



# THE INDEPENDENT

## From the Desk of the President



First let me say that it will be an honor serving you as President for the 2016/2017 year. I hope to meet as many of you as possible over the next year. Until I do, feel free to contact me via email:

[peter@peterjcrossa.com](mailto:peter@peterjcrossa.com) if you ever have any questions or concerns about the direction of the association. The attitude of our Executive Director and the entire Executive Committee is that we are here to serve and promote the interests of our members.

There are several initiatives that we will work at developing this year. The overall objective is to continue building an association that is the standard bearer for the industry. We want to build an association that existing members and outside non-member firms will view membership in the NAIIA as a key component to their own success. Finally, we want to build an association that guides its members to the best operational practices, “top of mind” brand exposure, and a sustainable business model.

To that end, we’re going to perfect the Call Center initiative. We’ve received a number of complaints about the existing provider. We agree that we’ve hit some snags and it appears changes will be in order. We will have a permanent toll-free number that will allow insurance claims examiners looking for an IA to find one quickly by calling that number. We anticipate firming up solutions over the next month or so.

We will have an app that a potential or existing client can download to their computer or mobile phone that, with a single touch, will take them to the assignment page on our website. This is still in the development stage.

We will develop a “ride along” program that will allow client companies to place a trainee in one of our participating member offices in order to “shadow” an experienced field adjuster for a day or more. This proposal was well received by NAC advisors at the annual conference. Many clients have desk adjusters that

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have never been in a flood or fire damaged building. This will be a great opportunity to bond and build relationships with clients and their trainees. Members must be vetted and there are liability issues that must be resolved. Joel Moore of Gulf Coast Claims in Houston, TX has agreed to chair this “ride along” committee. If you’re interested in participating as a “ride along” firm or just part of the committee, please contact Joel: [Joel.Moore@GulfCoastClaims.com](mailto:Joel.Moore@GulfCoastClaims.com).

As to promotion of the NAIIA symbol, Cathy Hester of C.J. Hester, Inc. is chair of the Marketing Committee. This is an elite group of members who will take this association to new levels of brand identity. The committee has invested in Google AdWords and Pay-per-Click marketing technology. This way when anyone searches for an IA using any combination of search phrases, they will see a pop-up ad for the NAIIA website. This is cutting edge marketing and is expected to drive new assignments to our website. You will see this very soon if you do a search.

Speaking of the website, we will continue to improve the website including its search properties to facilitate equity among members as to being “found” by insurance clients looking for IA’s in a specific location.

We will continue to promote recognition of the NAIIA symbol by placing key ads in leading claims publications. How could any adjusting firm not want to be a part of this?

We do have our challenges as an association. We’re losing longtime regional members to mergers & acquisitions. This has resulted in a sudden drop of over ten firms and a significant reduction in operating revenues.

It appears that a few smaller member firms are feeling the pinch of membership dues. In response to that we have been working on a dues restructuring. We’re examining a revenue based dues structure but also other alternatives with a view towards more equitable fees. Member Peter Schifrin of Schifrin, Gagnon & Dickey – California is heading that committee.

This reduction in revenues means we have to re-examine our budget and make substantial cuts of line items that don’t support the new marketing initiatives. We have already cut back on officer travel and are scanning the financials to find more areas to cut.

No matter what size we become going forward, we will do what is necessary to maintain a sustainable “excellent” association that serves its members to help them achieve excellence and thus, success. “Excellence by Association” is my theme this year. A rising tide lifts all boats. We raise the bar, we all get stronger.

Respectfully,  
Peter J. Crosa, NAIIA 2016/2017 President

## IACP/NAIIA Joint Award for Excellence in Risk Management

This spring the NAIIA, in partnership with the IACP, awarded three Apple iPads to three deserving students involved in majors pertaining to insurance adjusting and risk management. The colleges that participate in this program are the Manhattan Campus of St. Johns University School of Risk Management, Illinois State University, Katie College, and Virginia Commonwealth University. The RPA is also involved in a similar program in partnership with IACP with Cal State Fullerton in California.

