



*Automotive Service Councils of California*  
Professionals in Automotive Service ~ Since 1940

**Automotive Service Councils  
of California**

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**Team Weekend Book**  
*ASCCA January 2022 Team Weekend*

Join via Zoom

<https://us06web.zoom.us/j/88647975311>

Meeting ID: 886 4797 5311

*ASCCA Committee Meetings*  
*Chapter Representatives Committee Meeting*  
*Board of Directors Meeting*

January 29 – 30, 2022

Thank you to our Team Weekend Sponsors:

**LeadsNearMe®**



## **Antitrust Compliance Policy**

It shall be the policy of the Association to be in strict compliance with all Federal and State Antitrust laws, rules and regulations. Therefore:

1. These policies and procedures apply to all membership, board, committee and other meetings of the Association, and all meetings attended by representatives of the Association.
2. Discussions of prices or price levels is prohibited. In addition, no discussion is permitted of any elements of a company's operations which might influence price such as:
  - a. Cost of operations, supplies, labor or services;
  - b. Allowance for discounts;
  - c. Terms of sale including credit arrangements; and,
  - d. Profit margins and mark ups provided this limitation shall not extend to discussions of methods of operation, maintenance, and similar matters in which cost or efficiency is merely incidental.
3. It is a violation of Antitrust laws to agree not to compete, therefore, discussions of division of territories or customers or limitations on the nature of business carried on or products sold are not permitted.
4. Boycotts in any form are unlawful. Discussion relating to boycotts is prohibited, including discussions about blacklisting or unfavorable reports about particular companies including their financial situation.
5. It is the Association's policy that all meetings attended by representatives of the Association where discussion can border on an area of antitrust sensitivity, the Association's representative request that the discussion be stopped and ask that the request be made a part of the minutes of the meeting being attended. If others continue such discussion, the Association's representative should excuse himself from the meeting and request that the minutes show that he left the meeting at that point and why he left. Any such instances should be reported immediately to the President and staff of the Association.
6. It is the Association's policy that a copy of these Antitrust Compliance Policies and Procedures be given to each officer, director, committee member, official representative of member companies and Association Management Company (AMC) employees annually and that the same be read or understood at all meetings of the membership of the Association. A copy of this policy will be included in every meeting agenda packet.



*Automotive Service Councils of California*  
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**MISSION STATEMENT:** To provide business resources for our members and to advance the professionalism of the Automotive Repair Industry.

**CORE PURPOSE:** To elevate and unite automotive professionals and give them voice.

**CORE VALUES:** Integrity, Compassion, Professionalism, Unity

### **STRATEGIC LONG-RANGE GOALS**

- **MEMBERSHIP:** To Increase Membership by net 10%.
- **GOVERNMENT AFFAIRS:** Increased Credibility and Influence in Government and Regulatory Affairs.
- **EDUCATION:** Elevate Professionalism Through Increased Focused Education.

### **2021 STRATEGIC WORK PLAN**

- Marketing & Communications
  - Continue working with KP Public Affairs
  - Reach out to potential members and concentrate on growth.
  - Continue to improve both internal and external communications & marketing materials.
    - Redesign e-newsletter to be more eye catching & provide digests.
  - Demonstrate the value of membership in monetary savings via corporate partner program participation.
- Improve Chapter Engagement
  - Implement the new Chapter Representatives Training & Tools Developed in 2020.
- Member & Partner Outreach
  - Increase video messaging from leadership (President, Directors, and Committee Chairs) to continually personalize what ASCCA is doing.
  - Continually Survey Members Needs to help shape our communications and programs.
- Education
  - ASCCA Board Leadership Training
  - Technology training to members

## Robert's Rules of Order Quick Reference Sheet

Robert's Rules can be confusing to people who have never encountered it before. However, it is the most efficient way to handle business at a large meeting. Robert's Rules of Order protects the rights of the majority, of the minority, of individual members, of absentees, and all of these together.

The following points and chart should cover all you need to know to effectively participate during a meeting.

- Only voting delegates may make motions or vote on motions.
- Non-voting delegates may participate in the debate on a motion.
- State your name and the Chapter you represent (also add that you are a non-voting delegate, if necessary) when speaking or making a motion.
- Stand in line at one of the microphones to obtain the floor.
- You do not need to obtain the floor to second a motion or to make one of the motions that allow you to interrupt the speaker (although the chair may ask you to go to a microphone).
- Attempts to use point of order, point of information, or parliamentary inquiry to participate in the debate will be ruled out of order.
- Address your comments to the chair and not to another member (don't directly engage in debate with another member).
- An amendment to a motion may be amended, but an amendment to an amendment to a motion may not!

	<b>You want to...</b>	<b>You say...</b>	<b>Can you interrupt a speaker?</b>	<b>Does your motion need a second?</b>	<b>Is your motion debatable?</b>	<b>Can someone amend your motion?</b>	<b>Applies to which motions?</b>	<b>Vote Required</b>
D	alert the chair to an urgent matter affecting the assembly or of personal privilege.	I rise to a question of {privilege affecting the assembly, personal privilege}.	Yes	No	No	No	None	None
E	have the Convention follow the agenda.	I call for the orders of the day.	Yes	No	No	No	None	No vote
G	end debate and vote on the motion.	I move the Previous Question.	No	Yes	No	No	Any debatable or amendable	2/3
J	send a matter to committee.	I move to commit the motion...	No	Yes	Yes	Yes	No subsidiary motion	Majority
K	modify a pending motion.	I move to amend...	No	Yes	Yes (usually)	Yes	All amendable	Majority
M	bring business before the Convention.	I move...	No	Yes	Yes	Yes	None	Majority
S	alert the chair to some error.	Point of order.	Yes	No	No	No	Any error	No vote
T	disagree with the ruling of the chair.	I appeal from the decision of the chair.	Yes	Yes	Yes (usually)	No	Decision of the chair	Majority or tie
X	have the vote counted using a rising vote.	I call for a division.	Yes	No	No	No	Voice or hand vote	None
Y	obtain information on parliamentary law or rules of the organization.	A parliamentary inquiry, please.	Yes (if urgent)	No	No	No	Any motion	No vote
Z	request information relating to the business at hand.	A point of information, please.	Yes (if urgent)	No	No	No	Any motion	No vote



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 E-mail: info@ascca.com

**TO:** ASCCA BOARD, CHAPTER REPRESENTATIVES, COMMITTEES & INTERESTED PARTIES  
**FR:** ASCCA OFFICE  
**RE:** January 2022 ASCCA TEAM WEEKEND

Thank you to our Team Weekend Sponsors:



Attached, please find detailed information on the upcoming Team Weekend. Please Note: the schedule listed below is tentative and subject to change.

*All Directors, Committee Members, Chapter Presidents, and Chapter Representatives are responsible for making their own hotel and travel arrangements. Please let us know if you need any assistance with your travel planning. We are certainly available to assist you. Below please find important information to assist you with your travel planning:*

**WHAT:** JANUARY 2022 TEAM WEEKEND  
**WHEN:** JANUARY 29-30, 2022  
**LOCATION(s):** **VIA ZOOM ONLY!**

**This event will be held virtually only!**  
<https://us06web.zoom.us/j/88647975311>  
**Meeting ID: 886 4797 5311**

**SCHEDULE OF EVENTS: (Tentative)**

**Saturday, January 29:**

8:00 am – 8:10 am Welcome – Pledge, Opening Comments  
 8:10 am – 8:15 am **NEW:** Introduce new members and first-time Team Weekend attendees

8:15 am – Noon      **ASCCA Committee Meetings**  
8:15 am – 9:15 am      Government Affairs  
9:15 am – 9:30 am      Break  
9:30 am – 10:30 am      Membership  
10:30 am – 10:45 am      Break  
10:45 am – 11:45 am      ETI

Noon – 1:00pm      **Lunch**

1:00 - 4:00pm      **Chapter Representatives Meeting**

**Sunday, January 30:**

9:00 am - Noon      **Board of Directors Meeting**

# ASCCA Meetings Calendar 2022

(All meeting dates are tentative and subject to change)

Bylaws and Policy Committee	As Needed	All Meetings Via Zoom
Connected Cars	1st Monday	
Revenue & Benefits Committee	1st Wednesday	
Membership Committee	2nd Thursday	
Education Training & Information (ETI) Committee	3rd Wednesday	
Government Affairs Committee	3rd Thursday	
ASCEF Board of Trustees		
Executive / Finance Committee	4th Wednesday	
Chapter Reps Committee	4th Thursday	

## January 2022

January 5, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
January 10, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
January 29-30, 2022		<b>ASCCA Team Weekend</b>	Sacramento, CA

## February 2022

February 2, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
February 7, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
February 10, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
February 16, 2022	6:00 - 7:00 pm	Education Training & Information (ETI) Committee	Via Zoom
February 17, 2022	2:00 - 3:00 pm	Government Affairs Committee	Via Zoom
February 23, 2022	6:00 - 7:00 pm	Executive / Finance Committee	Via Zoom
February 24, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom

# ASCCA Meetings Calendar 2022

(All meeting dates are tentative and subject to change)

## March 2022

March 2, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
March 7, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
March 10, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
March 16, 2022	6:00 - 7:00 pm	Education Training & Information (ETI) Committee	Via Zoom
March 17, 2022	2:00 - 3:00 pm	Government Affairs Committee	Via Zoom
March 23, 2022	6:00 - 7:00 pm	ASCCA Finance / Executive Committee	Via Zoom
March 24, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom

## April 2022

April 4, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
April 6, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
April 14, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
April 20, 2022	6:00 - 7:00 pm	Education Training & Information (ETI) Committee	Via Zoom
April 21, 2022	2:00 - 3:00 pm	Government Affairs Committee	Via Zoom
April 25-29		<b>Virtual Legislative Fly-in Week</b>	Sacramento, CA
April 27, 2022	6:00 - 7:00 pm	Executive / Finance Committee	Via Zoom
April 28, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom

## May 2022

May 2, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
May 4, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
May 12, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
May 18, 2022	6:00 - 7:00pm	Education Training & Information (ETI) Committee	Via Zoom
May 19, 2022	2:00 - 3:00 pm	Government Affairs Committee	Via Zoom
May 25, 2022	6:00 - 7:00 pm	Executive / Finance Committee	Via Zoom
May 26, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom



# ASCCA Meetings Calendar 2022

(All meeting dates are tentative and subject to change)

## June 2022

June 1, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
June 6, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
June 9, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
June 15, 2022	6:00 - 7:00 pm	Education Training & Information (ETI) Committee	Via Zoom
June 23, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom
June 24-26, 2022		Aftermarket Industry Summit/ASCCA Team Weekend	San Diego CA

## July 2022

July 6, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
July 11, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
July 14, 2022	6:00 - 7:00pm	Membership Committee	Via Zoom
July 20, 2022	6:00 - 7:00pm	Education Training & Information (ETI) Committee	Via Zoom
July 21, 2022	2:00 - 3:00 pm	Government Affairs Committee	Via Zoom
July 27, 2022	6:00 - 7:00 pm	Executive / Finance Committee	Via Zoom
July 28, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom

## August 2022

August 1, 2022	6:00 - 7:00pm	Connected Cars Committee	Via Zoom
August 3, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
August 11, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
August 17, 2022	6:00 - 7:00 pm	Education Training & Information (ETI) Committee	Via Zoom
August 18, 2022	2:00 - 3:00 pm	Government Affairs Committee	Via Zoom
August 24, 2022	6:00 - 7:00 pm	Executive / Finance Committee	Via Zoom
August 25, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom

# ASCCA Meetings Calendar 2022

(All meeting dates are tentative and subject to change)

## September 2022

September 7, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
September 8, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
September 12, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
September 15, 2022	2:00 - 3:00 pm	Government Affairs Committee	Via Zoom
September 16-17, 2022		<b>ASCCA Education Conference</b>	Ontario, CA
September 21, 2022	6:00 - 7:00 pm	Education Training & Information (ETI) Committee	Via Zoom
September 22, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom
September 28, 2022	6:00 - 7:00 pm	Executive / Finance Committee	Via Zoom

## October 2022

October 3, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
October 5, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
October 13, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
October 19, 2022	6:00 - 7:00 pm	Education Training & Information (ETI) Committee	Via Zoom
October 20, 2022	2:00 - 3:00 pm	Government Affairs Committee	Via Zoom
October 26, 2022	5:30 - 7:30 pm	Executive / Finance Committee - Budget Meeting	Via Zoom
October 27, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom

## November 2022

November 2, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
November 7, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
November 10, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
November 16, 2022	6:00 - 7:00 pm	Education Training & Information (ETI) Committee	Via Zoom
November 23, 2022	6:00 - 7:00 pm	Executive / Finance Committee - Budget Meeting	Via Zoom
November 18-20, 2022		ASCCA Team Weekend	Sacramento, CA

# ASCCA Meetings Calendar 2022

*(All meeting dates are tentative and subject to change)*

## December 2022

December 5, 2022	6:00 - 7:00 pm	Connected Cars Committee	Via Zoom
December 7, 2022	6:00 - 7:00 pm	Revenue & Benefits Committee	Via Zoom
December 8, 2022	6:00 - 7:00 pm	Membership Committee	Via Zoom
December 15, 2022	2:00 - 3:00 pm	Government Affairs Committee	Via Zoom
December 21, 2022	6:00 - 7:00 pm	Education Training & Information (ETI) Committee	Via Zoom
December 22, 2022	6:00 - 7:00 pm	Chapter Reps Committee	Via Zoom
December 28, 2022	6:00 - 7:00 pm	Executive / Finance Committee	Via Zoom



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## 2022 State Board of Directors

### President

Carolyn Coquillet – Chapter 21  
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Term Expires: 12/31/2022

### Vice President

Lee Chesnin – Chapter 12  
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### Chapter Reps. Committee Chair

David Bauld – Chapter 14  
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### Treasurer

John Villa – Chapter State  
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### Secretary

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### Immediate Past President

Rory Balmer – Chapter 14  
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**Board Director**

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Term Expires: 12/31/2022

**Board Director**

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**Board Director**

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Term Expires: 12/31/2022



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## Chapter Representatives

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**Pitari, Rob**

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### **Bylaws, Policies & Procedures**

*Email Group Contact Information:* [ASC-Bylaws-policy@googlegroups.com](mailto:ASC-Bylaws-policy@googlegroups.com)

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### **Connected Cars**

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## **Government Affairs**

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<p><b>Angi Roberts</b>  <i>Treasurer</i>  The Association Office  950 S. Bascon Avenue #1113  San Jose, CA 95128  Tel: (408) 266-9658  <a href="mailto:asca@assoc-office.com">asca@assoc-office.com</a></p> <p><i>Trustee since: 3/2019</i>  <i>Term Exp: 10/2021</i></p>	<p><b>Dara Bakhshandeh</b>  C&amp;D Autocare  7167 University Avenue  La Mesa, CA 91942  Tel: (619) 466-9100  <a href="mailto:dara@cdautocare.com">dara@cdautocare.com</a></p> <p><i>Trustee Since: 05/2018</i>  <i>Term Exp: 10/2021</i></p>	<p><b>Stuart Terry</b>  Stuart Terry Auto Repair  4858 El Cajon Boulevard  San Diego, CA 92115  Tel: (619) 287-9626  Fax: (619) 287-6158  <a href="mailto:stuartterry@sbcglobal.net">stuartterry@sbcglobal.net</a></p> <p><i>Trustee Since: 10/2011</i>  <i>Term Exp: 10/2022</i></p>
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<p><b>Rory Balmer</b>  Twin Peaks Auto Service  26100 CA-189  Twin Peaks, CA 92391  Tel: (909) 337-0082  <a href="mailto:roryasca14@gmail.com">roryasca14@gmail.com</a></p> <p><i>Trustee Since: 12/2020</i>  <i>Term Exp: 10/2024</i></p>	<p><b>Wendy Lucko</b>  Pasadena City College  1570 East Colorado Blvd  Pasadena, CA 91106  Tel: (626) 585-7245  <a href="mailto:wllucko@pasadena.edu">wllucko@pasadena.edu</a></p> <p><i>Trustee Since: 12/2020</i>  <i>Term Exp: 10/2024</i></p>	



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Individual Donor (in CA)

Who has possession of the vehicle?

