



NAVIGATING
CHANGE

GO FOR GOLD

ANNUAL REPORT

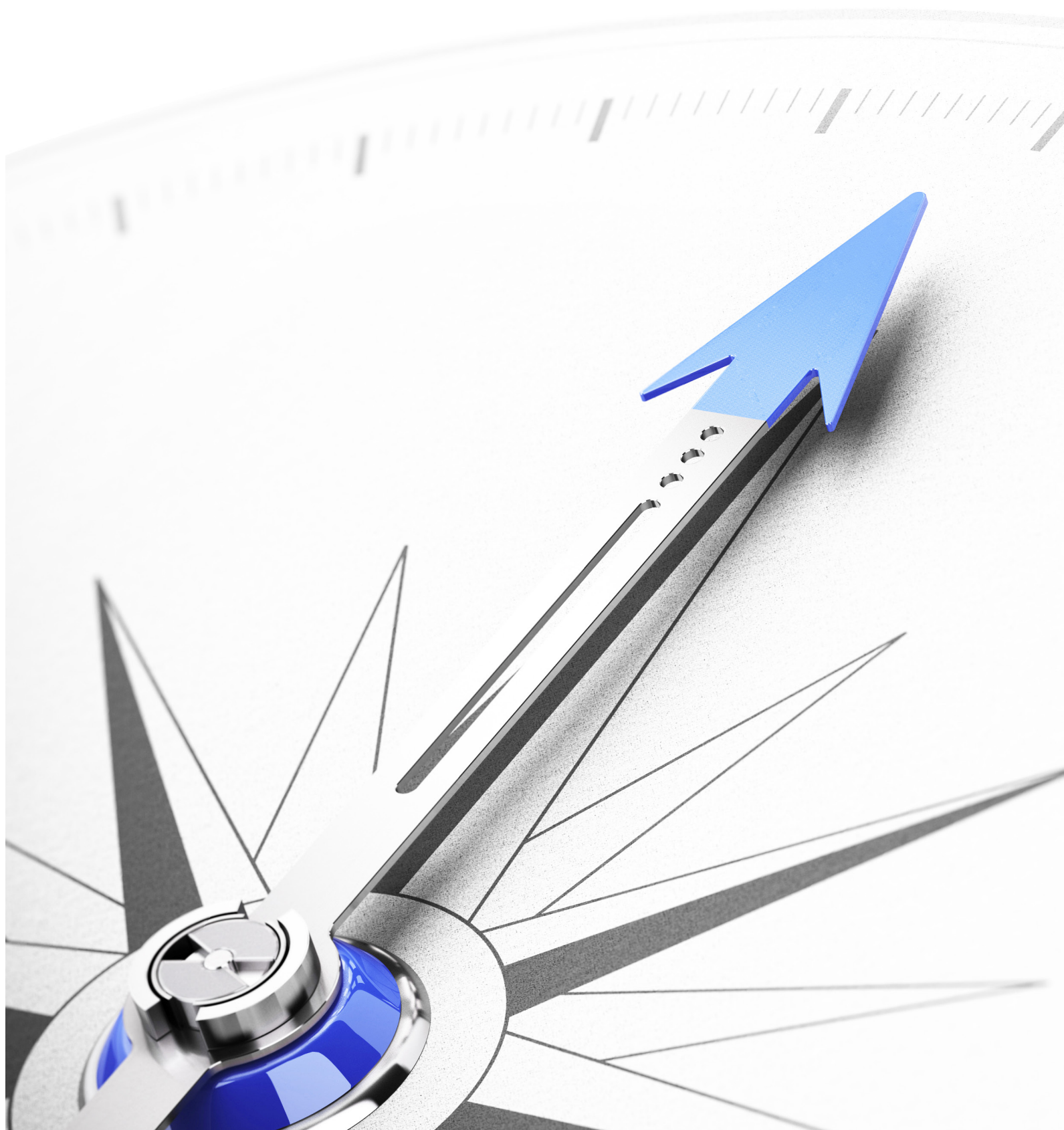




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CHAIRMAN'S MESSAGE



Dear Fellow Stakeholders,

As business leaders, we are accustomed to constant change. To run a successful organization, we must continually adapt to stay competitive, drive innovation, and meet our clients' needs.

The same business reality also applies to the operations of Printing Industries of America. It has been my pleasure to serve the organization as its Chairman of the Board this year. During this time, I have witnessed the association successfully enact changes, both big and small, to improve its business practices and take advantage of opportunities to better serve its members and the printing industry as a whole.

