

2025 NADC ANNUAL MEMBER CONFERENCE

May 4-6, 2025

Ritz-Carlton Golf Resort, Tiburón | Naples, FL

REGISTER TODAY



CONFERENCE REGISTRATION

The registration fee is **\$695 per attendee** and includes sessions and meal functions. To register, go to the “Events” tab on the NADC website, www.dealercounsel.com, and look for “2025 NADC Annual Member Conference.”

Registration is open to NADC members only. Payment may be made through the website using a credit card or by mailing NADC a check. Make checks payable to NADC and send to:

NADC, 1800 M Street NW, Suite 400 South, Washington, DC 20036

Contact info@dealercounsel.com with registration questions.

REGISTRATION CANCELLATION POLICY

Cancellation(s) for the 2025 NADC Annual Member Conference can be accommodated by NADC up to Friday, April 11, 2025 less a \$25.00 processing fee. After April 11, we are not able to process refunds.

CLE CREDIT

CLE Credit may be available for up to 885 minutes (this includes the Dealer 101 and In-House Roundtable sessions) of educational program pending approval in your state (14.75 general credits for states that calculate 60 minutes per credit; 17.7 general credits for states that use 50 minutes per credit). We will submit CLE applications to states requested on the registration form and will confirm once we hear back.

Contact Hannah Webster at hwebster@dealercounsel.com for more information. **Please make sure to indicate on your online registration form what states you would like to receive CLE credit in.**

TRAVEL PLANS

Our popular program, Dealer Counsel 101, will take place on Sunday, May 4 at 12:00 PM. Please arrange your travel to join us. The fee to attend is \$75. Attendees may expect CLE credits for this session. Make sure to indicate if you are planning to attend on our registration form. A light lunch will be provided.

We hope you will also join us later in the day on the 4th for a reception with music, cocktails, food and drinks at 6:00 PM. The conference will conclude on Tuesday, May 4, at 1:15 PM.

NEW MEMBER AND FIRST TIME ATTENDEE WELCOME RECEPTION/NETWORKING RECEPTION FOR WOMEN OF NADC—Sunday, May 4

Join us for two exciting receptions taking place simultaneously at 5:30 PM: the New Member and First Time Attendee Reception and the Networking Reception for Women of NADC. These events share a common space to encourage cross-community connections, support, and engagement, with NADC Board of Directors in attendance and available to network with attendees.

SUGGESTED DRESS

Dress attire for all conference events is business casual.

WEATHER

Average High Temperature: 89°F (31.6°C)

Average Low Temperature: 68°F (20°C)

TRANSPORTATION

The Ritz-Carlton Golf Resort, Tiburón in Naples is 21 miles away from the Southwest Florida International Airport, and 10 miles away from the Naples Municipal Airport. The hotel offers a free shuttle between The Ritz-Carlton Golf Resort, Tiburón in Naples and The Ritz Carlton, Naples, as well as a \$15 local shuttle. However, the hotel does not provide shuttle service to or from the airports. Rental cars are available at both airports.

Additionally, there is on-site automobile parking for \$10 per day. Daily valet parking is \$15, with in/out privilege. Also note that the resort has electric vehicle charging stations.

HOTEL ADDRESS

2600 Tiburon Drive,
Naples, Florida, USA, 34109

HOTEL RESERVATIONS

The room block at The Ritz-Carlton Golf Resort, Tiburón in Naples closes on April 11, 2025.

HOTEL CANCELLATION POLICY

Reservations may be cancelled more than 3 days prior to arrival without penalty. Cancellations received 3 days or less prior to arrival will assess a one night room + tax penalty.

2025 NADC ANNUAL MEMBER CONFERENCE SCHEDULE

SUNDAY, MAY 4

12:00 - 3:00 PM

Dealer 101 – Part 3: Buying & Selling a Dealership | Great Egret

*Johnnie Brown, Pullin, Fowler, Flanagan, Brown & Poe, PLLC
Lance Kinchen, Breazeale, Sachse & Wilson, LLP
Shari Patish, Hall Automotive*

(Light lunch served)

This program is an introduction to the dealership environment and the legal and regulatory issues dealership principals and managers are likely to encounter. It is designed for those attorneys relatively new to dealership operations and issues, or those more experienced attorneys who may be very knowledgeable about one legal area and wish to gain knowledge of other legal exposures faced by motor vehicle dealers. This session is part three of a three-part series for Dealer 101 and will focus on buying and selling dealerships.

