

NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

Q1 2022



UPCOMING EVENTS



Philadelphia Regional Networking

Thursday, May 5, 2022

6:00 - 9:00 PM ET

Red Owl Tavern, Philadelphia



Indianapolis 500 Test Round

Wednesday, May 18, 2022

11:00 - 5:00 PM ET

Indianapolis Motor Speedway, Indianapolis



Baltimore Crab Feast

Thursday, June 9, 2022

5:00 - 8:00 PM ET

Captain James Landing, Baltimore



SAVE THE DATE NEFA Funding Symposium

November 2-4, 2022

The Omni Hotel, Nashville

NEFA NOTE

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A MESSAGE FROM THE CEO



CHAD SLUSS

Dear Members—

As the first quarter ends, there's great excitement at NEFA. The organization recently concluded the March 23-25, 2022, Finance Summit, held at the Waterfront Beach Resort in sunny Huntington Beach, CA. The conference broke record attendance with 376 registered attendees! Surf City did not disappoint with beautiful weather, oceanfront views, and amazing venue for attendees to enjoy.

The conference theme "Bridging the Gap" was created and utilized throughout the entire conference. The conference offered countless networking opportunities, excellent education, and opportunities for attendees to connect. Highlights included:

- Networking Events
 - Chris Walker Education Fund Golf Outing provided golfers an opportunity to enjoy a round of golf and raise funds for the educational scholarships.
 - Women's Luncheon - provided an opportunity for women in the industry to connect and learn from their peers.
 - K1 Speed - Race for Blindness - this fundraiser allowed attendees to enjoy a high-speed racing event with proceeds going to Beyond Blindness.
 - Welcome Reception - conference attendees boarded the Endless Dreams Vessel for a three-hour coastal tour with breathtaking vista views of the California coast
- Awards and Recognition
 - During the Thursday luncheon we recognized a number of industry leaders including;
 - Jim Merrilees - received the NEFA Lifetime Achievement Award for his contributions to the industry.
 - Lovern Gordon - received the Leasing News Person of the Year Award



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A MESSAGE FROM THE CEO CONTINUED

- Education
 - Keynote Speaker, Jake Olson, who is a 23-year-old who was diagnosed with a rare form of eye cancer, which took his eyesight as a young child. Overcoming this enormous challenge and eventually earning a spot on the University of Southern California football team. Jake was the first completely blind football player to suit up and play in a game, which was an amazing accomplishment. Jake went on to become a motivational speaker inspiring the NEFA conference attendees with humor, resiliency and a never give up attitude. I do not believe there was a dry eye in the audience following Jake's presentation.
 - CEO Roundtable
 - Leaders from various companies in the industry discussed challenges and opportunities available in 2022 and beyond.
 - Bridging the Gap on Commercial Financing Disclosures
 - The panel provided updates on the proposed legislature in various states requiring new disclosures to borrowers in commercial loan transactions.
 - Bridging the Gap on Women in the Industry
 - The panel provided statistics on women in leadership positions and opportunities for women to thrive further in the industry.
 - Bridging the Gap on Broker Business
 - The presenters discussed creative ideas related to sales, marketing, procedures, and technology for industry brokers.
 - Bridging the Gap on Leadership
 - The panel provided a lively discussion on leading through change and innovation.
 - Practical Application Labs
 - Back by popular demand, the labs provided one-on-one advice from experts in Operations, LinkedIn, and Refining your Brand.



Special thanks to the 2022 Finance Summit Planning Committee:

Jesse Johnson, JDR Solutions- Co-Chair
Amy Spragg, CLFP- Pacifica Capital - Co-Chair
Anne Dalgaard, CPA, CLFP- Dynamic Rentals
Kirsten Dargy- LTi Technology Solutions
Barbara Griffith- Southern California Leasing Inc.
Jaimie Haver- Happy Manufacturing, Inc.
Maggie Holly- Hanmi Bank
Beth McLean, CLFP- Northland Capital
Shawn Smith- Dedicated Financial GBC
Lisa Whitehead, CLFP- First Foundation

This conference was not possible without the generous support of our sponsors and exhibitors. Thank you! Special thanks to the NEFA team members including Blair Dawson and Kale Tissue.

If you missed the conference, you can login into the NEFA Community in the coming weeks to review the materials and the plenary sessions which were videotaped.

As always, remember to "Think NEFA First" for all your needs within the industry!

Sincerely,
Chad Sluss
Chief Executive Officer



MORE THAN JUST NETWORKING.

Attend the next NEFA Regional Event
...near or far, it's worth the trip!