In 2016, Printing Industries of America set out to proactively tackle new challenges in order to meet the rising demands of the industry. Each department within the organization seized upon the opportunity to create

new products and services while making significant improvements to existing offerings. It is this willingness to grow and change along with the industry that will ensure the association continues to run successfully and efficiently well into the future.

In the year to come, I look forward to continuing to guide Printing Industries of America, along with my fellow Directors, to even greater success.

Sincerely,

Curt Kreisler

Chairman, Board of Directors
Printing Industries of America



PRESIDENT'S MESSAGE



Dear Stakeholders,

“Change is the law of life. And those who look only to the past or present are certain to miss the future.”
-John F. Kennedy

Over the past year, Printing Industries of America has embraced change, both internally and externally, treating each new challenge as an opportunity rather than an obstacle.

New products and services

The technological advancements in equipment and software for the printing industry are nearing a fever pitch. As the national trade association for the industry, it is our responsibility to keep pace with these changes and match them with our own improvements. 2016 saw the advent of several new products and services available to both members and non-members. The Center for Print Economics and Management launched their new Financial Performance Assessment program along with a revamped *Dynamic Ratios* structure. The Center for Technology and Research advanced their capabilities in micrographic measurement with the purchase of a Micro-Vu camera-based measurement system. Educational Programming introduced the Improvement Professional

in Print certification that saw 30 participants complete the program in its first year. Each of these changes represented the cycle of recognizing the need for change and developing a product or service to fill that void.

New challenges

There is no doubt that 2016 was a tumultuous year. A presidential election can be polarizing but also unifying. While not everyone may stand on the same side, all members, affiliates, and staff of Printing Industries of America want to ensure the continued success and growth of our industry. Our government affairs and advocacy efforts were increased to meet the demand of supporting pro-print legislators and ensure that our concerns were not overlooked. We stayed abreast of each new regulation and reform to keep members informed and ready to spring into action when the time came. It's through these concerted efforts that we rode the wave of changes into 2017.

New faces

We welcomed several new faces to the PIA family in 2016, adding expertise to our marketing, EHS, and human resources departments. Welcoming these opportunities allowed us to build a stronger, more cohesive team to better serve our members.

In 2017, we plan to continue with this positive trend of growing and developing to meet the needs of our members. There is much more to come and I look forward to having you join us on the journey.

Best regards,

Michael F. Makin

President & CEO
Printing Industries of America

CENTER FOR PRINT ECONOMICS AND MANAGEMENT

There is no doubt that the world had its eyes on the economy in 2016, and the printing industry was no exception. For many years, Printing Industries of America's Center for Print Economics and Management has been an invaluable source of accurate, up-to-date economic and market research on the North American printing industry. The Center has access to an extensive proprietary database developed through years of surveys of member printers, non-member printers, industry equipment manufacturers, and suppliers of consumables.

Utilizing this database, along with state-of-the-art survey software and statistical analysis capabilities, the Center responded to the demands of PIA members by developing several new products and services and improving upon others.

Financial Performance Assessment

In 2016, the Center added the Financial Performance Assessment (FPA) to their lineup of financial benchmarking tools. This new program provides members with an expert assessment based on selected strategic, operational, and financial metrics. The individualized report contains specific recommendations for profit improvement and is designed to be an affordable and accessible tool that any printer can use.

The FPA was born directly from a member need. A PIA member had four plants across the United States and was looking to compare themselves to their peers through a more personalized approach. Based upon their Financial Performance Assessment, they pinpointed several key areas in

