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DEAR WSWA MEMBER

2017 was a year of great accomplishments. Wine & Spirits Wholesalers of America’s work is enhanced by three key elements, all on display in this report.

Our membership invests in support of cooperation with their peers and in support of a shared pro-distributor mission. Our members engage with the association—at every level, from C-Suite and directors, down to young leaders and rising managers. And, your association staff ranks among the best in the association space for advocacy, membership service and development, our convention and meetings, operations, and of course, legal, government and regulatory affairs.

Atop the list of successes are several examples that demonstrate a significant return on investment to the members of WSWA:

- The tax reform plan just enacted protected key wholesaler priorities and benefitted member companies as well as the industry at large—the result of our work with policymakers over more than 10 years;
- Our Women’s Leadership Council is, after just two short years, a thriving hub of activity, action and results—led by members, providing benefits to the industry at-large;
- And, our Winter State Policy Conference set attendance records this year, part of our strategic plan to better and more deeply engage at the state level.

There are just a few brief examples; more results are outlined in the following pages.

As we begin 2018, I am pleased to provide you with our Annual Report to the Membership, which highlights the successes and key programs of your association. I am proud to report: our influence has never been greater; our voice never louder. Because of your support—and the superb work of the staff—WSWA has built a record of success—and we look forward to building upon this record in the months and years ahead.

Warm Regards,

CRAIG WOLF
PRESIDENT AND CEO
YOUR ASSOCIATION

53 Scholarships

Every Congressional District

103 Parent Houses

103 Parent Houses

2500+ Convention Attendees

22 WSWA Employees

385 Member Companies

65,000 Workers

ALL 50 States

53 Scholarships

2,419 PAC Contributors

2,419 PAC Contributors
WHOLESALE:
THE HUB OF
THE THREE-TIER
SYSTEM

Family-owned American wine and spirits distributors employ more than 65,000 workers at 4,000 locations who collectively earn more than $5 billion in wages each year.

Today, the three-tier system, with distributors as the central hub, provides to consumers the widest array of products available anywhere in the world in a manner that guarantees product integrity and appropriate regulatory oversight, and ensures effective tax collection.

The industry generates more than $55 billion in tax revenue for federal, state and local governments each year. In every state, in every community, wholesalers are a major economic engine, committed not just to successful business operations, but also to significant community engagement and philanthropy.

The voice of these community leaders and their employees in the nation’s capital—and across the country—is the Wine & Spirits Wholesalers of America (WSWA).

WSWA’s membership includes 386 member companies operating in all 50 states and the District of Columbia. These members represent more than 80 percent of all wine and spirits sold at wholesale in the United States.
ADVOCATING FOR FAMILY-OWNED AMERICAN WHOLESALERS

FEDERAL AFFAIRS
AT THE TOP OF OUR GAME

WSWA’s Federal Affairs team advocates for the interests of distributors before regulatory bodies and Congress, with the support of a top-tier political action committee, WSWA-PAC.

During 2017, WSWA secured pivotal wins within the passage of landmark tax reform legislation, building upon years of engagement and support by wholesaler member companies. The Federal Affairs team also protected a number of non-tax priorities, leading to one of its most successful years on Capitol Hill.

COMPREHENSIVE TAX REFORM A BIG WIN FOR WSWA
In November, House and Senate Republicans released a comprehensive tax bill overhauling the tax code. Building on years of strategic outreach and engagement with Members of Congress and Senators, WSWA pivoted rapidly to preserve both the Last-In, First-Out (LIFO) accounting method and the Section 5011 tax credit and, achieve a fair pass-through rate allowing American family-owned businesses to remain competitive with corporate entities. We also led the effort to thwart a last-minute change to the legislation that would have excluded ownership structures held in trust from accessing the new pass-through rate.

BUY LOCAL ANOTHER WIN FOR WSWA
WSWA secured the continuation of the DOD “Buy Local” provision in the annual appropriations process. This program ensures that military purchases come from an in-state wholesaler in Hawaii and Alaska.

ALCOHOL AND TOBACCO TAX AND TRADE BUREAU (TTB)
MAINTAINING AN ORDERLY MARKET
For a second year in a row, WSWA led industry efforts to successfully obtain an additional $5 million for TTB dedicated to trade practice enforcement, as included in the House and Senate Financial Services and General Government Appropriations bills.