ASCEF Donation Center

Make sure you have your original Title and the appropriate Bill of Sale form (*Form 262\** for vehicles less than 10 years old that require odometer reading OR *Form 135\*\** for vehicles over 10 years old and do not require an odometer reading) filled out and ready to turn over. The vendor should also have Form 262 if needed.

Please provide our Vehicle Donor Support Team with contact info for the donation center to coordinate the pick-up. The donor should provide you with the original Title and complete the appropriate Bill of Sale form (*Form 262* for vehicles less than 10 years old that require odometer reading OR *Form 135* for vehicles over 10 years old and do not require an odometer reading) to the Donation Center to turn over.

Make sure the donor removes all personal belongings from the vehicle. Present the keys, Title and \*Bill of Sale to the tow truck driver.

Vehicle donations are tax-deductible. An initial donation receipt is provided at the time of the pick-up. Whether the vehicle sells for \$500 or less, more than \$500 or over \$5000, donors are provided with all necessary tax documents.



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# AGENDA

## ASCCA GOVERNMENT AFFAIRS COMMITTEE

*Mission: Increased Credibility and Influence in Government and Regulatory Affairs.*

January 29, 2022 | 8:15 – 9:15 am (SHARP)

Via Zoom: <https://us06web.zoom.us/j/88647975311>

Meeting ID: 886 4797 5311

- |  |                                 |
|--|---------------------------------|
| I. Call to Order   | D. Kusa                         |
| II. Roll Call / Attendance Record – <i>encl.</i>                   | Staff                           |
| III. Minutes Approval  | D. Kusa                         |
| a. November 20, 2021 Meeting Minutes – <i>encl.</i>                |                                 |
| IV. NASTF & Society of Automotive Engineers (SAE) Committee Update | C. Johnson/R. Morrell/D. Seyfer |
| V. BAG Meeting & Workshop: January 27                              | J. Molodanof / D. Kusa          |
| VI. Legislative Update & Action Sheet – <i>encl.</i>               | J. Molodanof                    |
| VII. New Business  | D. Kusa                         |
| VIII. Old Business   | D. Kusa                         |
| a. ASCCA Virtual Legislative Week April 25-29                      |                                 |
| IX. Adjournment  | D. Kusa                         |

Government Affairs Committee  
2021 Attendance Record

Member Name	1/30	2/18	3/18	4/29	5/20	6/26	7/14	8/19	9/11	10/28	11/20	
1. Dave Kusa (Chair)	P	P	P	P	P	P	P	P	P	P	P	
2. James Justus (V. Chair)	P	E	P	P	P	P	P	P	P	P	P	
3. Rory Balmer	P	P	P	P	P	P	P	P	P	P	P	
4. Carolyn Coquillet	P	P	P	E	E	P	P	E	P	A	P	
5. Glenn Davis	P	A	P	P	P	A	P	P	P	P	A	
6. John Eppstein	P	A	P	P	P	P	P	P	P	A	E	
7. David Fischer	A	A	A	A	A	A	A	A	P	A	A	
8. Craig Johnson	P	A	A	A	P	P	A	A	A	A	E	
9. Rocky Khamenian	A	P	P	P	P	A	P	P	P	A	P	
10. Dennis Montalbano	P	A	A	A	P	A	P	A	P	A	P	
11. Rob Morrell	E	P	A	A	P	P	P	P	P	A	P	
12. Gene Morrill	A	A	A	P	P	A	A	P	P	P	P	
13. Allen Pennebaker	A	A	A	A	A	A	A	A	A	A	A	
14. Donny Seyfer	A	A	A	A	A	A	A	A	A	A	A	
15. Steve Vanlandingham	A	A	P	P	P	P	P	A	A	A	P	
16. John Villa	P	A	A	P	P	A	P	A	A	A	P	
<b>Advisors</b>												
Rachelle Golden						P	P	P	A	A	A	
George Hritz	P	P	P	P	P	P	A	A	A	A	P	
Larry Moore	P	A	P	P	P	A	P	P	P	P	A	
Phil Fournier	A	A	A	A	A	A	A	A	A	A	A	
Jim Silverman	P	A	A	A	A	P	A	A	P	P	P	
<b>Guest</b>												
Joseph Appler			P									

P = Present    A = Absent    E = Excused Absence



Government Affairs Committee  
2022 Attendance Record

Member Name	1/29											
1. Dave Kusa (Chair)												
2. James Justus (V. Chair)												
3. Carolyn Coquillette												
4. Lee Chesnin												
5. Glenn Davis												
6. John Eppstein												
7. David Fischer												
8. Craig Johnson												
9. Rocky Khamenian												
10. Dennis Montalbano												
11. Rob Morrell												
12. Gene Morrill												
13. Allen Pennebaker												
14. Donny Seyfer												
15. Steve Vanlandingham												
16. John Villa												
<b>Advisors</b>												
Rachelle Golden												
George Hritz												
Larry Moore												
Phil Fournier												
Jim Silverman												
<b>Guest</b>												
Joseph Appler												

P = Present    A = Absent    E = Excused Absence



*Automotive Service Councils of California*  
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## Automotive Service Councils of California

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# MINUTES

## ASCCA GOVERNMENT AFFAIRS COMMITTEE

*Mission: Increased Credibility and Influence in Government and Regulatory Affairs.*

November 20, 2021 | 8:15 – 9:15am

Holiday Inn Sacramento, Downtown Arena  
300 J Street, Sacramento, CA 95814

### I. Call to Order

D. Kusa call to order at 8:32 am.

### II. Roll Call / Attendance Record

Present: Dave Kusa (Chair), James Justus (V. Chair), Rory Balmer, Carolyn Coquillette, Rocky Khamenian, Dennis Montalbano, Rob Morrell, Gene Morrill, Steve Vanlandingham, John Villa, Advisors: George Hritz, Jim Silverman

Absent: Glenn Davis, David Fischer, Excused: John Eppstein, Craig Johnson, Allen Pennebaker, Donny Seyfer, Advisors: Rachelle Golden, Larry Moore, Phil Fournier

Guests: Gilber Rios, Estaban Gonzalez, Timothy Chakarian, Johanna Reichert, Grant Takikawa, Stuart Terry, Andrei Obolenskiy, Ani Papirian, Garbis Papirian, Rob Faulkenberry, Greg Hwang, Jess Elshere, David Bauld, Dan Biggs, Ryan Burton, Shannon Devery, Angi Roberts, Wendy Lucko, Zarkis Martirosian, Lee Chesnin, Daniel Costa

### III. Minutes: September 11 & October 28, 2021 Meetings

The minutes of the September 11 & October 28, 2021 meetings were approved, as submitted.

### IV. NASTF & Society of Automotive Engineers (SAE) Committee Update

D. Kusa provided an overview of NASTF and clarified the licensing fee / credentialing.

### V. Legislative Update & Action Sheet

J. Molodanof sought input from the Committee about the draft legislation regarding catalytic converters and provided an overview of the intent of the legislation being developed.

J. Molodanof reported that legislation addressing vehicle storage fees, such as AB 294 of 2021, which ASCCA opposed, will be introduced. The bill language requires that your storage rates must be reasonable, which is based on your shop's location. The second portion would create a new board under the Department of Consumer Affairs (DCA) to monitor towing and storage.

### VI. New Business

R. Khamenian reported that December 15 there will be a presentation by BAR with Q&A done via zoom.

### VII. Old Business

There was no old business to discuss.

### VIII. Adjournment

The meeting adjourned at 9:23 am.

## ASCCA GOVERNMENT AFFAIRS COMMITTEE 2019

Mission: Increased Credibility and influence in Government and Regulatory Affairs

### ACTION SHEET

1/21/2022

1. Legislative Bills Update -Jack M.
2. Monitor State Budget-Jack
3. BAR Advisory Group Committee-Dave, Jack, Gloria
4. BAR Educational Committee-Craig J., Jack M., Phil F., Gloria
5. Oil Change and Minor Services Regulations (vetoed SB 778 & AB 873)
6. California Vehicle Inspection System (Cal-VISTA)-Update
7. BAR Complaint Allegations, Trends, & Unlicensed Enforcement Activity
8. Automotive Fuels & Petroleum Products-Food-Ag (CDFA) Division of Measurements
9. Small Business Committee-John V., Dennis M., James J., Stuart T.
10. Tele-matics
11. Aftermarket industry's access to service notices via telematics. – Rob Morrell
12. National Automotive issues-R2Repair
13. ASCCA Advocacy Fund
14. PZEV Vehicles/Warranties/DAD Machines/CAP
15. Requesting BAR to Redefine Sublet Services
16. BAR Sunset Review

#### CURRENT BAR REGULATIONS IN PROCESS

1. BAR-97 Specifications
2. Brake and Lamp Handbooks
3. STAR Program Clean-Up
4. Bureau-Certified Institutions and Instructors
5. Licensing Application Updates

#### 2022 EVENT DATES

Jan 29	ASCCA Government Affairs Committee Meeting   Sacramento, CA
Feb 17	ASCCA Government Affairs Committee Conference Call
March 17	ASCCA Government Affairs Committee Conference Call
April 21	ASCCA Government Affairs Committee Conference Call
April 25-29	ASCCA Virtual Legislative Fly-in Week (Tentative)
May 19	ASCCA Government Affairs Committee Conference Call
June 24	Aftermarket Industry Summit   San Diego, CA
June 25	ASCCA Government Affairs Committee Meeting   San Diego, CA
July 21	ASCCA Government Affairs Committee Conference Call
Aug 18	ASCCA Government Affairs Committee Conference Call
Sep 15	ASCCA Government Affairs Committee Conference Call
Oct 20	ASCCA Government Affairs Committee Conference Call
Nov 19	ASCCA Government Affairs Committee Meeting   Sacramento, CA
Dec 15	ASCCA Government Affairs Committee Conference Call



## AGENDA

### ASCCA MEMBERSHIP COMMITTEE

Saturday, January 29, 2022 | 9:30 am – 10:30 am

Zoom Meeting ID: 886 4797 5311

<https://us06web.zoom.us/j/88647975311>

*Committee goal: Net 10% gain in new members in 2021*

<u>Agenda Item</u>	<u>Presenter</u>
I. Call to order	A. Roberts
II. Roll call	A. Mullinax
III. Approval of Minutes – November 20, 2021	
IV. Consent items - Membership Reports	A. Mullinax
a) Membership Trends Report Update – <i>encl.</i>	
b) Cancellation Report & Pie Chart – <i>encl.</i>	
c) Change in Membership Report – <i>encl.</i>	
d) 2022 Renewal Status / Early Bird Savings	
VI. Discussion Items	A. Roberts
a) Launch of ASCCA Membership Portal	
b) Review of New Member Onboarding Program – <i>encl.</i>	
c) Committee Goals and Activities for 2022	
d) Roundtable	
VII. Adjourn to next meeting of February 10, 2022 at 6pm	A. Roberts

**2021 Meeting Attendance**

Member	January TW	February	March	April	May	June	June TW	July	August	Sept TW	October	Nov TW	December
Lee Chesnin (Chair)	X	X	X	X	x	x	x		x	x	X	X	
Stephanie Pitari (Vice Chair)	X	X	X	X	E	x	x		E	A	A	A	
Jim Silverman	X	E											
Shannon Devery (DFG)	X	E	X	X	E	x	x		x	x	x	X	
Rocky Khamenian	E	X	X	A	A	x	E		x	x	x	X	
Angi Roberts	X	X	X	X	x	x	x		x	x	x	X	
Rob Pitari	X	E	X	E									
John Camara	X	A	A	A	A	x	E		A	E	A	A	
John Eppstein	X	X	X	X	x	x	x		x	x	x	X	
Rory Balmer - President	X	X	x	X	x	x	x		x	x	x	X	
Carolyn Coquillette - Vice President	X	X	E	E	x	A	x		x	x	x	X	
Jimmy Lea	X	A	X	X	x	A	E		x	A	x	A	
Daniel Costa	X	X	X	X	x	x	x		E	E	x	E	
Guests:													
Davie Bauld					x				x				

x= In Attendance

a = Absent

e=excused



## MINUTES

### ASCCA MEMBERSHIP COMMITTEE

Saturday, November 20, 2021 | 9:30 am – 10:30 am  
Via Zoom

*Committee goal: Net 10% gain in new members in 2021*

I. Call to Order

L. Chesnin called the meeting to order at 9:40 am.

II. Roll Call

Present: Lee Chesnin, Shannon Devery, Rocky Khamenian, Angi Roberts, John Eppstein, Rory Balmer, Carolyn Coquillet

Not Present: Stephanie Pitari, John Camara, Jimmy Lea, Daniel Costa

Staff: Anne Mullinax

III. Approval of Minutes – October 14, 2021

The Minutes of the October 14, 2021 were approved as presented.

IV. Action Items Review

The Committee reviewed and updated the Action Items list. Several items are pending the upgrade to the new membership database that was nearing completion.

V. Consent Items – Membership Reports

The Committee reviewed and discussed the reports. Comments made included: (a) multiple contacts may be necessary with past due members and (b) important for Chapters to stay connected with their members. Overall, the discussion focused on continuing to show value at the Chapter and State levels.

VI. Discussion Items

a. New Shop Owner Flyer – The Committee reviewed and approved the flyer created by A. Roberts. The flyer will be added to a shared Google folder accessible by Chapter leaders.

b. Updated on Association Management Software Implementation – G. Peterson updated the Committee on the implementation of the new database and membership portal. Staff is in the final stretch of the project and is aiming for launch before the end of 2021. Invoicing for 2022 will be going out shortly in order to provide members the opportunity to take advantage of the “early bird” discount. As part of this upgrade, new members will be able to join through the website rather than needing to print and then email/fax/mail an application. G. Peterson commented that instructions will be emailed to members on how to create their logins for the new portal.

c. Upcoming Events – A. Mullinax reminded the Committee of the upcoming PAVE Training event as well as the January Team Weekend in Sacramento.

d. Roundtable – The Committee discussed the potential introductory (free) member that incoming President Coquillette and expressed their support. If approved by the Board at a future date, members of the Committee expressed their interest in looking at ways to convert a free member into a paying one.

As he will be stepping down as Chair due to being Vice President of ASCCA in 2022, L. Chesnin thanked his fellow Committee members for their time and efforts.

