

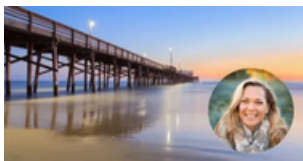
NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

Q3 2022



UPCOMING EVENTS



Equipment Finance Cares

Wednesday, November 16, 2022

1:30 - 7:00 PM PT

Blue Street Capital, Huntington Beach, CA



Northeast Regional Event

Wednesday, December 7, 2022

2:00 - 9:00 PM ET

New York City, NY



SAVE THE DATE

NEFA Finance Summit

March 21-24, 2023

Intercontinental Hotel, San Diego, CA



SAVE THE DATE

NEFA Funding Symposium

October 3-6, 2023

JW Marriott San Antonio Hill Country Resort & Spa

NEFA NOTE

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A MESSAGE FROM THE CEO



CHAD SLUSS

Dear Members,

We are pleased to share many initiatives launched this year are well under way! NEFA's current membership is at 356 members, with over 85 new members, and growing each week. It is great to see so many organizations gravitating to NEFA and our community.

NEFA added a new team member, Hannah Kroll – Director of Membership, to our team in mid-September. The growth, over the past five weeks, is due in large part to Hannah's efforts. Hannah is responsible for membership growth, engagement and retention. Prior to NEFA, Hannah worked at the Michigan Mortgage Lenders Association supporting member engagement. Hannah has a strong background in sales, with over 8 years of experience managing sales for the Association market at the Kellogg Hotel & Conference Center and the Greater Lansing Convention & Visitors Bureau.

NEFA members from all parts of North America traveled to Nashville for the recent 2022 Funding Symposium. The conference surpassed the highest attendance ever with over 400 attendees, 60 exhibitors and over 30 sponsors. Special thanks to the NEFA team and conference planning committee for all their relentless work in developing a phenomenal conference. The conference planning committee included:

Co-Chairs:

- Stephanie Hall, CLFP, Quality Equipment Finance
- Jena Morgan, CLFP, JDR Solutions

Committee Members:

- Kyle Bergeron, Blue Bridge Financial
- Jeffrey Bilbrey, Leasepath
- Anne Dalgaard, CPA, CLFP, Dynamic Rentals
- Beth McLean, CLFP, Northland Capital Equipment Finance
- Kim Riggs-Mounger, Orion First Financial
- Shawn Smith, Dedicated Financial GBC

On Wednesday, November 2nd the first STRIPES Leadership introductory workshop was provided at a NEFA conference. The workshop was presented by Blair Dawson – STRIPES Leadership, Lisa Rafter – Monitor & STRIPES Leadership, and Denis Stypulkoski – Reimagine Advisors. With over 40 participants, the introductory workshop was quite the success and we look forward to partnering with STRIPES Leadership going forward!

Mark Scharenbroich, Keynote speaker and author of "Nice Bike" offered a delightful and captivating session on the importance of connections. During Mark's session, he asked the audience if there were any Harley Davidson motorcycle owners. Several hands were raised and NEFA's Board President, Jim Jackson, was brought on stage for an entertaining interaction with Mark. Following Mark's session, each attendee received a copy of Mark's book, "Nice Bike," where they had the opportunity to have it signed.

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A MESSAGE FROM THE CEO, CONTINUED



CHAD SLUSS

Randy Haug - LTi Technology Solutions, proudly announced the Chris Walker Education Fund Member of the Year Award Winner Scott Wheeler, CLFP - Wheeler Business Consulting. Scott, a longstanding NEFA member, member of the NEFA Board of Directors, and time-honored industry veteran, shared that "it has always been a pleasure to work with NEFA members, its staff, and the board. Chris Walker and I served on the founding board of NEFA, and it is a personal honor to receive the Chris Walker Memorial Member of the Year award at the annual Funding Symposium."

At the beginning of the conference, NEFA assisted in the coordination of a charity axe throwing event, which attracted more than 50 participants. Over \$21,000 was raised to benefit Safe Haven, a Nashville based shelter to help families facing domestic violence and housing related challenges.

Thursday evening the Chris Walker Education Fund Committee brilliantly utilized our time together at the Whiskey River Saloon to raise funds for the continuation of providing educational programming in the form of grants. This event, located on a rooftop bar on Broadway Street, featured a phenomenal band, line-dancing, and food and drink. Due to the generosity of the NEFA members, over \$21,000 was generated for the Chris Walker Education Fund. With the success of this evening event, we hope that all our Funding Symposium attendees left Nashville on a high note!

Save the date for these upcoming events:

- December 7 - Northeast Regional Event (New York, NY)
- March 21-24, 2023 - Finance Summit (San Diego, CA)
- October 3-6, 2023 - Funding Symposium (San Antonio, TX)

There are numerous opportunities for the membership to get involved and participate in NEFA activities including committees, regional chapters, and conference planning committees. If you wish to volunteer, please contact me at csluss@nefassociation.org.

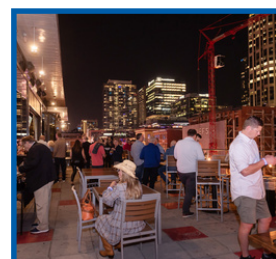
Do not forget NEFA has publishing opportunities available for you. Send us your content for consideration.