DRIVING UNDER THE INFLUENCE OF DRUGS (DUID)
ADVOCATING FOR SAFETY
Building on a multi-year campaign to address marijuana impaired driving, WSWA successfully advocated for the inclusion of report language accompanying the House and Senate Transportation, Housing and Urban Development Appropriations bill to expand Drug Recognition Expert (DRE) training of law enforcement officers particularly in those states that have legalized recreational and/or medicinal marijuana.

POSTAL REFORM STOPPING A NEW UNREGULATED CHANNEL
WSWA led the charge on Capitol Hill against efforts that would allow the U.S. Postal Service (USPS) to deliver beverage alcohol to consumers. In the House and the Senate, WSWA was successful in keeping legislation that would allow USPS direct shipment from being considered in 2017.

CRAFT BEVERAGE MODERNIZATION AND TAX REFORM ACT
SUPPORTING OUR SUPPLIER PARTNERS
In concert with industry partners, WSWA supported the Craft Beverage Modernization Act, which was included in the tax reform bill and will remain law through the end of calendar year 2019.
The Congressional Responsible Hospitality Caucus is a pro-three tier forum for Members of Congress that draws Congressional attention to the economic impact of America’s beverage alcohol system. This year, the Caucus hosted two briefings on the mission and programs of TTB and about technological innovation in the beverage alcohol marketplace, in addition to a year-end reception.

**LEGAL AND REGULATORY AFFAIRS**

**REGULATORY MONITORING AND ADVOCACY**

**TRACKING AND ENGAGING THREATS**

Legal and Regulatory Affairs continued to advocate for the wholesale industry on federal and state matters in 2017. At the federal level, WSWA continued to work closely with TTB to understand current agency thinking on a number of key issues through the submittal of letters on private labels, vintage spirits and permissible marijuana-related activities. At the state-level, WSWA continued to represent the industry at relevant regulatory meetings, including various panel presentations at NCSLA and NABCA.

**STATE LAW DATABASE**

**PROVIDING VALUE AND NON-DUES REVENUE**

2017 saw the launch of a brand-new user interface at statealcohollaw.com along with an uptick in sales of the product to trade associations, consulting firms and suppliers. A systematic marketing campaign was also launched to promote the product, which included a targeted email campaign and displays at a number of relevant industry meetings. Feedback on the database has been positive and it is fast becoming an industry standard for beverage alcohol regulatory information.

**LITIGATION**

**PROTECTING THE 21ST AMENDMENT**

Beverage-alcohol litigation remained active in 2017 with a number of notable decisions. Importantly, of the 9 cases decided impacting the wholesale tier, 7 were decided favorably for the industry. In particular, WSWA partnered with NBWA on an amicus brief in the RDN case which was decided favorably for the industry in June. WSWA also worked with NBWA to submit an amicus brief in the appeal of a case challenging Illinois’ prohibition on retailer direct sales of wine.

**STATE AFFAIRS**

**STATE AFFAIRS STRATEGIC THREATS**

**BRINGING THE FIGHT TO THE STATES**

Building on the success of a 2016, WSWA’s State Affairs staff continued to carry out directives to develop a proactive agenda to deal with certain prioritized issues identified by the “Strategic Threats Committee.” The priorities identified by the committee were: requiring common carriers to report shipments of alcohol to combat illegal interstate sales, and enacting legislation designed to mitigate the negative impact of retailer control of private label products. The second year of direct state engagement yielded many positive results, culminating in a total of ten Strategic Threats laws that were passed and signed. Several additional states considered Strategic Threats legislation and enforcement actions in 2017, and progress was made in multiple markets, laying the groundwork for action in 2018.

