

# NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

MAY 2021



## UPCOMING EVENTS



### **Baltimore Crab Feast**

Captain James Seafood Palace  
Baltimore, MD

**Thursday, June 3 | 5:00 - 8:00 PM ET**



### **NEFA Virtual Exchange Series- Hybrid Event & Book Signing**

Innovative Company Culture  
Dedicated Commercial Recovery, Inc., MN

**Wednesday, June 16 | 3:00 - 4:30 PM CT**



### **Minnesota Regional Networking Event**

Brit's Pub & Eating Establishment  
Minneapolis, MN

**Wednesday, June 16 | 6:00 - 9:00 PM CT**



### **SAVE THE DATE**

### **2021 Funding Symposium**

Westin, Charlotte - Charlotte, NC

**Tuesday, October 12 - Friday October 15**

NEFA NOTE

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# A MESSAGE FROM THE CEO

Dear Members-

Our team is very excited to see you at the in-person NEFA events in the coming weeks. It is strange writing this, let alone planning travel for these in person events. We hope you can join us for as many of the following events that your schedule allows:

- June 3rd - Northeast Regional Crab Feast in Baltimore, MD

5:00-8:00 PM ET

Captain James Seafood

\*Local COVID-19 guidelines must be followed\*

- June 16th - Virtual Exchange Series Hybrid Event: Innovative Company Culture

3:00-4:30 PM CT \*Panel discussion offered in person and virtually to all members\*

-**Christy Kusilek**, CLFP - Director of Professional Services, Northteq

-**Jenna Morgan**, CLFP - Vice President of Operations, KLC Financial

-**Deborah Reuben**, CLFP - CEO & Founder, TomorrowZone

-**Shawn Smith** - CEO, Dedicated Commercial Recovery, Inc.

- October 12-15 - NEFA Funding Symposium (Charlotte, NC)

- Mark your calendars and plan to attend - this event will be unlike others you have attended.

Do not forget to share news, articles, and updates with the entire NEFA community within the monthly NEFA Note e-Newsletter. Please send us your content by the 15th of the month to be included in the next issue. If you have any questions, feel free to email Blair Dawson (bdawson@nefassociation.org).

Please remember to **"THINK NEFA FIRST"** for all your needs within the industry!

Sincerely,  
Chad Sluss  
NEFA Executive Director/CEO



CHAD SLUSS

**CHANNEL PARTNERS CAPITAL**

**YOUR CUSTOMER.  
YOUR SUCCESS.**

**OUR FOCUS TODAY  
AND ALWAYS.**

2021 WORKING CAPITAL GUIDELINES ▶

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## SAVE THE DATE



Monday, August 9, 2021  
Kansas City Royals Game &  
Networking Event  
(7 PM Start vs NY Yankees)



Tuesday, August 17, 2021  
Dinner Cruise & Networking  
on Lake Minnetonka  
(4 PM Start, Port of Wayzata)

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# MEMBER SPOTLIGHT



**DIANA HENRY**  
Senior Digital Content Writer  
LTi Technology Solutions

## 3 Must Haves – What You Need to Find a Good Tech Solution

No matter what type of business you lead – from a small bank to a large captive – chances are you will need to rely on a solid technology solution to help you steer your ship. It's important to build your business resilience now by finding a reliable and robust platform that can handle your business' full lifecycle asset management requirements. While there are many different types of Cloud/SaaS solutions, not all of them will be a good fit for you. Here are three "surprises" equipment finance companies run into and how ASPIRE can help make your processes more efficient and scalable.

### 1. Configurability

LTi has spent 32 years building out a feature-rich platform that is individually configurable for all our customers. ASPIRE's customizable functionality can seamlessly configure multiple workflows and leverage multiple business channels in a frictionless environment. For instance, ASPIRE gives transportation companies the ability to manage single or multiple assets on a single lease structure while tracking all the assets on the specific feature level. For large lenders, ASPIRE's servicing portfolio management system gives them the confidence in knowing the system can concurrently manage and coordinate thousands of transactions with zero issues for the lifetime of the transaction.

### 2. Automation

As your organization's technology demands grow, productivity becomes a bigger concern. As a full lifecycle cloud platform, ASPIRE can support your company's current and future needs while easily scaling with your growth goals. For example, ASPIRE enables lenders to automate loan applications, obtain accurate assessments of applicants' financial strength, and eliminate dated manual processes. With the help of ASPIRE, our customers have been able to transform their operations, create further efficiencies in their business, and adopt best practices and automation processes.

