THE LOG

August/September 2019

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Lake States Lumber Association

Address: 1353 W Hwy US 2, Ste 2 Crystal Falls, MI 49920

Website: www.lsla.com

Email: lsla@lsla.com

Phone: 920-884-0409

Fax: 920-455-7705

Letter from Director James Maltese

Dear LSLA Membership,

The word uncertainty seems to be coming up in almost every conversation about lumber demand. In my relatively short career, compared to most of our members, I have never seen *nor heard* of the markets being so volatile with such major "swings" in the industry. I remember four months ago hearing from several seasoned personnel, "It can't get much worse" and well, here we are. This volatile time in the hardwood industry will continue to affect all of our members and indirect business partners but most importantly OUR everyday lives, both financially and emotionally.

So in a time of unprecedented uncertainty, what is certain? I can assure you that LSLA is on the front lines of collaboration with fellow industry leaders. It is our duty as an association to not only represent our region and our industry but to work together to promote the success of our industry for generations to come.

Back in July, hardwood industry leaders from all over the country were called to action and the Hardwood Promotion Coalition was established. It is comprised of several other industry related organizations and leaders, most of which are a part of the Hardwood Federation. LSLA is an actively engaged member of the coalition. The executive summary of the July meeting can be found on page 3 of this newsletter and on the LSLA website at www.lsla.com.

Moving forward, there will be a follow up meeting this fall to continue the collaboration effort. LSLA will continue to do everything within reach to actively engage in this effort to promote the hardwood industry and will be at the forefront of any industry related participation . We will be certain to share any major updates with all of our members. If there are any questions in the meantime, please reach out to myself at jmaltese@stella-jones.com



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Back Row (left to right): Jim Maltese (Stella-Jones Corp.), Larry Krueger (Krueger Lumber), Pete Johnson (Granite Valley Forest Products), Steve Peters (Rockland Flooring), Dennis "Gus" Gustafson (Besse Forest Products).

Front Row (left to right): Fred "Butch" Fisher (AJD Forest Products), Brady Francois (Snowbelt Hardwoods), Margaret Minerick (Sagola Hardwoods), Jennifer Lu (WI DATCP), Rob Paradise (Devereaux Sawmill). Photo courtesy of Zach Miller, Miller Publications.

The Log is published bi-monthly by the Lake States Lumber Association, Inc. For address corrections or to contribute news articles, opinion pages, or advertising, contact us at:

1353 W Hwy US 2, Ste 2 Phone: 920-884-0409 Crystal Falls, MI 49920 Email: lsla@lsla.com

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HARDWOOD PROMOTION COALITION

Executive Summary of July Meeting

Issue

The U.S. hardwood industry is facing significant change driven by a variety of factors, including stiff competition from vinyl, plastic, ceramic and concrete products, a slowing world economy, continued misleading campaigns about the sustainability of wood products aimed at both the public and policy makers, and the ongoing U.S. trade war with China. Markets are shrinking and businesses are looking towards an uncertain future.

The U.S. hardwood industry has a wonderful story to tell...the beauty and desirability of the products, the history of the industry, the small family business focus, the sustainability of our raw material, and the environmental and health benefits of using hardwood. However, the industry has not yet been successful in developing a coordinated and collaborative initiative to promote the true story and science-based benefits of real American hardwood. This has allowed our competitors and adversaries to frame public opinion and gain the advantage.

Call to Action

In order to start the process of developing a collaborative effort to promote the use of real American hardwood to consumers, a small group of hardwood association executives came together to brainstorm ideas and approaches. From this conversation came a larger meeting in Atlanta on July 16-17, 2019 with 19 hardwood association executives and association board members to further consider actions that the entire industry could participate in and benefit from.

The group agreed a priority is to move forward in a way that is open and engages **all** members of the hardwood community...receiving input and recognizing the differences of various industry segments. The many unique aspects of the hardwood industry were identified and it was acknowledged that different industry segments may have different, yet complimentary, promotional needs.

