

NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

Q2 2022



UPCOMING EVENTS



Kansas City Regional Networking Event

Thursday, July 28, 2022

6:00 - 9:00 PM CST

Boulevard Brewing Co., Kansas City



Dinner Cruise on Lake Minnetonka

Thursday, August 11, 2022

5:00 - 8:00 PM CST

Al & Alma's Charter Cruises, Wayzata



Northwest Regional Networking Event

Thursday, August 25, 2022

5:00 - 9:00 PM PST

Farrelli's Pizza, Pt. Ruston



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



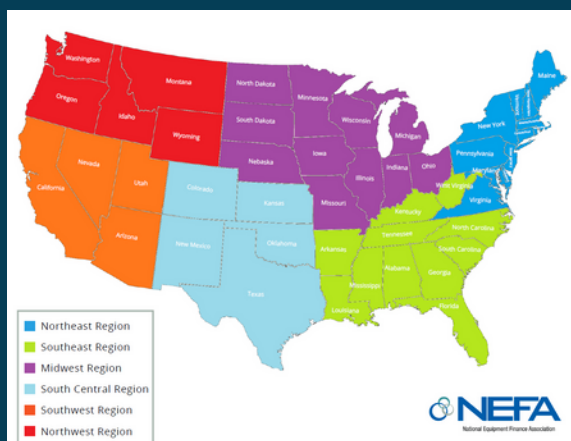
CHAD SLUSS

Dear Members-

The National Equipment Finance Association (NEFA) has many initiatives underway, which I hope you find to be beneficial. NEFA provides a forum for you to connect with industry colleagues at conferences, regional events, volunteering with committees and regional groups. NEFA's membership is currently at 330 member companies and growing regularly, with thousands of industry contacts, who are resources that can assist you and your clients.

Recently NEFA launched the following;

- Board of Directors Strategic Plan Task Forces
 - During the January 2022 Board of Directors Strategic Planning session, several task forces were formed to develop and enhance the NEFA membership benefits and services.
 - The Directory Task Force is working on updates to the online membership directory.
 - The Knowledge Sharing & Education Task Force is developing various tools that can help our members industry updates and educational tools.
 - The Task Force recently completed the following update:
 - NEFA FAQ: California's Small Business Truth in Lending Law Update
 - To view, visit the news section at www.nefassociation.org
- Diversity, Equity, and Inclusion Committee - This committee is vitally important to NEFA's future in developing diversity programs within the organization and entire industry.
- Member Benefits Committee - The committee's purpose is to work with the NEFA staff and Board of Directors to develop member discount and value add programs for the membership.
- Regional Chapters - NEFA has formally set-up the chapters into six regions. The regions are organized with volunteer leaders that work with the NEFA team and Board of Directors in developing regionally based events, programs, and tools for the membership. We anticipate local chapters, with high concentrations of industry professionals, will organize activities within a specific region.
 - Below is map of the Regional Chapters. If you are interested in volunteering, please let us know. Our goal is to have a five-person regional chapter committee for each region.



AMUR



CHANNEL

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A Division of Providence Bank & Trust



A MESSAGE FROM THE CEO CONTINUED

Below is a list of other committees and working groups;

- New – Broker/Lessor Leadership Roundtable Calls
- Conference Planning Committees
- Education
- New – Funding Source Leadership Roundtable Calls
- Legal
- Marketing
- Membership
- Coming Soon – Women in Leasing
- Coming Soon – Young Professionals

If you are interested in joining a NEFA Committee or one of the Regional Chapter Committee's, please let me know at csluss@nefassociation.org.

Save the dates for the following upcoming events;

- July 28 – Regional Networking Event (Kansas City, MO)
- August 11 – Virtual Exchange – Webinar & Networking Series entitled “Employee Recruitment, Engagement & Retention”
 - Hybrid Event (Virtual & In-Person)
- August 11 – Regional Networking Event – Lake Minnetonka Dinner Cruise (Wayzata, MN)
- August 25 – Regional Networking Event (Tacoma/Seattle, WA)
- November 2-4 – Funding Symposium (Nashville, TN)
 - Do not miss this event, the planning committee has been working extremely hard to organize a phenomenal conference with excellent speakers and educational programs, opportunities to meet industry funding sources and services providers in the exhibit hall, connect with colleagues at networking events, and take advantage of live entertainment in Nashville!
- December (TBD) – Regional Networking Event (New York City, NY)

Do not forget NEFA has publishing opportunities available for you. Send us your content for consideration.

- NEFA Note e-Newsletter
- Newline Magazine – published six times per year
- News/Press releases – Share your company news and gain exposure through the NEFA website

If you know of a company, that is not a member of NEFA, that will benefit from the organization, please pass their details along to me.

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

Sincerely,
Chad Sluss
Chief Executive Officer





NATIONAL EQUIPMENT
FINANCE ASSOCIATION



MORE THAN JUST NETWORKING!

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

July 28, 2022

**Kansas City Regional
Networking Event**
Boulevard Brewing Co.
Kansas City, MO

August 11, 2022

**Dinner Cruise on
Lake Minnetonka**
Al & Alma's Charter Cruise
Wayzata, MN

August 25, 2022

**Northwest Regional
Networking Event**
Farrelli's Pizza
Pt. Ruston, WA

www.nefassociation.org

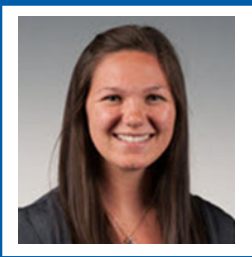
NEFA UPDATES

MEET THE NEFA STAFF



CHAD SLUSS
CHIEF EXECUTIVE OFFICER
(616) 204-9599
CSLUSS@NEFAASSOCIATION.ORG

Chad has over twenty years of association, strategic management and marketing experience gained working in various industries. Before joining NEFA, Chad worked for the International Society of Primerus Law Firms serving as the Senior Vice President of Services. Chad managed the global events, member services programs, global marketing and advertising, and benefit programs. Other organizations Chad served included President and CEO of the Associated Builders and Contractors Michigan Chapter, Member Services Manager with the State Bar of Michigan, Director of Sales & Marketing with the Mount Pleasant Convention & Visitors Bureau, and Marketing Manager with ARAMARK Corporation.