"ASPIRE is providing us with the foundation to automate core business processes, expand and focus on operational excellence, and be agile in today's rapidly changing environment. We are happy to partner with LTi as we channel talent, teamwork, and technology to offer best-in-class service to our customers." –Anne Williams, Chief Operating Officer for Propel Finance

### 3. High Availability

Digital Transformation is critical for today's businesses to be able to scale growth through cloud-based SaaS solutions. Companies need a system that can maximize their availability to compete aggressively in the marketplace. The ASPIRE platform delivers high availability in minimizing unplanned downtime and IT service disruption, and eliminates the need for dedicated resources or additional software. With a highly available infrastructure, LTi can serve our customers through thick and thin.

### LTi's Customer-Obsessed Culture

Choosing a good technology solution is a tough process. With our fearless approach in helping our customers become infinitely better, we thrive on providing personalized recommendations and creating a unique experience for each and every customer.

"Commitment to a group effort is what makes a team work, a company work, and a partnership work. LTi is a trusted and valued partner that helps us move our business forward." – Franklin S., for ENGS Commercial Finance



# 2021 FUNDING SYMPOSIUM



The 2021 NEFA Funding Symposium is scheduled for October 12-15, 2021. In order to serve you better, NEFA would love to hear about the issues your business is facing and what topics you would like NEFA to focus on at our next conference.

## Potential Topic Areas:

Business Development, Professional Development, Operations, Hiring, Technology & Innovation, Advancements in Consumer Technology, Asset Management, Inspection & Certification, Practical Application (including creating a Google Business site, software tips and tricks, social media, salesforce, etc.), and other industry related topics.

**All session ideas must be submitted by Friday, June 4, 2021. [Click here to submit a proposal!](#)**

## VIRTUAL EXCHANGE WEBINAR SERIES



### DR. JAMIL SAYEGH

10 Principles To Get The Most Out Of Yourself And Perform At The Highest Levels: Achieving More With Less!

[CLICK HERE TO VIEW  
WEBINAR](#)

## NEXT UP



Innovative Company Culture- Hybrid Event  
June 16, 2021 | 3:00 - 4:30 PM CT  
Roseville, MN

Generating innovative ideas is a key challenge for any business in a competitive market. However, often the best source of innovation is actually within the company itself – the employees. The most successful companies are the ones who capitalize on their assets- using employee suggestions, to disrupt the norm and harness potential from within. Learn how these industry leaders have effectively transformed ideas into results.

# WELCOME 2021 NEW MEMBERS

Triton Recovery and Commercial Services  
Jules and Associates  
American Capital Group  
CIE International, LLC dba C2 Management  
Alliance Commercial Capital Inc  
Computer Wholesalers, Inc.  
Odessa  
AuctionAdvisors  
Priority Lending  
Compass Equipment Finance  
Credito Real USA, Business Capital  
Lease Consultants Corporation

CapitalForMarket  
TruNorth Global  
Wolters Kluwer eOriginal  
JDR Solutions  
Kelley Kronenberg, P.A.  
Law Office of Kenneth Charles Greene  
Killgore, Pearlman, Semanie, Denius & Squires, P.A.  
National Debt Holdings  
Pro Leasing Services  
Asset Compliant Solutions (ACS)  
Centre Merchant Finance, Inc  
Global Truck Loans



## MEMBER NEWS

IDScroud Achieves SOC 1 Type 2 Validation Ensuring Data Integrity, Security and Confidentiality

CLFP Foundation Surpasses 1,000 Members

Liventus Helps Securely Integrate DocuSign into CRM

MHH Launches Closely-Held/Family Business Practice Group

BOSTON LAW FIRM COHN & DUSSI HIRES TWO NEW ATTORNEYS AND NEW CEO

IDS Wins Top Fintech Solution Provider Honors From Enterprise Viewpoint

## 2021 PARTNERS

### PLATINUM:

AMUR Equipment Finance  
BankFinancial Equipment Finance  
Channel Partners Capital  
IDS  
LTi Technology Solutions

### GOLD:

Financial Pacific Leasing, Inc.  
Navitas Credit Corp  
NewLane Finance  
Providence Equipment Finance, a  
Division of Providence Bank &  
Trust  
Quality Leasing Co., Inc.

### SILVER:

4 Hour Funding  
Bryn Mawr Funding  
Dedicated Commercial Recovery  
Inc.  
FirstLease, Inc.  
Great American Insurance Group,  
Specialty Equipment  
Marlin Capital Solutions  
North Mill Equipment Finance, LLC  
NorthTeq  
Orion First Financial, LLC  
Pawnee Leasing Corporation

### BRONZE:

ECS Financial Services, Inc.  
Dakota Financial, LLC  
Liventus  
Meridian Equipment Finance  
Orange Commercial Credit  
RTR Services, Inc.