

MEMBERSHIP MARKETING PACKET



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Thank you for considering the PTRA! Did you know the PTRA has been bringing Manufacturers Representatives and businesses together for more than 50 years? We present a significant value to any manufacturer who needs high caliber sales people. Here are a few metrics we'd like to offer:

The value of Manufacturers Reps, who are members of the PTRA to manufacturing businesses, is immense. They positively affect profitability by reducing the costs involved in the sale and by giving more quality opportunities developed through long term relationships. Also, PTRA members are known for their high degree of integrity and ascribe to a Code of Ethics.

PTRA members are easy to access. Go online at www.ptra.org to join the PTRA or find contact information about any member. Come to the Annual Conference to meet with your sales team, network with other Principal members or to seek new successful sales people. There are also great opportunities to learn more about our industry by listening to a number of excellent speakers.

Thanks again for considering the PTRA and its members for your business.

DID YOU KNOW?

Total Annual Business by PTRA Rep Channel	~ \$1.6 Billion
Active Sales Representatives	490+
Average Years of Experience Per Salesperson	23
Average Commission Rate Paid to the Agency <i>(This is your cost of sales)</i>	6.44%
Sales People that have Professional Designations <i>(CSP - Certified Sales Professional and/ or CPMR- Certified Professional Manufacturers' Rep)</i>	41%
Members that have Warehouses	52+

Virtual Meetings - Your Personal Introduction to PTRA

At PTRA, we understand that joining an association like ours is a big decision. That's why we offer the opportunity for prospective members like you to schedule virtual meetings with our current members. It's a chance to get your questions answered, understand our mission, and explore the benefits of PTRA.

How It Works

- 1. Express Your Interest:** Simply let us know you're interested in joining PTRA, and we'll set up a virtual meeting for you. You can email ptrahq@ptra.org with this request.
- 2. Meet with Our Experts:** You'll be connected with one of our knowledgeable current members who can provide insights, answer your questions, and guide you through what PTRA has to offer.
- 3. Get Informed:** During your virtual meeting, you'll learn about PTRA's history, goals, and benefits. It's your opportunity to explore what being a part of our community means.
- 4. No Pressure:** There's no commitment required. You're free to decide whether PTRA is the right fit for you at your own pace.

Ready to Dive In?

Reach out to us today and schedule your virtual meeting. We're here to help you make an informed decision about joining PTRA, so you can take full advantage of the benefits we offer.

****Unlock the potential of your membership with PTRA through virtual meetings. Connect with us today!***

MEMBERSHIP BENEFITS

Annual Conference:

A forum in which you can discuss common operational problems, participate in exchanges with other manufacturers and representatives, and schedule interviews with representatives for open territories.

Online Locator:

A searchable database of all PTRA members where Principal Members can search for representatives by territory and Representative Members can search for manufacturers to represent.

Lines Available:

A section of the PTRA Website where Principal Members can advertise for representatives to meet immediate open-territory needs.

Consultation:

PTRA's Legal Counsel is available for brief consultation at no charge either by telephone or by private interview during the Annual Conference. More extensive work for members is contracted at reduced rates.

Through our mentoring program, former reps with many years of experience on both sides of the principal/representative relationship are available for counseling throughout every business day.

Education:

Educational seminars designed to enhance the performance of your professional representative field sales force, conducted by the Manufacturers' Representatives Educational Research Foundation (MRERF), and the Manufacturers' Agents National Association (MANA).

This is inclusive of, but not limited to, the designations of "Certified Professional Manufacturers' Representative" (CMPR) and "Certified Professional Sales Consultant" (CPSC). Members of PTRA also receive a 15% discount off the standard tuition rate for courses at IDC University.

Throughout the last few years, PTRA has also conducted several best practice and business help webinars that are made entirely free to members. These include anywhere from Microsoft Teams tutorials to navigating life in a post COVID-19 era.

Contracts:

A Model Sales Representation Agreement prepared by PTRA's legal counsel.

Newsletters:

Monthly e-newsletters distributed to PTRA members that include periodic updates about Association activities, business information, legal and financial advice, member news and commentary on topics of broad interest.

In addition, PTRA distributes a print newsletter with Association updates in January each year. This newsletter issue also includes the PTRA Annual Conference brochure.

Special Reports:

Special Reports, research bulletins, and position papers dealing with specific issues relevant to rep/principal interdependence.