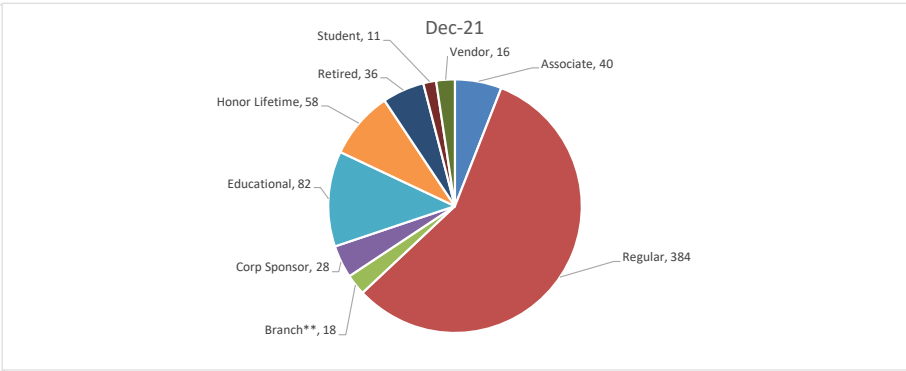
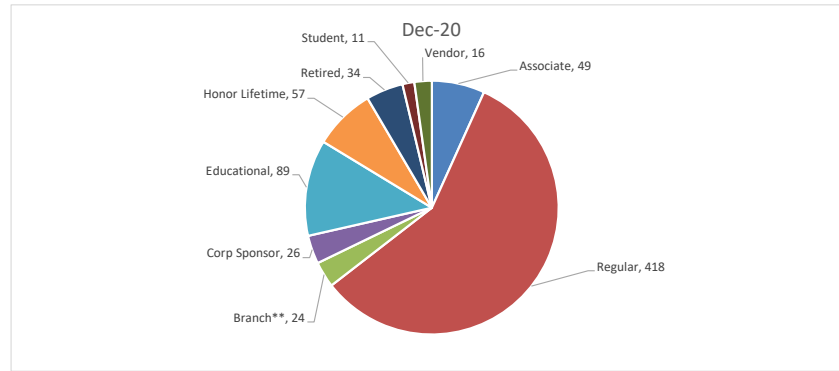
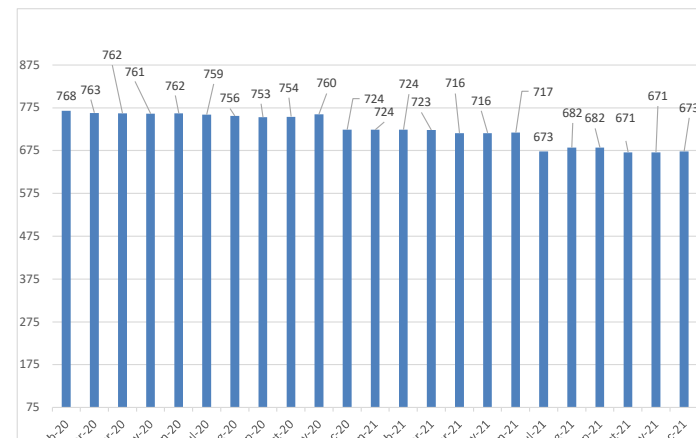
VII. Adjourned at 10:25 am.

### ASCCA Membership Trends

Chapter		2/6/20	3/5/20	4/2/20	5/7/20	6/5/20	7/8/20	8/7/20	9/2/20	10/1/20	11/9/20	12/4/20	1/11/21	2/4/21	3/4/21	4/5/21	5/6/21	6/4/21	7/6/21	8/6/21	9/2/21	10/8/21	11/15/21	12/2/21	YTD New Members (since 1/1/2021)	YTD Suspended Members (since 1/1/2021)	YTD Cancelled Members (since 1/1/2021)	Chapt. Rep
05	Foothill	94	94	92	92	92	92	91	91	92	95	94	94	93	93	91	91	89	88	88	88	89	89	91	5	1	7	Tim Chakarian
06	San Joaquin Valley	8	8	8	8	8	8	8	8	8	8	0	0	0	0	0	0	0	0	0	0	0	0	0				Vacant
12	W. Los Angeles	29	28	28	28	28	27	27	27	27	27	24	24	26	26	26	26	26	24	25	25	25	25	25	1		1	Lee Chesnin
14	Inland Empire	33	33	34	34	34	34	34	34	34	34	33	33	33	33	33	33	33	28	28	27	27	27	27			6	Rory Balmer
16	East Bay	26	25	25	25	25	25	25	24	24	24	22	22	22	22	22	21	21	20	21	21	19	19	19			4	Stephen Small
18	Long Beach	10	10	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	7	7	7			2	Dennis Schoedl
1940	LAX/South Bay	21	21	21	21	21	21	21	21	21	21	19	19	19	19	19	19	19	15	15	15	14	14	14			5	Tony Callas
20	Mt. Diablo	43	42	42	42	42	42	42	42	42	42	37	38	38	38	39	39	39	39	39	40	38	38	38	1		2	-
21	San Francisco	13	13	13	13	13	13	13	13	13	14	13	13	13	13	11	11	12	11	11	11	11	11	11			2	Paul Grecht
23	Peninsula	10	10	10	10	10	10	10	10	10	10	10	10	10	10	9	9	9	8	8	8	8	8	8			2	Eric Sevim
24	San Diego	72	70	69	70	70	70	70	70	69	70	69	70	68	67	68	69	70	65	67	67	66	65	65	4		8	Steve Vanlandingham
25	Fresno	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	17	17	17	16	16	16				-
26	Tulare/ Visalia	15	15	15	15	15	15	15	15	15	15	14	14	14	14	13	13	13	13	13	13	13	13	13			1	John Camara
28	Santa Rosa	28	28	28	27	27	27	27	27	27	26	26	26	26	26	22	22	23	21	21	21	21	21	21	1		6	Bob Toepp
42	San Jose	41	41	41	41	41	40	39	39	39	39	35	33	33	33	34	34	34	31	32	32	31	31	31	1		4	Dave Kusa
48	N. Orange County	49	48	48	48	48	48	48	48	48	48	43	43	43	43	43	41	41	33	34	34	33	34	34			7	Travis Guy
99	Redding	26	26	28	28	28	29	29	29	29	30	29	29	28	28	28	28	28	23	24	24	23	23	23	2		7	Rob Pitari
None	ASCCA Only	232	233	233	232	233	231	230	228	229	230	229	229	231	231	231	233	233	228	230	230	230	230	230	3		9	
		Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21				
Total		768	763	762	761	762	759	756	753	754	760	724	724	724	723	716	716	717	673	682	682	671	671	673	18	1	73	
Change		(1)	(5)	(1)	(1)	1	(3)	(3)	(3)	1	6	(36)	0	0	(1)	(7)	0	1	(44)	9	0	(11)	(1)	2				

	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
Associate	58	58	58	59	59	59	57	57	58	58	49	48	47	47	46	47	45	39	41	40	40	40	40
Regular	444	443	442	441	441	440	440	438	438	444	418	418	417	418	414	413	414	382	387	389	383	382	384
Branch**	29	26	26	26	26	26	25	25	25	25	24	24	24	24	25	25	25	22	23	23	18	18	18
Corp Sponsor	31	30	30	28	29	27	27	26	26	26	26	26	27	26	26	26	27	27	27	27	27	27	28
Educational	88	88	88	89	89	89	89	89	89	89	89	89	90	89	86	86	86	83	83	82	82	82	82
Honor Lifetime	57	57	57	57	57	57	57	57	57	57	57	58	58	58	58	58	58	58	58	58	58	58	58
Retired	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	35	35	36	36	36	36	36
Student	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11
Vendor	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16
Total	768	763	762	761	762	759	756	753	754	760	724	724	724	723	716	716	717	673	682	682	671	670	673

TOTAL MEMBERSHIP CHANGE TO DATE 2021: -55





**ASCCA Cancellations Report**  
**Report Date: 12/2/21**

**YEAR TO DATE CANCELATIONS & NEW MEMBERS**

	YTD	11/15/2021
New members	18	2
Canceled members	73	0
<b>Net change</b>	<b>-55</b>	

2021	Cancelations	New Members	Dues Amount	Net Change in Members	Estimated Net Change
Regular	49	11	\$ 450.00	-38	\$ (17,100.00)
Associate	10	2	\$ 545.00	-8	\$ (4,360.00)
Branch	5	1	\$ 300.00	-4	\$ (1,200.00)
Educator	6	1	\$ 25.00	-5	\$ (125.00)
CAT			-		-
Other	3	3	-	0	\$ 7,500.00
<b>Total</b>	<b>73</b>	<b>18</b>	<b>-</b>	<b>-55</b>	<b>\$ (15,285.00)</b>

2020	Cancelations	New Members	Dues Amount	Net Change in Members	Estimated Net Change
Regular	42	13	\$ 400.00	-29	\$ (11,600.00)
Associate	14	2	\$ 495.00	-12	\$ (5,940.00)
Branch	5		\$ 250.00	-5	\$ (1,250.00)
Educator		1	\$ 25.00	1	\$ 25.00
CAT			-		-
Other	1	1	-		\$ 1,000.00
<b>Total</b>	<b>62</b>	<b>17</b>	<b>-</b>	<b>-45</b>	<b>\$ (17,765.00)</b>

**NEW MEMBERS SINCE 11/15/21**

Seiko's Auto Service Inc., RM, Chapter 5  
 Superior Auto Clinic Inc., RM, Chapter 5

**REASONS FOR CANCELING**

	-	Not sufficient value
<b>11</b>	-	Declined Renewal
<b>53</b>	-	Nonpayment of Dues
<b>1</b>	-	Out of Business
<b>3</b>	-	Financial concerns
<b>6</b>	-	Retired/Sold Shop
	-	Previous contact left
	-	Health/Life Issues

**DROPPED MEMBERS YEAR TO DATE**

Member	Chapter	Mem Type	Joined	Cancelled	Reason
Campbell's Automotive	5	RM	1997	4-Oct	Non-payment
Community Smog Center	5	RM	2019	22-Apr	Declined Renewal
Dorman Products Inc.	5	AM	2014	8-Mar	Declined Renewal
Frank Joel	5	AM	2016	21-May	Retired/Sold
Huntington Tire & Auto Center	5	RM	2008	23-Jun	Non-payment
Leon's Transmission Service, Inc.	5	RM	1991	10-May	Non-payment
Performance Automotive	5	RM	2013	29-Jan	Declined Renewal
Toyo Star Auto Repair, Inc.	5	RM	2003	5-Apr	Financial concerns/hardship

**ASCCA Cancellations Report**

**Report Date: 12/2/21**

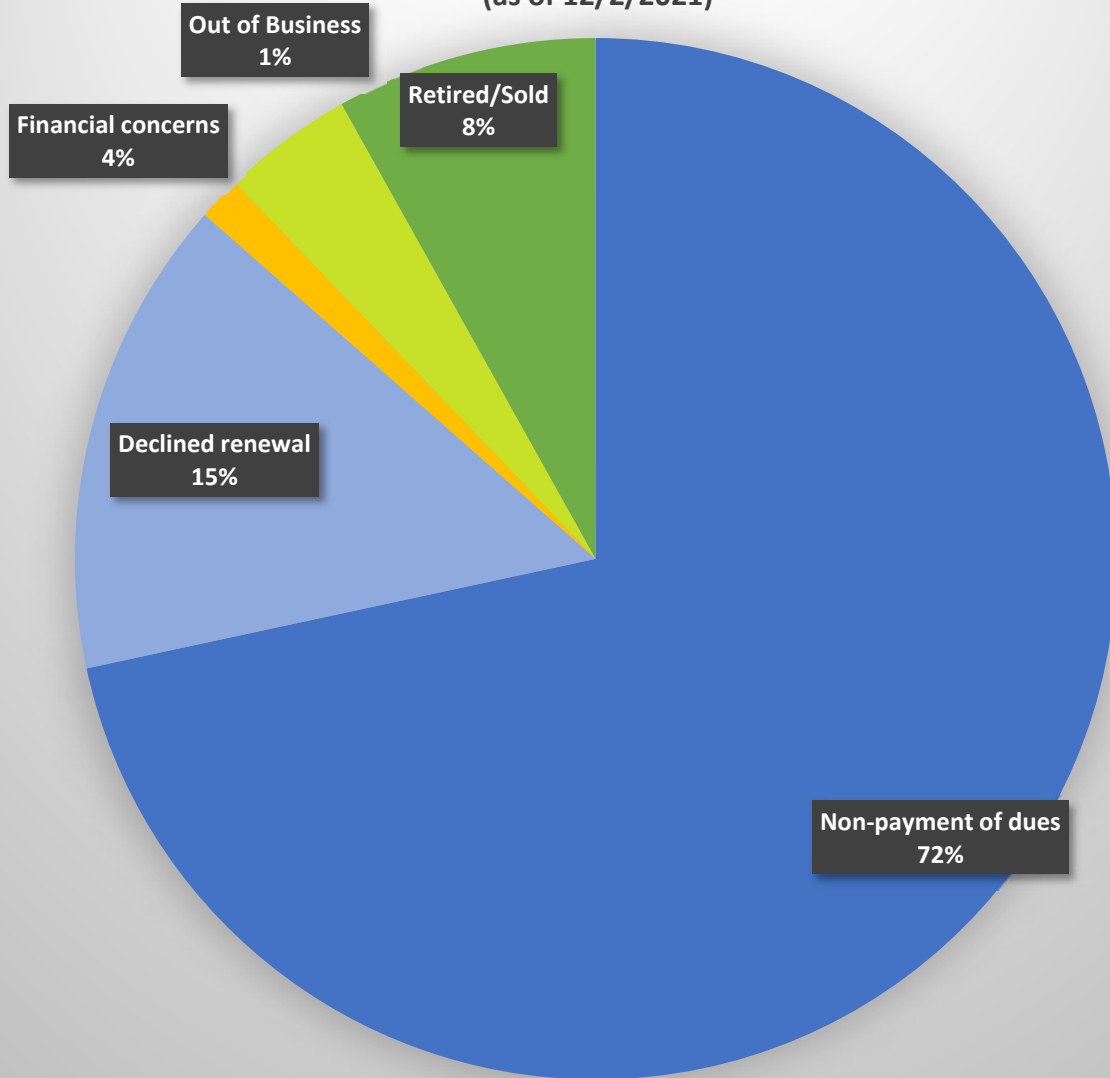
Eli's Independent BMW Autobody	12	RM	1994	23-Jun	Non-payment
Center for Employment Training	14	EM	2019	23-Jun	Non-payment
Ed Martin Garage, Inc.	14	RM	1976	23-Jun	Non-payment
GP Rice Insurance Services, Inc.	14	AM	1999	24-Aug	Declined Renewal
Jim's Auto Service	14	RM	2012	23-Jun	Non-payment
Star Auto Parts	14	AM	1999	23-Jun	Non-payment
Weingarten & Hough	14	AM	2017	23-Jun	Non-payment
Argonaut Garage	16	RM	2012	8-Apr	Declined Renewal
General Auto & Truck Parts	16	AM	2015	23-Jun	Non-payment
SC Fuels (16)	16	BR	2017	4-Oct	Non-payment
Wright's Automotive Service	16	RM	2015	20-Sep	Out of Business
Long Beach Autohaus	18	RM	1987	4-Oct	Non-payment
Modern Specialists, Inc.	18	RM	1969	4-Oct	Non-payment
G & M Oil Company, DBA Hillside Auto	1940	RM	1994	23-Jun	Non-payment
Miraleste Automotive	1940	RM	2013	23-Jun	Non-payment
Osborn's Automotive	1940	RM	1994	23-Jun	Non-payment
Rick's Automotive Service Inc.	1940	RM	2015	8-Oct	Declined Renewal
South Bay Car Care	1940	RM	2015	23-Jun	Non-payment
Autotron Service Center	20	RM	1985	4-Oct	Non-payment
SC Fuels (20)	20	BR	2017	4-Oct	Non-payment
Chase Auto Service	21	RM	2008	23-Jun	Non-payment
Hans Art Automotive	21	RM	1985	2-Apr	Non-payment
Market Garage, Inc.	21	RM	1988	22-Mar	Financial concerns/hardship
Holland Service	23	RM	1998	15-Mar	Declined Renewal
Spiteri's Auto Service	23	RM	1994	23-Jun	Non-payment
1-800 Radiator (SNZ Radiator)	24	AM	2014	19-Jan	Declined Renewal
Allied Gardens Automotive, Inc.	24	RM	2011	23-Jun	Non-payment
Bonita Valley Auto Care	24	RM	2019	23-Jun	Non-payment
Boulevard Automotive	24	RM	2001	23-Jun	Non-payment
Family Auto Service	24	RM	1991	12-Nov	Retired/Sold
O'Reilly Auto Parts, Inc.	24	AM	2013	23-Jun	Non-payment
SC Fuels (24)	24	AM	2017	4-Oct	Non-payment
Summit Transmissions	24	RM	2008	26-Jan	Retired/Sold
Valley Truck & Auto	24	RM	1996	23-Jun	Non-payment

