

9th Annual *Best Practices in*
Winery
Operations:
Cutting Edge Concepts and Practices



MARCH 19 & 20,
2015

River
Terrace
Inn

NAPA, CA

ACCREDITATION

CA CLE

11.25 General and 1.5
Elimination of Bias
MCLE Credit Hours

WA MCLE

12.0 Credits

Call our office for
accreditation in
other states.

TOPICS COVERED

Agriculture

Business

Employment

Land Use

Why You Should Attend:

Wineries, vineyard owners, and other businesses servicing the wine industry face a complex set of legal and regulatory obstacles at the federal, state and local level. Businesses looking to not just react to, but actually shape the laws that impact their bottom line, need to arm themselves with current information from industry leaders. At the same time, wine businesses looking to grow and flourish must explore different legal avenues for financing, marketing and promotion.

Please plan to join us on March 19 & 20, 2015. We will address such cutting edge issues as the Current State of the Winery Definition Ordinance, Operations Finance, Portfolio Building, Labor Issues with Volunteers, Interns and Immigrants, Licensing Agreements and Contractual Considerations, Production Deals, Private Labels, Franchising, Events, and much more. This program will give your business and clients the tools you need to succeed and excel!

Conference Sponsor:

THE
GRAPEVINE
MAGAZINE

Program Co-Chairs:



**K. Christopher ("KC")
Branch**

winelaw.net/KC Branch Firm



James W. Terry
*Dickenson Peatman &
Fogarty*

**5 EASY
WAYS TO
REGISTER**

- 1 **ONLINE:** www.TheSeminarGroup.net
- 2 **FAX:** 866-435-3444
- 3 **EMAIL:** info@TheSeminarGroup.net
- 4 **PHONE:** 206-463-4400 / 800-574-4852
- 5 **MAIL:** PO Box 523, Vashon, WA 98070

RAISING THE BAR OF CONTINUING LEGAL AND PROFESSIONAL EDUCATION

9:00 Introduction and Overview

K. Christopher ("KC") Branch, *Program Co-Chair*
winelaw.net/KC Branch Firm, A California Law Firm
John Trinidad, *Program Co-Chair*
Dickenson Peatman & Fogarty

9:10 Special Presentation: Legal and Regulatory Update

General Overview of Shift in DTC Laws;
 What is the Next Battleground?

Lori Ajax, Deputy Div. Chief (Invited)
California Department of Alcoholic Beverage Control
Steve J. Gross, Vice President, State Relations
Wine Institute

10:00 Break

10:15 25th Anniversary of the Napa Winery Definition Ordinance – Retrospective and Prospective Views

- Goals of WDO and Anticipated Growth Following Adoption
- Current State of Play; Criticism of WDO
- Proposed WDO Revisions
- Comparative Regulations from Other Counties

Richard P. Mendelson, Moderator
Dickenson Peatman & Fogarty
W. Andrew Beckstoffer, Owner
Beckstoffer Vineyards
Susan F. Petrovich
Brownstein Hyatt Farber Schreck LLP

11:45 Midday Break

1:00 Finance – Accessing Capital for Vineyard and Wine Production Projects

- Sources of Capital
- Tradeoffs
- Best Practices
- Licensing Issues

Alfredo Barreto, Jr., Partner
Wood Warren & Co.
Adam Beak, SVP/Manager
Bank of the West
Mark Brody, SVP/Mgr., Wine Specialty Group
Umpqua Bank

2:00 Creating a Winning Wine Portfolio

- Three Tier Distribution System
- A View from the Middle

Keith D. Wesselschmidt
 CFO/Vice Pres., New Business Dev.
V2 Wine Group

2:30 Break

2:45 Diversity in the Vineyard and the Cellar (Elimination of Bias)

- By The Numbers – How the Legal Profession and the Wine Industry Stack Up
- Finding Mentorship Models That Work
- Women in Leadership

Katja Loeffelholz, Moderator
Dickenson Peatman & Fogarty
Coral E. Brown, Co-Owner/Dir., Brand Mgmt.
Brown Estate Vineyards LLC
Remi Cohen, Vice Pres./Gen Mgr.
Lede Family Wines/Cliff Lede Vineyards
Cathy Corison, Winemaker/Proprietor
Corison Winery
Genevieve Janssens, Dir. of Winemaking
Robert Mondavi Winery
Vanessa Robledo, CEO/Majority Owner
Black Coyote Winery

4:15 Volunteers, Interns, and Immigration

- Laws Limiting Use of Volunteers and Recent Audits
- Winemaking / Grape Picking Marketing Events
- Harvest Interns
- Securing Foreign Labor