**ADVISORY COUNCIL**

**CREATING A UNIFIED NETWORK OF ADVOCATES**

WSWA continued to increase the level of service provided to our membership, especially their government affairs representatives and state associations. Staff encouraged more active participation in the Advisory Council by member companies, encouraged formation of more state associations, and proactively addressed emerging legislative and regulatory challenges as they arose. Staff tracked over 2,000 measures relating to wine and spirits laws filed this year, and generated a weekly legislative tracking report for all Advisory Council members and wholesalers. WSWA continued our monthly State Affairs call that regularly includes more than 20 Advisory Council and member company representatives. These calls are an opportunity for Advisory Council members and staff to regularly discuss and find solutions for legislative trends and areas of concern. State Affairs staff worked closely with members of the Advisory Council during the 2017 legislative session to provide information, legislative updates, talking points, one-pagers, economic impact data, and other research for issues of interest to wholesalers across the country.
EVENTS

MEMBER COMPANY FACILITY VISITS
DEMONSTRATING OUR IMPACT
WSWA’s Federal Affairs team worked in partnership with member companies to coordinate a dozen wholesaler location visits across the country. These tours provide an important venue for discussing the importance of the three-tier system, the economic impact of wine and spirits distributors in local communities, and the specific legislative issues unique to our membership of closely held American family-owned businesses.

FLY-IN
MAKING THE ASK
In June, 42 member-owners, executives, and Advisory Council members joined WSWA in DC for our annual legislative fly-in. Twenty teams of WSWA members engaged in a record 206 meetings with federal legislators, seeking support for our tax priorities, TTB funding, funding to prevent marijuana-impaired driving, and blocking USPS direct shipment of beverage alcohol.

TOAST TO CONGRESS AND WSWA HOLIDAY PARTY
PARTIES WITH A PURPOSE
WSWA held the annual Toast to Congress reception in June, which was attended by elected officials, senior legislative staff, and regulators. Breakthru Beverage Group, Legacy Partners, Republic National Distributing Company, and Southern Glazer’s Wine & Spirits were on hand to highlight new brands in the DC market and supply signature tasting bars. The Toast to Congress event continues to be a prime opportunity to showcase the benefit and value of WSWA member companies.

The association’s annual holiday party provided an important year-end opportunity to engage with elected officials with whom staff have worked over the past year. Four member companies in the DC market showcased product diversity and the important role of distributors, and they were joined by brand ambassadors from FEW Bourbon and AnestasiA Vodka.

WSWA-PAC
BACKING OUR CHAMPIONS
WSWA-PAC is the political arm of the association supporting federal candidates who promote the three-tier system, support tax reform for American, family-owned businesses and advocate for the interests of wholesalers. WSWA-PAC concluded another successful year including:
- Sixth year of surpassing $1 million in receipts with over $9.5 million raised in last 10 years.
- Increased Board of Directors contributions to $454,000—another new record.
- Maintained individual participation over 1,900 people.
- Maintained top-level $10,000 Sapphire contributions with 24 couples.
- Supported 155 candidates so far for the 2017-2018 election cycle.

BRANDED TASTING EVENTS
SHOWCASING OUR TIER
WSWA-PAC hosted 38 tasting events in 2017. These receptions are excellent partnerships between the association and local member companies that showcase the expertise of distributors. The tasting events include a wine or spirits specialist and tasting notes for all participating legislators.
EMPOWERING FUTURE LEADERS

WOMEN’S LEADERSHIP COUNCIL

The WSWA Women’s Leadership Council (WLC) has quickly evolved in two short years. Its success is driven by an Advisory Board of volunteers who connect monthly to execute its mission. This year the group has seen increased enthusiasm within the wholesaler tier to participate in the Women’s Leadership Council and held its first stand-alone conference.

The WLC provides an opportunity to network with leaders, advance skill development and inspire women. The Women’s Leadership Council is engaging the WSWA Executive Committee, other leaders, and next generation owners and operators while creating a platform for women within the wholesaler tier to connect with one another. Networking events have included a WLC reception at the WSWA Annual Convention and Exposition, a WLC sponsored speaker to open up the annual CLD conference and the inaugural WLC Conference held in DC this year.

The WLC Conference was held in Washington, D.C., in September 2017 with a sold-out event of 45 attendees from wine and spirits wholesaler member companies from across the country. WSWA received tremendous feedback from the membership regarding the relevant content, exceptional speakers and networking opportunities packed in the day-and-a-half agenda. WSWA members were welcomed by Rep. Barbara Comstock (R-VA) at the kick-off reception; heard from top hill staff on their personal paths to leadership; learned about Women and Whiskey trends; as well as new digital opportunities to better serve the supplier and retailer through Google products and services. Claire Shipman, author of The Confidence Code, rounded out the conference.