**ASCCA Cancellations Report**

**Report Date: 12/2/21**

Tulare Automotive Repair	26	RM	2019	2-Apr	Non-payment
Bill's Automotive Inc.	28	RM	2012	10-Mar	Retired/Sold
Leonardi Automotive	28	RM	2014	23-Jun	Non-payment
Maria Carillo High School (Maddie Doyle)	28	EM	2019	25-Mar	Declined Renewal
Maria Carillo High School (Sean Fleming)	28	EM	2019	25-Mar	Declined Renewal
Maria Carillo High School (Trish Terrell)	28	EM	2019	25-Mar	Declined Renewal
Peet's Foreign Car Garage	28	RM	1989	23-Jun	Non-payment
Fred's Foreign and Domestic Car Repair	42	RM	2019	23-Jun	Non-payment
Freeman Frame & Alignment	42	RM	1995	11-Jan	Retired/Sold
SC Fuels (42)	42	BR	2017	4-Oct	Non-payment
The Car Doctor	42	RM	2010	23-Jun	Non-payment
Alexis Oil Company	48	AM	2011	23-Jun	Non-payment
Exclusive Truck & Auto	48	RM	2002	4-Oct	Non-payment
High Point Distributing (48)	48	BR	7/1/1905	23-Jun	Non-payment
Jax Auto Repair	48	RM	1993	23-Jun	Non-payment
Mark Christopher Auto Center (48)	48	BR	2010	23-Jun	Non-payment
Santa Ana College	48	EM	2017	23-Jun	Non-payment
Star Auto Service	48	RM	2018	23-Jun	Non-payment
Angelo's Classic Import Service, Inc.	99	RM	1996	14-Jun	Retired/Sold
Autoworks	99	RM	2017	23-Jun	Non-payment
Chico Car Care	99	RM	2018	23-Jun	Non-payment
J & H Performance	99	RM	2006	4-Oct	Non-payment
Jefferson State Diesel	99	RM	2018	23-Jun	Non-payment
Paul Stower Automotive	99	RM	2020	23-Jun	Non-payment
Steve's Auto & Ag Repair	99	RM	1985	8-Mar	Financial concerns/hardship
ALL DATA	Sta	ACS	2019	23-Jun	Non-payment
Aram's Auto Repair Center	Sta	RM	1997	23-Jun	Non-payment
Brea Auto Body, Inc.	Sta	RM	2002	23-Jun	Non-payment
Broadly	Sta	ACS	2017	4-Oct	Non-payment
Magic Auto Center	Sta	RM	2020	23-Jun	Non-payment
Master Automotive Training	Sta	AM	2019	4-Oct	Non-payment
Mt. San Jacinto College	Sta	EM	1995	23-Jun	Non-payment
Pride Automotive Body	Sta	RM	1985	23-Jun	Non-payment
Upswell	Sta	ACS	2011	25-Feb	Declined Renewal

## Reasons for Canceling (as of 12/2/2021)



**Change in Membership  
All Types**

**2015 – 2021**  
(as of 12/2/21)

	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>
New	30	20	56	74	55	17	18
Canceled	66	81	76	51	63	62	73
<b>Net</b>	<b>-36</b>	<b>-61</b>	<b>-20</b>	<b>23</b>	<b>-8</b>	<b>-45</b>	<b>-55</b>

<b>2021</b>	<b>Cancelations</b>	<b>New Members</b>	<b>Net Change in Members</b>
Regular	49	11	-38
Associate	10	2	-8
Branch	5	1	-4
Educator	6	1	-5
CAT			
Other	3	3	0
<b>Total</b>	<b>72</b>	<b>16</b>	<b>-55</b>

<b>2020</b>	<b>Cancelations</b>	<b>New Members</b>	<b>Net Change in Members</b>
Regular	42	13	-30
Associate	14	2	-11
Branch	5		-5
Educator		1	1
CAT			
Other	1	1	0
<b>Total</b>	<b>62</b>	<b>17</b>	<b>-45</b>

<b>2019</b>	<b>Cancelations</b>	<b>New Members</b>	<b>Net Change in Members</b>
Regular	53	21	-32
Associate	3	4	1
Branch	1	1	-
Educator	3	5	2
CAT	-	23	21

Other	3	1	-2
Total	63	55	-8

## Onboarding of New ASCCA Members (Regular Members only)

When a new candidate signs up for membership, the State Association does the following:

- Emails Chapter Leadership and administrator (if one exists) with information of new members and requests a Mentor for the new member.
- Orders ASCCA sign for any member not provided a sign by the Chapter (Chapters 1940, 20, 24, 48, and sometimes 5 often provide signs to their members).
- Adds to the “Find a Shop” feature on the ASCCA website.
- Sends a “welcome” email to the new member.
- Adds new member to TeamTalk.
- Welcomes the new member in an email on TeamTalk.
- Mails, via USPS, a new member packet with Membership Card (possibly pump up the new member packet).
- Provides a short introduction to the ASCCA website, especially the Home Page.

### Two weeks following the original sign-up

The State Association sends the new member the following email:

Good Afternoon,

Thank you again for joining ASCCA. We would like to get to know you a little better. Please take a moment to fill out this new member survey so that we can help make the most out of your ASCCA membership experience. You can complete this online survey using the link:

<http://survey.constantcontact.com/survey/a07ecx1tx3jiqbhd1sv/start>

Some of the questions are specific to certain types of shops, so you can answer the parts that apply to you.

We look forward to hearing from you!

**\*\* Questions asked in the survey should be reviewed and perhaps updated so that we are gathering additional information about the new member (such as outside interests or specific reasons for joining ASCCA**

### Two months following sign-up

Invite the new member to an Orientation Webinar –

- Could be recorded with live Q&A afterwards
- Held quarterly
- Go over *Advantage* and other benefits

- Email a copy of the *Advantage* afterwards (the new member has previously received a copy of the *Advantage* as part of the “Welcome” packet)

AND/OR

Have a representative of the Membership Committee send an email to the new member with content related to their special interests derived from the completed survey.

Three months following sign-up

Send an email, pairing the new member with a mentor from their Chapter or introduce them to another member with similar interests. (This would need to be coordinated with the Chapter so as not to interfere with any mentor they have already set.)

Four months following sign-up

Send an email focusing on State Association activities such as Team Weekends, TeamTalk, State Committees and initiatives, endorsed vendor list, and a copy of the most recent *Advantage*.

Five months following sign-up

Spotlight one ASCCA member benefit. (This is something that should be included in each communication with the new member.)

Six months following sign-up

The State Association will send out a new member satisfaction survey (utilize KP in drafting the survey). What benefits are being used? What are they getting from ASCCA that is valuable to them? What are they still wanting from the organization? What is the likelihood of renewing their membership?

Seven months following sign-up

Targeted email reviewing their topics of interest as identified from the two-week and six-month surveys. This would be sent by the State Association.

Eight months following sign-up

Send an email that spotlights another member benefit or endorsed vendor (perhaps something/someone new). Invite them to an upcoming state event. Ensure that they are receiving their Chapter newsletter and/or information.

Nine months following sign-up

Send an email that reviews recent topics on TeamTalk, provides legislative update, and pertinent updates from State Committees. Provide a message from the ASCCA President thanking them for their membership and encouraging them to renew.



Ten months following sign-up

Send an email that reviews activities from other Chapters (utilizing the Chapter Rep report from a Team Weekend to create the content). Review online shop locator available through website so that members are aware of being able to refer customers to other trusted shops throughout the state.

Eleven months following sign-up

Member satisfaction survey (utilize KP to draft) – What benefits have they been using? What are they getting from the organization? Have they been able to attend a State event? Are they involved in their Chapters? What is the likelihood of them renewing their membership?

Twelve months following sign-up

Provide a “year in review” message; highlight any accomplishments throughout the previous 12 months. Also point out the activities anticipated for the next 12 months.



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### AGENDA

#### ASCCA Education Training & Information (ETI) Committee

January 29, 2022 | 10:45 – 11:45 AM

Zoom: <https://us06web.zoom.us/j/88647975311>

Meeting ID: 886 4797 5311

Committee's Mission: *Elevate Professionalism Through Increased Focused Education.*

- |  |           |
|--|-----------|
| I. Call to Order   | L. Murray |
| II. Attendance   | Staff     |
| III. Minutes: 11/20/2021 Meeting – <i>encl.</i>                      | L. Murray |
| IV. Educational Conference: September 17, 2022– Ontario, CA          |           |
| a. Speaker Invitation Sent – Deadline February 25                    |           |
| b. Sponsorship Opportunities – Review of 2021 Outline – <i>encl.</i> |           |
| V. Apprenticeship/Mentor Program Development Task Force              | L. Murray |
| VI. New Business   | L. Murray |
| VII. Old Business  | L. Murray |
| VIII. Adjournment  | L. Murray |

## ASCCA ETI Committee 2021 Attendance Record

Name	Position	1/18	1/30	2/15	3/10	4/21	5/19	6/26	7/21	8/18	9/11	10/20	11/20
1. Luke Murray	Committee Chair	P	P	P	E	P	P	P	E	P	P	P	E
2. Jim Silverman	Vice Chair	P	P	P	P	P	P	P	P	P	P	A	P
3. Rory Balmer	President	P	P	P	P	P	P	P	P	A	P	P	P
4. Carolyn Coquillette	Vice President	P	P	P	P	P	P	P	P	A	P	A	p
5. John Eppstein	Member	P	P	P	P	P	P	P	P	P	P	P	P
6. Jaime Gonzalez	Member	A	A	P	P	P	P	A	P	P	A	P	A
7. George Hritz	Member	P	P	P	P	P	E	P	P	A	P	P	P
8. Rocky Khamenian	Member	A	A	A	P	P	P	A	P	P	P	P	P
9. Dave Kusa	Member	E	P	E	P	E	P	P	E	P	P	P	P
10. Jimmy Lea	Member	P	A	P	P	A	P	A	A	A	A	A	A
11. Wendy Lucko	Member	A	P	A	A	A	A	A	A	A	P	A	P
12. Rob Morrell	Member	E	A	A	P	P	P	P	A	A	P	A	P
13. Mark Warren	Member	A	A	P	A	P	P	A	P	A	P	A	A
14. Gilbert Rios	Member	P	P	P	P	A	A	P	P	A	A	A	P

P = Present  
A = Absent  
E = Excused

## ASCCA ETI Committee 2022 Attendance Record

Name	Position	1/29											
1. Luke Murray	Committee Chair												
2. Jim Silverman	Vice Chair												
3. Carolyn Coquillet	President												
4. Lee Chesnin	Vice President												
5. John Eppstein	Member												
6. Jaime Gonzalez	Member												
7. George Hritz	Member												
8. Rocky Khamenian	Member												
9. Dave Kusa	Member												
10. Jimmy Lea	Member												
11. Wendy Lucko	Member												
12. Rob Morrell	Member												
13. Mark Warren	Member												
14. Gilbert Rios	Member												

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### MINUTES

#### ASCCA Education Training & Information (ETI) Committee

November 20, 2021 | 10:45 – 11:45 AM  
Holiday Inn Sacramento, Downtown Arena  
300 J Street, Sacramento, CA 95814

Committee's Mission: *Elevate Professionalism Through Increased Focused Education.*

I. Call to Order

J. Silverman called the meeting to order at 11:02 am.

II. Attendance

Present: Jim Silverman, Rory Balmer, Carolyn Coquillet, John Eppstein, George Hritz, Rocky Khamenian, Dave Kusa, Wendy Lucko, Rob Morrell, Gilbert Rios

Absent: Jaime Gonzalez, Jimmy Lea, Mark Warren Excused: Luke Murray

Guest: David Bauld, Dan Biggs, Ryan Burton, Timothy Chakarian, Lee Chesnin, Daniel Costa, Shannon Devery, Jess Elshere, Estaban Gonzalez, Greg Hwang, Zarkis Martirosian, Andrei Obolenskiy, Ani Papirian, Garbis Papirian, Johanna Reichert, Angi Roberts, Grant Takikawa, Stuart Terry, Tatsunori Tsuchida

III. Minutes: 10/20/2021 Meeting

MOTION It was moved, seconded, and carried to approve the minutes of the October 20, 2021 meeting, as presented.

IV. Educational Conference: September 17, 2022 – Ontario, CA

The Committee reviewed the following:

- Hotel Contract – The hotel contract was reviewed and approved. It will go to the Board of Directors for final approval.
- It was reported that the speaker invitations sent with a deadline February 25.
- Budget – The Committee approved the conference budget.
- Attendee Pricing – The attendee pricing model was deferred.
- Sponsorship Opportunities – A copy of the 2021 conference sponsorship opportunities was provided, but discussion was deferred.

V. PAVE Training

J. Silverman reviewed the importance of participating in the PAVE Training event.

VI. Apprenticeship or Mentorship Program Development

There was discussion that the committee is attempting to identify if the program it will develop is an

apprenticeship or mentorship program. The following attendees volunteered to work on a task force to develop the program: T. Chakarian, Grant Takikawa, Gilber Rios, and Estaban Gonzalez.

VII. New Business

Dennis Montalbano shared information about an event that he participated in representing skilled labor and automotive industry was not representatives. Discussion followed about getting more involved in similar events.

VIII. Old Business

There was no old business.

IX. Adjournment

The meeting adjourned at 11:11 am.