Melissa Harms
Law Offices of Melissa Harms
Gregory J. Walsh
Dickenson Peatman & Fogarty

5:00 Adjourn and Reception ~ Sponsored by:

DICKENSON PEATMAN & FOGARTY
 WORLD CLASS LAW FIRM - WINE COUNTRY LOCATIONS

winelaw.net
 by the



Friday, March 20, 2015

9:00 Introduction and Overview*Program Co-Chairs***9:10 Land Prices and the Next Generation: Finding Vineyard Sources**

- Where Are Young Winemakers Finding Their Own Vineyards?
- What Impact Will Land Prices Have in Keeping Talent in Napa?
- What Alternative Models Are Available for Owning Your Vineyard?

John Trinidad, Moderator*Dickenson Peatman & Fogarty***Tegan Passalacqua**, Head Winemaker/Vineyard Mgr.*Turley Wine Cellars***Matthew Rorick**, Winemaker*Forlorn Hope Wines***10:10 Break****10:25 The AVA Application Process**

- What TTB Looks For in Creating an AVA
- Place Name, History, Intellectual Property Issues
- Geographic, Climate and Other Scientific Evidence
- Dealing with Potential Opposition

Carol Kingery Ritter*Dickenson Peatman & Fogarty***11:00 Creating and Maintaining AVA Value**

- Protecting Place Name
- Creative Marketing Solutions for AVA / Winegrower Groups
- Petitions to Expand Boundaries: Sta Rita Hills AVA

Carol Kingery Ritter, Moderator*Dickenson Peatman & Fogarty***Richard Sanford**, Owner*Alma Rosa Winery & Vineyards***Rex Stults**, Govt. Relations Dir.*Napa Valley Vintners***12:00 Midday Break****Conference Information****Course Accreditation**

THE SEMINAR GROUP is an approved State Bar of California MCLE provider; therefore, this course is approved for 11.25 general and 1.5 elimination of bias MCLE Credit Hours. This course has been approved for 12.0 hours of Washington MCLE credit. For information or accreditation in other states, please call THE SEMINAR GROUP at (206) 463-4400 or (800) 574-4852.

Substitution/Cancellation

You may substitute another person at any time. We will refund tuition, less a **\$50 cancellation charge**, if we receive your cancellation by **Friday, March 13, 2015**. No refunds will be given after this date. *Please note that if you do not cancel by the deadline and/or do not attend, you are still responsible for payment.*

Seminar Location

The seminar will be held at the River Terrace Inn, 1600 Soscol Avenue, Napa, California, (707) 320-9000. Please call the venue for directions/questions.

1:15 Rock Stars, Ragu Kings and Retailers: What's Possible through Licensing Agreements, Production Deals and the World of Private Labels:

- Getting into the Wine World without a Winery
- Structuring the Trademark License Agreement
- Exercising License Privileges
- Trademark Protection—Brand Owner Approval
- Promotions and Personal Appearances – Supplier Approval
- Private Label Wars – Where Are the Lines Being Drawn

Suzanne DeGalan*Hinman & Carmichael LLP***John A. Hinman***Hinman & Carmichael LLP***Simone M. Katz-O'Neill**, Staff Attorney*Delicato Family Vineyards***Jolene A. Yee**, Vice Pres./General Counsel*Delicato Family Vineyards***3:00 Break****3:15 Franchise Laws: Knocking Down Trade Barriers**

- Overview of States with Franchise Laws and Update on Litigation (Mainly in Missouri)
- How Franchise Laws Impact the Market
- Distributor Relationships and Terminations in a Franchise State

Tracy K. Genesen*Edrington Americas; New York, NY***Erik Lawrence***Gaw Van Male***Ken R. Minami**, Vice Pres./General Counsel*Constellation Brands, Inc.***4:15 Charity, Sports, and Concert Events**

- Using Events to Promote Your Products
- Creative Ways to Get Brand Exposure
- Legal and Regulatory Concerns – What You Need to Know to Stay Legal
- Licensing Required for Special Events

J. Daniel Davis*Attorney at Law***Drea Helfer**, Owner*DH Wine Compliance***Richard J. Idell***The Idell Firm***5:00 Adjourn**

9th Annual **Best Practices in Winery Operations**

March 19 & 20, 2015 • River Terrace Inn • Napa, CA

Name _____

Additional Name _____

Firm _____

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Attendance Fees

- ☐ Attorney \$895
☐ Winery \$795
☐ Government/ Non-Profit \$695

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