Professionalism:

Membership applications are reviewed by the Membership Committee and approved by the Board of Directors; our membership comprises top industry professionals, each upholding our Code of Ethics.

Interdependence:

A continuing commitment to develop effective relationships between reps and manufacturers that result in increased profits for suppliers and increased income for representatives.

MANA MEMBER BENEFITS

Representative:

- 12 Steps to Rep Professionalism Manufacturers' Agent Professionalism Program
- Free "Member in Good Standing" Web Page
- Business Telephone Counseling
- Legal Telephone Counseling
- Agency Sales Magazine (online only)
- Special Access to European Manufacturers Seeking Reps
- MANA iToolbox e-Newsletter
- Special Reports and Publications
- Webinars and Teleforums
- Agreement Guidelines
- Seminars to Educate Your Principals
- Commission Protection Acts
- Sales Lead Generation Program

Manufacturer:

- Steps to Becoming a High-Quality Principal Program
- Business Telephone Counseling
- Legal Telephone Counseling
- Agency Sales Magazine
- Special Reports and Publications
- Manufacturer's Seminars
- Webinars and Teleforums
- Agreement Guidelines

After 25 years of direct selling and executive sales management for two of the premier power transmission and bearing manufacturers, I joined a company utilizing Manufacturer's Representatives as the field sales force. PTRA provided resources and relationships that facilitated an easy transition from a direct sales force to selling through Reps. Through the process I have found that if managed properly, selling through Reps has many distinct advantages and being a member of a dedicated organization like the PTRA has helped our company maximize the efficiency of our critical frontline sales team.

The annual PTRA convention provides manufacturing members with an excellent venue for interacting with all of their Rep partners in a great environment for learning how best to achieve success in the selling effort. The Rep Mix allows members to meet and discuss critical issues as well as a great opportunity to fill open territories when needed. During my five years as a PTRA member, the convention agenda has continually opened my eyes to the motivations that drive productive Manufacturer/Rep relationships.

Overall, **the excellent training opportunities, legal assistance, and relationship building makes the PTRA an organization that is a must** for any company that utilizes Manufacturers Representatives. PTRA has been extremely beneficial in my transition and in the acceleration of KWS sales growth. KWS will continue to expand our support and participation in the PTRA for many years to come.

Jim Collins

Executive Vice President

Sales & Marketing

KWS Manufacturing Company, Ltd.

MISSION STATEMENT

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

CODE OF ETHICS

The position of the representative is unique in that he is the liaison between the distributor, the original equipment manufacturer, the consumer, and the company he represents.

As a power transmission/motion control advisor he owes a high professional duty towards the distributor, the original equipment manufacturer and at the same time he occupies a position of trust and loyalty to the company he represents.

Only by observing the highest ethical balance can he avoid any conflict between these obligations.

THEREFORE, I BELIEVE IT TO BE MY RESPONSIBILITY:

- To hold my business in high esteem and strive to maintain its prestige.
- To keep the needs of my distributors always uppermost.
- To respect my distributors' confidence and hold in trust personal information.
- To render continuous service to my distributors, customers, and their employees.
- To employ every proper and legitimate means to persuade my customers to use the proper equipment for the application if known; but to rigidly adhere to the highest standards of business and professional conduct concerning these recommendations.
- To present accurately, honestly, and completely every fact essential to my distributors' and customers' final decisions.
- To perfect my skills and add to my knowledge through continuous thought and study.
- To study my business on such a high plane that others emulating my example may help raise the standards of our vocation.
- To keep myself informed with respect to my manufacturers' policies, rules and regulations, and to observe them in both letter and spirit.
- To respect the prerogatives and cooperate with all others whose services are constructively related to ours in the meeting of the needs of our distributors and customers.