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### **ASCCA Virtual Training Event Sponsorship Levels May 14-15, 2021**

#### **Platinum Sponsor** - \$2,500 (only 1 available)

- Banner Logo on ASCCA website, linked to Sponsor landing page on website
- Recognized as **Daily Event Sponsor** w/short intro video before 1 training session each day, for a total of 2 sessions
- Logo on ALL electronic announcements, newsletters etc.
- Personalized Marketing Material for your distribution to promote sponsorship of the event
- Sponsor short video and contact information included in class session intermission
- Session Waiting Room Slide – Opportunity to feature Sponsors.
- Introduce speaker for one session each day, 2 sessions total
- Attendee listing one week prior and post event
- Virtual Happy Hour Sponsor
  - Sponsor to administer the “gamification” during the virtual happy hour (approximately 15 minutes) – game(s) and prizes to be determined and provided by sponsor

#### **Diamond Sponsor** - \$2,000 (limit of 10)

- Banner Logo on ASCCA website, linked to Sponsor landing page on website
- Recognized with short intro video before 1 training session
- Logo on ALL electronic announcements, newsletters etc.
- Personalized Marketing Material for your distribution to promote sponsorship of the event
- Sponsor short video and contact information included in class session intermission
- Session Waiting Room Slide – Opportunity to feature Sponsors.
- Introduce speaker for one session
- Attendee listing one week prior and post event

**Gold Sponsor** - \$1,500 (no limit)

- Logo on event page of the ASCCA website, linked to Sponsor landing page on website
- Logo on ALL electronic announcements, newsletters etc.
- Personalized Marketing Material for your distribution to promote sponsorship of the event
- Attendee listing one week prior and post event

**Silver Sponsor** - \$750 (no limit)

- Logo on event page of the ASCCA website, linked to Sponsor landing page on website
- Personalized Marketing Material for your distribution to promote sponsorship of the event





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### AGENDA

#### ASCCA Chapter Representatives Committee

January 29, 2022 | 1 – 4pm

Zoom Meeting ID:

<https://us06web.zoom.us/j/88647975311>

#### *Committee Mission:*

*To develop relationships between the Chapters and Liaisons |  
Promote ASCCA's Legislative Day | 100% Chapter Participation*

- |      |  |                        |
|------|--|------------------------|
| I.   | Call to Order  | D. Bauld               |
| II.  | Roll Call  | A. Mullinax            |
| III. | Minutes Approval: December 16, 2021  | D. Bauld               |
| IV.  | Updates/Reports  |                        |
|      | a. Armstrong & Associates  | G. Dailey              |
|      | b. ASCEF   | J. Eppstein            |
|      | c. Connected Cars Committee  | D. Dinis / I. Rodell   |
|      | d. ETI Committee   | L. Murray              |
|      | e. Government Affairs Committee  | D. Kusa / J. Molodanof |
|      | f. Membership Committee  | A. Roberts             |
|      | g. Revenue & Benefits Committee  | J. Silverman           |
| V.   | Discussion items   | D. Bauld               |
|      | a. Updated 2022 Calendar – <i>encl.</i>  |                        |
|      | b. Launch of ASCCA Membership Portal   |                        |
|      | c. Review of Chapter Affiliation Agreement – creation of task force – <i>encl.</i> |                        |
|      | d. Launch of 401k program – <i>encl.</i>   |                        |
|      | e. Review of Chapter activities, challenges, etc.                                  |                        |
| VI.  | Adjourn to next meeting on February 24, 2022                                       |                        |

	January TW	February	March	April	May	June TW	July	August	September TW	October	Nov	Dec
<b>Davie Bauld (14), Chair</b>	x	x	x	x	X	x	x	x	X	x	x	x
Tim Chakarian (5) Vice Chair	x	x	E	E	X	x	A	x	X	A	x	x
Lee Chesnin (12)	x	x	x	E	X	x	x	x	X	x	x	x
Stephen Small (16)	x	A	A	A	A	A	A	A	A	A	A	A
Dennis Schoedl (18)	A	A	A	A	A	A	A	A	A	A	A	A
Tony Callas (1940)	x	A	A	x	A	A	A	A	A	A	A	A
Andrei Obolenskiy (20)										x	x	x
Paul Grech (21)	x	A	x	x	A	x	A	A	X	A	x	x
Eric Sevim/Angi Roberts (23)	x	x	x	x	X	x	x	x	X	x	x	x
Steve Vanlandingham/Stuart Terry (24)	x	x	x	x	X	x	x	x	X	x	x	x
Zarkis Martirosian (25)	x	x	A	A	A	A	A	A	X	A	x	x
John Camara (26)	x	x	x	x	X	E	x	x	x	x	A	x
Bob Toepp (28)	x	x	x	x	E	E	x	x	A	x	x	x
Dave Kusa (42)	x	E	x	x	E	x	E	x	X	x	x	E
Tatsu Tsuchida (48)	x	A	A	A	A	x	A	x	X	A	x	x
Rob Pitari (99)	x	x	A	x	X	A	A	A	A	A	A	A
Rory Balmer (President)	x	x	x	x	E	x	x	x	X	x	x	x
Carolyn Coquillette (Vice President)	x	E	x	x	A	x	x	x	X	x	x	x
John Eppstein					E	x	x	x	X	x	x	x
Guests:												
Joseph Appler (5)		x	x	x	x			x				
Kirk Haslam (5)			x					x				
Don Yocum (for Lee)												
Rob Morrell								x				
Mark Warren								x				x

A = Absent

E = Excused



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## MINUTES

### ASCCA Chapter Reps Committee Meeting

December 16, 2021 | 6:00pm

- I. Call to Order  
D. Bauld called the meeting to order at 6:08pm.
  
- II. Roll Call  
**Present:** David Bauld, Tim Chakarian, Lee Chesnin, Andrei Obolsnekiy, Paul Grech, Angi Roberts, Steve Vanlandingham, Zarkis Martirosian, John Camara, Bob Toepp, Tatsu Tsuchida, Rory Balmer, Carolyn Coquillet, John Eppstein  
**Not present:** Stephen Small, Dennis Schoedl, Tony Callas, Dave Kusa, Rob Pitari  
**Guests:** Mark Warren  
**Staff:** Anne Mullinax
  
- III. Discussion Items
  - a. Goals/Strategies for 2022 – The Committee discussed ideas that could be used by all Chapters to increase engagement. T. Chakarian reported that he continued to try to gather cell phone contact information for each Chapter Rep so that quick chats can easily occur. The Committee also discussed the proposed “free” membership that the Board will consider at its January meeting.  
  
The Committee concurred that a deeper conversation about Chapters and the challenges they face should be scheduled for the January 2022 meeting.
  
  - b. Updated Calendar of Chapter Responsibilities – The Committee discussed administrative responsibilities of each Chapter in 2022. A. Mullinax stated that Chapter Affiliation agreements would be needed from each chapter in 2022 and that staff wanted to work more closely with leadership to ensure that billing agreements are submitted in a timely manner. An updated calendar of important dates for 2022 will be included in the January agenda packet.
  
  - c. January 2022 Team Weekend - A. Mullinax reported that the billing agreements for 2022 had been sent to Chapter Leaders. In addition to receiving authorization to bill on behalf of the Chapters, the State office would like to have any updated information about changes to Chapter Leaders. Chapter Leaders should contact the office if there are any questions.

VII. Adjournment

The meeting adjourned at 7:00pm to the meeting of the Committee on Saturday, January 29, 2022 as part of Team Weekend.



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## Important Dates for 2022

Monthly Chapter Reps Committee meeting – 4<sup>th</sup> Thursday of each month at 6pm via Zoom

January 29-30      Team Weekend (Virtual)

April 15      Deadline for submission of signed Chapter Affiliation Agreements

April 25-29      Virtual Legislative Fly-in Week (Sacramento)

June 24-26<sup>h</sup>      Aftermarket Industry Summit/ASCCA Team Weekend (San Diego)

September 9      Chapter Billing Agreements for 2023 sent to Chapter Leadership

September 16-17      ASCCA Education Conference (Ontario)

October 3      Deadline for submission of signed Chapter Billing Agreements for 2023

November 18-20      ASCCA Team Weekend (Sacramento)

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA**  
**Chapter Affiliation Agreement**  
**Revised January 2018**

This Agreement is entered into as of this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_  
Between the Automotive Service Councils of California, a California nonprofit mutual benefit corporation (ASCCA) and undersigned (Chapter) with respect to the following:

A. ASCCA is the preeminent professional trade association of independent repair garage owners in the State of California whose overall purpose is to advance and protect the industry.

B. The Chapter represents ASCCA members primarily in the geographical area described below within the State of California and desires to be chartered by ASCCA as its exclusive Chapter within that geographical area subject to the terms and conditions of this Agreement.

1. **Charter.** ASCCA grants to Chapter the exclusive charter to operate as an ASCCA Chapter in the geographical territory as recommended by the Chapters Representatives Committee and approved by the ASCCA Board of Directors (Attachment A). This grant shall become effective (or continued) as of the date of this Agreement and shall continue until suspended or terminated as provided below.

2. **Name.** ASCCA licenses the use of its name to the Chapter for the purpose of using the ASCCA name in conformance with the terms and conditions of this Agreement, provided Chapter shall adopt, or continue in use, “Automotive Service Councils of California, [followed by the name of the Chapter]” in the manner stated in Attachment A (“Chapter name”). The Chapter shall refer to itself by the Chapter name in the conduct of its affairs and shall avoid any inference that it is acting under the authority of ASCCA unless specifically authorized by ASCCA to do so in writing. The license of the use of the ASCCA name as provided in this Agreement shall be effective as of the date of this Agreement and shall continue until it is suspended or terminated as provided below.

3. **Logo.** ASCCA licenses the use of its logo to the Chapter for the purpose of identifying itself as a chapter of ASCCA in conformance with the terms and conditions of this Agreement and in accordance to Article VIII: Use of Association Name, Section: 8-01. The license of the use of the ASCCA logo shall be effective as of the date of this Agreement and shall continue until it is suspended or terminated as provided below.

4. **ASCCA Membership.** All members of the Chapter shall be members in good standing of the ASCCA.

5. **Leadership.** Chapter Board members shall be ASCCA members in good standing; committee members are not required to be ASCCA members.

6. **Standards.** The Chapter shall conform its activities to the purposes of ASCCA as expressed in the ASCCA Bylaws, Policies, and Code of Ethics as amended from time to time, and as established by the ASCCA Board. The ASCCA Board may pass resolutions which also apply to the Chapter and the Chapter shall conform its activities to meet the standards of such resolutions.

7. **Minimum Membership.** The Chapter must maintain a minimum membership in accordance with policy 3-2 *New Chapter Formation and Minimum Requirement of an Existing Chapter* as established by the ASCCA Board of Directors.

8. **Incorporation.** The Chapter shall be organized and operated as a separate, independent corporation, as required by State law, with its own tax identification number.

9. **Respective Authority.** The parties are independent corporations. Neither party shall have the authority to direct or control the other except as specifically provided in this Agreement. Neither party shall have the authority to bind the other except as specifically provided in this Agreement. No partnership or joint venture is created by this Agreement.

10. **Dues.** The respective responsibility of ASCCA and the Chapter for dues collection is described in policy number 2-14, *Collection and Payment of Membership Dues*, as established by the Board of Directors.

11. **Insurance.** ASCCA shall procure insurance in the following general coverage areas that it deems appropriate as to the terms and conditions of each policy and that will specifically name the Chapter as an insured: comprehensive general liability insurance or its equivalent and association professional liability insurance (directors and officers liability insurance) or its equivalent. ASCCA may revise the policies at any time, provided it shall give the Chapter adequate notice. The Chapter will be responsible for determining whether those policies are adequate for the Chapter's particular needs. The Chapter may obtain other or additional insurance as it deems appropriate.

12. **Indemnification.** Each party shall defend, indemnify, and hold harmless the other against any claim arising from the negligence or willful misconduct of the indemnifying party, its agents and employees in the performance of its own activities.

13. **Programs, Activities and Materials.** The parties shall make reasonable efforts to avoid conflicts with the scheduling of significant events. ASCCA and the Chapter shall exchange educational and informational materials produced by each upon request.

14. **Program Providers.** Both parties agree that providing benefits at both the state and chapter level is not only beneficial but desirable for the member. ASCCA partners with reliable companies to enhance the benefit of membership and revenue to the association to support its effectiveness. Program Providers may be endorsed vendors, corporate sponsors and or benefit providers, as defined in Policy 2-19, *Association Program Partner Definitions*. Chapters should participate in joint program development and revenue sharing, as defined in Policy 3-5A, *Chapter / Association Joint Corporate Partner Program*.

15. **Chapter Access by Program Providers.** A benefit offered to ASCCA Program Providers is access to members. Chapters are encouraged to highlight the benefits of the ASCCA Program Providers when they attend local meetings. Program Providers will participate at chapter events, at the chapter applicable member rate. Participation shall be coordinated to cause minimal inconvenience to the Chapter.

16. **Records and Reports.** After consultation with the chapter, ASCCA may require such records and reports of the chapter as it deems reasonably necessary to establish that the

chapter is conforming to the terms of this Agreement. Upon reasonable notice to the chapter, ASCCA may inspect and copy those records.

**17. Confidential Information.** Each party shall maintain the confidentiality of all confidential and proprietary information and data, including membership lists (“Confidential Information”) of the other party. Each party shall also take all reasonable steps to ensure that no use, by themselves or by any third parties, shall be made of the other party’s Confidential Information without the other party’s consent. Each party’s Confidential Information shall remain the property of that party and shall be considered to be furnished in confidence to the other party when necessary under the terms of this Agreement.

**18. Contracting.** The Chapter Board shall specify those persons authorized to enter into Chapter agreements; such persons shall be advised to avoid any impression that ASCCA is in any way involved or liable for performance of the agreement.

**19. Tax Matters.** The Chapter is encouraged to adopt the same accounting year as that of ASCCA. The Chapter is solely responsible for preparation and filing of its own tax returns and other legal filings as required by law, regardless of whether the Chapter has a separate tax exemption or is exempt under ASCCA’s Group Exemption. The Chapter agrees to provide ASCCA a copy of its annual return within 30 days of filing. By Acceptance of the affiliation agreement the Chapter acknowledges its responsibility for filing its own tax return.

**20. Suspension or Termination.** ASCCA retains the right to suspend or terminate this Agreement and any of the benefits conferred under it to the Chapter based on a majority vote of the ASCCA Board of Directors that the Chapter has substantially breached any of the provisions of this Agreement or has or is taking actions prejudicial to the interests of ASCCA. A Chapter may terminate this Agreement for any or no reason by a 2/3 vote of its entire membership. Should this agreement be terminated, the Chapter must immediately cease usage of any and all ASCCA identifiers and return all ASCCA property within 10 days. All members will remain members of ASCCA despite any dissolution of the Chapter.

**21. Review and Revisions.** This Agreement shall be reviewed on the first day of December of the year this Agreement is entered into and every two years thereafter on December 1. This Agreement may be revised or amended at any time, but only by a written document executed by both parties.

**21. Dispute Resolution.** In the event of any dispute or controversy arising out of this Agreement, the parties agree to first submit all issues to mediation under the procedures of the American Arbitration Association. In the event that mediation fails to resolve all issues, the parties shall submit all remaining issues to arbitration under the procedures of the American Arbitration Association; the prevailing party shall be entitled to reasonable attorneys' fees and expenses in accordance with those procedures. The venue of the mediation or arbitration shall be Sacramento, CA.

**23. Controlling Law.** This Agreement shall be controlled and governed by the laws of the State of California.

IN WITNESS WHEREOF, the parties have entered into this agreement as of the day and year first above written.

**Automotive Service Councils of California:**



By: \_\_\_\_\_  
[name/title]

**[Full, legal name of Chapter]:** \_\_\_\_\_

By: \_\_\_\_\_  
[name/title]

Pursuant to the authority granted by Chapter Board motion adopted on \_\_\_\_\_ (date), a true and correct copy of which is attached to the Agreement.

## **ASCCA Policy # 2-19**

### **Association Program Partner Definitions**

*Adopted August 2016*

*Amended June 2017*

ASCCA Currently has three (3) separate definitions for a program partner based on the level of participation and vetting process.

1. Exclusive Partner – The Exclusive Partner is the highest-level program provider. The Exclusive Partner is vetted through a request for proposal process that involves extensive review of the services and or products provided, reputation of the company, and requires that the vendor can provide services and or products state-wide. The resulting outcome is the association exclusive promotion of the vendor's services and the association's approval of the services provided.
2. Corporate Partner– A Corporate Partner is a vendor that elects to support the ASCCA Advantage in exchange for brand exposure.
3. Member Benefit Partner - A Member Benefit Partner is a business that offers value added services to ASCCA members. An Exclusive Partner and Corporate Partner may also be a Member Benefit Partner.