May 5, 2022

Philadelphia Regional Event
Red Owl Tavern, Philadelphia, PA

May 18, 2022

Indianapolis 500- Practice Round
Indianapolis Speedway, Indianapolis, IN

June 9, 2022

Baltimore Crab Feast
Captain James Landing, Baltimore, MD



www.nefassociation.org

NEFA UPDATES



NEFA is proud to announce the promotion of Kale Tissue, to Director of Events & Operations. Kale has been on staff at NEFA since July of 2021. Since coming on board, Kale has taken a deep dive into NEFA's operations and membership services. Additionally, she has contributed to the ongoing implementation of the new CRM system, been the point of contact for event registration and exhibitor experience at conferences, and has assisted with the Partner Program, among other things.

Prior to NEFA, Kale worked at Ferris State University with multiple contracted clients, with a concentration of continuing education, conferences, and workshops. These events ranged from 1-5 days in length and up to 700 attendees. Corporate events (user conference and exhibiting at tradeshow) for a small software company located in Grand Rapids, MI. As well as event experience working with associations for semi-annual conferences and annual scientific meetings, both fully virtual and in-person.

Blair Dawson will be stepping down from her role as Vice President of Marketing & Programs to pursue a position outside of the Association.

Blair has been on staff since January of 2020 and looks forward to her continued work in the Equipment Finance Industry, and attending future NEFA events and conferences! NEFA is actively working to hire a Director of Marketing - for the time being, all marketing and sponsorship items can be directed to Chad Sluss at csluss@nefassociation.org.



SPONSORSHIP OPPORTUNITIES



Regional Events - Supporting Sponsors

\$750 - includes 1 complimentary attendee

- Philadelphia Regional Event- 5/5
- Indianapolis Practice Round Event - 5/18
- Baltimore Crab Feast - 6/9
- Kansas City Event - July
- Southern California Event - July
- Boat Cruise on Lake Minnetonka - 8/11
- North West Regional Event - 8/25

NEFA Finance Summit

November 2-4, 2022 | Nashville, TN

- Networking Breakfast Sponsor
- Refreshment Break Sponsor
- President's Reception Sponsor
- Attendee List Sponsor
- Conference Gift Sponsor
- And more...

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!

[JANUARY CHAT WITH SHERVIN RASHTI](#)

[FEBRUARY CHAT WITH STEPHANIE HALL, CLFP](#)



MEMBER NEWS

[Solifi releases the 2022 Global Leasing Report](#)

[Rivers Leasing and LTi Technology Solutions Announce Partnership](#)

[CLFP Foundation Adds 16 New CLFPs](#)

[Tamarack Technology Taps Andrew Hedstrom to Lead Sales](#)

[NORTH MILL ANNOUNCES PRICING OF LARGEST SECURITIZATION EVER AT \\$371M](#)

[CLFP Foundation Releases Ninth Edition Handbook](#)

[Reliance Bank Adds Tamarack President & CDO Scott Nelson to Board of Directors](#)

[CHESSWOOD ANNOUNCES FISCAL YEAR 2021 RESULTS](#)

[LTi Technology Solutions Launches ASPIRE Express](#)

[CHESSWOOD GROUP LIMITED TO ACQUIRE WAYPOINT INVESTMENT PARTNERS INC.](#)

[Accord Announces Record Fiscal 2021 Funds Employed, Revenue and Earnings and Reports Strong Fourth Quarter Results](#)

[Castlelake and Chesswood Announce Forward Flow Purchase Agreement for Equipment Loan and Lease Receivables](#)

[KLC Financial Implements Tamarack Technology's Artificial Intelligence Platform](#)

[Haydock Finance Selects Odessa to Help Drive Growth](#)

[CLFP Foundation Adds 18 New CLFPs](#)

[Jason St. Laurent Joins Odessa as Chief Operating Officer to Drive Aggressive Growth Strategy in Professional Services](#)

[Channel Adds New Member to Sales Leadership](#)

[Amur Achieves Record-Breaking First Quarter, Achieving 100% Year-over-Year Growth](#)

[NORTH MILL'S ORIGINATIONS REACH ALL-TIME HIGH](#)

[Quality Leasing Posts Unprecedented 102% Q1 Growth Year over Year](#)

2022 PARTNERS

DIAMOND:

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CHANNEL

LTi Technology Solutions

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PLATINUM:

Financial Pacific Leasing, Inc.

Great American Insurance Group,
Specialty Equipment

Providence Equipment Finance, a
Division of Providence Bank & Trust

Quality Leasing Co., Inc.

SCJ Commercial Finance Services

GOLD:

Centra | 4 Hour Funding

Navitas Credit Corp

North Mill Equipment Finance, LLC

SILVER:

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ECS Financial Services, Inc.

FirstLease, Inc.

Leasepath

Marlin Capital Solutions

NewLane Finance

NorthTeq

Oakmont Capital Services

Pawnee Leasing Corporation

RTR Services, Inc.

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Liventus

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Orion First Financial, LLC