Proposed Action

During the conversations in Atlanta it became clear that the first thing we as an industry must do is to assess our current marketing resources, including existing promotion, research projects, advocacy efforts, and data related to consumer trends and competing product availability. Once we know what we have, we can identify what we need. This information will help us develop the strong brand statement we will need to effectively promote hardwood products. The effort to collect this information has already begun.

The second priority, closely related to the first, is to identify university architecture and design school courses and competitions related to the use of hardwood. Once identified, we can share existing educational materials and recommend industry experts willing to participate in classroom presentations.

Third, and probably most importantly, we must also identify and welcome all those who have an interest in working with us...and creating a process that encourages and allows engagement in different yet complimentary ways. A team has been identified to draft communication materials that can be widely shared at industry meetings over the next several months. Future meetings (to be scheduled soon) will be open to interested associations and companies alike and communications about strategy development and implementation will be available to all.

The task before us all, as members of the U.S. hardwood industry, is not an easy one. However, there is great optimism that if we can work together, we can overcome the obstacles we face.

For more questions and information, please send a note to hardwoodpromotion@gmail.com.

HARDWOOD FEDERATION UPDATE

By Dana Lee Cole—Executive Director, Hardwood Federation

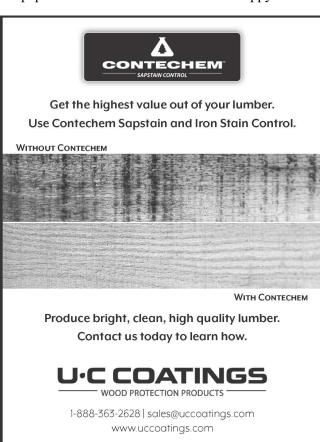
Congress is on Vacation...Now is the Time to Take Action – At Home, On-Line, In DC!

The ongoing trade war with China has sent many in the industry reeling and there is no end in sight as the Administration continues to push hard on China. The Hardwood Team continues to talk to Administration and Congressional officials about the consequences of their actions on the hardwood industry and the need for assistance. Now that members of both the U.S. House and Senate are back in their home states and districts...many on the campaign trail...it is the perfect time for YOU to make your voice heard! You can take action in several ways.

Talk to Your Elected Officials Personally: Take the opportunity to attend town meetings or make appointments with candidates while they are home. Another way to engage is to invite Members to visit you and your business...SHOW them the impacts of the dispute.

You can get more information about your Member of Congress and Senators, district offices locations and contacts, and information about upcoming schedules here.
You can also use this link to send electronic messages to your representatives.

Talk to the Press: Write a letter to your home town newspaper. The Hardwood Federation is happy to work



with you to craft the message.

If you are interested in taking calls from the press, the Hardwood Federation can put you in touch with the <u>Tariffs Hurt the Heartland</u> campaign, a D.C. based coalition that we have been working with closely. THTH is collecting stories, organizing listening sessions, and getting businesses and farmers in touch with media outlets to relate how tariffs are affecting the lives of real people. Please let us know if you would like to be added to their data base of impacted businesses.

Come to the Fly-In! This is your opportunity to come to DC and get in front of elected officials where they work. The annual Fall Fly-In is one of the Hardwood Federation's biggest, most anticipated, and most important events of the year. Each fall, members of the hardwood industry gather in Washington D.C. to stroll the halls of Congress and meet with Representatives and Senators and staff from their - and other important - states to tell their stories and relate the most important issues affecting the industry. The 2019 Fly-In will be held September 17-19.

You may register for the Fly-In here.

Regardless of how and when you speak to your elected officials, it is important that you tell YOUR story. This is your most important and most effective data point. Below are some additional talking points you may also want to refer to during your conversations.

Prior to the trade dispute, half of the grade lumber exported by U.S. hardwood companies went to China. Over \$2 billion if you include all hardwood products. US hardwoods enjoyed a \$1.5 billion trade surplus with China.

