

# NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

DECEMBER 2021



# HAPPY HOLIDAYS

## UPCOMING EVENTS



### **Virtual Wine Tasting**

Thursday, January 27, 2022

**California Wine Mixer**

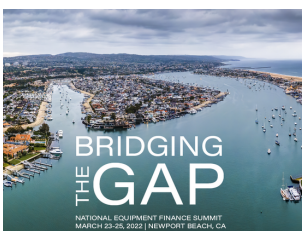
**Registration Deadline January 13**



### **Ice Fishing on Lake Minnetonka**

Thursday, February 10, 2022

**Wayzata, MN**



### **SAVE THE DATE**

**Finance Summit: Bridging the Gap**

March 23-25, 2022

**Newport Beach, CA**

NEFA NOTE

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# A MESSAGE FROM THE CEO



CHAD SLUSS

Dear Members-

The organization had a fantastic year! The Board of Directors, Committees, member volunteers and staff had one goal - provide more value for the NEFA members.

The following is a list of highlights from 2021:

## New - NEFA Website

The new website features improved search navigation, images, and home page tile format for ease of use to find the latest events and updates.

## New - NEFA Note e-Newsletter

To effectively communicate and keep the members apprised of NEFA benefits, services, events, and various initiatives, the team launched a new e-newsletter.

## New - Virtual Exchange Webinar & Networking Series

The organization launched the new Virtual Exchange webinar series, which provides 60 minutes of education followed by 30 minutes of networking.

## New - Virtual Networking Mixers

NEFA offered a tequila tasting event, which allowed the members to learn, enjoy an alcoholic drink or two, and network with their friends. We will have more of these in the future.

## New - Member Directory

As a benefit of membership, NEFA launched a new downloadable membership directory. This resource guide provides the membership with an up-to-date directory of NEFA members located around North America with contact details.

## Enhanced - Online Member Community

The enhanced online member community features a robust online searchable members directory, NEFA store, Resources including previously held educational event recordings, an online discussion board, and the ability for members to update their company plus their personal profiles.

## New - Virtual Finance Summit (March 2021)

Due to the pandemic, NEFA could not offer the traditional in-person Finance Summit. The staff and leadership made the decision to offer a virtual conference instead, which attracted over 290 industry professionals over a two-day period. Special thanks to Kristian Dolan, Northteq, and the committee for organizing a great virtual conference.

## Enhanced - Regional Meetings

Our team was so pleased to offer six regional meetings in 2021 as follows:

- June 3 - NEFA Crab Feast (Baltimore, MD)
- June 16 - Midwest Regional Networking Event (Minneapolis, MN)
- August 9 - Kansas City Royals Baseball Game (Kansas City, MO)
- August 17 - Lake Minnetonka Dinner Cruise (Wayzata, MN)
- November 4 - New York Tastings Networking Event (Brooklyn, NY)
- November 17 - Western Regional Networking Dinner (Costa Mesa, CA)

## Enhanced - Funding Symposium (Charlotte, NC)

As the theme suggested, the planning committee and staff did "Reimagine Everything" related to this conference. Special thanks to Jacklynn Manning, AMUR, and Mae Philpott, Quality Leasing Co., Inc., and the planning committee for their leadership. The conference provided opportunities for attendees to learn from subject matter experts, network with industry colleagues, and attend the closing dinner overlooking Charlotte's skyline.

Feedback from the membership has been incredibly positive regarding the various initiatives launched in 2021. We hope you will take advantage of everything NEFA has to offer in 2022 and beyond! As always, **"THINK NEFA FIRST"** for all your needs within the industry!

Sincerely,  
Chad Sluss  
NEFA Executive Director/CEO

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**JANUARY 27, 2022 | 5:00 PM ET & PT**

**\*REGISTRATION DEADLINE: JANUARY 13\***

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

**REGISTER**



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 **LTI**  
Technology Solutions

**FEBRUARY 10, 2022 | 11:00 AM CT - 8:00 PM CT**

**Join us for NEFA's Ice-Fishing & Networking Event**  
**Space is Limited | Reserve Your Spot TODAY!**

11:15 am: Networking Lunch

1:00 - 5:00 pm: Ice-fishing

5:30 pm: Depart Lake Minnetonka

6:00 - 8:00 pm: Dinner at Lord Fletchers (dinner included with ticket price)

**REGISTER**





NEW YORK CITY TASTINGS EVENT

During this gastro experience attendees discovered the cultural delights and delectable bites of Brooklyn, by the hand of local food experts. A walking tour uncovered the rich culinary history of the area while attendees visited iconic institutions to sample tasty treats.



SOUTHERN CALIFORNIA NETWORKING EVENT

NEFA members enjoyed a night of networking and fun at Seasons 52 in Costa Mesa California. With over 90 people registered it was a wonderful opportunity to reconnect!





Ray Wizbowski  
Solifi



Dan Feeney  
North Star  
Leasing Company,  
A Division of  
Peoples Bank



Scott Nelson  
Tamarack  
Technology



Eldon Richards  
Solifi

VIRTUAL EXCHANGE WEBINAR SERIES

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

[CLICK HERE TO VIEW RECORDING](#)



# 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!

**DECEMBER FIRESIDE CHAT WITH ROBERT HORNBY**

**NOVEMBER FIRESIDE CHAT WITH AMY SPRAGG**



## MEMBER NEWS

[NETSOL: Artificial Intelligence in the Equipment Finance Industry Podcast](#)

[MHH Welcomes Three Associates](#)

[CHESSWOOD ANNOUNCES THIRD QUARTER 2021 RESULTS](#)

[Moritt Hock & Hamroff Included In U.S. News & World Report -Best Lawyers® 'Best Law Firms' 2022 Edition](#)

[Channel Expands Team with Three New Hires](#)

[Solifi Announces Continues Growth in North America with 11 New Customers and 14 Go-Lives to Date in 2021](#)

[Leslie A. Berkoff Appointed Chair Of The ABA's Dispute Resolution Committee Of The Business Law Section](#)

[Channel Closes \\$105MM Securitization](#)

[Robert Henry Joins Marlin as Head of National Account Division](#)

[AMERIS BANK ACQUIRES BALBOA CAPITAL CORPORATION, A PREMIER ONLINE PROVIDER OF BUSINESS LENDING SOLUTIONS](#)

[CLFP Foundation Adds 17 New CLFPs](#)

[Tamarack Adds Theresa Eichten to Professional Services Team](#)

[LTi Technology Solutions' Jenny Jarose Honored in Monitor Daily's Women in Equipment Finance](#)

[BOSTON ATTORNEY LEWIS J. COHN OF COHN & DUSSI NAMED TO BOSTON MAGAZINE'S FIRST-EVER TOP LAWYERS LIST](#)

[Moritt Hock & Hamroff's Julia Gavrilov Named To Monitor's Top Women In Equipment Finance For 2021](#)

## 2021 PARTNERS

### PLATINUM:

AMUR  
BankFinancial Equipment Finance  
Channel  
LTi Technology Solutions  
Solifi

### 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.