

NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

Q4 2022



UPCOMING EVENTS



Ice Fishing on Lake Minnetonka

Thursday, February 9, 2023

11:15 AM - 9:00 PM CT

Wayzata, MN



REGISTER NOW

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

Happy New Year from the NEFA Team!

The NEFA Board of Directors, member volunteers and NEFA staff are very proud of the accomplishments from 2022. Below are some highlights.

Membership

NEFA added 92 new members to the membership in 2022, which brought the year-end total to 370. These new members are excited to connect with the NEFA community.

Record Setting Attendance

The two annual NEFA conferences reached the highest attendance in NEFA's history! The March Finance Summit had 376 attendees and the November Funding Symposium had 409 attendees. Additionally, there were nine regional events held in 2022 with 375 attendees collectively.

New Member Benefits

NEFA launched new member benefit programs including a Monitor Suite subscription and Corporate Freight Savers shipping program. We are planning to offer additional member benefit programs in 2023.

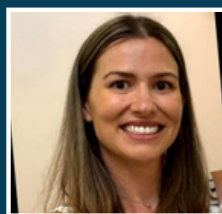
Meet the NEFA Team

The NEFA team includes the following team members and roles:



Alicia Bos

Director of Marketing
abosenefassociation.org
Joined NEFA January 2023



Hannah Kroll

Director of Membership
hkrollenefassociation.org
Joined NEFA September 2022



Kale Tissue

Director of Events & Operations
ktissueenefassociation.org
Joined NEFA July 2021

NEFA Committees

NEFA offers many opportunities for our members to get involved including committees, regional groups, and various groups including;

- Broker/Lessor Leadership Group
- Conference Planning Committees (one for each annual conference)
- Funding Source Leadership Group
- NEW - Diversity, Equity & Inclusion Committee
- Legal Committee
- Marketing Committee
- NEW - Membership Benefits Committee
- NEW - NextGen Leadership Committee
- NEW - Women in Leasing Committee
- Regional Committees: Midwest, Northeast, Northwest, South Central, Southeast, and Southwest



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A MESSAGE FROM THE CEO



CHAD SLUSS

Save the Dates

- February 9 – Midwest Regional Ice Fishing (Lake Minnetonka, MN)
- March 21-24 – Finance Summit (San Diego, CA)
- April 19 – South Central Regional Event (Dallas, TX)
- May – Northeast Regional Event (Philadelphia, PA)
- June 13 – Northeast Regional Crab Feast (Baltimore, MD)
- July – Northwest Regional Event (Seattle, WA)
- August – Southwest Regional Angels Baseball Game (Anaheim, CA)
- August – Midwest Regional Lake Minnetonka Dinner Cruise (Minneapolis, MN)
- September 19 – Midwest Regional Event (Chicago, IL)
- October 4-6 – Funding Symposium (San Antonio, TX)
- Virtual webinars and member meetups

If you wish to get involved and make the most out of your NEFA membership, I encourage you to volunteer, attend one of the annual conferences or a regional event, join a committee, get published in Newsline or NEFA Note. Please contact me if you are interested in learning more.

Our team is excited for 2023 and the opportunities available for the NEFA membership.

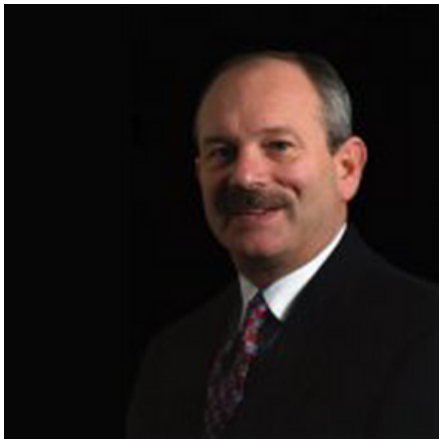
We wish you much success in the upcoming year!

Sincerely,

Chad Sluss

Chief Executive Officer
csluss@nefassociation.org

THE MISSION AND VALUE OF THE CHRIS WALKER EDUCATION FUND



Providing educational programming is at the core of NEFA's mission and remains one of the most valuable offerings of the association. In 2011, NEFA Board Member and a tireless industry advocate, Chris Walker, passed away. Chris Walker was VP of Business Development for GreatAmerica Financial Service in Cedar Rapids, IA.

When Chris passed away in 2011, many NEFA Members and other industry professionals had asked if there was some way they could make a donation to honor and continue Chris' great service to the equipment finance industry. The decision was made by the NEFA Board to rename the NEFA Member of the Year Award in Chris's name. Simultaneously, donations began coming in in Chris's name to honor his legacy. In response, NEFA created the Chris Walker Education Fund. Chris was a tireless proponent of industry education, as evidenced by his active participation in conferences, classes, and committees of a range of industry groups. Chris Walker embodied the spirit of giving back by actively helping NEFA and its members as an active volunteer. The Chris Walker Education Fund honors the selfless efforts of members who strive to improve and give back to our industry.