China imposed 10% retaliatory tariffs on US hardwoods last summer leading to an immediate and severe drop in exports. Between January and June of 2019, exports of US hardwood to China declined by 40% (valued at \$452 million) compared to the same time period in 2018.

The increase of tariffs to 25% in June 2019 is escalating losses. Hardwood exports to China for the month of June 2019 were down 50% compared to June 2018 exports. We expect the situation to continue to worsen as China is shifting away from U.S. hardwoods to materials from other countries. Jobs, mostly in rural areas, are at risk as companies struggle with declining sales and low prices. US hardwoods are not receiving financial support from USDA to help us weather the storm. Ask them to talk to the USDA and encourage them to take another look and figure out how to support the industry so that it survives.

Wisconsin Worker's Comp Rates Decrease Again Effective 10/1/19



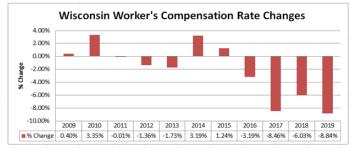
By Scott Shaver, Commercial Insurance Consultant with R&R Insurance

Back in 2017, I had posted an article in The Log stating that Wisconsin worker's compensation rates were taking the largest decrease experienced in the past three decades. At that time, rates were decreasing on average by 8.46%. Well, I'm back again two years later letting you know that rates effective 10/1/19 are down another 8.84%. This makes for a decrease in each of the last four years. Individual rates vary, but overall, the lumber industry rates have benefited from these types of decreases.

These rates are calculated by the Wisconsin Worker's Compensation Rating Bureau (WCRB) annually and they are based on historic payroll and loss data. According to the WCRB, the decrease is believed to be due to lower frequency of claims, quality of medical treatment for injured employees, worker attitudes, economics, and workers' desire to return to work.

Examples of rate changes specific to the lumber industry: 2702 Logging (non-mechanized): -5.86% 2709 Logging (mechanized): -8.52% 2710 Sawmill& Drivers: -6.92% 2714 Veneer Manufacturing: -10.2% 2731 Planing or Molding: -15.66%

2759 Pallet Manufacturing: -8.61% 8232 Lumberyard: -8.19%



Deceasing rates are good for business, however, the anticipated consequence is that insurance carriers in Wisconsin will begin to dial back on dividends. If you have good loss history, you should push for no change.

If you have any questions about a rate that I have not included above, please feel free to reach out to me for additional information.



THE MICHIGAN REPORT

By Scott Everett, LSLA Michigan Legislative Consultant

Roads, Budget, Shutdown

As of this writing there appears to be sharp disagreement between the Senate, House, Governor and everyone in between when it comes to new road funding and the 2019-2020 budget.

In a nutshell, (again as of this writing) the new budget has not been passed by the legislature and sent to the Governor yet. Mainly because the Governor says she wants more road funding within the budget . . . or she isn't going to sign it. How much more funding? . . that's the question. Governor wants a 45 cent per gallon gas tax increase. The Legislature appears to be somewhere between less than that and zero tax increase.

The deadline is October 1. If the budget is not passed by the legislature and signed by the Governor by then, the State Government will shutdown. On August 23, State Budget Director Chris Kolb sent a memo to all State Departments asking them to begin contingency planning in the event of a shut down.

Oak Wilt Legislation Introduced

Legislation was introduced on August 27, HB 4827 (Rep Sabo (D) Muskegon) attempting to curb the spread of Oak Wilt disease.

The legislation would make it illegal to prune or remove dead wood from an Oak tree or remove an Oak tree between April 15 and July 15.

The legislation does have a few exceptions including "Timber Operations" so long as the stump is immediately treated with a sealant, covered with soil or chipped out within 48 HRS.



In August a federal judge ruled that an 1855 treaty "cannot plausibly be read" to create a 337-square-mile Indian reservation on lands in northern Michigan.

The Little Traverse Bay Band of Odawa Indians sued the state in 2015, claiming the 1855 Treaty of Detroit established its reservation on lands that now include Petoskey, Charlevoix and Harbor Springs, and it wanted the court to pave the way to create a reservation there.