This year's winner from St. Johns was Ms. Imoni Heard, a senior in the school's Risk Management department, whose award winning essay was on "What is the value/benefit of having interaction between the Claims & Underwriting departments in the underwriting/deal making process". Granton Clem, a graduating senior from Virginia Commonwealth University was awarded their NAIIA/IACP Scholarship award on April 28, 2016 during a Gamma Iota Sigma meeting. The award for Illinois State University went to Dylan Smalley and was presented by IACP's IPP, Peter Fennell of Aon Benfield, who conferred the Gift Card at the school's award presentation dinner



Pictured with Ms. Heard from St. John's are Chuck Reilly, President of Edward R. Reilly & Co., Inc., in New York City and his co-presenter, Frederic Gindraux, SVP of Claims for Swiss Re.



Pictured with Granton Clem are Paul Graf, Sr. Vice President of Claims Service Corporation of American, in Richmond, VA and Alex Sardinia, Executive Claims Officer, Markel, North America.

## Website Update

We have been busy updating the NAIIA Member Listings with all the changes you have been sending us. While we like to think we are really good at what we do, we will admit we are not perfect. We need everyone to go to the website and proof their website listings the same way you have proofed your blue book listings. The paper proof we send you does not import into the website (not yet, anyway), so the data on the website is hand entered. That allows for human error, and we are definitely human. So, it is your responsibility to look at your listings and let us know if any corrections need to be made. This can be done at your leisure, but we won't know if there is anything incorrect unless you tell us.

The new website also now has the capability of providing your firm with a direct link to a claim assignment page on your website if you have one established. If you do, and you wish to have us activate the link to your site just send us the URL to the website page where your claim form is currently located. Send it to [brenda@naiia.com](mailto:brenda@naiia.com) and she will get it set up for you.

## NAIIA 2016-2017 Secretary/Treasurer

Your 2016, 2017 Secretary/Treasurer reports that dues collections are lagging this year. We still have 11 members who have not paid their dues. We try to be as lenient as we can in collections, but we are at the point where if the dues are not paid, but you still intend to stay in the NAIIA, we will not be able to list your firm's office in the 2016/2017 blue book. Assuming you will pay by August 26, we will keep you on the website until that date and then we will need to remove you from there as well and consider your membership cancelled. Don't go through all that turmoil – let's just get those dues paid!

## Legislative Update

The NAIIA has a member representative for each state to keep an ear to the ground on any legislative activity within their state that might affect independent adjusters. They on occasion will send us updates that then get published in our newsletter. There have been no updates received for this quarter to date, but it makes me wonder if life gets in the way sometimes and those "ears to the ground" might be pretty busy with their day jobs. So, in that line of thought, we would welcome anyone sending us anything on any legislative activity in your state that affect your job as an independent adjuster. Any new laws on licensing, or changes to claims adjusting that might be in committee would be of interest to others firms in your state. You don't have to be on the committee to send in something and we will always welcome your input. Send any updates to [admin@naiia.com](mailto:admin@naiia.com).

## NASP Offers NAIIA Members Free Membership for 2016

In an ongoing effort to develop the partnership between NASP (National Association of Subrogation Professionals) and the NAIIA, NASP is once again offering new members a complimentary NASP membership for 2016. This offer is for any NAIIA member who is NOT currently a member of NASP, and who did not take advantage of this offer last year in 2015. NASP now has a member forum for discussion threads and there are more than 50 free educational webinars on the calendar!

- What does this mean for NAIIA members? NAIIA members will:
- Have their (\$395) 2016 NASP membership fee waived;
- Receive a subscription to the eSubrogator (online version of the printed magazine that is produced 3x each year);
- Be granted access to the NASP LISTSERV, an email forum that allows >2,300 members to share information and/or seek resources (such as an IA in a particular area);
- Have access to NASP's online member directory;
- Be granted access to the NASP LISTSERV, an email forum that allows >2,300 members to share information and/or seek resources (such as an IA in a particular area);
- Have access to NASP's online member directory;
- Receive access to the NASP Recovery Specialist Guidebook, an online resource of insurance laws in all 50 states;
- Be invited to attend educational events at NASP's 30+ regional chapters;
- Participate in 50+ free educational webinars in 2016;
- Receive discounted member rates (and CE credits) to attend NASP's two national conferences;
- Be invited to write an article for the *Subrogator* magazine / receive priority to be published, and;
- Network with thousands of insurance professionals and have access to a \$35 billion market in subrogation.