2023 – 2024 PTRA

BOARD OF DIRECTORS LISTING

President

Andy Simpson

SKA Simpson & Associates, Inc.
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andy@skadrives.com
(205) 246-9296

First Vice President

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Corbin Gunstream

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(651) 270-0151

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Eden, NY
don@propowerreps.com
(716) 870-3301

Principal Director, Chairman

George Dib

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Charlotte, NC
gdib@solveindustrial.com
(803) 526-5583

Principal Director

Lisa Houry

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Worcester, MA
lisak@pobcoplastics.com
(508) 791-6376

Principal Director

Barb Ross

Garlock
Pell City, AL
barbara.ross@garlock.com
(205) 533-0546

Representative Director

Dan Bendell

Divine Industrial Sales, Inc.
Chanhassen, MN
danbendell@divineindustrialsales.com
(612) 220-8886

Representative Director

Billy Taylor

Taylor Industrial Sales Co.
Atlanta, GA
bill3@gotisco.com
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Representative Director

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Pro-Power Associates, Inc.
Eden, NY
ryan@propowerreps.com
(585) 355-8799

Representative Director

Brent Marbut

Conveying & Power
Transmission Solutions
Itasca, TX
bmarbut@c-pts.com
(817) 907-1830

Representative Director

Adam Creech

R.C. Turk Company
Franklin, TN
adam.creech@rcturkco.com
(404) 358-1691

Representative Director

Tom Thoen

Mountain States Reps &
Associates
Fort Collins, CO
tomthoen@mtnstatesreps.com
(970) 817-1355

PRINCIPAL MEMBERSHIP APPLICATION

PTRA membership runs June 1 – May 31 to align with PTRAs fiscal year. New PTRAs members will receive a pro-rated fee depending on when they join. New members will still be required to pay full membership dues through November 30th. After December 1st, new members that join the association will receive a 50% discount on their dues. This does not apply to renewing members, or those who have previously lapsed their membership.

Qualifications for Principal Membership in PTRAs:

- All applicants must meet the qualifications of the Association’s Bylaws. See www.ptra.org or call PTRAs headquarters for a copy.
- The applicant must be principally a manufacturer, importer, or assembler of power transmission or motion control products, which markets in at least a portion of North America through manufacturers’ representatives.
- The applicant must maintain a registered office in North America.
- The applicant must be sponsored by at least one member firm.



Send completed application along with dues payment to:

PTRAs
10700 Highway 55, Suite 275
Plymouth, MN 55441

Phone: (952) 564-3051
E-mail: ptraHQ@ptra.org
Web site: www.ptra.org

Company Name: _____

Address: _____

City: _____ State/Province: _____ ZIP+4/Postal Code: _____

Country: _____ Phone: _____ Fax: _____

E-mail: _____ Web Site: _____

Year Company was Founded: _____

Sole Proprietorship Partnership LLC Corporation

Name and Title of Firm’s Primary Representative to the Association: _____

Spouse’s name for the Directory: _____

Spouse’s home address for special interest mailings: _____

PRINCIPAL MEMBERSHIP APPLICATION

Products Manufactured:

- | | |
|--|--|
| <input type="checkbox"/> Actuators | <input type="checkbox"/> Gear Drives |
| <input type="checkbox"/> Adjustable Speed Drives | <input type="checkbox"/> Gear Manufacturing Services |
| <input type="checkbox"/> Air Handling | <input type="checkbox"/> Gears |
| <input type="checkbox"/> Bearings | <input type="checkbox"/> Industrial Hardware and Machine Parts |
| <input type="checkbox"/> Belting & Belt Drives | <input type="checkbox"/> Linear Motion Devices |
| <input type="checkbox"/> Brakes | <input type="checkbox"/> Lubrication |
| <input type="checkbox"/> Bulk Material Handling | <input type="checkbox"/> Motors/Generators |
| <input type="checkbox"/> Chain & Chain Drives | <input type="checkbox"/> Plastics |
| <input type="checkbox"/> Clutches | <input type="checkbox"/> Pumps |
| <input type="checkbox"/> Controls | <input type="checkbox"/> Seals |
| <input type="checkbox"/> Couplings & U-Joints | <input type="checkbox"/> Sensors |
| <input type="checkbox"/> Fluid Power | <input type="checkbox"/> Other: _____ |

Does the company own any part of a Power Transmission or Motion Control Distributorship or Manufacturers' Representative Company? Yes No

If yes, name of company: _____

Is your firm's business predominately Power Transmission OR Motion Control ?

Do you sell through your own direct sales force? Yes No

If yes, where: _____

Do you currently market through Manufacturers' Representatives? Yes No

Do you currently have territories open for representation? Yes No

Do you warehouse anywhere other than at your plant? Yes No

Do you expect representatives to purchase your product for resale? Yes No

Will you be willing to assist PTRA in improving relations with manufacturers? Yes No

If no, please state your reasons: _____

SPONSOR. Please list your firm's PTRA member sponsor: _____

Name: _____

Firm: _____

PRINCIPAL MEMBERSHIP APPLICATION

Membership dues are based on your company's North American annual sales volume for Power Transmission/Motion Control Products. Dues cycle is 6/1-5/31.