GOT MEMBER NEWS?

If you are a member of LSLA and your company has news to share, we have the space for it! Significant personnel changes, new products, business expansion or relocation, or any other notable developments with your business, here is where you can make an announcement.

Send us the information or press release, along with any photos you may want to accompany the article, and we'll do our best to include it in *The Log*. It's a great way to let your fellow LSLA members know what's happening.

Contact us at Isla@Isla.com or 920-884-0409.

Need more issues of *The Log*? Send extra copies to other people or divisions within your company for only \$50/year. It's the best way to ensure everyone is up to date on LSLA news. Contact us at 920-884-0409 or email at Isla@Isla.com.



Bob Bernklau - President 152 N. Cedar St., P.O. Box 159 Stetsonville, Wisconsin 54480

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THE WISCONSIN REPORT

By Amy Boyer, LSLA Wisconsin Legislative Consultant

Public Forums Highlight Inadequate Freight Rail Service

Wisconsin Senator Tom Tiffany (R-Hazelhurst) and Michigan Senator Ed McBroom (R-Waucedah) held joint public forums in late August to call attention to CN freight rail service in Northern Wisconsin and the Upper Peninsula of Michigan. The forums, held in Marquette, MI and Rhinelander, WI were well attended by a diverse group of business leaders and industries from across the region including: the timber industry, paper industry, mining industry, sawmills, manufacturers, regional rail transit commissions and economic development organizations as well as representatives from both the Michigan and Wisconsin Departments of Transportation.

Persistent themes throughout the joint forums included poor customer service, high rates, irregular service, damage to local roads due to increased heavy truck loads, and the closure of a key segment of rail between Rhinelander and Goodman Wisconsin. Representatives from CN were on hand to address concerns and stated, "Service follows demand," to which Tiffany responded "There's much more opportunity out there, and they've squelched some of their opportunity, and they need to take another look at their business plan."

Tiffany, a member of the Wisconsin Joint Finance Committee, also indicated that the state may consider a cash infusion for rail infrastructure improvements and enhancements, but there would need to be commitments by CN tied to those improvements, such as minimum service requirements. There was also robust discussion

around utilizing more short-line railroads and many who spoke hoped that these forums would result in increased communication and collaboration with the freight rail provider. LSLA Board Secretary Pete Johnson testified on behalf of the organization and talked about the

competitive disadvantage the industry faces and focused on the need for an intermodal facility in Northern Wisconsin as well as improved customer service and rates that make sense.

WI U.S. Rep. Duffy to Resign

Republican Congressman Sean Duffy (WI-7) surprised the Wisconsin political world by announcing his resignation from the House of Representatives effective September 23. Duffy, who has served in Congress since 2010, made the announcement after learning that his unborn child, due at the end of October, has a serious heart condition. Governor Tony Evers (D) must call a special election to fill the seat, which is solidly Republican. Nobody has officially announced a bid for the seat, but Sen. Tom Tiffany (R-Hazelhurst) is thought to be seriously considering. Others considering making a run are Sen. Jerry Petrowski (R-Marathon), Rep. Romain Quinn (R-Rice Lake), Sen. Janet Bewley (D-Mason) and former Democrat Senator Pat Kreitlow.

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LSLA Member News: Where members of Lake States Lumber Association share news and updates with their fellow members

Buffalo, NY – August 15, 2019 – U-C Coatings, LLC, a leading manufacturer of wood protection products announces the promotion of Chris Fehr to Sales Director – Eastern Region. Chris joined U-C Coatings in February 2017 as a Sales Representative covering the Great Lakes and Midwest Territory, including Ohio, Indiana, Illinois, Iowa, Michigan, Wisconsin and Minnesota.

In his new role, Chris will oversee the Eastern Region Sales Team as U-C Coatings continues to grow as a trusted partner in the logging and lumber protection, wood products manufacturing and woodworking industries. "Chris has done a remarkable job representing U-C Coatings," says CEO Eric Degenfelder. "He has served our customers well, grown his territory, and partnered with customers on the launch of new products such as our Contechem line of sapstain control and brighteners. We are excited for him to take on this expanded role with the company."