3:00 - 5:00 PM

Board Meeting | Preserve

5:30 - 6:00 PM

New Member and First Time Attendees Reception | Court of Palms

Networking Reception for Women of NADC | Court of Palms

Sponsored by:



6:00 - 7:30 PM

Reception | Court of Palms

Sponsored by:



MONDAY, MAY 5

7:00 AM Registration | Ballroom Foyer

7:00 - 8:00 AM Breakfast | Court of Palms

Co-Sponsored by:



8:00 - 8:30 AM Opening Remarks | Tiburon Ballroom

8:30 - 10:00 AM Session 1: NADA Update | Tiburon Ballroom

Daniel Ingber, NADA

Paul Metrey, NADA

During this session, NADA Executives will highlight salient and breaking federal developments affecting dealers on a range of topics including NADA’s engagement of the new Administration and the 119th Congress; the aftermath of the 5th Circuit decision on the FTC Vehicle Shopping Rule; EV policy developments; tariffs affecting the automotive industry; federal legislation on right to repair, privacy, and catalytic converters; and more.

10:00 - 10:30 AM Break | Ballroom Foyer

Monday Refreshments Co-Sponsored by:



10:30 - 11:30 AM Session 2: Legal Aspects of Data in Advertising | Tiburon Ballroom

Charles Gallaer, ArentFox Schiff LLP

Kenneth Rosenfield, Rosenfield and Company PLLC

Todd Smith, QoreAI

This session will cover types of agreements with data providers and users of your data, what to look for in contracts, and how to utilize the data.

MONDAY, MAY 5

11:30 AM - 1:00 PM Lunch | Court of Palms

Co-Sponsored by:



11:30 AM - 1:00 PM In-House Breakout Lunch | Great Egret

Moderated by:

Kyle Sipples, Autosaver Group

Kate Uding, Luther Landers Automotive Group

(Lunch Provided)

1:00 - 2:00 PM Session 3: The Legal Ins and Outs of AI in Automotive Retail | Tiburon Ballroom

Charles Gallaer, ArentFox Schiff LLP

Michael McMahan, ArentFox Schiff LLP

Kenneth Rosenfield, Rosenfield and Company PLLC

Todd Smith, QoreAI

This session will focus on current and future anticipated uses of AI in Dealership Marketing for both the front and back ends. Hear how to effectively use the AI, what is common today, and the legal ramifications and issues of using the AI in a practical sense.

2:00 - 2:30 PM Break | Ballroom Foyer

2:30 - 3:30 PM Session 4: Risk Allocation in Vendor Agreements | Tiburon Ballroom

Laurence Smith, Day Pitney LLP

Mark Morgan, Day Pitney LLP

Thomas Reck, Withum

Vendor agreements often foist upon the dealership the risk that programs or form customer contracts provided by the vendor do not comply with applicable federal or state law, this despite the vendor conducting business in multiple states and tailoring its programs and form contracts to the requirements of each state.

The presentation will also examine the potential detriment to dealers of other provisions of vendor agreements, such as limitation of liability, exclusion of certain types of damages, and alternate dispute resolution mandating two-party arbitration that prevents a dealer from being a member of a class action instituted by a third party.

MONDAY, MAY 5

3:30 - 3:45 PM

Break | Ballroom Foyer

3:45 - 4:45 PM

Session 5: Best Practices for Outside Counsel | Tiburon Ballroom

Kate Kelley, Carmax

Shari Patish, Hall Automotive

Kate Uding, Luther Landers Automotive Group

In-house counsel will present on best practices for those firms that are representing dealers. We will discuss expectations (general and industry-specific), what goes into firm selection, the qualities of firms and attorneys that maintain long relationships, pet peeves, alternative billing arrangements, communication, preparedness, the importance of following client billing guidelines and more!