## **Chapter / Association Joint Corporate Partner Program**

*Amended June 2017  
Amended August 2016  
Policy # Assigned 12/2014  
Adopted 9/25/12*

The ASCCA Corporate Partner program will work with individual Chapters that provide a warm referral of a potential Corporate Partner to the association. In exchange for the Chapter's referral, the Chapter will receive 20% of the Corporate Sponsorship amount.

In exchange for the 20% referral fee the Chapter agrees to extend to the Corporate Partner the following minimum tiered benefits based on the Corporate Partner amount:

- \$1,500 – 2,500 - Listing as a Corporate Partner for 1 year
- \$5K – 1 year Chapter Membership + Listing as a Corporate Partner for 1 year + Literature distribution at Chapter Events.
- \$7,500 – 1 year Chapter Membership + Listing as a Corporate Partner for 1 year + Literature distribution at Chapter Events + 2x newsletter half page ads (and/or website)
- \$10K - 1 year Chapter Membership + Listing as a Corporate Partner for 1 year + Literature distribution at Chapter Events + 2x newsletter half page ad (and/or website) + Speak at Chapter Event + Table at Chapter Event

Each Chapter will also adhere to items 14 & 15 of the *Chapter Affiliation Agreement*.

### **Continuous Revenue Opportunity**

If the Corporate Partner renews its sponsorship, the Chapter will continue to receive the 20% referral fee.

### **Corporate Partner Criteria**

The association is interested in developing corporate partner relationships with businesses that can provide goods and services on a state-wide level, which is the minimum criteria that must be met by the vendor to be considered for a corporate partnership.

### **Warm Referral Defined**

A warm referral is defined as a confirmed decision maker within the potential partnership organization who has been contacted by the Chapter and made aware by the Chapter of the ASCCA partner opportunities. The Chapter will then facilitate an introduction between the referral and ASCCA.



Automotive Service Councils of California  
Professionals in Automotive Service ~ Since 1940

## Automotive Service Councils of California

One Capitol Mall, Suite 800  
Sacramento, CA 95814  
(916) 924-9054  
(800) 810-4272

### CHAPTER PARTNER REFFERRAL FORM

#### Corporate Partnership Criteria:

The association is interested in developing corporate partner relationships with businesses that can provide goods and services on a state-wide level, which is the minimum criteria that must be met by the vendor to be considered for corporate partnership.

#### Chapter Information:

Date: \_\_\_\_\_ Chapter Number: \_\_\_\_\_

Chapter Address: \_\_\_\_\_

Name of Referring Chapter Member: \_\_\_\_\_

Contact Number: \_\_\_\_\_ Best Time to Call: \_\_\_\_\_

Email: \_\_\_\_\_

#### Referred Partner Information:

Name of company (Potential Partner): \_\_\_\_\_

Company Contact Name: \_\_\_\_\_

Contact Number: \_\_\_\_\_ Email: \_\_\_\_\_

Please describe what the company does and why it would be a good fit to partner with ASCCA:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please let us know how the Chapter has facilitated a warm referral and what information, such as the Partner Brochure, has been shared with the potential partner: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### Warm Referral Defined

A warm referral is defined as a confirmed decision maker within the potential partnership organization who has been contacted by the Chapter and made aware by the Chapter of the ASCCA partnership opportunities. The Chapter will then facilitate an introduction between the referral and ASCCA.



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 FAX (916) 444-7462  
 E-mail: [info@ascca.com](mailto:info@ascca.com)

**AGENDA**

**MBI BOARD OF DIRECTORS**

January 30, 2022 | 9:00 am

Via Zoom: <https://us06web.zoom.us/j/88647975311>

Meeting ID: 886 4797 5311

- |   |                |
|---|----------------|
| I. Call to Order                                  | C. Coquillette |
| II. Pledge of Allegiance                          | C. Coquillette |
| III. Roll Call – encl.                            | T. Guy         |
| IV. Minutes of the 11.21.21 Meeting– <i>encl.</i> | C. Coquillette |
| V. Overview of Year-to-Date Revenue – <i>TBP.</i> | G. Peterson    |
| VI. ASC Insurance Program Update                  | G. Dailey      |

**AGENDA**

**ASCCA BOARD OF DIRECTORS**

January 30, 2022 | 9:00am – Noon

Via Zoom

- |  |                       |
|--|-----------------------|
| I. Call to Order   | C. Coquillette        |
| II. Secretary’s Report   | T. Guy                |
| a. Minutes Approval: 11.21.21 Board Meeting– <i>encl.</i>          |                       |
| b. Action Items Review – <i>TBP.</i>                               |                       |
| III. Treasurer’s Report  | J. Villa              |
| a. 2020 Year-end Reviewed Financial Statement – <i>encl.</i>       |                       |
| b. 2021 Preliminary Year-end Financial Statement – <i>TBP.</i>     |                       |
| c. Investment Statement – <i>encl.</i>                             |                       |
| IV. President’s Report   | C. Coquillette        |
| V. Executive Directors Report                                      | G. Peterson           |
| a. ASCCA Building Update   |                       |
| i. Lease Renewal   |                       |
| b. Association Management Software (AMS) Conversion Update         |                       |
| c. 401k Program Launch Update – <i>encl.</i>                       |                       |
| VI. ASCEF Update   | D. Kusa / G. Peterson |
| a. Committee Discussion & Recommendations                          | C. Coquillette R&B    |
| Committee - Recommended Corporate Partner Benefits                 |                       |
| & Pricing Model – <i>encl.</i>                                     |                       |
| b. Approval of Corporate Partner “speakers” program – <i>encl.</i> |                       |
| VII. Old Business  | C. Coquillette        |
| VIII. New Business   | C. Coquillette        |
| a. 2022 Action Plan to Address Chapter Needs                       |                       |
| IX. Adjournment  | C. Coquillette        |

**Board of Directors & Executive Committee  
2021 Attendance Record**

	<b>Board Term Exp.</b>	<b>1/30 BOD</b>												
<b>EXECUTIVE COMMITTEE</b>														
1. Carolyn Coquillette, President	12.31.2022													
2. Lee Chesnin, Vice President	12.31.2023													
3. Rory Balmer, Immediate Past President	12.31.2022													
4. John Villa, Treasurer	12.31.2023													
5. Travis Guy, Secretary	12.31.2022													
6. Davie Bauld, CRC Chair	12.31.2022													
<b>BOARD DIRECTORS (1 Vacancy)</b>														
7. Scott Brown	12.31.2023													
8. John Eppstein	12.31.2023													
9. Esteban Gonzalez	12.31.2022													
10. Dave Kusa	12.31.2022													
11. Wendy Lucko (Educator Member)	12.31.2022													
12. Dennis Montalbano	12.31.2023													
13. Gilbert Rios	12.31.2023													
14. Steve Vanlandingham	12.31.2022													
15. Rob Morrell (Associate Member)	12.31.2022													
<b>ADVISOR – NON-VOTING</b>														
Rocky Khamenian	12.31.2022													

P = Present    A = Absent    E = Excused Absence

# MINUTES

## MBI BOARD OF DIRECTORS

November 21, 2021 | 10:45am – 1:00pm  
Holiday Inn Sacramento, Downtown Arena  
300 J Street, Sacramento, CA 95814

### I. Call to Order

R. Balmer called the meeting order at 10:51 am.

### II. Roll Call

Present: Rory Balmer, Carolyn Coquillette, John Eppstein, John Villa, Davie Bauld, Lee Chesnin, Esteban Gonzalez, Dave Kusa, Wendy Lucko, Steve Vanlandingham, Rob Morrel  
Advisors: Rocky Khamenian, Jim Silverman

Absent: Scott Brown, Tony Callas, Travis Guy  
Advisor: Mark Warren

Staff: Gloria Peterson, Anne Mullinax

Guests: Gilbert Rios, Dennis Montalbano, Johana Reichert, Tim Chakarian, Dan Biggs, Ani Papirian Garbis Papirian, Ryan Burton, Jess Elshwhere, Stuart Terry

### III. Minutes of the 6.27.2021 & 09.12.2021 Meetings

MOTION It was moved, seconded, and carried to approve the minutes of the June 27 and September 12, 2021 meetings, with one correction to the September 12 meeting attendance.

### IV. Overview of Year-to-Date Revenue

G. Peterson provided an overview of the revenue year-to-date compared to the budget.

### V. ASC Insurance Program Update

Matt Nabity provided an updated report of the program.

### VI. Adjournment

The meeting adjourned at 10:57 am.



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# MINUTES

## ASCCA BOARD OF DIRECTORS

November 21, 2021 | 10:45am – 1:00pm  
Holiday Inn Sacramento, Downtown Arena  
300 J Street, Sacramento, CA 95814

### I. Call to Order

R. Balmer called the meeting to order at 11:05 am.

### II. Attendance

Present: Rory Balmer, Carolyn Coquillette, John Eppstein, John Villa, Davie Bauld, Lee Chesnin, Esteban Gonzalez, Dave Kusa, Wendy Lucko, Steve Vanlandingham, Rob Morrel  
Advisors: Rocky Khamenian, Jim Silverman

Absent: Scott Brown, Tony Callas, Travis Guy  
Advisor: Mark Warren

Staff: Gloria Peterson, Anne Mullinax

Guests: Gilbert Rios, Dennis Montalbano, Johana Reichert, Tim Chakarian, Dan Biggs, Ani Papirian  
Garbis Papirian, Ryan Burton, Jess Elshwhere, Stuart Terry

### III. Secretary's Report

#### a. Minutes Approval

**MOTION** It was moved, seconded, and carried to approve the minutes of the 09.12.21 & 11.11.21 Board, 09.29.21 & 10.27.21 Executive Committee Meetings, with one correction to the Sept 29 meeting attendance. (10-yes, 0-no, 0-abstentions)

### IV. Treasurer's Report

J. Villa provided an overview the October Month-end Financial Statement and the Investment Statement.

#### a. 2020 Year-end Reviewed Financial Statement

The report was not included in the packet, so this was deferred until the next meeting.

#### b. 2022 Proposed Budget

**MOTION** It was moved and seconded to approve the 2022 Proposed Budget.

**Amend motion** Dave Kusa/John Eppstein to include additional funds for upgraded audio visual equipment to include the purchase of an Owl Device and additional sound equipment, not to exceed \$1,500.

The motion passed. (10-yes, 0-no, 0-abstentions)

### V. President's Report

R. Balmer highlighted the training and goal setting conducted yesterday. He shared that he has had



a lot of input from members regarding the negative and positive aspects of TeamTalk. The leaders of chapters should help in promoting good behavior and the image that the association wants to convey to members. Also, there are areas on the etiquette for our corporate partners so that they are more aware of what is appropriate for them to share. He also thanked each of the committee chairs for their service to the association.

He also review the Business Acceleration Team (BAT) benefit, the 401k program, and the Association Management Software (AMS) implementation status.

VI. Executive Directors Report

a. ASCCA Building Update – It was reported that the lease agreement has been sent to the tenant for review. Additionally, there was plumbing repairs needed to the property.

b. Association Management Software (AMS) Conversion  
Staff is continuing to work through the conversion and has identified some data integrity that needs to be addressed before testing. Once completed, a few beta testers work with staff to create profiles before launching its availability to all members.

c. 401k Program Launch

G. Peterson reported that the final marketing materials should be available to launch the program.

VII. ASCEF Update

D. Kusa reminded everyone to participate in the fundraising effort the Foundation is conducting on *Giving Tuesday*, which is always the Tuesday after Thanksgiving.

VIII. Committee Discussion & Recommendations

There were no formal committee recommendations for the Board of Directors.

IX. Old Business

There was no old business.

X. New Business

R. Morrell highlighted the STX event that is being hosted by WorldPac in Florida and the opportunity for ASCCA to have a booth at the event. There was discussion about volunteers at the booth. Esteban Gonzalez volunteered to be there and help plan and prepare for the event.

J. Silverman also noted that there is a booth available at ATI, John Eppstein will volunteer at that booth. Rob Morrell may be able to attend as well.

C. Coquillette thanked the staff, partners, and leadership. She highlighted her focus for 2022 to assist chapters by focusing our efforts towards providing them help. She plans to visit the chapters.

R. Balmer, D. Bauld, and T. Chakarian will help in the efforts to connect with inactive chapters. She invited the Board to help determine how we will measure our efforts.

There was discussion about adding texting to communicate, unite members, and assist with accountability.

**ACTION** Rob Morrell will make a recommendation to the Board on a texting platform for the association by the January Team Weekend.

There was discussion about a chapter audit. C. Coquillette reported that it has been started, but it will be expanded upon with more information about each chapter.

**ACTION** G. Peterson will finalize the analysis of the chapters done by our January Board meeting.

ACTION D. Bauld and T. Chakarian will review the Chapter affiliation agreement and give feedback in advance of January.

C. Coquillette reported that the second area she will focus on is membership. She reviewed her plan regarding a freemium membership and that the offer may be re coined an Introductory membership that is time bound by 6 months. Also, the need to have more staff resources about following up with the membership. There was discussion around the resources needed to support membership growth and specifically having someone in charge of sales.

ACTION G. Peterson will work on a budget projection for a membership salesperson and have that to the board prior to the February Executive Committee meeting. Recommend Salary + commission.

There was discussion about having this program rolled out before the ATI & WORLDPAC shows in March. S. Vanlandingham volunteered to work on the new member concept task force.

There was a consensus that the onboarding of new corporate partners needs to be looked so that new partners are getting contacted as soon as their application is submitted.

ACTION J. Silverman will work on that and report back.

D. Montalbano noted that the attendance records from 2021 reflects individuals who don't participate in Committees and the need to have the chair contact those individuals.

ACTION To-Do – Review with the committee chairs to have them do that reach out to individuals not attending meetings.

D. Montalbano noted that we should have career fairs on our radar screen.

XI. Adjournment

The meeting adjourned at 1:02 pm.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**

**CONSOLIDATED FINANCIAL STATEMENTS  
AND  
SUPPLEMENTARY INFORMATION**

**YEARS ENDED DECEMBER 31, 2020 AND 2019**

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**

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## **INDEPENDENT ACCOUNTANTS' REVIEW REPORT**

To the Board of Directors  
Automotive Service Councils of California, Inc.

We have reviewed the accompanying consolidated financial statements of Automotive Service Councils of California, Inc. (a nonprofit organization), which comprise the consolidated statements of financial position as of December 31, 2020 and 2019, and the related consolidated statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the financial statements. A review includes primarily applying analytical procedures to management's financial data and making inquiries of management. A review is substantially less in scope than an audit, the objective of which is the expression of an opinion regarding the financial statements as a whole. Accordingly, we do not express such an opinion.

### **Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement whether due to fraud or error.

### **Accountants' Responsibility**

Our responsibility is to conduct the review engagements in accordance with Statements on Standards for Accounting and Review Services (SSARs) promulgated by the Accounting and Review Services Committee of the AICPA. We have not reviewed the financial statements of Member Benefit, Inc. (MBI), a wholly-owned subsidiary, whose financial statements reflect total assets constituting 8 percent and 8 percent, respectively, of consolidated total assets at December 31, 2020 and 2019, and total revenues constituting 14 percent and 14 percent, respectively, of consolidated total revenues for the years then ended.

SSARs require us to perform procedures to obtain limited assurance as a basis for reporting whether we are aware of any material modifications that should be made to the consolidated financial statements for them to be in accordance with accounting principles generally accepted in the United States of America. We believe that the results of our procedures provide a reasonable basis for our conclusion.