Chris has over 20 years of experience in the forest products industry as a procurement forester, lumber trader and sales director for a number of hardwood lumber companies including Northwest Hardwoods, Baillie Lumber, Kiever-Willard Lumber, Ron Jones Hardwood Sales and Clear Lake Lumber. He also serves as a current member of the Board of Directors for the Great

Lakes Kiln Drying Association. His expertise provides him with unique insight into the needs of U-C Coatings' customers.

Fehr graduated *cum laude* from the State University of New York College of Environmental Science and Forestry with a Bachelor of Science in Natural Resources Management.

U-C Coatings, LLC is a Buffalo-based manufacturer of wood protection products serving the logging, lumber and woodworking industries. Its products help customers achieve higher yields and less waste which furthers the company's mission to protect, enhance and conserve forest resources. For more information, visit www.uccoatings.com.





OVERVIEW OF WI'S VALUE-ADDED WOOD MANUFACTURING INDUSTRY

SCOTT LYON, WI DNR FOREST PRODUCTS SPECIALIST

The valued-added wood manufacturing industry, also known as the secondary wood manufacturing industry, includes firms that use primary wood products such as lumber or veneer to produce higher value products. These products include: flooring, cabinets, millwork, furniture, sporting goods, doors, windows, roof trusses, wall panels, and other building materials. Wisconsin's valued-added wood industry is an important sector for the state's economy and serves as a vital downstream market for forest raw materials. The industry includes more than 800 establishments, employs more than 20,000 workers, and generates a direct economic impact of \$3 billion. In 2016, the wood window and door manufacturing sector of the value-added wood industry was the largest employer.

From July to September 2018, an online and mail survey was conducted with Wisconsin's value-added wood using industry. The goals of the survey were to update the Wisconsin Wood Using Industry Directory, determine the impact of the secondary wood industry on Wisconsin's economy, and develop an understanding of educational and training needs of Wisconsin's secondary wood manufacturers. Survey question topics included: demographics, wood product production, wood product purchasing, employment needs, forest certification program enrollment, trade association membership, and educational training needs. In total, 205 responses were received. After removing undeliverable addresses and

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closed businesses from those contacted, the adjusted response rate for the survey was 51 percent.

One hundred seventy-eight firms with a single facility and 27 with multiple facilities responded to the survey. Of responding companies, only 20 had a production location outside of Wisconsin. The majority of respondents (66%) had fewer than 25 full time employees and produced less than \$5,000,000 annually. Only 12% of responding companies had more than 100 employees. Large companies (23%) reported sales from \$10,000,000 to over \$50,000,000. Most respondents identified as millwork manufacturers (66 firms), architectural woodwork manufacturers (62), followed by cabinet manufacturers (59), furniture (55) and container and pallet manufacturers (54) (Table 1). Some of the respondents indicated that their companies identified as more than one manufacturer type. Other products manufactured included: veneer, lath or stakes, boats or ships, caskets, fencing, beehives, birdhouses and feeders, and partitions and fix-

Respondents were asked about the wood products their company purchased in 2017 (Figure 1). Respondents stated the most frequently purchased wood products were hardwood lumber (135 firms), plywood (110), hardwood dimension components (94), softwood dimension lumber (87), and fiberboard or medium density fiberboard (65). Other products purchased included: sawdust, wood shavings, urban wood. In addition, respondents were asked if they imported products from outside of the United States. Only 22 percent of respondents imported materials in 2017. The most common sources for imports were Canada, China, European Union, South America and Taiwan. Twenty percent of respondents exported finished wood products.