5:00 - 6:30 PM

Reception | Fairway Lawn

Sponsored by:



TUESDAY, MAY 6

7:00 AM

Registration | Ballroom Foyer

7:00 - 8:15 AM

Breakfast | Court of Palms

Sponsored by:



8:15 - 8:30 AM

Opening Remarks | Tiburon Ballroom

8:30 - 9:30 AM

Session 6: Steering Clear of Fraud: Lessons and Strategies for Dealerships | Tiburon Ballroom

Jennifer Walton, Forvis Mazars

H. Clay Walker, Jr., Haynsworth Sinkler Boyd

This session will focus on the critical issue of fraud in dealerships, drawing from the extensive experience of our forensic accountant speakers. Attendees will hear compelling stories and insights from our work with clients and learn about common fraudulent activities in dealerships, essential safeguards to help limit fraud, and practical takeaways they can implement in their organizations.

TUESDAY, MAY 6

9:30 - 9:45 AM

Break | Ballroom Foyer

9:45 - 10:45 AM

Session 7: Understanding Indirect Lending Compliance: A Guide for Dealer Counsel | Tiburon Ballroom

Eric Johnson, Hudson Cook, LLP

Mark Metrey, Hudson Cook, LLP

This presentation will cover:

- An overview of federal and state compliance requirements for sales finance companies, including Truth in Lending Act (TILA), Equal Credit Opportunity Act (ECOA), Fair Credit Reporting Act (FCRA), and state specific dealer reserve and markup regulations.
- How sales finance companies manage dealer oversight, mitigate risks, and address red flags like power booking or undisclosed fees.
- Key challenges faced by indirect lenders, including fraud detection, fair lending compliance, and data privacy concerns.
- Practical insights into dispute resolution, consumer complaints, and responding to regulatory scrutiny in indirect auto lending.
- Actionable strategies for dealer counsel to collaborate with sales finance companies to reduce shared risks, align compliance efforts, and foster trust.

10:45 - 11:00 AM

Break | Ballroom Foyer

11:00 AM - 12:00 PM

Session 8: Cyber Liability Market - Emerging Issues | Tiburon Ballroom

Andrew McClave, Alliant Insurance Services

Steve Levine, Alliant Insurance Services

This session will focus on Cyber Liability and market pressures facing Auto Dealerships. It will provide insight on the following topics:

- Increased regulatory activity
- Business Interruptions
- Renewal Applications
- Emerging issues
- Mitigating Loss

12:00 - 1:00 PM

Session 9: 2026 Estate Tax Cliff – Why Auto Dealers Need to Revisit their Estate Plan | Tiburon Ballroom

David Blum, Akerman LLP

John Davis, Haig Partners

David Harkins, Mercer Capital

Mike Toth, Haig Partners

In late 2017, the Tax Cuts and Jobs Act (“TCJA”) was signed into law. While some provisions were permanent, other aspects of the legislation are due to sunset December 31, 2025, including personal income tax rates, Qualified Business Income (“QBI”) deduction, State and Local Tax Limits (“SALT”), and the Estate/Gift Tax Limit.

In the past few years, auto dealer buy-sell activity has been high due to high earnings and Blue Sky multiples, and there has not been as much need for estate planning work because valuations have been high, tax rates have been low, and taxation thresholds have been high. However, these trends are reversing. With the provisions sunseting at year-end, more dealerships will be subjected to higher tax rates.

If dealer principals don’t have a succession plan in place, it may be more favorable for them to sell their dealership in 2025 rather than 2026. If dealers plan to incentivize management/ the next generation, valuation discounts help transfer the value of the auto group over time in the most tax efficient manner. Either way, dealer principals ought to reach out to an estate planning attorney to see what makes sense for their situation.

1:00 PM

Closing Remarks and Adjourn | Tiburon Ballroom

ADDITIONAL SPONSORS:

Wifi:



Conference Lanyards:



CAPITAL AUTOMOTIVE
Driving Up Dealers' Returns for Over 25 Years!

Conference Bags:



Conference Badges:



Hotel Key Cards:



USB Drives:



Conference Gifts:



THANK YOU TO OUR 2025 NADC ANNUAL MEMBER CONFERENCE SPONSORS



LOCAL ACTIVITIES

AUDUBON CORKSCREW SWAMP SANCTUARY

Daily Access to the Audubon Corkscrew Swamp Sanctuary for 2 guests. (2 tickets are included with \$55 Daily Resort Fee available with the Concierge.)