To take advantage of this offer, please click [HERE](#), fill out the form and send it to Brenda Reisinger at [brenda@naiia.com](mailto:brenda@naiia.com). She will forward it to Leslie Wiernik, Executive Director of NASP. This is a great opportunity to learn more about the subrogation opportunities out there for your firm.

## Welcome New NAIIA Members

**Evergreen Adjustment Service, Inc.**

Seattle, WA

Elinore Tucker, President

(206) 297-2030

etucker@evergreenadjustment.com

**Best Claims Service, LLC**

Dripping Springs, TX

James Kelsey

(512) 829-4373

claims@bestclaimsservice.com

**J. F. Terry Associates, Inc.**

Newtown Square, PA

Joseph Terry

(610) 355-0400

jterry@jfterry.com

**Trinidad Claims Service, LLC**

Chicago, IL

(847) 830-3072

bob.khosropur@trinidadclaims.com

**Carwood Claims Services, Inc.**

Lakewood, CO

(303) 688-3607

ccowan@carwoodclaims.co

## Claim Professionals Liability Insurance Company, RRG Declares Its First-Ever Dividend to Policyholders

Michael A. Hale, CEO and president of Claim Professionals Liability Insurance Company (CPLIC), Risk Retention Group (RRG), announced today that the board of directors has voted to pay a dividend to policyholders. This is the first time CPLIC, RRG has declared a dividend, making it the only claim professional liability insurer to pay a return to policyholders. A \$25 dividend will be paid as a credit against policy renewal premiums beginning on May 1, 2016 through April 30, 2017. Class A share owners will receive four dividends per share, or \$100, and Class B share owners will receive one dividend per share, or \$25. A dividend will not be distributed to owners of Class C stock.

When we organized our risk retention group in 2004, we told policyholders that our goal was not to make money, but to protect our insureds with liability coverage specifically designed for claim professionals at the lowest cost possible. At that time, we said that after we built our reserves, any year in which we had a significant surplus of funds, we would reward our customers for purchasing stock in our group. Because CPLIC, RRG is organized as a risk retention group, policyholders are required to purchase CPLIC, RRG stock in the group.

### Liability Coverage Designed for Claim Professionals Alone

CPLIC, RRG was founded by claim professional firms to offer independent claim professionals comprehensive liability protection at the lowest possible price. When we started, other insurance companies charged claim professionals the same premium as professions with higher risk profiles. CPLIC, RRG covers *only* claim professionals, and our goal is not to make a profit. Therefore, we can offer lower premiums, fewer exclusions, and smaller deductibles than other insurers in our field. And when there is a substantial surplus and more than adequate reserves, we will issue a dividend.

## NAIIA Happenings

**NAIIA Member and Western Region Vice President, Michael Marsh**, has been awarded the State of Montana's Governor's Achievement Award for Outstanding Workers' Compensation Professional. Congratulations from all your fellow members of the NAIIA on a well-deserved award. Our members are known in the industry to be the best of the best! His award will be presented at the Governor's Conference in Big Sky, Montana on August 25. Way to Go, Michael!

**NAIIA EXECUTIVE COMMITTEE FOR 2016/2017**

Your 2016/2017 Executive Committee for this year includes the following folks. They will work hard all year to bring together the changes President Crosa is planning to implement. Their time is all volunteer and they work hard so when you see them, give them your thanks!

Peter J. Crosa, President, Peter J. Crosa & Co., St. Petersburg, FL; Susan Daniels, President-Elect, Northern Adjusters, Anchorage, AK; David Hausch, Secretary/Treasurer, Hausch & Company, Elgin, IL; Jim Hunt, Past President, International Insurance Services, Ltd, Las Vegas, NV; Paul Graf, Eastern Region VP, Claims Service Corporation of American, Richmond, VA; David Anderson, Southeastern Region VP, Premiere Capitol Adjusters, Inc., Montgomery, AL; Michael Csom, Mid-States Region VP, ASU Group, Kalamazoo, MI; Joel Moore, Southwestern Region VP, Gulf Coast Claims, Houston, TX; and Michael Marsh, Western States Region VP, Midland Claims Service, Inc., Billings, MT. Missing from the photo are Outgoing President, Matt Ouellette, Secretary/Treasurer David Hausch, and Western States RVP, Michael Marsh.