WLC BY THE NUMBERS

- 175 toiletry kits made for women and children’s homeless shelter during philanthropic event
- 45 attendees participated in the inaugural WLC Conference in Washington, D.C.
- 38 attendees at the second annual WLC Reception at WSWA Convention
- 10 volunteer WLC Advisory Board members
- 5 articles in the press raising the group’s profile in the industry, used in tandem with 1 marketing video
- 4 sponsorships for WLC events
- 1st WLC-sponsored speaker to kick-off CLD Conference in Austin, TX
- 1 wholesale panel at Women of the Vine and Spirits Symposium
- 1st and only women-led group for wholesalers
MEETINGS AND EVENTS

WSWA 74TH ANNUAL CONVENTION & EXPOSITION
FOSTERING INNOVATION AND RELATIONSHIPS
The WSWA Convention & Exposition continues to be an industry-leading event uniting suppliers and service providers with wholesalers from across the country over three days. Highlights of the 74th Annual Convention & Exposition which took place in Orlando, FL include:

- 2,352 Registered Attendees
- Over 385 exhibiting companies in a combination of Lower Level and Traditional Hospitality Suites and two exhibit halls
- Wine and Spirits Tasting and Mixology Competitions
  - Over 640 products entered into the wine and spirits tasting competitions
  - Over 40 entries submitted for the Call For Cocktails Mixology Competition, 12 selected, representing a full slate
  - 7 wholesalers competed in the Wholesaler Iron Mixologist Competition
- 2nd Annual Brand Battle where 7 brands presented their products to a panel of industry influencers and wholesaler decision makers
- Keynote speakers at two general sessions sponsored by the Distilled Spirits Council:
  - Chris Wallace, TV anchor, political commentator and host of Fox News Sunday
  - Mick Ebeling, CEO of Not Impossible Labs
- Awards were presented to industry veterans:
  - Lifetime Leadership Award was presented to Alan Dreeben, Partner, Republic National Distributing Company
  - Sidney Frank Award was presented to Gerry Ruvo, Chairman, Campari America
- More than 50 trade press, social media influencers and mainstream media attended, resulting in significant increases in convention coverage and social media engagement
Over the two days, committees met to discuss current topics, review priorities for the coming year and discuss actionable directives coming out of the Strategic Plan. Attendees also heard from four speakers covering a variety of topics:

- Robert Angelo, Director, Trade Investigations, TTB
- Thomas J. Donohue, President and CEO, U.S. Chamber of Commerce
- Brendan M. Dunn, Policy Advisor and Counsel, Office of Senate Majority Leader Mitch McConnell (R-KY)
- Steve Lohr, CEO, J. Lohr Vineyards & Wines

WINTER STATE POLICY CONFERENCE
COORDINATING STATE-LEVEL ADVOCACY
The Winter State Policy Conference provides an opportunity for wholesaler state association leaders and member lobbyists to discuss the political and legal issues facing members in their states. This year’s meeting was held in San Francisco with a record-tying 35 attendees. Participants heard from three informative industry speakers:

- Matthew D. Botting, General Counsel, California Department of Alcoholic Beverage Control
- Alicia H. Cronbach, Vice President, Legal & Corporate Affairs, Duckhorn Wine Company
- Steve Gross, Vice President, State Relations, Wine Institute

Attendees had the opportunity to register for a post-meeting day trip to Napa Valley to tour Rombauer Vineyards, Charles Krug Winery and Raymond Vineyards.

COUNCIL FOR LEADERSHIP DEVELOPMENT (CLD)
EDUCATING OUR FUTURE LEADERS
One of WSWA’s most popular and successful programs is the CLD Leadership Skills Conference, which provides rising executives in the wholesale tier with an opportunity to develop their leadership skills, meet with key industry representatives and network with their peers. The conference is a two and one-half day meeting that takes place in July in locations recommended by the CLD committee. This year’s CLD meeting took place in Austin, TX with record attendance and supplier participation through presentations and sponsorships.