APPLICABLE DUES AMOUNTS:

\$475 <\$2M	\$650 \$2M-\$3.99M	\$750 \$4M-\$5.99M
\$875 \$6M-\$9.99M	\$1,100 \$10M-\$14.99M	\$1,300 \$15M-\$24.99M
\$1,500 \$25M-\$49.99M	\$2,000 \$50M-\$99.99M	\$2,500 \$100M-\$499.99M
\$3,250 \$500M-\$1B	\$4,000 >\$1B	

Dues Amount: _____

Payment method: Check #: _____ (payable to PTRAs) enclosed.

Or, the following credit cards are accepted: Visa MasterCard American Express

Credit Card Account #: _____ Security Code: _____

Expiration Date: _____ Signature required for Credit Card: _____

STATEMENT: Contributions or gifts to the Power-Motion Technology Representatives Association are not deductible as charitable contributions for federal income tax purposes. Dues payments are deductible by members as an ordinary and necessary expense.

See 10701 of the Revenue Act of 1987. PTRAs's Federal ID Number is 23-7267570

Signature of firm's representative: _____ Date: _____

REPRESENTATIVE MEMBERSHIP APPLICATION

PTRA membership runs June 1 – May 31 to align with PTRA's fiscal year. New PTRA members will receive a pro-rated fee depending on when they join. New members will still be required to pay full membership dues through November 30th. After December 1st, new members that join the association will receive a 50% discount on their dues. This does not apply to renewing members, or those who have previously lapsed their membership.

Qualifications for Representative Membership in PTRA:

- All applicants must meet the qualifications of the Association's Bylaws. See www.ptra.org or call PTRA headquarters for a copy.
- Representative membership in the Association is open to independent manufacturers' representatives for power transmission and motion control equipment who sell primarily through distribution or to designated markets.
- Membership includes individuals and firms, such as sole proprietorships, partnerships and corporations.
- The applicant must represent at least two manufacturers in the product category and must operate under contracts or agreements for specific territories.
- The applicant must not be under the control of a distributor and must be free of financial control by any manufacturer.
- The applicant must also agree to comply with the Association's Code of Ethics as approved by the Board of Directors. *See page 3.*



Send completed application along with dues payment to:

PTRA
10700 Highway 55, Suite 275
Plymouth, MN 55441

Phone: (952) 564-3051
E-mail: ptrahq@ptra.org
Web site: www.ptra.org

Company Name: _____

Address: _____

City: _____ State/Province: _____ ZIP+4/Postal Code: _____

Country: _____ Phone: _____ Fax: _____

E-mail: _____ Web Site: _____

Year Firm was Founded: _____ Sole Proprietorship Partnership LLC Corporation

Number of Outside Salespeople: _____ Number of Inside Salespeople: _____

Name and Title of Firm's Primary Representative to the Association: _____

Spouse's name for the Directory: _____

Spouse's home address for special interest mailings: _____

REPRESENTATIVE MEMBERSHIP APPLICATION

Territory Covered (Check all states/provinces served wholly or in part):

US Territories:

- | | | |
|--------------------------------------|---|---|
| <input type="checkbox"/> Alabama | <input type="checkbox"/> Kentucky | <input type="checkbox"/> North Dakota |
| <input type="checkbox"/> Alaska | <input type="checkbox"/> Louisiana | <input type="checkbox"/> Ohio |
| <input type="checkbox"/> Arizona | <input type="checkbox"/> Maine | <input type="checkbox"/> Oklahoma |
| <input type="checkbox"/> Arkansas | <input type="checkbox"/> Maryland | <input type="checkbox"/> Oregon |
| <input type="checkbox"/> California | <input type="checkbox"/> Massachusetts | <input type="checkbox"/> Pennsylvania |
| <input type="checkbox"/> Colorado | <input type="checkbox"/> Michigan | <input type="checkbox"/> Rhode Island |
| <input type="checkbox"/> Connecticut | <input type="checkbox"/> Minnesota | <input type="checkbox"/> South Carolina |
| <input type="checkbox"/> DC | <input type="checkbox"/> Mississippi | <input type="checkbox"/> South Dakota |
| <input type="checkbox"/> Delaware | <input type="checkbox"/> Missouri | <input type="checkbox"/> Tennessee |
| <input type="checkbox"/> Florida | <input type="checkbox"/> Montana | <input type="checkbox"/> Texas |
| <input type="checkbox"/> Georgia | <input type="checkbox"/> Nebraska | <input type="checkbox"/> Utah |
| <input type="checkbox"/> Hawaii | <input type="checkbox"/> Nevada | <input type="checkbox"/> Vermont |
| <input type="checkbox"/> Idaho | <input type="checkbox"/> New Hampshire | <input type="checkbox"/> Virginia |
| <input type="checkbox"/> Illinois | <input type="checkbox"/> New Jersey | <input type="checkbox"/> Washington |
| <input type="checkbox"/> Indiana | <input type="checkbox"/> New Mexico | <input type="checkbox"/> West Virginia |
| <input type="checkbox"/> Iowa | <input type="checkbox"/> New York | <input type="checkbox"/> Wisconsin |
| <input type="checkbox"/> Kansas | <input type="checkbox"/> North Carolina | <input type="checkbox"/> Wyoming |

Canadian Territories:

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- New Foundland
- Nova Scotia
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan

International Territories:

- Mexico
- Puerto Rico
- South America
- South Korea
- Virgin Islands

Other: _____

Branch Locations (List address and phone numbers of each; attach supplemental sheet if necessary):

List all manufacturers you represent. Provide full name and address; attach supplemental sheet/line card if necessary. (This information is for the application process only and is not available to the membership.)

Complete the following:

- A. Can you provide warehouse space? Yes No
- B. Do you invoice in your company name? Yes No
- C. Do you warehouse any lines? Yes No
- D. List the names of the suppliers you invoice under your company name:

E. Is your business predominately Power Transmission OR Motion Control ?

SPONSOR. Please list your Firm's PTRAs member sponsor:

Name: _____

Firm: _____

REPRESENTATIVE MEMBERSHIP APPLICATION

PTRA Code of Ethics

The position of Manufacturers' Representative is unique in that the Representative is the liaison between the distributor, the original equipment manufacturer, the consumer, and the company represented.

As a power transmission/motion control advisor, the Representative upholds a high professional responsibility to the distributor and the original equipment manufacturer, and at the same time occupies a position of trust and loyalty to the company represented. Only by observing the highest ethical balance can the Representative avoid conflict between these responsibilities.

As a Manufacturers' Representative, it is my responsibility to:

- Hold my business in high esteem and strive to maintain its prestige.
- Keep the needs of my distributors at the forefront.
- Respect my distributors' confidence and hold in trust personal information.
- Render continuous service to my distributors, customers and manufacturers.
- To employ every proper and legitimate means to persuade my customers to use the proper equipment for their application, if known, while strictly adhering to the highest standards of business and professional conduct concerning these recommendations.
- Present accurately, honestly and completely every fact essential to my distributors' and customers' final decisions.
- Perfect my skills and add to my knowledge through continuous thought and study.
- Conduct my business on such a high plane that others emulating my example may help raise the standards of my profession.
- Keep myself informed with respect to my manufacturers' policies, rules and regulations, and to observe them in both letter and spirit.
- Respect the prerogatives of and cooperate with all others whose services are constructively related to mine in meeting the needs of my distributors and customers.

Do you agree to comply with the Association's Code of Ethics? Yes No

Dues are \$450 per year for the firm (including the owner/president), plus \$50 per additional employee.

\$450

for membership 6/1-5/31

+

\$50

per additional employee

Primary Dues Amount: **\$450**

Additional Employee Amount: (Number of employees _____ x \$50) = \$ _____

TOTAL: _____

Payment method: Check # _____ (payable to PTRA) enclosed.

Or, the following credit cards are accepted: Visa MasterCard American Express

Credit Card Account #: _____ Security Code _____

Expiration Date: _____ Signature required for Credit Card _____

STATEMENT: Contributions or gifts to the Power-Motion Technology Representatives Association are not deductible as charitable contributions for federal income tax purposes. Dues payments are deductible by members as an ordinary and necessary expense.

See 10701 of the Revenue Act of 1987. PTRA's Federal ID Number is 23-7267570

Signature of firm's representative: _____ Date: _____