KALE TISSUE
DIRECTOR OF EVENTS & OPERATIONS
KTISSUE@NEFAASSOCIATION.ORG

Kale has been on staff at NEFA since July of 2021. Since coming on board, Kale has taken a deep dive into NEFA's events and operations. 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 tradeshows) 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.



KIMBERLY MCGLOTHERN
DIRECTOR OF MARKETING
KMCGLOTHERN@NEFAASSOCIATION.ORG

Kimberly is our newest NEFA Staff member and is excited to be on board to help promote NEFA's mission and membership growth. She has an extensive background in marketing, sponsorship and event planning. Prior to NEFA, Kimberly oversaw the marketing for events and programs for the City of Angleton, TX and the City of Clute, TX. Among those city events was an annual three-day music festival that sees up to 12,000+ attendees each year. Marketing for this event earned Kimberly and her former colleagues multiple marketing awards with the Texas Festival and Events Association.

SPONSORSHIP OPPORTUNITIES



Regional Events - Supporting Sponsors
\$750 - includes 1 complementary attendee

Kansas City Event - 7/28
Boat Cruise on Lake Minnetonka - 8/11
Northwest Regional Event - 8/25

NEFA Funding Symposium
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 April, May and June chats!

- April Chat with [Linda Tiers](#)
- May Chat with [Scott Wheeler, CLFP](#)
- June Chat with [Mae Philpott, CLFP](#)



MEMBER NEWS

[1st Star Alacer LLC welcomes appraisal expert to Expand Valuations Practice in North America](#)

[ECS Financial Services Recognized for 25 Years of Membership in the Equipment Leasing and Finance Association](#)

[Hofstra University's Maurice A. Deane School of Law Inducts Marc L. Hamroff Into Its Inaugural Hall of Fame](#)

[Channel Announces Newest CLFP Designations](#)

[Q1 NEFA Note](#)

[CLFP Foundation Adds 19 New CLFPs](#)

[Nuria Blais named New Business Development Manager at American Lease Insurance](#)

[Business Law Firm Cohn & Dussi Opens Rhode Island Office](#)

[Tamarack Technology Expands Artificial Intelligence Team with Addition of Aaron Jackson](#)

[ELFA Foundation Forecast | Powered by You](#)

[Moritt Hock & Hamroff Speakers to Present on Latest Cases and Emerging Legal Issues At ELFA Legal Forum in Washington, D.C. Next Week](#)

[CLFP Foundation Adds 14 New CLFPs at DLL](#)

[Data Sales Co., a provider of lease financing and IT Asset Disposition \(ITAD\), has proudly announced the start of its 50th year in business](#)

[Leasing Avenues - Featuring an interview with Dave Schaefer, Orion First](#)

[CLFP Foundation Adds 14 New Members](#)

[Alexander Litt Appointed Co-Chair Of The Membership Committee Of The Commercial & Federal Litigation Section Of The New York State Bar Association](#)

[Moritt Hock & Hamroff Welcomes: Frank A. Mazzagatti, Ph.D., Esq.](#)

[Northteq provides automated fraud solution for the equipment finance industry with Ekata](#)

2022 PARTNERS

DIAMOND:

AMUR
BankFinancial Equipment Finance
CHANNEL
LTi Technology Solutions
Solifi

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:

Dakota Financial, LLC
Dedicated Financial GBC
ECS Financial Services, Inc.
FirstLease, Inc.
Leasepath
Marlin Capital Solutions
NewLane Finance
NorthTeq
Oakmont Capital Services
Pawnee Leasing Corporation
RTR Services, Inc.

BRONZE:

Liventus
Meridian Equipment Finance
Orion First Financial, LLC



MEMBER NEWS CONTINUED

[Solifi partners with EQ Riskfactor to offer integrated risk-management technology for the ABL industry](#)

[Moritt Hock & Hamroff's Christine H. Price Named To Secured Finance Network's 2022 Top 40 Under 40 List](#)

[Moritt Hock & Hamroff Represents Raich Ende Malter in EisnerAmper Deal](#)

[Channel Adds to Business Development Team](#)

[NEFA FAQ: California's Small Business Truth in Lending Law Update](#)

[Michael Calcagni Appointed Co-Chair of Surrogate's Court Estates & Trusts Committee of the Nassau County Bar](#)

[Beacon Funding Recognized as one of Chicago's Best Workplaces and Great Place to Work Certified](#)

[CLFP Foundation Adds 17 New CLFPs](#)

[Channel Named a Top 200 Workplace by Star Tribune](#)

[Matthew J. Simon Joins Moritt Hock & Hamroff Real Estate Practice Group](#)

[Liventus is named one of the Best Workplaces in Chicago™ in 2022 by Great Place to Work® and Fortune Magazine, Ranking 27](#)



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DIAMOND:

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BankFinancial Equipment Finance
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Solifi

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:

Dakota Financial, LLC
Dedicated Financial GBC
ECS Financial Services, Inc.
FirstLease, Inc.
Leasepath
Marlin Capital Solutions
NewLane Finance
NorthTeq
Oakmont Capital Services
Pawnee Leasing Corporation
RTR Services, Inc.

BRONZE:

Liventus
Meridian Equipment Finance
Orion First Financial, LLC