CLD by the Numbers:
- 90 wholesaler attendees from 25 distributors
- 14 educational sessions featuring 26 speakers discussing a variety of leadership and industry-related topics
- 9 supplier sponsors
- 3 exciting evening networking events including a Riverboat event sponsored by Tito’s Handmade Vodka and a dinner and distillery tour sponsored by Deep Eddy

FALL MEMBERSHIP MEETING
CHARTING OUR COURSE
The Fall Membership Meeting is the association’s primary annual governance meeting, which takes place in Washington, D.C. In 2017, the newly restructured two-day format meeting had 29 member attendees and 22 Advisory Council members in attendance.
The WSWA Communications team is the voice of the association, working to promote a pro-distributor government affairs agenda and support the association’s membership, marketing and event programs.
HIGHLIGHTS

ADVOCATING FOR TAX REFORM
TARGETING DECISION MAKERS
The Communications team created and executed a strategic communications plan that supported the Government Affairs team’s effort to secure comprehensive tax reform. This included a targeted Facebook advertising campaign that garnered more than half a million impressions as well as media relations, direct communications with elected officials and staff, and rapid response with media and coalition groups.

PROMOTING MEETINGS, CONVENTION & EVENTS
BRINGING PEOPLE TOGETHER
In addition to promoting the association’s Government Affairs agenda with custom resources used at the state and federal levels, and with industry coalitions, the Communications team works to market participation at the WSWA Annual Convention & Exposition as well as the association’s annual small meetings.

At the Convention, efforts in 2017 helped deliver record level participation, expanded social media engagement as well as increased media attendance.

The team also broadened its use of creative marketing materials and resources for the CLD Leadership Skills Conference, Women’s Leadership Council Conference, Fall Membership Meeting, and the Winter State Policy Conference, all of which saw record or capacity-level participation and engagement.

REPEAL DAY
A LEGACY OF LEADERSHIP
To recognize the 84th anniversary of the repeal of Prohibition and the importance of the three-tier system in the modern American beverage alcohol industry, WSWA provided members with a comprehensive social media resource kit. This kit led to a significant increase in member engagement on social media and provided graphics that can be utilized for varied purposes in the future.

ADVOCACY FLIPBOOKS
NEXT GENERATION COMMUNICATION
In 2017, WSWA purchased and delivered to members and state wholesaler groups more than 1,500 “flipbook” video player advocacy tools. These laminated card stock books, about the size of an iPad, feature a high-resolution video screen pre-loaded with educational videos. Each short-subject video showcases the value of wholesalers, explains the important work of distributors and their employees, and provides an attention-getting means of educating key audiences (media, elected officials) about a distributor’s role in the beverage alcohol industry.

BIENNIAL REPORT ON COMMUNITY ENGAGEMENT AND PHILANTHROPY
A PROUD TRADITION
The Communications team produced a report that detailed the hundreds of programs, organizations and projects supported by WSWA member companies as part of their ongoing community and philanthropic engagement. The report was shared with a wide array of elected officials, staff members, news media outlets and key media influencers as an educational and advocacy tool.
SERVING WHOLESALERS: MEMBERSHIP SERVICES

At the end of 2017, association membership included 103 parent houses, 282 branches and 385 total member firms operating in every state and D.C. The association also counts 138 Associate Members representing service providers, suppliers and other industry firms.

SERVICES

2017 WSWA ANNUAL MEMBERSHIP DIRECTORY & RESOURCE GUIDE
BUILDING THE NETWORK
WSWA’s continued relationship with Naylor Association Services to produce the 2017 WSWA Annual Membership Directory & Resource Guide that is provided to all WSWA members and is available for sale to non-members. This directory is produced at no cost to the association and serves as a valuable industry resource. Members continue to have access to their contact profile, as well as the ability to search for other member companies and individuals through the member-only portion of the WSWA website.

FINANCIAL BENCHMARK SURVEY
MEASURING PERFORMANCE
The association continued the annual Performance Analysis Report (PAR), providing insights and detailed financial and operation benchmark data comparisons for companies of all sizes and types. Aggregated results of the annual PAR survey are available through the member-only portion of the WSWA website along with archived results from prior years.

