City, here we come! Home of the U.S. Open of Surfing, Huntington Beach, CA is the perfect destination for business or pleasure. This lovely city is situated on 8.5 miles of pristine, natural sand beaches and it offers the casual, laid-back, refreshing air of a cool little seaside community combined with the sophistication of one of the largest metropolitan areas in the world.

Huntington Beach not only gives you the opportunity to bring out your inner beach bum, but offers a

myriad of fun activities. The city has fabulous shopping, an equestrian center, a marina with boat slips and rentals in Huntington Harbour, and an 18-hole golf course. Huntington Beach is also home of the International Surfing Museum, the first museum of its kind on the globe.

If you're feeling more adventurous and want to venture out into Orange County, you will be met with a multitude of options! Be sure to explore Newport Beach, home of the lovely Fashion Island, a shopping mall sure to please even the

most discriminating shopper. Nearby is Balboa Island with its Pavilion and Fun Zone where you can have some old-fashioned fun riding the Ferris wheel, driving bumper cars, and playing laser tag. Also, you won't want to miss beautiful Laguna Beach, home to the Laguna Art Museum which boasts a permanent collection that focuses on art of California from late 19<sup>th</sup>-century Impressionism to contemporary.

And who could resist a trip over to the "Happiest Place On Earth"?

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*Hey, check it out for yourself! Just don't get sand in your keyboard!*  
[www.hbvisit.com](http://www.hbvisit.com)

## *The Importance of Being a Member*

By Mario Lacasse, Sales Director, Poulies Maska Inc., Ste. Claire, Quebec

At our Rep Council meeting last September I was discussing with Chris Brisbane about some of the good things that Maska has been doing lately and how the PTR A association has helped our organization. The reason why I decided to write this article is that Chris asked me to share my thoughts about what I had gained by joining the PTR A association throughout the years.

The PTR A is a place where you can do some networking and socializing. It gave me the opportunity to share and learn more information on how the industry and

business is going. During these conferences I was able to share not only my ideas, but gain from others ideas.

It is a wonderful place to meet your reps and see everybody all at once. It has also allowed me to make new contacts and has given me the opportunity to find potential new reps, but most important, I have gained a better understanding of how reps work and the similarities and differences between our businesses. One of the best tools that I have acquired from being a member is how to deal and find solutions to dilemmas that may occur be-

tween a manufacturer and rep. I have retained many tips over the years, such as rep evaluations, how to select a rep. and managing the outsource sales force just to name a few.

We consider our reps as our partners whom are our eyes and ears in the field. Their input is essential to allow us to build a good strategic plan in the market. Maska is proud to be associated with our reps and the PTR A.

***PTRA thanks Poulies Maska and all our Allied members for their ongoing support of our members and our association!***

## What We Learned . . . *Continued from page 1*

*Continued page 4*

to provide at our Conferences also remain unchanged:

- Improving selling skills
- Business management skills such as business planning and time management
- Sales management training
- Improving representative performance (#1 with Allies!)

Our 2004 Conference Chairman, Jim Mabrey, CPMR received and reviewed this information and is building his 2004 Conference program around topics you, the membership want. In the next few weeks you'll learn more about the upcoming Conference.

Readership in Focus remains very high – 90+%. We've asked our members a couple of times about distributing Focus via email, and by nearly 4 to 1, the membership prefers receiving the Focus in printed form. Therefore, PTRA will continue to distribute the Focus in printed form. We do, however, post Focus to our website in .pdf and .html versions, also. Obviously, an increasing percentage of members accept email as a preferred means of PTRA distributing information whereas few desire it to be faxed. PTRA will use a mix of regular mail and email to get information out to our membership, but will focus on eliminating faxed messages as few members find desirable.

Members find, 4 to 1, that the present schedule length for PTRA Conferences is 'just right'. The Welcome Reception, networking time, and the Finale Dinner rank as the top three events at Conferences.

Educational sessions are key to a successful Conference, and representatives and allied alike prefer topic specific speakers to motivational ones. Round table (or other interactive type) of sessions are also desired as a means to get everyone involved and find a variety of view points on a given subject. You'll see that Jim Mabrey took note of this in his conference planning and has great topics to be presented as well as interactive roundtable topics.

Best months for Conference remain as April and March (in that order). Those are the months that Conferences have been historically held in, and the next two (the only ones we have firm dates for) will be in that timeframe. Conference location received our widest distribution of responses with members desiring conferences to be held in almost every section of the U.S., Canada and Mexico. It seems like there's no preconceived idea as the best location. We do have two very exciting locations coming up – Huntington Beach, CA in 2004 (with 8.5 miles of beach and every room an ocean view), then San Antonio, TX in 2005 – you'll need to come to the 2004 Conference and

see John Rice's production to learn more about that site!