Of those respondents that purchased lumber, the top hardwood species that manufacturers purchased were red oak, hard maple, cherry, white oak, and soft maple. These hardwood species were primarily used in cabinets, millwork, furniture, flooring, container and pallet manufacturing. The main softwood species used in manufacturing were eastern white pine, Douglas fir, western red cedar, southern yellow pine and red pine. Companies purchasing eastern white pine included: window and door manufacturers, millwork, and furniture makers. Other softwood species were used in manufacturing of roof trusses, laminated beams, containers, pallets, and fencing. Overall, the majority of respondents preferred to purchase kiln dried lumber since only 16% of respondents have dry kilns available at their location.

In summary, Wisconsin's value-added wood manufacturers produce a diverse group of products ranging from furniture and millwork to industrial products, such as

OVERVIEW OF WI'S VALUE-ADDED WOOD MANUFACTURING INDUSTRY (CONT'D) SCOTT LYON, WI DNR FOREST PRODUCTS SPECIALIST

crates and pallets. The results showed that employment opportunities exist across the industry with most of responding companies experiencing some sort of labor shortage, especially larger companies. Enrollment in a forest certification and/or chain-of-custody certification program was the minority among respondents. Of those that were certified, manufacturers who responded to the survey were more likely to be enrolled in the Forestry Stewardship Council program compared to other programs. Most of the respondents purchased and sold wood products domestically. Global markets for valued-added wood products from the United States are minimal because of low labor and production costs overseas. There may be an opportunity to substitute locally grown commercial species such as red maple, cherry, walnut, aspen and red or white pine for wood species that are being purchased outside of Wisconsin such as red alder, tulip-poplar, southern yellow pine, or ponderosa pine. Market opportunities for residues may exist or could be enhanced in some areas of Wisconsin for sawdust, shavings, and cutoffs that are currently being landfilled. Potential uses for these residues not only include: wood energy, but also products such as animal bedding, biochar, and wood composite products. This study indicated a continued need for educational training for the value-added wood industry, particularly in the areas of manufacturing and processing. Industry associations, state agencies, and technical colleges should continue to collab-

orate and provide learning opportunities to help strengthen and grow Wisconsin's value-added wood products industry.

Literature Cited

IMPLAN DATA. 2017. Economic Impact Analysis for Planning. Available at: www.implan.com.

WI DWD. 2019 State of Wisconsin Department of Workforce Development. Labor market information. Available at: www.jobcenterofwisconsin.com/wisconomy/query.

Please Update LSLA Mailing Address

LSLA has changed its mailing address. Please update your records. Starting in October 2019, mail sent to the old Green Bay address will not be forwarded to the LSLA office.

The new address is below.

Lake States Lumber Association 1353 W Hwy US 2, Ste 2 Crystal Falls, MI 49920

2019 NHLA CONFERENCE

The National Hardwood Lumber Association invites you to attend the 2019 NHLA Annual Convention & Exhibit Showcase, October 2-4 in New Orleans!

While the current business environment may be uncertain, this is your chance to get a first-hand look at the global hardwood community. You will find new customers, build relationships, get inspired as you network with industry peers, learn from specialized education sessions, and ultimately discover ways to make your business more profitable.

Register today by visiting

nhla.com/nhla/nhla-convention/registration

LSLA ED UPDATE

Thank You Northern Capital Insurance!



LSLA Education would like to thank Northern Capital Insurance Group for their generous donation of a crossbow for the Golf Outing Bucket Raffle in LSLA ED's name. Their donation not only contributed a fantastic prize for the event, but meant a portion of the money collected from the raffle was donated to LSLA Education.

Northern Capital Insurance has been supporting LSLA Education in this and many other ways for years and we could not continue to provide and support educational programs for the hardwood industry without their support.

WHERE IS DAVID BRADLEY?

David Bradley enjoying a waterfall near Hatfield, Wisconsin





Come work with LSLA to promote and improve the Wood Industry! Become a member and enjoy the benefits of networking, publicity, and educational opportunities.

Contact us today at 920-884-0409 or email at lsla@lsla.com, or visit our website at www.lsla.com.

Become an LSLA Member— Enroll Today!

Becoming part of our growing association is as simple as completing this form and mailing it to:

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