WSWA SMARTBRIEF
DELIVERING THE NEWS
WSWA’s custom subscription daily newsletter, WSWA SmartBrief, has continued to grow in popularity. In the four and a half years since its launch, the opt-in SmartBrief has grown to over 4,000 subscribers. This custom newsletter offers curated content and targeted news for wholesalers, and has proven to be a widely-utilized member service in addition to generating non-dues revenue for the organization.

WINE & SPIRITS INDUSTRY ONLINE BUYER’S GUIDE
SERVING AS A RESOURCE
WSWA’s Online Buyer’s Guide, linked through the WSWA website, features Associate Members and other industry suppliers. The online guide categorizes Associate Members and suppliers by product/service area, and its search capability serves as a convenient, highly-utilized resource. 2017 marked the eighth year of this offering and netted the association over $15,000 in non-dues revenue.
This year’s strategic planning process was a member-led, staff-driven effort—markedly different from years past. A Strategic Planning Committee comprising larger and smaller members regularly met in-person to create the plan. A subset Strategic Planning Committee Working Group met every month for eight months to develop the ongoing process and refine the strategy outlined in the plan. This created the most engaged strategic planning process to date. The members started from square one, first discussing and examining the current and foreseeable challenges they face. Every industry facing a time of enormous change and provocation to the traditional methods of doing business. After many robust discussions on the difficulties our industry faces, the members then started to delve into possible solutions and courses of action—a much harder exercise. The committee also gathered the opinions of industry partners—both suppliers and retailers.

The members also reflected on the mission, vision and values of the association—updating all three to better communicate today’s WSWA. While we don’t have all the answers even after this thorough process, we do know what we don’t know and are working towards a more in-depth, data-driven understanding of our challenges, strengths, and vulnerabilities to come up with effective solutions.

The alliance with Drizly provided an important connection between wholesalers and this growing consumer-engagement platform, and helped position wholesalers as an important link in the three-tier system, utilizing new and innovative technologies to link with consumers.

2017 marked the end of the commitment WSWA Services had to Drizly to provide a project manager. As part of the Strategic Alliance Agreement, WSWA Services agreed to hire someone for two years to help effectuate the alliance. Arthur Rebisz filled this role as the Digital Strategy Project Manager, and we thank Arthur for the work he provided WSWA Services and WSWA, as well as the industry insight he has given Drizly.

The alliance with Drizly provided an important connection between wholesalers and this growing consumer-engagement platform, and helped position wholesalers as an important link in the three-tier system, utilizing new and innovative technologies to link with consumers.
WSWA EDUCATIONAL FOUNDATION

In 2017, the WSWA Educational Foundation provided $106,000 in college scholarships, assisting 53 wholesaler employee families, a significant increase from previous years with more than 500 applications received. The College Scholarship Program serves as one of many ways the foundation and its members can give back to the industry and their employees’ families.

2017 SCHOLARSHIP RECIPIENTS INCLUDED:

Cierra Abellera  
*Southern Glazer’s Wine & Spirits (HI)*  
Boise State University

Richa Agnihotri  
*Breakthru Beverage Group (MD)*  
Rochester Institute of Technology

Isabella Alessandrini  
*Southern Glazer’s Wine & Spirits (NY)*  
University of Vermont

Lindsay Antaya  
*Martignetti Companies (MA)*  
Providence College

Victoria Baram  
*Southern Glazer’s Wine & Spirits (FL)*  
University of Central Florida

Emily Benoit  
*Republic National Distributing Co. (LA)*  
Northwestern State University

Skyler Bowden  
*Republic National Distributing Co. (CO)*  
University of Denver

Kambrynn Bowman  
*Martignetti Companies (MA)*  
Fitchburg State University

Kenneth Cacacho  
*Southern Glazer’s Wine & Spirits (CA)*  
University of San Francisco

Haley Chiles  
*Breakthru Beverage Group (SC)*  
Clemson University

Emma Cook  
*Hartley & Parker Limited, Inc. (CT)*  
Boston College

Dominique Cordivari  
*Breakthru Beverage Group (NJ)*  
Stockton University

Nicolas Cuesta  
*Southern Glazer’s Wine & Spirits (IL)*  
Miami University

Ashley D’Antuono  
*Empire Merchants, LLC (NY)*  
Salve Regina University

Anna Dickie  
*United Distributors, Inc. (GA)*  
Auburn University

Jack Dively  
*Republic National Distributing Co. (MI)*  
Cleveland State University