Conference sites were almost exactly split in thirds between resort, vacation and city. Again, our Huntington Beach site fits the bill on two of those – city and resort. Next month with your Conference packet, you'll be receiving a lot of information on Huntington Beach. I don't remember PTRA ever holding a Conference at a site with so many diverse activities from world-class museums to water activities to ecological parks to golf (and, yes, shopping!).

A word on hotel room costs. Of almost any topic, this is one I hear most frequent comments on. PTRA's members overwhelmingly want to see Conference hotel room night costs in the \$140 to \$175, with under \$140 as the next option. I know, when I travel for business, \$140 is way more than I pay. One of the realities, and this has also come up, as discussion at PTDA, is that the sites that we need for our Conferences need more than just sleeping rooms – we need banquet/reception rooms, meeting rooms, and breakout rooms. Many hotels provide only sleeping rooms, or very limited meeting space. Hotels that do have the conference space for a meeting such as PTRA's along the staff to operate them do not provide them for free.

The PTRA Board works diligently on the issue

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## PTRA MISSION STATEMENT

The POWER-MOTION TECHNOLOGY REPRESENTATIVES ASSOCIATION (PTRA) is an Association of independent manufacturers' representatives and manufacturers dedicated to promoting the sales representation (rep) function in the power transmission and motion control industries. PTRA will strive to offer all members opportunities for education, information exchange, networking with other reps and manufacturers, plus an array of quality services designed to improve career performance and professional stature.

## Lynn Mattis Scholarship Fund Updated

by Bob Lennon, CPMR, T.P. Lennon Company, Inc., Elburn, IL, Communication Committee Co-Chair

The Executive Committee and Board of Directors recently approved an update to the **Lynn Mattis Scholarship Fund**, which now brings the scholarship opportunity to all PTRA Members; Active and Allied. In the past, a drawing was held at the Annual Conference from the names of current Active members enrolled in the CPMR Program. The scholarship award helped defer some of the tuition cost of the recipients CPMR Program. As MRERF has been expanding their educational opportunities over the last several years, PTRA has decided to open up the Scholarship Program for greater member benefit.

The new scholarship will still be based on an award drawing during the Annual Conference, but now the award will be available to

eligible Active **and** Allied members. Active members will be able to apply the \$800 tuition award to any of following: CPMR, "Back On Campus" continuing education, or Multiple Lines Sales Training and Certified Sales Professional Programs sponsored thru IPA and MRERF. Allied members will be able to apply the \$800 tuition award to the "Managing Your Manufacturers' Representative Network" Program offered thru IPA and MRERF.

To be eligible, PTRA will be adding a voluntary contribution of \$10 as a line item to the registration form for the Annual Conference. The \$10 voluntary contribution will be 100% credited to the balance of the Scholarship Fund (\$9,309 as of November 2003). If your firm chooses to make the \$10 contribution along with your

Conference Registration fees, your firm's name will be entered into the drawing pool for that years scholarship award drawing.

We hope you all see the added benefits of these important changes. We are driving the fund forward thru greater participation and contribution, while allowing all of our members to benefit from the annual award; increasing all of our levels of professionalism and expertise in the process.

Please visit the **Lynn Mattis Scholarship Fund section of our website at [www.ptra.org](http://www.ptra.org)** to see where we currently stand toward our goal for the fund. Feel free to use the on-line contribution feature to make a year-end contribution as well. Every contribution made now benefits us all.

## The Case of the Disappearing Inventory . . .

Continued from page 2

what we could establish as the real inventory shortage. Again, my clients' excellent records paid off. After two weeks of reconciliation, the \$300,000.00 short fall was reduced to \$3,000.00. It was not worth the time necessary to find that small a discrepancy so the case settled. My clients pocketed the settlement and found competing lines to sell.

Moral: Keep

excellent records throughout your relationship with each of your principals. Be particularly careful if you are warehousing a consigned inventory.

### Suggestions:

- If you maintain inventory that is owned by a principal, inventory it as if it was your own.
- If any portion of the inventory is with sales people, customers, or

anyone else, have them sign a receipt for what they have and maintain those receipts.

- If a principal does an inventory of products you hold, get a copy of that inventory and keep it. Also, check it to make sure it is accurate. Write a letter to the principal pointing out any discrepancy in its inventory records and keep a copy of your letter.