Maximize your Financials by Benchmarking your Company

NEW Financial Performance Assessment

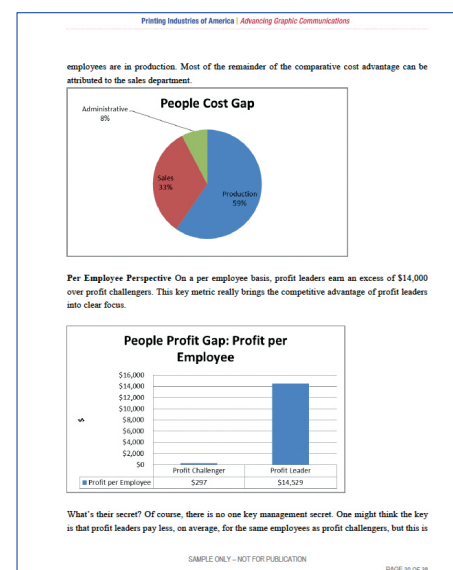
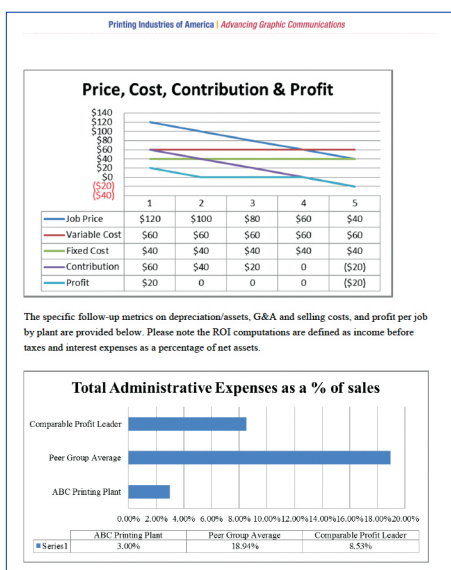
A quick and affordable way for printers to determine their strengths, find their weaknesses, and get a customized template for success.

A personalized Financial Performance Assessment includes...



For more information, visit www.printing.org/fpa.

which their company could improve, including highlighting areas where costs could be reduced. In fact, their CFO even stated that the "Financial Performance Assessment provided us with very useful information and recommendations to improve our bottom line." For a printer with an average of \$1 million in sales per year, even a 1% improvement to the bottom line is worth \$10,000.



CENTER FOR PRINT ECONOMICS AND MANAGEMENT

Dynamic Ratios

Another welcome improvement to PIA's suite of financial benchmarking tools, the Center rebranded its longstanding *Ratios* studies as the new and improved *Dynamic Ratios*. Key features of the new reports include:

SHORTER SURVEY OPTION

24/7 SECURE INTERACTIVE
DASHBOARD

INSTANT GRAPHICS

FOCUS ON
KEY PERFORMANCE METRICS

PEER GROUP REPORT

LEGACY REPORTS AND
DATABASE

A WEB-BASED SURVEY

Although the Center continues to provide traditional reports, albeit with a facelift, we have added a brand-new chapter to each volume, showing the actual quartile points for each piece of information. This has made it easier than ever for members to see exactly how they are performing in comparison to their peers. "The *Ratios* are an extremely valuable tool. I can't imagine not having them," said one member. "We use them monthly to compare

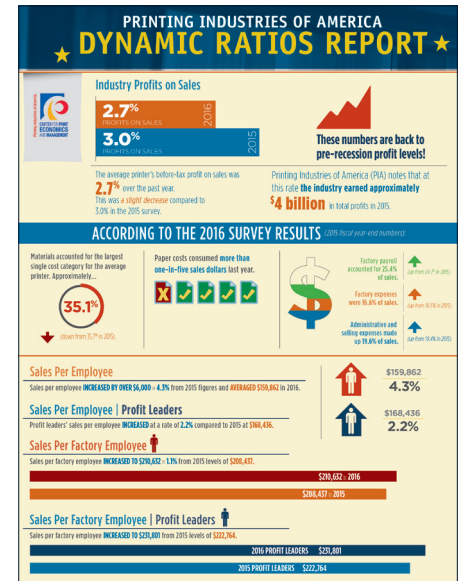


our financial numbers to those of the profit leaders. The comparison allows us to see what areas we need to work on to be at profit-leader levels. We also utilize them to help us develop our annual budget, using the profit-leader numbers as a target."

From the decision-making process to the initial setup, collection period, turn-around time, releases, and reports to our members, the sheer amount of changes has added extra time to our process. We thank everyone for bearing with us while we navigate through this exciting time.

Improved, More Frequent Reporting

In 2016, the Center also dramatically increased the number of special reports and *Flash* reports aimed



at management issues to provide a broader range of information to our members. Our *Flash* reports cover a wide range of topics, such as how-to information on evaluating key performance metrics and explanations of the top ten reasons for low profits. With Middle Tennessee State University, we dug deeper into the managerial issues at the firm level. This included advice for strategic planning, goal setting, operations management, and family involvement for best practices. We were also able to see which products and services were gaining traction among respondents.



