

NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

OCTOBER 2021



UPCOMING EVENTS

New York City Tastings Event

Thursday, November 4, 2021

Williamsburg Mini Mall- 1.5 Mile Walking Tour

Southern CA Networking Event & Dinner

Wednesday, November 17, 2021

Seasons 52 Costa Mesa

Virtual Wine Tasting

Thursday, December 2, 2021

California Wine Mixer

Registration Deadline November 18

NEFA Virtual Exchange Series Event

Tuesday, December 7 | 1:00 - 2:30 PM ET

**Futureproofing Finance Through Technology:
How Lenders Can Prepare for Future Storms
and Opportunities**

NEFA NOTE

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A MESSAGE FROM THE CEO



CHAD SLUSS

Dear Members–

We hope you are having a fantastic year. As we move into the final quarter of 2021, there is much to be thankful for during these challenging times. Family, friends, thriving businesses, colleagues, and your NEFA family should be top of mind. Please remember the NEFA staff, and members across North America, are here for you.

As you may recall, NEFA recently held the 2021 Funding Symposium in Charlotte, NC which was the first in person conference in two years. The attendees were excited to see old friends and connect with new ones. The NEFA planning committee and our staff did a fantastic job organizing a memorable conference. The schedule offered excellent keynote presenters, new networking events, innovation labs for one-on-one business assistance, and a closing fundraising networking dinner for the ages organized with the Chris Walker Education Fund.

Mark your calendars for the upcoming events scheduled for the balance of 2021 and those planned so far in 2022:

- November 4, 2021 – Northeast Regional Tastings and Networking Event (Brooklyn, NY)
- November 17, 2021 – Western Regional Networking Event (Costa Mesa, CA)
- February 17, 2022 – NEFA Ice Fishing Event (Lake Minnetonka, MN)
- March 23–25, 2022 – NEFA Finance Summit (Newport Beach, CA)
- November 2–4, 2022 – NEFA Funding Symposium (Nashville, TN)

We are always looking for news, articles, and updates from the NEFA community that can be shared through 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



PRESENTING SPONSOR:

NEW YORK FOOD TOUR A TASTE OF BROOKLYN

During this gastro experience, discover the cultural delights and delectable bites of Brooklyn, by the hand of local food experts. Delve into the rich culinary history of the area as you visit iconic institutions to sample tasty treats.

TOUR STOPS

Northside Bakery
Mables Smokehouse
Best Pizza
Milk Bar

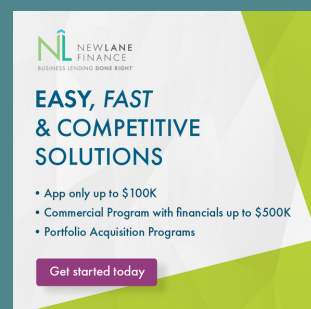
Tacombi Taco
Kahkow Chocolate Factory
William Vale Hotel

NOVEMBER 4, 2021 | 12:00 PM ET

[REGISTER](#)



SUPPORTING SPONSOR:





PRESENTING
SPONSOR:



Alliance
Funding
Group

REGISTER

NOVEMBER 17, 2021 | 6:30 PM PT

Join NEFA for dinner and networking at Seasons 52 in Costa Mesa, California. You'll enjoy tastings of their autumn dinner menu and open bar, while you dine outside amongst friends.

NEFA is proud to partner with Equipment Finance Cares (EFC) to offer a platform for industry education and philanthropy. EFC will host a panel session and networking opportunity ahead of NEFA's networking dinner. Follow the link below to register and for more information.



PRESENTING
SPONSOR:



REGISTER

DECEMBER 2, 2021 | 5:00 PM ET & PT

***REGISTRATION DEADLINE: NOVEMBER 18**

Sip back and relax from the comfort of your home while our wine expert guides your colleagues, prospects, or clients through a fun, interactive, and engaging tasting.

This event has two tasting times offered: 5:00 PM ET and 5:00 PM PT



FUNDING SYMPOSIUM RECAP

NEFA was thrilled to be back in-person with so many of our members, after two years without a conference! From October 13-15, NEFA hosted its annual Funding Symposium in Charlotte, NC at the Westin, Charlotte.