**CONGRATS TO OUR MOST RECENT GRADUATES OF THE CERTIFIED PROFESSIONAL MANUFACTURERS REPRESENTATIVE (CPMR) PROGRAM!**

**Mark Bergel**  
Midwest PT Sales

**Carol Ann DiPietro**  
Gears & Drive Systems, Inc.

**Christopher Halaska**  
JMC Industrial Sales, Inc.

**William Nolan**  
JMC Industrial Sales

**Jerry Rhodes**  
Midwest P.T. Sales

**Michael Simpson**  
SKA Simpson & Associates, Inc.

**Devin Ware,**  
Mahx Linster, Inc.

## *What We Learned... Continued from page 4*

of Conference and conference hotel costs and is aware of the membership's leaning on these matters. As a reality check, we independently surveyed 13 conferences from 10 other associations such as NIRA, FPDA, PTDA, AIM/R, ALA, ASMC, NEMRA. Most (PTDA being the exception due to its much larger size) utilize hotels that PTRA could consider. Of the 13 conferences we surveyed, all from 2002 to 2004, eight had room costs of \$204 to \$240 and four of the remaining five ranged from \$190 to \$199. PTRA's 2004 and 2005 Conferences will be less than \$175. And we'll be at very nice, top-notch facilities.

As part of the survey of other association's conferences, we also found that PTRA's conference fee was consistently a good value. Of the 13 conference's surveyed, conference fees ranged from \$415 to \$995 (whew!) and only 2 were under \$500. PTRA has been between \$375 and \$390 the last three

years. Again, PTRA's Board continues to work hard in this area to provide solid member value. If anyone wants further detail on our findings in this area, please contact me - [bnewman@industrialmotion.com](mailto:bnewman@industrialmotion.com) or 630-235-7981 - I'll be happy to review this in more detail.

PTRA has one of the highest percentages of CPMR designees of MRERF member associations, which is a tribute to the value our membership puts on continuing education. Many PTRA survey respondents also belong to MANA - nearly 3 out of 4 also find value MANA's message. My firm has long belonged to MANA, and just the insights I get from their monthly magazine AGENCY SALES is worth the price of membership.

During our mid-year Executive Committee meeting, Past President MacDonald used the survey findings and data as he led the rest of PTRA's ExecComm through a Strategic Plan re-

view. We'd all agree until you get through the Strategic Plan a couple of times, it's a bit of a mental challenge. We spent the better part of a day reviewing the survey and the Strategic Plan and have made a number of changes, all based upon member input. But, having waded through it and discussed all aspects in considerable detail, you'll find that every one of the ExecComm members understands it and buys into what's contained in PTRA's road map to a stable and viable association.

Member input and comment is vital to having PTRA remain focused on what you, our membership wants out of this association. We're always glad to hear from you, and I can assure each member that their comments and input don't rest on just one person's ears. The PTRA Executive Committee and Board are here to respond and to make PTRA a value to our membership.

## *We're Going to Surf City . . . Continued from page 3*

Make your way over to Anaheim to Disneyland and Disney's California Adventure theme parks and indulge your inner-child for a while!

What would a great trip be without a beautiful place to stay? We have selected the elegant Hilton

Waterfront Beach Resort for PTRA's 2004 Conference, a hotel sure to deliver an unforgettable experience for all Conference attendees. Nestled along the Huntington Beach coastline, the Hilton offers fine luxury accommodations, comprehensive meeting facilities, sweeping

ocean vistas, and elegant dining options.

It's easy to see why we are so excited about PTRA's 2004 Conference destination! So surf on over, dude, and join us for what's sure to be one fabulous Conference, April 28-May 1!

## Members' News

**Mike Vasko** has joined **Ogura Industrial Corporation, Somerset, NJ** as the Mobile Products Manager as well as Regional Sales Manager for the South and Southeast reports **Frank Flemming**. He lives in northeastern Maryland with his wife, Toni, daughter Alex, and son Michael.

Since graduating from the University of Hartford many years ago, he has worked in the clutch industry for the better part of his professional life. His first exposure to the industry came with Inertia Dynamics in Connecticut where he gained experience as an application engineer for three years. In 1988, lured by the glamour of the sales world, he joined Warner Electric as a Regional Account Manager. He relocated from snowy Connecticut to even snowier Rochester, New York, where he was responsible for managing numerous office automation accounts including Xerox, Kodak, and NCR. Seven years later and tired of the winters, he moved to Maryland, where his main focus turned to managing Warner distributors in the mid-Atlantic as well as servicing a few select lawn & garden and mobile products accounts in the Southeast.

In his spare time he enjoys traveling with his family, attending his daughter's equestrian competitions and playing golf with his son, who is already beating him by a number of strokes.

Mike looks forward to the challenges presented to him and anticipates contributing to the continued growth of Ogura in the mobile, lawn & garden, and industrial markets.