Gabriele D’Orsi  
*Southern Glazer’s Wine & Spirits (NY)*  
Molloy College

Grant Duncan  
*Young’s Market Company, LLC (HI)*  
University of Southern California

Maria Fernandez  
*Republic National Distributing Co. (FL)*  
Florida Atlantic University

Gabriela Fowler  
*Southern Glazer’s Wine & Spirits (FL)*  
University of West Florida

Alexandra Franklin  
*Republic National Distributing Co. (GA)*  
University of North Georgia

Lexton Garrett  
*Southern Glazer’s Wine & Spirits (TX)*  
Texas A&M University
Maia Guterbock  
**Mutual Distributing Co. (NC)**  
University of North Carolina at Chapel Hill

Elijah Havens  
**Southern Glazer’s Wine & Spirits (CA)**  
Occidental College

Michaela Horger  
**Breakthru Beverage Group (AZ)**  
University of Arizona

Margaret Husek  
**Fedway Associates, Inc. (NJ)**  
Providence College

Kathryn Iwanek  
**Heidelberg Distributing Co. (OH)**  
Heidelberg University

Crystal Jajjo  
**Great Lakes Wine & Spirits (MI)**  
Oakland University

Jordyn Jones  
**Fedway Associates, Inc. (NJ)**  
Rutgers University

Ivy Lee  
**Empire Merchants, LLC (NY)**  
The State University of New York at Stony Brook

Hunter Leise  
**Transatlantic Wine & Spirits (CO)**  
University of Colorado Boulder

Kaitlyn Locke  
**Southern Glazer’s Wine & Spirits (FL)**  
Troy University

Jaliah Luster  
**Breakthru Beverage Group (FL)**  
Concordia College

Declan McGraw  
**General Beverage Sales Co. (WI)**  
University of Minnesota Twin Cities

Devin Melancon  
**Republic National Distributing Co. (LA)**  
University of Louisiana at Monroe

Casey Mills  
**Republic National Distributing Co. (TX)**  
Del Mar College

Alexa Munoz  
**Southern Glazer’s Wine & Spirits (NY)**  
Adelphi University

Nicholas Murphy  
**Great Lakes Wine & Spirits (MI)**  
Michigan State University

Charlotte Naquin  
**Southern Glazer’s Wine & Spirits (LA)**  
University of New Orleans

Emily Newton  
**Republic National Distributing Co. (CO)**  
South Dakota School of Mines and Technology

Chloe Norvell  
**Breakthru Beverage Group (NV)**  
Lehigh University

Olivia Nuzzi  
**Tri County Wholesale Distributors, Inc. (OH)**  
Youngstown State University

Reagan Oswald  
**Southern Glazer’s Wine & Spirits (FL)**  
University of South Alabama

Jessica Pitt  
**Heidelberg Distributing Co. (OH)**  
Wright State University

Dannielle Potter  
**Republic National Distributing Co. (VA)**  
North Carolina State University

Chianti Price  
**Republic National Distributing Co. (TX)**  
University of Texas Health Science Center

Irving Rivera  
**Breakthru Beverage Group (IL)**  
Illinois State University

Morgan Smith  
**Great Lakes Wine & Spirits (MI)**  
Michigan State University

Annie Snyder  
**Republic National Distributing Co. (FL)**  
Mississippi State University

Jordan Venglass  
**Young’s Market Company, LLC (CA)**  
University of California Berkeley

Lilly Walker  
**Georgia Crown Distributing Co. (GA)**  
Auburn University

Danae Williams  
**Southern Glazer’s Wine & Spirits (WA)**  
Washington State University, Tri-Cities Campus

Alexandra Zorrilla  
**Opici Family Distributing**  
Seton Hall University
MANAGING YOUR ASSOCIATION

Summary

1. Briefly describe the organization’s mission or most significant activities.

2. Check this box if the organization discontinues operations.

3. Number of voting members of the governing body (Part IX, column (A), lines 3, 4, 5).

4. Number of independent voting members of the governing body.

5. Total number of individuals employed in calendar year.

6. Total number of volunteers (estimate if necessary).

7a. Total unrelated business revenue from Part VIII, column (A), line 6.