CENTER FOR TECHNOLOGY AND RESEARCH

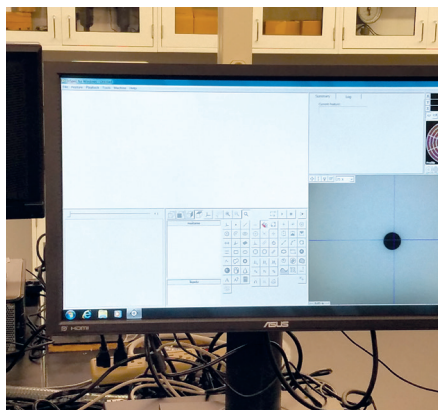
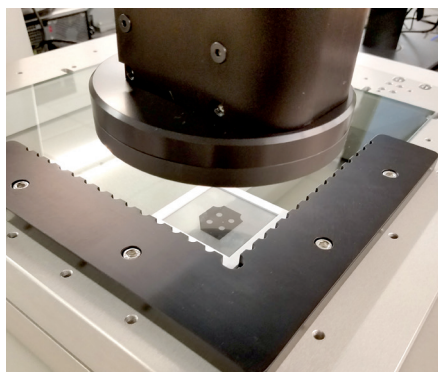
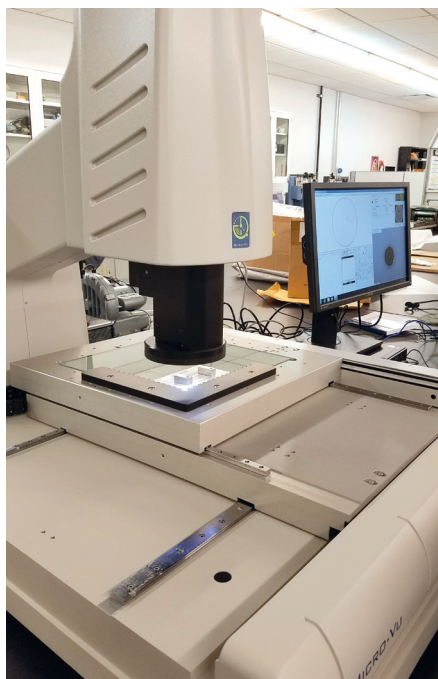
There are many different types of change. Some changes are implemented to make improvements, while other changes occur because of a catalyst to which you must react. Both types of change occurred within the operations of the Center for Technology and Research at PIA in 2016.

Micro-Vu Vertex

The Center for Technology and Research chose to make an operational improvement with the acquisition of a Micro-Vu Vertex video camera measuring system. The Micro-Vu enables the Paper and Ink Laboratory to calibrate quality control devices and make precise measurements of samples submitted to the lab for examination. The bed of the Micro-Vu is capable of measuring samples up to 12.4×21.4 inches and a Z-axis up to 6.3 inches. It can magnify to $817\times$ and is accurate to approximately 3 microns.

Micro-Vu's software provides point-and-click simplicity, proprietary edge detection, advanced LED lighting control, automated calibrations, and a clear display of measurement data and tolerances. When performing measurements on multiple samples, the software records a measurement program to run automatically.

Previously, our lab completed measurements of this type manually. Paper and Ink Lab Technician Lindsay Ferrari would follow a laborious process of taking photomicrographs of samples and using a microscope to



examine and measure the size, shape, volume, and other characteristics of dots. The Micro-Vu system has dramatically increased the lab's productivity and expanded capabilities to precisely measure images.

Technical Association of the Graphic Arts (TAGA)

TAGA is a professional association of industry professionals, scientists, researchers, academics, and students devoted to technology research and innovations in the graphic arts. It features an annual technical conference and houses the world's largest archive of technical papers on graphic arts subjects, dating back to TAGA's founding in 1948.

When colleagues move on to other opportunities, it can cause an unexpected disruption. In this instance, the departure of Dr. Mark Bohan with the TAGA Annual Technical Conference just months away left the volunteer leadership understandably worried about the continuity of the organization.

Jim Workman, vice president of the Center for Technology and Research, took on the role as TAGA managing director and quickly got up to speed about the organization and conference. With the able assistance of TAGA Administrator John Bodnar, the conference was a success with greater attendance than the previous year. The advisory committee breathed a sigh of relief realizing that TAGA's day-to-day operation continued without interruption.

CENTER FOR TECHNOLOGY AND RESEARCH



Continuous Improvement Conference

Following a successful 2016 Continuous Improvement Conference in Milwaukee, the advisory committee realized that the conference, which focuses on Lean manufacturing and operational excellence, lacked content on employee development and engagement for companies intent on building a “people first” culture. With that insight, combined with attendee evaluation comments, the team set out to develop a new session track, Growing and Developing People, for 2017. The breadth and depth of the Continuous Conference was expanded and a new audience of potential attendees was discovered.