**William McCard** of

**Specialty Products Division, Morrisville, PA** announces **Bob Hallaway** has joined the firm as Outside Sales Representative, covering New York and the New England states. Bob has 30 years experience in the bearing and power transmission industry. He is a welcome addition to the company and is already showing positive results. Specialty Products Division represents 7YH Bearings among other lines covering the Northeastern US.

Additionally, Bill McCard, has announced the addition of **Charles D. Hoyt** to the sales team. Chuck will cover New York state and New England. Former Territory Manager **Bill Chapman** will remain with SPD as a Sales and Marketing Consultant.



**John E. Rice** has been promoted to the position of President of **Dichtomatik North America, Burnsville, MN**. John had founded **Transcom, Inc.** in 1978 and sold that company to Dichtomatik North America, division of Freudenburg NOK Group North America, in July 2002. He remained on as President of the TCM Dichtomatik division in Burnsville, and as of June 17 is now responsible for the entire organization including the custom molded and fluid power division in San Luis Obispo, California, the ring division in Purcellville, Virginia, and the Canadian operation in Toronto and Dichtomatik de Mexico outside Mexico City.

John will be consolidating the US based divisions into a single sealing product

line which will be headquartered in expanded facilities near its current location outside Minneapolis, Minnesota.



**SKA Simpson & Associates, Birmingham, AL** is proud to announce that **Barry Payne** has joined the company. Barry Payne comes from Siemens and has worked with Fanuc as well. Barry is an engineer and was a machine designer at Siemens. His addition gives SKA some real depth in providing solutions to their customers and principals states **Mike Simpson**.



**Stephen DiPietro** of **Gears & Drive Systems, Inc., Spring House, PA** is pleased to announce the addition of **KB Electronics** to their line of Power Transmission products. KB Electronics provides a complete line of "Genesis" Digital Inverters for 3-Phase AC Induction Motors through 30 HP and Programmable Relays along with KBMV Series Human Machine Interface. Gears & Drives will be responsible for Eastern Pennsylvania, Southern New Jersey, Delaware, Maryland and the District of Columbia. KB Electronics is also a member of PTR A.



**Harry Haedt, H & H Sales, Inc., Davenport, IA**, is pleased to announce its expansion into Southern Indiana and Kentucky. The new office will be managed by **R.J. Rothchild**. R.J. comes to H & H Sales, Inc. with an engineering degree from Ohio State University and 12 years of chain experience.

*More news next page!*

PTR A welcomes any opportunity to assist your promotion of your firm! To have your firm's news included in the next Focus, please use the enclosed Quick Report Form. Send it to PTR A before **February 15!**

**Member News...***Continued from page 7*

**Advantage Sales Network** is pleased to announce the opening of their new Brampton, Ontario, 13,000 square foot office/warehouse. Advantage has five warehouse operations in Montreal, Toronto, and Edmonton as well as Dallas/Fort Worth and Acuna, Mexico. They offer a complete package of pick, pack & ship capability.



**Robert Baker** of **Baker Enterprises, South Bend, IN**, states the Fall 2003 starts our 42<sup>nd</sup> year of presenting the I.D.E.A.S. classes in both Power Transmission Principles (PTP) and Professional Selling Techniques (PST). As they start, Baker Enterprises has a new address and an updated phone number: Baker Enterprises, 1246 Oakridge Drive, South Bend, IN 46617, (574) 234-2587.



The **W.C. Brooks Company, Inc.** is pleased to announce that they have relocated into new, company owned, 14,000 square foot office/warehouse facility just west of downtown Atlanta. Their new address is 6758 Oak Ridge Commerce Way Austell, GA 30168. Phone and fax remain the same, Ph: (770) 933-0453, Fx: (770) 933-0549.



**PTRA extends our sympathy to Richard Hayslett, BC&H Company, Inc., Matthews, NC, and his family.**

**Richard's father, Charles N. Hayslett, passed away on July 1 in Columbus, MS at the age of 89. He had been in declining health.**

**CALENDAR OF UPCOMING EVENTS****2004**

**January 11-15**  
CPMR Coursework  
Arizona State University

**April 28-May 1**  
**PTRA Conference**  
Hilton Waterfront  
Beach Resort  
Huntington Beach, CA

**October 14-16**  
PTDA Annual Convention  
Disney's Contemporary  
Resort  
Orlando, FL, LA

**WELCOME NEW MEMBERS****REPS**

Tom Sulfaro  
**Integrated Drives & Controls**  
Ann Arbor, MI

Doug Horrell  
**Loadstar Technical Components Inc.**  
Wilmington, NC

**ALLIEDS**

Chris Chandler  
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Pittsburg, CA

Paulo Fernandes  
**Regina USA Inc.**  
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