### **Accountants' Conclusion on the Financial Statements**

Based on our reviews, we are not aware of any material modifications that should be made to the accompanying consolidated financial statements in order for them to be in accordance with accounting principles generally accepted in the United States of America.

Our reviews were made primarily for the purpose of expressing a conclusion that there are no material modifications that should be made to the consolidated financial statements in order for them to be in conformity with accounting principles generally accepted in the United States of America. The supplementary information in Schedules I, II, and III is presented for purposes of additional analysis and is not a required part of the basic financial statement. Such information has been subjected to the inquiry and analytical procedures applied in the reviews of the basic consolidated financial statements, and we did not become aware of any material modifications that should be made to them.

*Shaw Accountancy Corporation*

SHAW ACCOUNTANCY CORPORATION  
Sacramento, California

September 27, 2021

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**CONSOLIDATED STATEMENTS OF FINANCIAL POSITION**  
**DECEMBER 31, 2020 AND 2019**

ASSETS

	<u>December 31,</u> <u>2020</u>	<u>December 31,</u> <u>2019</u>
Cash	\$ 139,766	\$ 213,912
Investments in marketable securities	597,519	511,484
Dues and assessments receivable	549	549
Prepaid expenses	3,839	4,458
Prepaid income tax	-	536
Property, net	<u>90,717</u>	<u>90,717</u>
Total assets	<u><u>\$ 832,390</u></u>	<u><u>\$ 821,656</u></u>

LIABILITIES AND NET ASSETS

LIABILITIES:

Accounts payable	\$ 63,189	\$ 99,503
Income tax payable	10,205	298
Contract liability	87,364	87,098
Tenant liabilities	<u>3,138</u>	<u>3,138</u>
Total liabilities	163,896	190,037

NET ASSETS:

Board designated building repair fund	21,844	21,844
Without donor restrictions	<u>646,650</u>	<u>609,775</u>
Total liabilities and net assets	<u><u>\$ 832,390</u></u>	<u><u>\$ 821,656</u></u>

See accompanying notes and independent accountants' review report.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**CONSOLIDATED STATEMENTS OF ACTIVITIES**  
**YEARS ENDED DECEMBER 31, 2020 AND 2019**

	2020	2019
OPERATING ACTIVITIES:		
REVENUES:		
Membership dues and assessments	\$ 206,696	\$ 218,250
Endorsements	54,484	68,960
Special items	-	53
Other revenues	-	3
Seminars	740	1,274
Contributions	52,627	86,420
Total revenues	314,547	374,960
EXPENSES:		
Program services	238,263	210,550
Management and general	133,961	123,927
Total expenses	372,224	334,477
CHANGE IN NET ASSETS FROM OPERATING ACTIVITIES	(57,677)	40,483
NON OPERATING ACTIVITIES:		
Investment income	66,035	90,452
Building rents	45,792	43,753
Building expenses	(17,275)	(21,654)
Total other income (expense)	94,552	112,551
CHANGE IN NET ASSETS	36,875	153,034
NET ASSETS, Beginning of Year	631,619	478,585
NET ASSETS, End of Year	\$ 668,494	\$ 631,619

See accompanying notes and independent accountants' review report.



**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**CONSOLIDATED STATEMENTS OF FUNCTIONAL EXPENSES**  
**YEARS ENDED DECEMBER 31, 2020 AND 2019**

	Year ended December 31, 2020		
	Program Services	Management and General	Total Expenses
Board of Directors	\$ 17,565	\$ -	\$ 17,565
Communication		974	974
General and administrative		22,097	22,097
Government affairs committee	-		-
Income taxes		10,215	10,215
Membership	18,471		18,471
Professional services	201,350	100,675	302,025
Committee expenses	877		877
	<u>\$ 238,263</u>	<u>\$ 133,961</u>	<u>\$ 372,224</u>

	Year ended December 31, 2019		
	Program Services	Management and General	Total Expenses
Board of Directors	\$ 19,915	\$ -	\$ 19,915
Communication		2,374	2,374
General and administrative		23,663	23,663
Income taxes		14,962	14,962
Membership	17,473		17,473
Professional services	165,857	82,928	248,785
Committee expenses	7,305		7,305
	<u>\$ 210,550</u>	<u>\$ 123,927</u>	<u>\$ 334,477</u>

See accompanying notes and independent accountants' review report.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**CONSOLIDATED STATEMENTS OF CASH FLOWS**  
**YEARS ENDED DECEMBER 31, 2020 AND 2019**

	<u>December 31,</u> <u>2020</u>	<u>December 31,</u> <u>2019</u>
<b>CASH FLOWS FROM OPERATING ACTIVITIES:</b>		
Change in net assets	\$ 36,875	\$ 153,034
Adjustments to reconcile increase in net assets to net cash provided (used) by operating activities:		
Unrealized gains		(80,304)
(Increase) decrease in operating assets:		
Prepaid expenses	619	300
Prepaid income tax	536	(211)
Increase (decrease) in operating liabilities:		
Accounts payable	(36,314)	29,359
Income tax payable	9,907	(5,089)
Contract liability	266	30,685
Net cash provided (used) by operating activities	<u>11,889</u>	<u>127,774</u>
<b>CASH FLOWS FROM INVESTING ACTIVITIES:</b>		
Sale of marketable securities	1,111,579	-
Purchase of marketable securities	<u>(1,197,614)</u>	<u>(50,148)</u>
<b>INCREASE (DECREASE) IN CASH</b>	(74,146)	77,626
CASH, Beginning of Year	<u>213,912</u>	<u>136,286</u>
CASH, End of Year	<u>\$ 139,766</u>	<u>\$ 213,912</u>
<b>SUPPLEMENTAL DISCLOSURE:</b>		
Income taxes paid	<u>\$ 20,226</u>	<u>\$ 20,226</u>

See accompanying notes and independent accountants' review report.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**  
**YEARS ENDED DECEMBER 31, 2020 AND 2019**

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**NOTE 1 – STATEMENT OF SIGNIFICANT ACCOUNTING PRINCIPLES**

Business Activity

Automotive Service Council of California, Inc. (ASC) is a nonprofit association incorporated in 1972 to provide business resources for members and to advance the professionalism of the automotive repair industry.

The consolidated statements of financial position includes ASC's wholly owned subsidiary, ASC Member Benefit Incorporated (MBI), a California for-profit corporation organized in 1991. MBI is a partner in ASC Insurance Services (ASCIS). ASCIS was organized in 2000. MBI owns 50% of ASCIS, which provides insurance services to members of ASC.

ASC is also affiliated with ASC Education Foundation, Inc. (the Education Foundation), 501(c)(3) nonprofit organization. ASC controls the Education Foundation through a majority voting interest in the Board; however, it does not have an economic interest in the entity; therefore, it has not been consolidated in the accompanying consolidated financial statement.

All inter-company balances have been eliminated from these consolidated financial statements.

Accounting Method

ASC accounts for all transactions using the accrual method of accounting.

Taxes

Under applicable laws and regulations, ASC has been determined to be a tax exempt organization under IRC 501(c) (6) which is not subject to federal or state taxes on its exempt function income. If ASC receives any income not related to its exempt status, such as commission, it is responsible to pay federal and state taxes on that income less corresponding expenses.

ASC's income tax returns are subject to examination, generally three years for federal and four years for state, after they are filed. There were no penalties or interest related to the current year federal and state tax returns.

MBI is subject to income taxes but has substantial net operating loss carryforwards. Income taxes are provided for the tax effects of transactions reported in the financial statements and consists of taxes currently due plus deferred taxes. Deferred taxes are recognized for the tax benefit of net operating loss carryforwards that are available to offset future taxable income.

Contributed Services

A number of people have donated significant amounts of time to the activities of ASC and its committees. No value has been reflected in the consolidated statement of activities because the criteria for recognition of such volunteers.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**  
**YEARS ENDED DECEMBER 31, 2020 AND 2019**

---

**NOTE 1 – STATEMENT OF SIGNIFICANT ACCOUNTING PRINCIPLES (Continued)**

Cash and Cash Equivalents

ASC considers all short term investments with an original maturity of three months or less to be cash equivalents.

Basis of Presentation:

The financial statements of ASC have been prepared on the accrual basis in accordance with accounting principles generally accepted in the United States of America. The financial statements are presented in accordance with Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 958 dated August 2016, and the provisions of the American Institute of Certified Public Accountants (AICPA) “Audit and Accounting Guide for Not-for-Profit Organizations” (the “Guide”). (ASC) 958-205 was effective January 1, 2018.

Under the provisions of the Guide, net assets and revenues, and gains and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of ASC and changes therein are classified as follows:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of ASC. ASC’s board may designate assets without restrictions for specific operational purposes from time to time.

Net assets with donor restrictions: Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of ASC or by the passage of time. Other donor restrictions are perpetual in nature, where by the donor has stipulated the funds be maintained in perpetuity.

Measure of Operations:

The statement of activities reports all changes in net assets, including changes in net assets from operating and non-operating activities. Operating activities consist of those items attributable to the Association’s ongoing activities. Non-operating activities are limited to resources that generate return from investments, endowment contributions, financing costs, and other activities considered to be a more unusual or nonrecurring nature.

Programs

The Association pursues its objects through the execution of the following programs:

Program Services –Coordinating the warehousing documents to streamline external audits for members and other networking activities to provide timely information to members concerning various activities from legislative and regulatory agencies to the methods of operations of dental plans.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**  
**YEARS ENDED DECEMBER 31, 2020 AND 2019**

---

**NOTE 1 – STATEMENT OF SIGNIFICANT ACCOUNTING PRINCIPLES (Continued)**

Functional Expenses

The costs of providing program and other activities have been summarized on a function basis in the statement of activities. Accordingly, certain costs have been allocated among program services and supporting services benefited. Such allocations are determined by management on an equitable basis.

The expenses that are allocated include the following:

Advocacy services	Time and effort
Annual meeting	Time and effort
Board and committee	Time and effort
Legal and accounting services	Full time equivalent
Legislative conference	Time and effort
Management services	Time and effort
PAC administration	Time and effort
QA Auditor course expense	Time and effort
Warehouse	Time and effort

Use of Estimates

The preparation of the consolidated financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the consolidated financial statements and the reported amounts of revenue and expenses during the reporting period. Actual results could differ from those estimates.

Investments

Investments in marketable securities with readily determinable fair values are reported at their fair values in the statement of financial position. Unrealized gains and losses are included in the statement of activities. Investments returns presented are net of any investment fees.

Method of Consolidation

The accompanying consolidated financial statements include the accounts of ASC and its wholly owned subsidiary, MBI. Intercompany transactions and balances have been eliminated in consolidation.

Dues and Assessments Receivable

Dues and assessments receivable consist primarily of amounts due from members. ASC deems all amounts collectible; therefore, no allowance for doubtful accounts has been recorded as of December 31, 2020 and 2019.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.  
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS  
YEARS ENDED DECEMBER 31, 2020 AND 2019**

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**NOTE 1 – STATEMENT OF SIGNIFICANT ACCOUNTING PRINCIPLES (Continued)**

Revenue Recognition

Revenue is recognized as performance obligations are satisfied. For conference and meeting registration fees and sponsorships, revenue is recognized when the event occurs. Membership dues are recognized as revenue over the applicable membership period which is the calendar year. Revenues received for future years are deferred to the appropriate period.

**NOTE 2 – INVESTMENTS IN MARKETABLE SECURITIES**

ASC’s securities investments that are bought and held principally for the purpose of selling them in the near term. Securities are recorded at fair value on the balance sheet in current assets, with the change in fair value during the period included in earnings.

Investments in marketable securities consists of the following:

	<u>December 31, 2020</u>	<u>December 31, 2019</u>
Securities:		
Total stock market index	\$ 0	\$ 360,287
Mutual funds	486,561	
Exchange traded funds	99,156	
Vanguard GNMA fund	<u>151,197</u>	<u>151,197</u>
	<u>\$ 511,484</u>	<u>\$ 511,484</u>

The following table presents securities which represent 10% or more of total investments at December 31:

Vanguard GNMA Fund		27%
Vanguard Total Stock Market Index Fund		68%
Sterling Capital Equity Income Fund	18%	
SPDR Portfolio	12%	

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**  
**YEARS ENDED DECEMBER 31, 2020 AND 2019**

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**NOTE 3 – PROPERTY AND EQUIPMENT**

Property and equipment consists of the following:

	December 31, 2020	December 31, 2019
Land	\$ 73,800	\$ 73,800
Building and improvements	<u>165,594</u>	<u>165,594</u>
	239,394	239,394
Less accumulated depreciation	( <u>148,677</u> )	( <u>148,677</u> )
	<u>\$ 90,717</u>	<u>\$ 90,717</u>

Beginning in 2020, the building is deemed fully depreciated. Therefore, depreciation is not claimed on a going forward basis.

**NOTE 4 – INCOME TAXES**

Income tax expenses (benefit) consists of the following:

	December 31, 2020	December 31, 2019
Current	\$ 10,215	\$ 14,962
Deferred	<u>0</u>	<u>0</u>
	<u>\$ 10,215</u>	<u>\$ 14,692</u>

The deferred tax asset consists of the following:

Cash payments for taxes were \$298 and \$20,226 during the years ended December 31, 2020 and 2019, respectively.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**  
**YEARS ENDED DECEMBER 31, 2020 AND 2019**

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**NOTE 5 – FAIR VALUE MEASUREMENTS**

FASB ASC 820-10, defines fair value, establishes a framework for measuring fair value, and expands disclosure requirements for fair value measurements.

FASB ASC 820-10, defines fair value as the exchange price that would be received for an asset or paid to transfer a liability (an exit price) in the principal or most advantageous market for the asset or liability in an orderly transaction between market participants on the measurement date. ASC determines the fair values of its assets and liabilities based on the fair value hierarchy established in FASB ASC 820-10. The standards describes three levels of inputs that may be used to measure fair value (Level 1, Level 2 and Level 3). Level 1 inputs are quoted prices (unadjusted) in active markets for identical assets or liabilities that ASC has the ability to access at the measurement date. An active market is a market in which transactions occur with sufficient frequency and volume to provide pricing information on an on-going basis. Level 2 inputs are inputs other than quoted prices that are observable for the asset or liability, either directly or indirectly. Level 3 inputs are unobservable inputs for the asset or liability. Unobservable inputs reflect ASC’s own suppositions about the assumptions market participants would use in pricing the asset or liability (including assumptions about risk). Unobservable inputs are developed based on the best information available in the circumstances and may include ASC’s own data.

The following methods and assumptions were used to estimate the fair values of assets and liabilities.

- (a) Cash and cash equivalents: The carrying amount equals fair value. All amounts, including interest bearing accounts, are subject to immediate withdrawal.
- (b) Accounts receivable, prepaid expenses, accounts payable, accrued liabilities: The carrying values are considered equal to their fair values due to the short-term maturities of these instruments.
- (c) Investments: The carrying values are determined by reference to quoted market prices and other relevant information generated by market transactions.

Fair values of assets and liabilities measured on a recurring basis as of December 31, 2020 and 2019 are as follows:

Assets at Fair Value as of December 31, 2020

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Marketable securities	\$ 597,519	\$ 0	\$ 0	\$ 597,519

Assets at Fair Value as of December 31, 2019

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Marketable securities	\$ 511,484	\$ 0	\$ 0	\$ 511,484



**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.  
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS  
YEARS ENDED DECEMBER 31, 2020 AND 2019**

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**NOTE 6 - COMMITMENTS**

ASC entered into contracts with hotels and professional service firms. The commitments under these contracts for professional service firms total \$74,500 and \$74,500 at December 31, 2020 and 2019, respectively. The commitments under these contracts for hotels total \$18,199 and \$26,910 at December 31, 2020 and 2019, respectively.