This new approach encourages companies to involve their HR professionals and managers in creating an environment where future organizational stars are quickly



identified and all employees are given the feedback and coaching necessary to capitalize on their talents. As a result of this change, the Continuous Improvement Conference is positioned to remain the top industry conference for progressive companies looking for new approaches and ideas to improve their performance. ❄️

ENVIRONMENTAL, HEALTH, AND SAFETY

When it comes to environmental, health, and safety issues, the only constant is, in fact, change. With the end of the Obama Administration in 2016, the Environmental, Health, and Safety Affairs (EHS) Department experienced a significant increase in the demand for assistance from PIA members. The pace of regulatory development accelerated throughout 2016 ending in a flurry of regulatory activity with the U.S. Occupational Safety and Health Administration (OSHA), U.S. Environmental Protection Agency (EPA), and many state air pollution control authorities either adding or modifying regulations.

Expanding the EHS Team

With the EPA and OSHA regulatory pressure on the printing industry increasing, the EHS team added Matthew Crownover as its newest member. Matthew has a degree in Environmental Geoscience and experience working as an EHS professional in the oil and gas industry. His addition has expanded the capacity of the EHS team to service members in a consulting role.

In helping its members with compliance requirements, the EHS Department responds to thousands of member questions and requests each year, providing support, tools, and reference documents as needed. Members can learn about regulations that affect their operations and how to



comply with requirements with the help of the EHS Department. Staff also assists with violation notices and OSHA citations by advising members on how to respond or challenge the notices as applicable.

OSHA Changes

The requests for customized, in-depth consulting services grew dramatically in 2016 due to several factors. The primary one was OSHA's steep increase in penalties coupled with the printing industry being considered a high hazard industry for amputations. This means that OSHA is randomly conducting inspections for compliance at printing operations with their machine guarding and lockout/tagout standards. There has also been an increase in inspections by federal and state EPA enforcement personnel

for air permit and hazardous waste compliance.

The focus on the printing industry has resulted in at least one to two printing operations being inspected per week, and the agencies are issuing large penalties for violations.



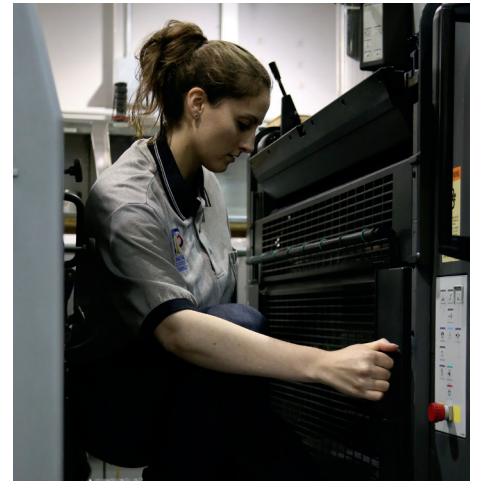
ENVIRONMENTAL, HEALTH, AND SAFETY

This has caused more companies to become proactive in their compliance programs with requests for audits, training, and complete turn-key safety programs. The environmental assistance provided by PIA has involved obtaining air permits, preparing and submitting air emission and other EPA reports, assistance with compliance testing, and hazardous waste management.

Another key service provided by our team involves helping companies respond to notices of noncompliance issued by environmental agencies or citations for noncompliance issued by OSHA. There are a variety of strategies that can be employed when responding to enforcement actions. In many instances, the EHS Department can have specific citations rescinded or assist in getting the penalty greatly reduced.

Providing Invaluable Resources

The support our team provides to the industry includes the development of educational pieces, such as the revised *OSHA Primer* publication, and additions to the safety poster series. The EHS Department gave over twenty-five presentations including webinars, workshops, conferences, and seminars that were designed to educate PIA members about compliance requirements. In-depth articles are prepared on key topics and are published in almost



every issue of *The Magazine*. Yet, our most popular programs are the four-hour OSHA Compliance Essentials workshops.

The Environmental, Health, and Safety Affairs Department takes its name to heart, providing members with a “safety net” as they navigate countless local, state, and national regulations impacting the printing industry. The numerous requests for assistance received in 2016 made

it one of the busiest years ever for the EHS Department, and 2017 is shaping up to be just as busy. 🌀

GOVERNMENT AFFAIRS AND ADVOCACY

Presidential election years require trade associations to assess government affairs priorities and “set the table” for seizing policy opportunities or defending against legislative challenges based on the results at the polls, and 2016 was no exception. PIA certainly expected to navigate a slight change in advocacy waters but awoke after Election Day with the rest of America realizing that a sea of change was quickly approaching.