Attendees enjoyed NEFA's trademark networking events – providing funding sources, lessors, brokers, and service providers multiple opportunities to meet, conduct business and create new relationships. This year's keynote speaker, Raja Rajamannar, CMO of Mastercard addressed the group about his book, Quantum Marketing and shared breakthrough, frontier strategies to navigate the challenges faced by companies to thrive in a modern business world.



The planning committee developed the theme “Reimagine Everything” which was fitting given the elevated experience that was offered to attendees. This conference provided more networking opportunities, new and inventive education, keynote speakers who provided fresh ideas for the attendees to apply to their businesses, and a new Innovation Lab allowing attendees to discuss tangible business issues with subject matter experts.





New Board of Directors Members of the association were also announced during the Annual Meeting and include Don Cosenza, CLFP – North Mill Equipment Finance; Kim King, CLFP –Navitas Credit Corp; Shervin Rashti, CLFP –SLIM Capital Services; and Bob Rinaldi – Rinaldi Advisory Services. They are joined by the other tenured Board Members including Paul Fogle, CLFP–Quality Leasing Co., Inc; Jacklynn Manning, CLFP–AMUR Equipment Finance; and Beth McLean, CLFP–Northland Capital Equipment Finance; and Shawn Smith–Dedicated Commercial Recovery Inc.

NEFA's outgoing Board President Laura Carini, CLFP – Financial Pacific Leasing, is now joined on the Executive Committee by incoming Board President, James Jackson–The Alta Group; Scott Wheeler, CLFP–Wheeler Business Consulting as Vice President; Adam Peterson –Channel Partners Capital as Treasurer; and Robert Hornby –Chiesa Shahinian & Giantomasi PC as Secretary.



Also, during the Annual Meeting, the Executive Committee awarded Kristian Dolan – Northteq, the Chris Walker Memorial Member of the Year Award. Kristian Dolan was the Chair of the 2021 Virtual Finance Summit. Kristian worked tirelessly with the NEFA Team and Planning Committee to create a unique, educational, and accommodating experience for all attendees. He has also spent countless hours working with the NEFA team to spearhead their systems change. NEFA is thankful for all the support Kristian has showed the Association and we are honored to have him as the 2021 Chris Walker Volunteer of the Year.

The conference concluded with an extraordinary reception and dinner at Fahrenheit Charlotte featuring fantastic food, a cigar bar, karaoke, a fundraiser for the Chris Walker Education Fund and jaw-dropping views of the city.



To view all photos from the Funding Symposium [CLICK HERE](#)

FIRESIDE CHATS WITH NEFA



NEFA is partnering with Jesse Johnson of JDR Solutions and Equipment Finance Cares to offer monthly Fire Side Chats with NEFA members. Please enjoy the September and October chats with Laura Carini and Daryn Lecy!

SEPTEMBER FIRESIDE CHAT WITH LAURA CARINI

OCTOBER FIRESIDE CHAT WITH DARYN LECY



MEMBER NEWS

27 Moritt Hock & Hamroff Attorneys Named 2021 New York Metro Super Lawyers

Channel Lists Among Inc 500/5000 Fastest Growing Companies For Ninth Consecutive Year

Channel Recognizes Five New CLFP Designations

NORTH MILL SETS TWO RECORDS AS THE COMPANY'S ORIGINATIONS REACH ALL-TIME HIGH

Leading Finance Technology Provider IDS is now Solifi

Maxim Commercial Capital Funded Deals in 32 States During Q3 2021

Moritt Hock & Hamroff Funds Hofstra Law School's Freedman Institute Social Justice Fellows Program

CHESSWOOD CLOSES MARKETED SECURITIZATION FOR US\$356 MILLION

Tamarack Expands Professional Services Team with Addition of Crandall and Rieckhoff

Stonebriar Commercial Finance Extends Contract with Solifi

Falcon Leasing Becomes Falcon Equipment Finance

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.