8. Contributions and grants (Part VIII, line 1h).

9. Program service revenue (Part VIII, line 2g).

10. Investment income (Part VIII, column (A), lines 3, 4, 5).

11. Other revenue (Part VIII, column (A), lines 6, 8, 9).

12. Total revenue - add lines 8 through 11 (must equal Part IX, column (A), line 1).

13. Grants and similar amounts paid (Part IX, column (A), line 1).

14. Benefits paid to or for members (Part IX, column (A), line 2).

15. Salaries, other compensation, employee benefits (Part IX, column (A), line 3).

16a. Professional fundraising fees (Part IX, column (A), line 4).

16b. Total fundraising expenses (Part IX, column (D), line 4).

17. Other expenses (Part IX, column (A), lines 11a-11d).

18. Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 2).


20. Total assets (Part X, line 16).

21. Total liabilities (Part X, line 26).

22. Net assets or fund balances. Subtract line 21 from line 20.

Signature Block

Under penalties of perjury, I declare that I have examined this return, true, correct, and complete. Declaration of preparer (other than officer).

Signature of officer

CRAIG WOLF, PRESIDENT AND CEO

Type or print name and title

Preparer’s signature

Date

Check if you are an agent of the preparer.

Signature Here
FINANCE AND ADMINISTRATION

The WSWA Finance and Administration team manages budgeting, payroll, business operations and employee and member accounting, and ensures oversight in accordance with association bylaws and industry best practices.

2017 ACCOMPLISHMENTS:

• Maintained a clean audit and better than budget performance that resulted in dues refunds for all members
• Wrote and put into effect a new investment policy for association reserves
• Negotiated a favorable new lease securing additional office space at a lower rate
• Built out and moved into new office space on time and within budget
• Migrated the association email system to the Cloud
• Organized an all-staff retreat for staff to improve office communication and teamwork

ASSOCIATION STAFF

Craig Wolf  
President and CEO

Lisa Bockelman  
Senior Executive Assistant to the President and CEO

Jo Moak  
Senior Vice President and General Counsel

Dawson Hobbs  
Senior Vice President, Government Affairs

Catherine McDaniel  
Vice President, Federal Affairs  
Director, Women’s Leadership Council

Jake Hegeman  
Vice President, Legal and Regulatory Affairs

Heather Calio  
Senior Director, State Affairs

Ashley Lantz  
Senior Director, Federal Affairs

Ali Prolago  
Senior Director, Federal Affairs

Steve Rebillot  
Senior Director, Federal Affairs

Reid Teschner  
Manager, State and Regulatory Affairs

Arielle Broussard  
Manager, Federal Affairs

Jeff Solsby  
Vice President, Communications and Membership

Bob Wiggans  
Senior Director, Membership

Cassie Boehm  
Manager, Advocacy Communications

Emily Magram  
Manager, Communications and Membership

Cindy Nachman-Senders  
Senior Consultant, Meetings and Conventions

Kari Langerman  
Senior Director, Meetings and Conventions

Ryann Squier  
Coordinator, Meetings and Conventions

Sam Block  
Vice President, Finance and Administration

Katherine Brown  
Director, Finance and Administration

Phoebe Warren  
Assistant, Finance and Administration
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Republic National Distributing Company
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IMMEDIATE PAST CHAIRMAN
Horizon Beverage Group
Norton, MA

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Breakthru Beverage Group
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LEADERSHIP CAUCUS A REP.
TO THE EXECUTIVE COMMITTEE
American Premium Beverage
Colfax, NC

STEVEN BECKER
LEADERSHIP CAUCUS B REP.
TO THE EXECUTIVE COMMITTEE
Southern Glazer’s Wine & Spirits
Miami, FL

SUE MCCOLLUM
LEADERSHIP CAUCUS B REP.
TO THE EXECUTIVE COMMITTEE
Major Brands Premium Beverage Distributors
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Chicago, IL

CHRIS UNDERWOOD
SECRETARY
Young’s Market Company
Tustin, CA

WSSWA ASSOCIATION LEADERSHIP 2017-2018