Grassroots Outreach

First, PIA worked to conduct grassroots outreach throughout 2016. The outreach was meant to ensure that lawmakers running for election were on notice that printing industry executives pay attention to key votes and actions taken on the floor of the United States Senate and House of Representatives.

In June, over two dozen PIA member company executives joined forces with allied industry peers,

the Association of International Corrugated Converters (AICC) and Fibre Box Association, at a Washington, DC fly-in that included briefings by the leadership of the Congressional Paper and Packaging Caucus and a private industry meeting with Speaker of the House Paul A. Ryan to discuss core industry policy issues. PIA also joined forces with hundreds of manufacturers from across the country and across industry sectors to lobby lawmakers directly on the need for pro-growth public policy.

Focus on the Issues

PIA engaged in two high-profile issue campaigns on policy interests at the heart of concern for the printing industry: postal reform and advocating consumer access to paper-based communications. USPS is undergoing a Congressionally-mandated ten-year review of its rate-setting process this year, and in 2016 the Coalition for a 21st Century Postal Service dedicated much of its activity to laying groundwork on legislation to allow USPS to shore up its financial operations to mitigate an outcome of a return to capricious and expensive rate hikes. PIA also worked on behalf of the industry as a leading member of the Coalition for Paper Options (CPO). CPO, a supply chain coalition, served as a watchdog on Capitol Hill to beat back attempts by government agencies to automatically convert



GOVERNMENT AFFAIRS AND ADVOCACY



from paper-based to electronic communications or to penalize consumers for choosing to utilize paper and postal mail.

PrintPAC Achievements

Capitol Hill's focus in 2016 was heavily political. This was also the case with Printing Industries of America. PrintPAC, the political advocacy committee dedicated to electing pro-print, pro-business lawmakers, was in high gear thanks

to the leadership of many PIA member company executives. With their generous support, PrintPAC achieved the following objectives during an intense election year:

**SUPPORTED MORE THAN
30 PRO-PRINT CANDIDATES
AT A 90%-WIN RATE ON
ELECTION DAY**

**SUPPORTED BIPARTISAN
PARTY COMMITTEES AT
BOTH SENATE AND HOUSE
LEVEL**

**REACHED THE \$100,000
ANNUAL FUNDRAISING
GOAL SET BY OFFICERS OF
PIA BOARD OF DIRECTORS**

PIA members stepped up in record numbers to support the industry's political advocacy efforts. Fundraising successes this year included the following:

**OVER 125 INDIVIDUAL
CONTRIBUTORS**

**AVERAGE CONTRIBUTION OF
\$800 PER INDIVIDUAL**

**FIRST-TIME EVER 100%
BOARD OF DIRECTORS
PARTICIPATION RATE, PLUS
85% PARTICIPATION BY
AFFILIATE MANAGERS**

Peer-to-peer fundraising again proved to be PrintPAC's most effective means of building both the contributor base and overall dollar amount necessary to support a pro-print agenda on Capitol Hill. PIA

Government Affairs Chairman Doug Rawson of Superior Lithographics and PrintPAC Chairman Bob Murphy of Japs-Olson led a drive to encourage fellow CEOs/presidents to consider investing just \$84 per month in the industry's political advocacy efforts. Such monthly support translated to \$1,000 in annual contributions and gave a major boost to the industry's political power in Washington, DC. Over 50 individuals came together to aggregate their political giving on behalf of the industry at this \$1,000 mark (also known as the Congressional Circle); ten of these individuals went above and beyond to contribute at the President's (\$2,500) and Chairman's (\$5,000) Circles.

As 2016 ended and the presidential administration prepared the White House transition process, PIA focused on transition as well, on how to leverage the year's political momentum and seize public policy opportunities on behalf of the industry in 2017. ☼

MARKETING AND EDUCATIONAL PROGRAMMING

Embracing change is essential in the areas of Educational Programming and Marketing. Members look to Printing Industries of America to help them navigate the changing technology, trends and customer expectations that may impact their businesses. Keeping a sharp eye on topics that will inform our members is key to our educational programming efforts. The same is true for our marketing team, where finding optimal ways to communicate with members is a top priority.

IPP Certification

Lean manufacturing and continuous improvement are carving out a greater role in our industry. As companies try to combat waste, increase productivity, and boost profitability, a growing number of print professionals work to implement improvement strategies within the workplace. In an effort to recognize those individuals who strive for operational

excellence, Printing Industries of America designed an Improvement Professional in Print (IPP) program that includes comprehensive educational coursework along with a certification exam. To date, more than 30 people have enrolled in the program and 14 successfully passed the exam to become a certified Improvement Professional in Print.