**In Memoriam**

We consider the NAIIA to be one big family – all related in our adjusting careers. As such, when one member suffers the loss of someone close to them, we all feel their loss. Please let the office know of any deaths in your offices so we can share them with the rest of the "family". The following people have departed from this world and our family. Please remember their contributions to our industry and cherish their memory.

**Phyllis Keenan**, Mother of Gary Keenan, former owner of Keenan & Associates (now Integrion), passed away on June 21, 2016

**Teresa Phillips**, mother of Geno Phillips, president of Phillips and Associates, passed away on June 13, 2016

**Wendell Bishop**, Principle of Mason Dillard & Co., passed away on June 29, 2016

**Beverly June Zarembo**, Wife of Ronald Zarembo of Zarembo Claims Service, passed away on July 23, 2016

## NAIIA Scholarships for Students

The Ways & Means Committee has reinstated the Thomas Crowley, Jr. Scholarship Fund. We are making available four \$1,000 scholarships per year to students who are enrolled in an institute of higher learning with a career goal of being involved in the insurance/adjusting industry. The recipient must be the son or daughter of an employee of a member firm or of a current National Advisory Council Member. The application can be found in the NAIIA Community under the Resources for the Main Office Members. Click [HERE](#) for the link to the NAIIA Community. If you would like an application emailed to you, please contact our office at [admin@naiia.com](mailto:admin@naiia.com). The Requirements are listed on the application. Awards will be announced via this newsletter.

## Upcoming Meeting Dates

Everyone mark your calendars for the following dates for regional and affiliated association meetings. You are welcome to attend ANY regional meetings – not just the one in your area.

### **Eastern Region Meeting**

September 21–23, 2016  
Hyatt Regency Chesapeake  
Cambridge, MD

### **Mid–States Region Meeting**

October 5–6, 2016  
Indianapolis, IN

### **Western States Region Meeting**

October 12–15, 2016  
Coeur d'Alene, ID

### **NAIIA 80th Annual Conference**

June 14–18, 2016  
St. Thomas, U.S. Virgin Islands

## FC&S Subscriptions Available

NAIIA is partnering with FC&S Online to provide our members with discounted access to the information they provide. The NAIIA will host the main office fee of \$745 which will allow for our members to piggy back on our subscription for \$85 per user license they wish to enroll.

This is a yearly membership with the fees added to your NAIIA Dues invoice each year. The access for members will run from July 1 to June 30 of each year. You can choose to renew or not on a yearly basis.

If you are interested in taking advantage of this offer, please contact our office at [admin@naiia.com](mailto:admin@naiia.com). We will send you a form to fill in and invoice you for the \$85. You will then get instructions on how to set up your account on-line. Members have told us this is an invaluable tool for them and the price is great. Just remember, it is only one log in per \$85 subscription.

## NAIIA Community

OK – we are ready for all members to go and begin to explore the NAIIA Community. Some of you have gone in and updated your profiles which is great, but for this to be truly successful we need to get all our members to participate. It's hard to hear someone say, "I just don't get anything out of my membership" and realize I've never met them, or seen them involved in any part of the association. It is a true fact that you will only get out of an investment in direct proportion to the involvement you put into it. Business is tough enough – why not learn from your fellow members how to make it a little easier.

So, promise yourself that you will log in at [www.naiia.com](http://www.naiia.com). Click on Membership and then My Transactions. Log in with your email address and password – if you have never logged in before the default passcode is Password1. If you have any trouble at all in logging in send Brenda an email and she will help you reset your password. Once you have logged in click on Social Community on the left side of the screen. You will see which groups you are in – most of you will be in the Main Office Group and then your Regional Group. Update your profile – add your photo so we will recognize you at the next meeting.

If you come across a resource that you think is beneficial to the community send it to Brenda and she'll upload it to the community. If you want to read the minutes of your region meeting or the national meeting, they will be posted in the Community. If you need help when a winter storm takes up all your resources, you can connect with your fellow members and ask for help through the Community. But you have to log in to get started.