**NOTE 7 – BUILDING LEASE**

On October 1, 2011, ASC agreed to lease the building to a tenant. The tenant is currently on a month-to-month lease.

**NOTE 8 – LIQUIDITY AND AVAILABILITY OF FINANCIAL ASSETS**

The following reflects ASC’s financial assets as of the balance sheet date, reduced by amounts not available for general use because of contractual or donor-imposed restrictions within one year of the balance sheet date. (Donor-restricted amounts that are not available for use for general purposes).

	<u>2020</u>	<u>2019</u>
Cash	\$ 139,912	\$ 213,912
Investment in marketable securities	597,519	511,484
Dues and assessments receivable	<u>549</u>	<u>549</u>
Financial assets available to meet cash need for general expenditures within one year	<u>\$ 737,980</u>	<u>\$ 725,945</u>

**NOTE 9 – DATE OF MANAGEMENT REVIEW**

In preparing the financial statements, ASC has evaluated events and transactions for potential recognition or disclosure through September 27, 2021, the date that the financial statements were available to be issued.

**NOTE 10 – SUBSEQUENT EVENTS**

The Covid-19 pandemic may impact ASC as it relies on members to fund the organizational activities. ASC does not believe that there will be a material impact on the results of operations during or after the pandemic.

**SUPPLEMENTARY INFORMATION**

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**SCHEDULE I - CONSOLIDATING SCHEDULE OF FINANCIAL POSITION**  
**DECEMBER 31, 2020**

ASSETS

	<u>Automotive Service Councils of California, Inc.</u>	<u>Member Benefit, Inc.</u>	<u>Eliminating Entries</u>	<u>Total</u>
Cash	\$ 117,984	\$ 21,782	\$	\$ 139,766
Investments in marketable securities	597,519			597,519
Dues and assessments receivable	549			549
Prepaid expenses	3,361	477		3,838
Property, net	90,717			90,717
Investment in subsidiary	12,054		(12,054)	-
	<u>\$ 822,184</u>	<u>\$ 22,259</u>	<u>\$ (12,054)</u>	<u>\$ 832,389</u>
Total assets	<u>\$ 822,184</u>	<u>\$ 22,259</u>	<u>\$ (12,054)</u>	<u>\$ 832,389</u>

LIABILITIES AND NET ASSETS

LIABILITIES:

Accounts payable	\$ 63,189	\$ -	\$	\$ 63,189
Income tax payable		10,205		10,205
Deferred revenue	87,364			87,364
Tenant liabilities	3,138			3,138
	<u>153,691</u>	<u>10,205</u>	<u>-</u>	<u>163,896</u>
Total liabilities	<u>153,691</u>	<u>10,205</u>	<u>-</u>	<u>163,896</u>

NET ASSETS:

Without donor restrictions	<u>668,493</u>	<u>12,054</u>	<u>(12,054)</u>	<u>668,493</u>
	<u>\$ 822,184</u>	<u>\$ 22,259</u>	<u>\$ (12,054)</u>	<u>\$ 832,389</u>
Total liabilities and net assets	<u>\$ 822,184</u>	<u>\$ 22,259</u>	<u>\$ (12,054)</u>	<u>\$ 832,389</u>

See accompanying notes and independent accountants' review report.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**SCHEDULE I - CONSOLIDATING SCHEDULE OF FINANCIAL POSITION**  
**DECEMBER 31, 2019**

ASSETS

	<u>Automotive Service Councils of California, Inc.</u>	<u>Member Benefit, Inc.</u>	<u>Eliminating Entries</u>	<u>Total</u>
Cash	\$ 155,480	\$ 58,432	\$	\$ 213,912
Investments in marketable securities	511,484			511,484
Dues and assessments receivable	549			549
Prepaid expenses	4,458			4,458
Prepaid income tax		536		536
Property, net	90,717			90,717
Investment in subsidiary	58,670		(58,670)	-
<b>Total assets</b>	<b><u>\$ 821,358</u></b>	<b><u>\$ 58,968</u></b>	<b><u>\$ (58,670)</u></b>	<b><u>\$ 821,656</u></b>

LIABILITIES AND NET ASSETS

LIABILITIES:

Accounts payable	\$ 99,503	\$ -	\$	\$ 99,503
Income tax payable		298		298
Deferred revenue	87,098			87,098
Tenant liabilities	3,138			3,138
<b>Total liabilities</b>	<b>189,739</b>	<b>298</b>	<b>-</b>	<b>190,037</b>

NET ASSETS:

Without donor restrictions	<u>631,619</u>	<u>58,670</u>	<u>(58,670)</u>	<u>631,619</u>
<b>Total liabilities and net assets</b>	<b><u>\$ 821,358</u></b>	<b><u>\$ 58,968</u></b>	<b><u>\$ (58,670)</u></b>	<b><u>\$ 821,656</u></b>

See accompanying notes and independent accountants' review report.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**SCHEDULE II - CONSOLIDATING SCHEDULE OF ACTIVITIES**  
**YEAR ENDED DECEMBER 31, 2020**

	Automotive Service Councils of California, Inc.	Member Benefit, Inc.	Eliminating Entries	Total
<b>REVENUES:</b>				
Membership dues and assessments	\$ 206,696	\$	\$	\$ 206,696
Investment income	66,034			66,034
Endorsements		54,484		54,484
Building rents	45,792			45,792
Seminars	740			740
Contributions	52,627			52,627
Other income	-			-
Net income of MBI	28,423		(28,423)	-
	<u>400,312</u>	<u>54,484</u>	<u>(28,423)</u>	<u>426,373</u>
<b>EXPENSES:</b>				
Board of Directors	\$ 17,565	\$	\$	\$ 17,565
Building expenses	17,275			17,275
Communication	974			974
General and administration	22,051	46		22,097
Government affairs committee	135			135
Income taxes		10,215		10,215
Membership	18,471			18,471
Professional services	286,225	15,800		302,025
R & B committee	302			302
Technology	440			440
	<u>363,438</u>	<u>26,061</u>	<u>-</u>	<u>389,499</u>
<b>CHANGES IN NET ASSETS</b>				
WITHOUT DONOR RESTRICTIONS	<u>\$ 36,874</u>	<u>\$ 28,423</u>	<u>\$ (28,423)</u>	<u>\$ 36,874</u>

See accompanying notes and independent accountants' review report.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**SCHEDULE II - CONSOLIDATING SCHEDULE OF ACTIVITIES**  
**YEAR ENDED DECEMBER 31, 2019**

	Automotive Service Councils of California, Inc.	Member Benefit, Inc.	Eliminating Entries	Total
<b>REVENUES:</b>				
Membership dues and assessments	\$ 218,250	\$	\$	\$ 218,250
Investment income	90,452			90,452
Endorsements		68,960		68,960
Special items	53			53
Other revenues	3			3
Building rents	43,753			43,753
Seminars	1,274			1,274
Contributions	86,420			86,420
Net income of MBI	38,187		(38,187)	-
	<u>478,392</u>	<u>68,960</u>	<u>(38,187)</u>	<u>509,165</u>
<b>EXPENSES:</b>				
Board of Directors	\$ 19,915	\$	\$	\$ 19,915
Building expenses	21,654			21,654
Communication	2,374			2,374
General and administration	23,627	36		23,663
Government affairs committee	4,558			4,558
Income taxes		14,962		14,962
Membership	17,473			17,473
R & B committee	2,747			2,747
Professional services	233,010	15,775		248,785
	<u>325,358</u>	<u>30,773</u>	<u>-</u>	<u>356,131</u>
<b>CHANGES IN NET ASSETS</b>				
WITHOUT DONOR RESTRICTIONS	<u>\$ 153,034</u>	<u>\$ 38,187</u>	<u>\$ (38,187)</u>	<u>\$ 153,034</u>

See accompanying notes and independent accountants' review report.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**SCHEDULE III - CONSOLIDATING SCHEDULE OF CHANGES IN NET ASSETS**  
**YEAR ENDED DECEMBER 31, 2020**

	Automotive Service Councils of California, Inc.	Member Benefit, Inc.	Eliminating Entries	Total
<b>NET ASSETS WITHOUT DONOR RESTRICTIONS</b>				
Beginning of Year	\$ 631,619	\$ 53,536	\$ (53,536)	\$ 631,619
Transfer to ASCCA		(69,905)	69,905	-
Change in unrestricted net assets	<u>36,874</u>	<u>28,423</u>	<u>(28,423)</u>	<u>36,874</u>
<b>NET ASSETS WITHOUT DONOR RESTRICTIONS</b>				
End of Year	<u><u>\$ 668,493</u></u>	<u><u>\$ 12,054</u></u>	<u><u>\$ (12,054)</u></u>	<u><u>\$ 668,493</u></u>

See accompanying notes and independent accountants' review report.

**AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA, INC.**  
**SCHEDULE III - CONSOLIDATING SCHEDULE OF CHANGES IN NET ASSETS**  
**YEAR ENDED DECEMBER 31, 2019**

	Automotive Service Councils of California, Inc.	Member Benefit, Inc.	Eliminating Entries	Total
<b>NET ASSETS WITHOUT DONOR RESTRICTIONS</b>				
Beginning of Year	\$ 478,585	\$ 47,062	\$ (47,062)	\$ 478,585
Transfer to ASCCA		(31,713)	31,713	-
Change in unrestricted net assets	<u>153,034</u>	<u>38,187</u>	<u>(38,187)</u>	<u>153,034</u>
<b>NET ASSETS WITHOUT DONOR RESTRICTIONS</b>				
End of Year	<u>\$ 631,619</u>	<u>\$ 53,536</u>	<u>\$ (53,536)</u>	<u>\$ 631,619</u>

See accompanying notes and independent accountants' review report.



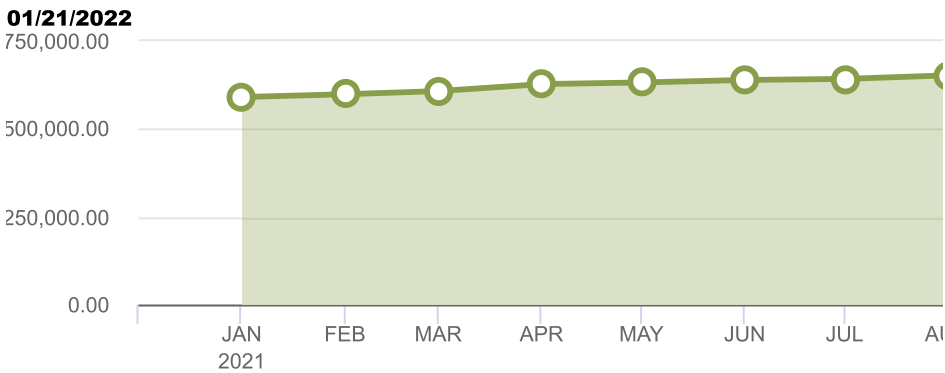
Viewing: AVM052156 ▼ In USD

**SUMMARY** As of 6:59 PM ET 01/21/2022

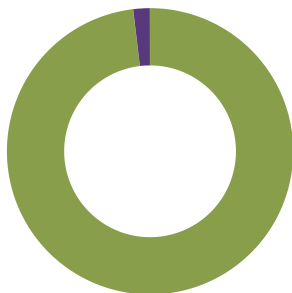
	TOTAL VALUE	DAY CHANGE	UNREALIZED GAIN/LOSS *
<b><u>AVM052156</u></b>	<b>579,441.50</b>	<b>-6,159.10 (-1.05%)</b>	<b>-42,867.78 (-6.82%)</b>

\* Unrealized Gain/Loss value is based on positions and quotes as of previous close.

**MARKET VALUE (LAST 12 MONTHS) AS OF 6:59 PM ET** [Go to Valuation Over Time](#)



**COMPOSITION**



ASSET CLASS	CURRENT VALUE	PERCENT OF TOTAL
 <u>MUTUAL FUND</u>	568,549.08	98.12%
 <u>CASH, MONEY FUNDS, BANK DEPOSITS</u>	10,892.42	1.88%

## PORTFOLIO MOVERS

### Strongest Performers

COMPANY	TODAY'S CHANGE (%)
---------	--------------------

No data available for Strongest Movers.

### Weakest Performers

COMPANY	TODAY'S CHANGE (%)
---------	--------------------

No data available for Weakest Movers.

Portfolio Movers securities are derived from the top 20 holdings based on current market value.

Quotes at least 15 min delayed

## HISTORY

As of 6:59 PM ET 01/21/2022

DATE	SECURITY ID	DESCRIPTION	NET AMOUNT
01/14/2022	PER9800	FDIC INSURED BANK DEPOSITS INTEREST RECEIVED	0.10
01/14/2022	PER9800	FDIC INSURED BANK DEPOSITS INTEREST REINVESTED	-0.10
01/10/2022	USD9999	FDIC INSURED BANK WITHDRAWAL	1,343.79
01/10/2022	USD9999	ADVISORY FEES	-1,343.79
01/03/2022	VWETX	REINVEST CASH INCOME ** VWETX	-30.34

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For valuation, delayed quotes using the last price are used for domestic equities and options only. Pricing of other positions is as of the previous day's close or the most recently available price. If an equity security has not traded today, the valuation is based on the best bid price from the previous business day. The current bid or ask may be different from the price displayed. Securities pricing may vary from actual liquidation value.

Prices shown should only be used as a general guide to portfolio value. Your printed confirmations and statements are the official records of your account.

The value of any non-dollar denominated holding used is first converted in to a U.S. Dollar Equivalent (USDE) amount. The USDE amount is calculated by multiplying the previous day's closing price for the holding in its native currency by the previous day's closing spot (conversion) rate from sources deemed to be reliable. If the previous day's closing price is not available, then the most recent closing price available for the holding will be used.

Prices for Mutual Funds are not updated until after market close (usually between 7PM ET and 10PM ET). Until prices are updated, Change and Change (%) for Mutual Fund holdings are based on the difference between the prior two business days closing price. These values reflect the effect of market fluctuations on the Market Value of a Mutual Fund. Recent Mutual Fund activity such as a purchase or sale will not affect these values, but may result in these values not accurately reflecting the effect of market fluctuations on the account in which it is held.

Due to rounding, total asset type percentages may vary from 100.00%.

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**From:** [Grant Knox](#)  
**To:** [Gloria Peterson](#)  
**Cc:** [Dan.Kolosowski@transamerica.com](mailto:Dan.Kolosowski@transamerica.com)  
**Subject:** status  
**Date:** Monday, January 17, 2022 10:44:24 AM

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Gloria, new year now is in full swing and now we are focused on the 401k launch

1. Dan will be sending over this week a schedule for the next 6 webinars (every 2 weeks) we will alternate daytime and evening
2. He's working on a studio on demand version
3. We are going to do an in person for chapter 25 feb 10th
4. My office will be calling individual owners starting next week
  - a. Can we get the spreadsheet with all the contact information re-sent to us WITH their chapter affiliation and the chapter head's contact information?
  - b. Zardis really gave us the idea to work with each chapter to use this also as a recruiting tool at the chapter level so we'd like to break down our marketing to chapter by chapter

Let's talk about any questions

**Grant Knox, D.Min, CKA**  
Financial Advisor  
Knox Financial

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