



National Association of  
Consumer Advocates

2015

# ANNUAL MEETING

**FRIDAY, NOVEMBER 13, 2015**

**GRAND HYATT SAN ANTONIO HOTEL, TEXAS**

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## AGENDA

### WELCOME

Kirsten Keefe and Stuart Rossman, *Co-Chairs*

### MANAGEMENT AND FINANCIAL REPORT

Ira Rheingold, *Executive Director*

Daniel Blinn, *Treasurer*

Christine Hines, *Legislative Director*

Jessica Hammond, *Membership  
& Communications Director*

### BOARD ELECTIONS

Leslie Bailey, *Secretary*

### PRESENTATION OF AWARDS

Ira Rheingold, *Executive Director*

### OPEN DISCUSSION

# LETTER FROM THE EXECUTIVE DIRECTOR

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Dear Colleagues:

As we wrap up our 20th anniversary year, I am very excited for what our collective future holds. While we all know that we will be faced with more than our fair share of challenges as attorneys and consumer advocates, I am certain that if we work together, we will all continue to not only survive but thrive in our effort to achieve consumer justice.

This past year, NACA has taken significant steps in setting the groundwork for the future of our organization and our more than 1,500 members. Our Board of Directors has laid out a strategic plan that will help us achieve our vision of becoming the recognized national legal profession leader for consumer protection advocacy. Whether we are working with Congress, advocating with regulatory agencies, or striving to meet all of your substantive, practical, and entrepreneurial needs, our focus is always on providing you with all the tools and skills necessary to be successful consumer attorneys. Part of what makes NACA, your organization, so unique is the community of lawyers that comes together to donate time, resources, and talent in support of our important shared mission. I am constantly amazed and gratified that whenever a call for help or support goes out, you and your fellow NACA members respond

without hesitation. Simply, without you our small staff and budget would not allow for all the successes we've had over these past twenty years.

As we enter 2016 and beyond, we will continue to build upon our current work and continue to support all of your efforts in fighting for vulnerable consumers. We will be looking to bring more of you into the conversation and empower greater ownership of your association across the membership. We'll also be turning to you to help expand our community. As we all know, there are not nearly enough consumer lawyers to meet the needs of vulnerable consumers, so we must work to significantly grow our community. If you have ideas or suggestions or if you are willing to donate your time to help us in our efforts, I hope you will take the opportunity to talk to me or our staff. Together we can and will build a stronger NACA!

Sincerely,



**Ira Rheingold**  
*Executive Director*

## REPORT TO MEMBERS

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This year has been another exciting and challenging year for the field and our association. Consumers continue to face tremendous challenges. Operationally, the launch of the 2015–2017 strategic plan created by the Board of Directors last year has set our association on a course to make significant progress in the coming years, ensuring that our association's priorities will be sound moving forward and that we will continue to build and strengthen our programs to offer the highest quality of service to you, our members.

The investments in infrastructure, technology, and operations this year, the broadening of opportunities to bring more members into volunteer leadership opportunities, and the enhancing of our ability to listen and hear from members has and will continue to pay off in a strengthened and more dynamic organization. NACA is now an organization driven by its strategic plan. This plan allows us to better anticipate the needs

of the field, respond in a timely manner, and maintain focus on our core values and mission. At the same time, the plan insists that we are attentive to the need to review our revenue opportunities and manage our resources wisely.

### WHAT YOU CAN EXPECT IN THE FUTURE

#### ADVOCACY

- Continued work on the issue of arbitration. 2016 will be the year of arbitration and we have the greatest chance in recent history of making significant change to financial contracts.
- Model language for fee agreements that you can use in contracts with clients, which will protect your clients from being taxed on attorneys' fees.
- New technology providing you with prepopulated templates that you can personalize, allowing you to take action quickly when the call goes out.

**COMMUNICATION**

- An interactive online tool and video for consumers to determine if they need a lawyer and connect them to you when they do.

**LEADERSHIP**

- Increased opportunities for short- and medium-term volunteer offerings.
- Efforts to grow the community of consumer lawyers to meet the ever-increasing needs of vulnerable consumers.

**NETWORKING**

- Several technology improvements, including a new platform to facilitate listserv discussions and make it easier for you to search for and connect with other members.
- The relaunch of a mentoring program for new members.

**PROFESSIONAL DEVELOPMENT**

- Educational and resource library offerings classified by skills that the Education Committee determined are necessary for a 21st century consumer lawyer.
- Partnerships with other organizations, which will enable us to offer you trial skills specific to consumer law.

**TECHNOLOGY**

- A refreshed website that is fully responsive and easier to navigate, especially for consumers looking to find an attorney.
- A member portal that makes it easier to access the information you need and want.

**AUDITED STATEMENT OF ACTIVITIES**

For Years Ended December 31, 2014, 2013, and 2012

	2014	2013	2012
<b>INCOME</b>			
Membership Dues	\$375,503	\$324,238	\$306,039
Conferences & Trainings	\$71,939	\$93,850	\$64,895
Cy Pres	\$281,416	\$770,273	\$525,983
Donations	\$7,529	\$15,360	\$5,940
Other	\$36,747*	\$201,334	\$24,236
<i>*This is due largely to one off programs \$102,075 was raised for the Tax Initiative and \$60,000 was from the Mortgage Database contract</i>			
<b>Total</b>	<b>\$773,134</b>	<b>\$1,407,068</b>	<b>\$929,105</b>
<b>EXPENSES</b>			
Membership	\$117,962	\$227,099	\$236,882
Conferences & Trainings	\$184,625	\$204,214	\$229,408
Advocacy	\$156,175	\$152,533	\$210,476
Management & General	\$418,394	\$376,780	\$260,054
Other	\$69,580*	\$26,014	\$7,262
<i>*\$59,115 of the other expenses was for the Tax Initiative contract.</i>			
<b>Total</b>	<b>\$946,737</b>	<b>\$986,640</b>	<b>\$944,082</b>
<b>Net Income</b>	<b>(\$173,603)</b>	<b>\$420,428</b>	<b>(\$14,977)</b>

For Period Ending June 30, 2015

Income \$428,255      Expenses \$503,656      **Net Income (\$75,401)**

# A ROUND OF APPLAUSE

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## 2015 AWARD WINNERS

### Excellence in Consumer Journalism

Amy Davis, *KPRC2 News*

### Excellence in Investigative Journalism

Blake Ellis, *CNN Money* and Melanie Hicken, *CNN Money*

### Consumer Attorney of the Year

Keith Keogh, *Keogh Law, LTD*

### Consumer Advocate of the Year

Jane Santoni, *Williams & Santoni, LLP*

### Outstanding Achievement in Consumer Law

J. Erik Heath, *Attorney at Law*

## MEMBERS MAKING A DIFFERENCE

A large part of NACA's strength comes from those members who go above and beyond to make a difference in the financial position of our organization. We would like to thank the following individuals for their generous support of our association.

### 2015 CY PRES DONORS

Leonard Bennett  
Daniel Blinn  
Richard Gordon  
James Pietz

### 2015-2016 MEMBERSHIP YEAR

#### PLATINUM MEMBER

Leonard Bennett

#### GOLD MEMBERS

Seth Lesser  
Michael Malakoff  
David Philipps  
Mary Philipps

We would also like to thank our 11 Silver members and 42 Bronze members.

If you are ready and able to take your membership to the next level, talk to NACA staff about increasing your membership to one of these higher levels.

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