The benefit of the Community forum was recently reinforced by a call for discussion on pending ballot votes. You all saw how easy it is to communicate with the forum. **GET INVOLVED!**

## NAIIA 2015-2016 Digital Blue Book

An updated version of the digital directory has now been uploaded onto the website for clients to view. The only difference is the advertising in this updated version. If you have a list of clients you would like to receive this digital version as well, please forward their emails to Brenda so they can be added to the distribution list. Remember the only person who sees these lists is our Executive Director and the publishing company that is doing the directory. You can help with the success of this directory in another way as well. The money collected on the sales of ads goes into the marketing budget which helps promote the NAIIA to all our clients.

**Please help - recommend advertising in the digital book to the vendors that you use. You can give them this contact if they want to place an ad: Karen Grizzard, [grizzardenterprises@yahoo.com](mailto:grizzardenterprises@yahoo.com).**

## NAIIA and The National Advisory Council

Each region has company representatives that sit on their regional National Advisory Council. If you have an industry professional that you think would be a good addition to your region's NAC Committee, please share their contact information with your regional vice president or send an email to us at [brenda@naiia.com](mailto:brenda@naiia.com). We will forward your information on to the RVP of your region. It is a huge benefit to the NAIIA to have these good folks attend our meetings and participate in our programs. We can never have too much input from our clients as to what they would like to see from our association.

## 2017 Conference Information

A picture is worth a thousand words – you probably want to mark your calendars already for the 2017 conference in St. Thomas, US Virgin Islands. Remember Puerto Rico and how much fun we had? This is right up there with "Meeting in Paradise". The dates for the 2017 conference are June 14–17, 2017. Those of you who responded to the room type survey will have first choice of upgraded room types. If you did not reply to the survey and request a room upgrade to a water view, you will be put onto the waiting list for an upgrade and confirmed in an island view room. **The survey is open until Monday, August 15.**



## NAIIA Constitution and ByLaw Balloting Update

Below are the results of the recent voting on ByLaw changes as recommended by the NAIIA Constitution and ByLaws Committee. Voting closed on Friday, August 5, and a total of 97 votes were cast. According to the ByLaws on changes to the Constitution and ByLaws, a two-thirds affirmative vote of the votes cast are required for passage of each measure. The ByLaws will be updated on September 1 for those areas where the voters approved the ballot measure.

**Ballot 1 – Vote to Approve 48, Vote to Disapprove 51** – This measure does not pass to ByLaws 12 and 13 will remain as written.

**11. Branch Office** - The requirements for a “Main Office” are equally applicable to a branch office. In addition, a member firm must show that said branch office is owned and operated on a full time basis by full time salaried personnel under the direction, control and supervision of the member firm, and that the expenses of said branch office and the salaries of the personnel are controlled and recorded in the main office, provided, however, the branch office personnel may receive in addition to salary a bonus or share of the profits. (See Bylaw 20.)

**12. Resident Adjusters** - Member firms may establish and maintain resident adjusters in localities approved by the executive committee. The resident adjuster must be competent to adjust the lines publicized. The resident adjuster must be employed on a full time basis and be under the supervision of the member’s main office or one of its branch offices. All business expenses and the salary of the resident adjuster must be paid from the member’s main or branch office. A resident adjuster may receive in addition to salary, a bonus or share in the profits.

**Ballot 2 – Vote to Approve 90, Vote to Disapprove 7** – This measure will pass and was also approved by the members at the annual conference prior to the voting. This is a new ByLaw 30 which will now read as follows:  
**Bylaw 30.**

**Use of Electronic Communication and Media** – For the purpose of conducting the business of the association matters may be sent to members through electronic communication or other electronic media. The Secretary – Treasurer may utilize electronic communications and media to deliver approved ballots for matters before the membership.

**Ballot 3 – Vote to Approve 87, Vote to Disapprove 10** – This measure will pass and will change Article VIII, Section 10 to read as follows:

**Section 10. Convention Site Committee** – The Executive Committee shall investigate potential sites and the available accommodations for future conventions of the association and shall report thereon to the membership.

**Ballot 4 – Vote to Approve 85, Vote to Disapprove 12** – This measure will pass and will change Article X, Sections 1 and 2 to read as follows:

**ARTICLE X. MEETINGS OF THE ASSOCIATION**

**Section 1.** The association shall meet once in each calendar year at a time and place fixed by the membership. No convention site shall be considered by the association at its annual convention unless it has been investigated by the Executive Committee. Recommendations for sites to be considered by this committee should be submitted to this committee at least 90 days in advance of a convention.