Revamping the Education and Marketing Teams

A successful team depends on having the right players. Julie Shaffer, vice president of Education and Marketing Strategies, set out in 2016 to ensure that she had a great roster of people on her team. With the loss of a few key individuals to other endeavors, Julie recognized the opportunity to make significant changes by adding new staff whose talents better suited the work at hand and utilizing third-party vendors and freelancers to fill gaps as needed.

Jenn Strang was hired to quarterback marketing operations and strategy early in the year. Jenn works closely with Julie to create comprehensive marketing strategies for all PIA products, services, conferences, and events. She also serves as lead content writer and public relations point of contact with media. Sam Shea assumed the role of content manager, overseeing content editing and management for www.printing.org, its microsites, and webinar administration. Recognizing her strengths in project management, Kayleigh Smith was named marketing production manager, overseeing workflow and production scheduling along with email marketing, magazine administration, and affiliate liaison duties. Lastly, Ellen Rogers was added to the team as the marketing administrator for the department, assisting with reporting, conference planning, and program administration.



MARKETING AND EDUCATIONAL PROGRAMMING

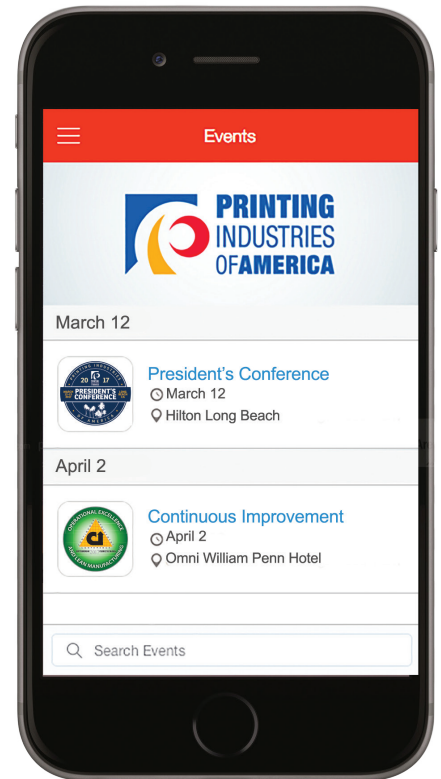
Konica Minolta

A welcome addition to the PIA headquarters in 2016 was a bizhub PRESS C1060 Digital Printing Press generously provided by Konica Minolta. The new machine has dramatically improved the marketing team's ability to create quality printed materials in-house. The results are reduced costs and production time and the ability to print custom, variable-data mailing campaigns directly from our own machine. The team has only just begun to test the capabilities of the machine. Look for exciting new projects to be rolled out in the months to come.

Event App and Survey Analysis

It seems like there is an app for everything these days, and conferences are no exception. Disappointed with the capabilities of the previous event

application that was being used, the marketing team set out to find an affordable solution that met its needs. After looking at several products, Attendify was selected as the app of choice for PIA conferences. Not only does the app have the ability to disseminate information to attendees, it also allows them to connect online, post and tag images from social media, and most importantly provide valuable feedback on the conference and its sessions. A new comprehensive post-event survey was also rolled out in 2016. Rather than merely scratching the surface on participant feedback and opinions, the new survey format is user-friendly and provides in-depth data analysis to assist in future event planning. In its first use, the team saw a 37% completion rate and as a result was able to make some critical decisions on formatting for the 2017 conferences. 🌀



KONICA MINOLTA



HUMAN RESOURCES

Last year certainly had quite a few changes for the Human Resources Department. From a changing of the guard to new regulations that affect all businesses in our industry, the Human Resources Department has risen to the challenge and continued to offer quality and comprehensive services to our members.



Welcome Adriane

In September 2016, Printing Industries of America welcomed human resources expert Adriane Harrison, who stepped in to fill the shoes of exiting Jim Kyger. Adriane's broad knowledge of regulatory and legal interpretation helps members navigate the complicated landscape of labor and employment law. She is based in the Warrendale, PA office and works closely with all PIA Departments to help members with labor and employment issues. She hit the ground running, quickly familiarizing herself with the industry and has become a go-to resource for HR questions and concerns.