A visit to Audubon's Corkscrew Swamp Sanctuary is a journey into the heart of the Everglades ecosystem. Discover the rugged beauty of this natural area on the Sanctuary's famous boardwalk—a 2.25-mile adventure through an enchanting wilderness and the largest old-growth bald cypress forest in North America.

Located about 30 minutes northeast of Naples, Corkscrew Swamp Sanctuary is home to alligators, otters, white-tailed deer, and red-bellied turtles. A wide variety of wading birds, songbirds, and raptors can be seen throughout the year, while the fabulous Painted Bunting is one of many winter visitors. Guided experiences immerse visitors in the natural wonders of the Sanctuary with photo opportunities available at every turn of the boardwalk trail. With exhibits, a nature store, and bird-friendly gardens, the Blair Visitor Center serves as a gateway to the Western Everglades environment.

<https://corkscrew.audubon.org>



NAPLES SIGHTSEEING BOAT TOUR

Discover the sights and marine life of Naples on a sightseeing cruise. You have the opportunity to see birds, dolphins, and, season permitting, manatees. The cruise also takes you past the area's top mansions, Keewaydin Island, and more. Relax and learn about local history, wildlife, and celebrity real estate during on board commentary. It's the perfect time to take unobstructed photographs of the city and its natural surroundings.

<https://www.viator.com/tours/Naples/Naples-Sightseeing-Tour/d22381-32251P1>



THE VILLAGE SHOPS ON VENETIAN BAY

For shopping, head to The Village Shops on Venetian Bay, a unique luxury shopping destination with more waterfront shopping and dining than any other shopping center in Naples.

<https://www.venetianvillage.com>



DOLPHIN, BIRDING AND SHELLING TOUR

Consisting of two parts, The Dolphin, Birding and Shelling Tour is a wonderful experience for the whole family and a great introduction to the area. First a dolphin tour to search for dolphins and wading birds on a naturalist-led boating tour. Then a shelling tour to explore an uninhabited barrier island. You will learn about island's beach dynamics and collect some of the wonderful shells on these remote islands.

https://www.marcoisland-boattours.com/dolphin_birding_tour.html



GULF OF MEXICO SUNSET CRUISE FROM NAPLES

Cruise aboard the Double Sunshine from Naples and into the Gulf of Mexico at sunset. Move freely on the deck to see the best views and capture lovely pictures. You may be able to spot dolphins or manatees swimming in the gulf. Cruise past stunning mansions in exclusive Port Royal, serene Keewaydin Island, and enjoy the tales of Florida history from your knowledgeable captain.

<https://www.viator.com/tours/Naples/Naples-Sunset-Cruise/d22381-32251P2>

POPULAR RESTAURANTS

THE DOCK AT CRAYTON COVE

A Naples staple since 1976, the casual, open-air restaurant, accessible by boat, offers views of Naples Bay and the boats in Naples City Dock. The eatery specializes in seafood prepared with Caribbean and Latin influences, and the raw bar is top-notch.

239.263.9940

845 12th Ave S, Naples, FL 34102

www.dockcraytoncove.com

SAILS RESTAURANT

Set amid a cluster of fine dining establishments on Fifth Avenue South in downtown Naples, Sails Restaurant is not only known as one of the Paradise Coast's best seafood restaurants — it's one of the best restaurants, period. This upscale establishment combines an elegant atmosphere, gourmet meals derived from France, Italy and Greece, and Old World service to make for the perfect evening. Sails brings its fish in daily, and its prix-fixe menus are designed to serve up an unforgettable culinary experience.

239.360.2000

301 Fifth Ave South, Naples, Florida 34102

www.sailsrestaurants.com

BAYSIDE SEAFOOD GRILL & BAR

A local destination since 1990, Bayside Seafood Grill & Bar has two full bars, casual dining in the first-floor Café, sophisticated dining in the second-floor Grill, as well as casual dining and live music on the patio at Sukie's Wine Shop.

239.649.5552

4270 Gulf Shore Boulevard N., Naples, FL 34103

www.baysideseafoodgrillandbar.com