Section 2. Proceedings in any meeting shall be according to Robert's Rules of Order. The executive committee, however, is empowered to decide whether a voting matter, shall be presented at the annual meeting of the association, or shall be submitted to the membership by mail. If submitted by mail, votes which are returned by the membership to the executive office within 30 days from date of mailing are to be counted. The affirmative vote required to pass or approve a matter by mail shall be the same if voted upon in the annual meeting. Matters submitted for a vote by mail shall be accompanied by sufficient information to enable a member firm to understand the purpose of the matter submitted and the effect of the vote. All ballots shall be certified by the secretary-treasurer and the certified results kept on file in the association's national headquarters.

Members may also designate a proxy voter in the event no members will be in attendance at the annual meeting. The proxy vote will be submitted to the Secretary/Treasurer no later than 30 days prior to the meeting date. Any Proxy Vote form submitted will be in effect for just the date of the meeting indicated on the Proxy Vote form.

**Ballot 5 – Vote to Approve 71, Vote to Disapprove 26.** This measure will pass and will change ByLaw 1 to read as follows:

**1. Independence**

Each applicant or member, sole proprietorship, partnership, limited liability company or corporation must establish and maintain to the satisfaction of the Executive Committee that it is established as a full time insurance claim/loss adjusting organization with the principal purpose to serve the claim/loss needs of insurance carriers and self-insured. The Executive Committee may use its discretion in granting or rejecting such membership. Each applicant or member, sole proprietorship, partnership, limited liability company or corporation must establish and maintain plus present documentation of professional liability insurance coverage.

## NAIIA Featured Benefits

Members are reminded that your membership offers more advantages than just great networking, a listing in the Blue Book, and the ability to have your company listed in the on-line membership directory.

**Our newest partner is Lands' End.** We have established a NAIIA store for any apparel or promotional item you might like to have with the NAIIA logo on it. Just click on this line <http://business.landsend.com/store/naia> to go to the NAIIA store for any purchases you might like to make with the NAIIA logo. You will have two options for logos – the official NAIIA logo, or the updated, more modern version of the logo. You are not restricted to any specific color on clothing and there are two color options depending on the color you might be ordering. Take a look and let's show up with logo wear at our NAIIA meetings once again! If you want to bookmark the link in your browser it is

**CEU.com** is a continuing education provider offering professional license holders convenient, engaging and superior quality compliance training that both enhances their career development and increases productivity. They offer NAIIA members a 15% discount off the listed rate. CEU.com is approved in all 50 states and the District of Columbia. The CFP Board of Standards, the CPCU Society, and the American College have also approved many of our courses for CE credit.

**Enterprise Rent A Car** offers members of the NAIIA a discount of 10% from any airport location and 5% from any other (in-town) location. Members need only mention account number 15A9796 when booking through 1-800-rent-a-car or through the web at [www.enterprise.com](http://www.enterprise.com)

**Flippin Cards** Offers NAIIA members competitive rates on business cards. Members may wish to contact Josh Turner, Design Team Lead, [jturner@flippincards.net](mailto:jturner@flippincards.net) Telephone: (858) 4493583; Fax: (858) 408-3000, Website [www.flippincards.net](http://www.flippincards.net) for more information.

**Dell** is a vendor specialists are also available from all Dell partners to customize solutions for every environment. Discounts are extended off of retail/list pricing. Please contact the NAIIA | DELL account manager for assistance: David Frazier, phone: [512-946-1368](tel:512-946-1368), fax: [512-283-7875](tel:512-283-7875), Email: [david\\_frazier@dell.com](mailto:david_frazier@dell.com)

**CDW** A leading provider of technology driven products and solutions allows members to take advantage of a discounted contract pricing structure that could increase based on volume purchases from our organization. **Also, please retain our organizations corporation account number (3725880) which all purchasing should include.** To begin using your purchasing power with CDW, please retain this number [877.840.8164](tel:877.840.8164) for direct contact with Calis Jones, our CDW Account Manager, [calijon@cdw.com](mailto:calijon@cdw.com).