Fair Labor Standards Act

One of the hot button issues in 2016 for human resources and operations



professionals was the proposed change to the Fair Labor Standards Act pertaining to overtime. The proposal included provisions that would have raised the overtime threshold significantly to \$47,476, having a dramatic effect on nearly every company in the printing industry. Throughout the year, there was much speculation as to whether the proposed changes would indeed take effect, and PIA made sure to keep its members informed and helped them prepare to make the necessary changes. However, in the end, a federal judge struck down the new regulations just days before they were to take effect. PIA is continuing to keep a close eye on any further regulations that may rise up from the new administration and will keep its membership informed accordingly.

Anticipating Political Change

A presidential election year can have many unknowns, and last year's volatile campaigning was no exception. Both candidates had very distinct platforms involving labor reform, family leave, and

equality that led to much speculation on how the state of employment would look moving forward. Once the dust settled, however, it was Adriane's responsibility to become as knowledgeable as possible regarding labor regulations and employment issues that may arise over the next four years. The result was a series of webinars and articles to keep PIA members up-to-date and prepared with the latest information.

Best Workplaces in the Americas

The Best Workplaces in the Americas awards program was in full swing when Adriane took the helm of HR. This allowed her to take on a more observatory role in the judging procedures. Based on feedback from affiliate managers, judges, and program participants, Adriane crafted a plan for improving upon the Best Workplaces in the Americas program. Look for exciting changes to roll out in the upcoming awards cycle, including a brand new look. ✨

FINANCIAL REPORTS

Combined Statements of Financial Position December 31, 2016 and 2015

	2016	2015
Assets		
Current Assets		
Cash	74,067	191,315
Accounts receivable	386,278	525,283
Inventory	84,692	79,373
Prepaid expenses	40,799	59,435
Investment in GASC	31,400	37,650
Total Current Assets	617,236	893,056
Investments	8,278,225	8,410,095
Property and Equipment, Net	370,516	398,504
TOTAL ASSETS	9,265,977	9,701,655
Liabilities and Net Assets		
Current Liabilities		
Accounts Payable & Accrued Expenses	364,702	405,010
Deferred Revenue	98,867	131,797
Current Portion of Long-term Debt	0	0
Total Current Liabilities	463,569	536,807
Long-term Debt	0	0
Total Liabilities	463,569	536,807
Net Assets		
Unrestricted	8,802,408	9,164,848
Temporarily Restricted	0	0
Permanently Restricted	0	0
Total Net Assets	8,802,408	9,164,848
TOTAL LIABILITIES AND NET ASSETS	9,265,977	9,701,655

Combined Statements of Activities
For the Years Ended December 31, 2016 and 2015

	2016	2015
Change in Net Assets		
Revenue		
Membership	825,545	840,062
Group buying programs	276,160	503,597
Awards	207,764	210,338
Marketing	3,048	0
Education & Training	536,805	514,272
Industry, Career, and Core/Sections	0	15,420
Internet Communications	0	33,307
Economics	63,820	71,285
Human Relations	22,619	21,398
Government and Public Affairs	2,500	0
Administration	147,850	23,488
Exhibits	375,000	742,000
Special interest groups	0	99,447
Publications	71,580	108,955
The Magazine	59,275	62,343
Research	721,931	832,440
Environmental	115,416	85,291
Integrated Print Center	0	37,467
Building and related	0	0
Investment return	810,237	-126,778
Other	59,400	61,200
Total Revenue	4,298,950	4,135,532

Combined Statements of Activities Cont.
For the Years Ended December 31, 2016 and 2015

	2016	2015
Change in Net Assets		
Expenses		
Membership	85,555	91,537
Group buying power programs	165,120	315,788
Awards	156,381	168,384
Marketing	341,569	329,810
Education & Training	540,859	288,321
Industry, Career, and Core/Sections	0	12,792
Internet Communications	0	60,293
Economics	169,731	206,632
Human Relations	116,130	118,524
Government and Public Affairs	462,792	440,814
Administration	1,135,742	1,035,087
Exhibits	6,250	6,250
Special interest groups	0	122,811
Post Retirement Benefits	6,000	12,000
Designated Programs	148,344	68,474
Publications	46,323	99,929
The Magazine	123,114	138,401
Research	570,692	811,067
Environmental	223,908	211,263
Integrated Print Center	0	222,822
Occupancy	303,194	313,775
PGSF	59,686	61,328
Other	0	0
Total Expenses	4,661,390	5,136,102
Change in Net Assets	-362,440	-1,000,570
Total Change in Net Assets	-362,440	-1,000,570
Net Assets, Beginning of Year	9,164,848	10,165,418
Net Assets, End of Year	8,802,408	9,164,848

2016-2017 BOARD DIRECTORY



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