- NEFA Note e-Newsletter
- Newsline 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.

Remember to "Think NEFA First" for all your needs within the industry!

Sincerely,
Chad Sluss
Chief Executive Officer



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NEFA Funding Symposium

October 3-6, 2023

JW Marriott San Antonio Hill Country Resort & Spa



SAVE THE DATE

Equipment Finance Cares Golf Outing

Monday, August 7, 2023

Rockland Country Club, Sparkill, NY

*Stay
TUNED*

**2023 NEFA
REGIONAL
EVENTS**

2022-2023 NEFA BOARD OF DIRECTORS

We are pleased to announce our 2022 - 2023 NEFA Board of Directors.
To learn more about the Board of Directors, visit NEFAssociation.org.

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Rinaldi Advisory Services



Shawn Smith
Dedicated Financial GBC

THANK YOU

...to our 2021 - 2022 NEFA Board of Directors who have completed their terms.
We appreciate your time and dedication in serving your Association and fellow NEFA members.



Laura Carini, CLFP

Financial Pacific Leasing, Inc.



Beth McLean, CLFP

Northland Capital Equipment Finance



Scott Wheeler, CLFP

Wheeler Business Consulting

CHRIS WALKER EDUCATION FUND

The Chris Walker Memorial Member of the Year Award is given annually, by the Executive Committee of the Board of Directors of NEFA, to individuals whose service to the Association exemplifies the volunteer driven spirit of Chris Walker.



Scott Wheeler, CLFP

Wheeler Business Consulting

2022 MEMBER OF THE YEAR

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 August and September chats!

- [August Chat](#) - California Disclosure Laws with Andy Alper & Shervin Rashti, CLFP
- [September Chat](#) with Stephanie Hall, CLFP & Jena Morgan, CLFP



MEMBER NEWS

[2021 Chris Walker Education Fund Grants Awarded](#)
[North Mill Reports Record-Breaking Quarter and Month](#)
[Tamarack Technology Continues Expansion of Tamarack.ai Team](#)
[Channel Closes \\$163MM Securitization](#)
[Solifi Names Mithu Bhargava as President](#)
[Moritt Hock & Hamroff Welcomes New Associates: Marshall O. Dworkin & Rohan Maitra](#)
[Mountain Ridge Capital Selects Solifi ABL to Accelerate Growth](#)
[CLFP Foundation Adds 16 New CLFPs](#)
[North Mill Enhances Rate Card Program](#)
[Tamarack's AI Platform Dramatically Streamlines KLC Financial's Operations](#)
[Quality Leasing Continues Record-Breaking Volume through Q2 2022](#)
[Marlin Leasing Corporation Unveils Upcoming Rebrand as PEAC Solutions](#)
[Brean Capital Secures \\$32.0 Million Corporate Note for Expiry Ventures](#)
[Tibor Horvath To Join New Global Peac Finance Team In CT&I Division](#)
[North Mill Hits \\$1 Billion In Originations on Anniversary of Capitalization](#)
[Regents Capital Expands National Sales Team to Support Growth](#)
[BCA Partner Finance Extends Solifi Wholesale Finance Contract](#)
[PEAC Solutions Welcomes Robert Mercogliano As Head of Asset Management](#)
[Chesswood Announces Second Quarter 2022 Results](#)
[Dan Gannon Promoted to Vice President of Lease Sales](#)
[Solifi Launches SaaS Pricing Solution](#)
[CLFP Foundation Adds 15 New CLFPs](#)
[Tamarack's TrailView™ Online Support Service Modernizes Equipment Finance Customer Service Capabilities](#)

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Oakmont Capital Services
Pawnee Leasing Corporation
PEAC Solutions
RTR Services, Inc.

BRONZE:

Liventus
Meridian Equipment Finance
Orion First Financial, LLC



MEMBER NEWS CONTINUED

[9 MH&H Attorneys Named Best Lawyers in America® & Best Lawyers Ones to Watch in America® For 2023](#)

[Moritt Hock & Hamroff Named Top Winner For Best Financial Law Firm](#)

[Channel Appears on Inc. 5000 Annual List of Fastest Growing Private Companies for 10th Consecutive Year](#)

[Lenovo Selects Odessa to Help Support Global Transformation](#)

[Solifi's Latest ABL Release Elevates Customer and Lender Experience](#)

[Kawasaki Motors Finance Corporation optimizes with Solifi's Wholesale Finance platform](#)

[CLFP Foundation Adds 10 New CLFPs](#)

[LeasePoint Funding Group Launches Med Rep Financing with Med Rep Meeting](#)

[Solifi Named to 2022 IDC FinTech Top 100](#)

[Meet PEAC Solutions' Expanded Broker Team](#)

[Finova Capital Enhances Digital Lending Experience with Northteq](#)

[Solifi Wholesale Finance Release Delivers Enhanced Asset Risk Management](#)

[20 Moritt Hock & Hamroff Attorneys Named New York Metro Super Lawyers® & 6 Named New York Metro Rising Stars for 2022](#)

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