Chris Walker was a champion for education both within his own company and within the industry. He was truly devoted to advancing education and gave much of himself, and his time, to promote the importance of education and involvement in the industry. He would undoubtedly be very honored that his influence on the professionalism and expertise of our industry will continue well beyond his lifetime through this education fund named in his honor. He has left behind a great legacy with his years of service and friendship to so many whose lives he touched.

Throughout the years, various networking events and golf outings are held to continue raising funds to support this mission. Individuals, Foundations, Associations, and Institutions can apply for these funds annually.

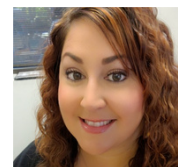
Today - The Chris Walker Education Fund Committee continues its annual mission in honoring late NEFA Member and Member of NEFA's Board of Directors, Chris Walker. The Chris Walker Education Fund focuses on an issue near and dear to Chris's heart - education and the idea of "a lifetime of learning." The CWF Committee is now actively raising funds and accepting grant requests to honor Chris's great service to the industry. Funds will award a total of \$20,000 in grants to be distributed by the end of February 2023. The grant application process is available to individuals as well as associations, foundations, and institutions. Individual grants may be requested up to \$1,500, or an amount equal to the cost of qualified industry-related education.

Funds available through the Chris Walker Education Fund may be used for any project or need that provides industry education opportunities for leasing professionals. This includes industry-related education, certifications (such as the Certified Lease and Finance Professionals (CLFP) designation), educational initiatives of the NEFA, or other educational initiatives related to the equipment finance industry. Through its founding in 2011, the Chris Walker Education Fund has now funded over \$100,000 in educational grants. All grant requests must be submitted online through the following link: <https://www.nefassociation.org/about-us/chris-walker-education-fund>.

Thank you and we hope this helps you better understand the mission and value that the Chris Walker Education Fund provides the Industry.



Randy Haug, CLFP
LTi Technology Solutions
CWF Committee Member



Kim King, CLFP
BankFinancial Equipment Finance
CWF Committee Member





NEFA NEXTGEN COMMITTEE INVITES YOU TO JOIN THE CONVERSATION

Greetings NEFA and a happy 2023!

As we reflect on a successful 2022, it's time to start planning for the upcoming year and beyond. And when I say beyond, NEFA is happy to announce the formation and kick-off of NEFA's NextGen Committee. The goal is to foster the growth of our industry's next leaders.

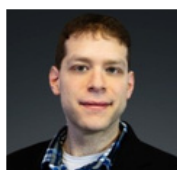
When we think of our current NEFA member base, we think of our business leaders and decision-makers. We see CEOs, Presidents, Sales & Credit managers, and other industry professionals at NEFA events. The NextGen Committee would love to see young professionals, who represent the next generation of equipment finance industry professionals, at a future event. The NextGen Committee's goal is to welcome newer talent to the industry and provide opportunities for growth to those young professionals who would like to advance in their roles and learn new relevant skills.

The NextGen Committee is working to provide recommendations on new programming, activities, and events including:

- Continuing Education (Intro to Equipment Finance topics)
- Online Roundtables on Industry Topics
- Q & A Sessions (Ask the CEO, etc.)
- Networking Events (Online and in person)

How can we engage emerging talent in the equipment finance industry? We would love to welcome that new salesperson out of college or that new marketing coordinator who has limited experience in equipment finance. Some of the newer industry professionals may have questions such as: How does a deal get priced? What is a delivery and acceptance in the contract? Is this a capital or operating lease? How does one interpret a financial statement? What is the difference between a lessor and a funding source? Having some introductory seminars would get these beginner questions answered.

I remember my first months in the equipment finance industry. As a lawyer by trade I thought, "What the heck am I doing at a lease & finance company"? I was lucky to have a great team of colleagues whom I could ask my silly questions, but it would have been a great resource to have an outside community to connect with and learn from. I eventually received cross-training among different company functions, but sometimes it is difficult for others to be exposed to new concepts outside of day-to-day tasks.



Aaron Massie
Beacon Funding Corp.
NextGen Committee Member

If your business has not thought of a plan to retain or foster talent, it would be a great 2023 initiative to get that underway. We see that hiring has become a tedious process in the post-COVID years and having your staff attend educational and networking events is a priceless investment. Investment in your employees leads to a more knowledgeable workplace, and your employees will appreciate the opportunity of being acclimated to a professional society outside of the company walls.

In summary, I ask our members to keep their junior staff in mind for future events. Add more of your employees to your company profile in the NEFA membership directory so they can get NEFA newsletters and event notifications. Think about who in your organization could benefit from attending NEFA events and encourage them to get involved.

As we develop more events this year, think about if there are any industry topics that you are passionate about and would possibly like to lead an online seminar on. The committee has been putting together a tentative schedule of online events throughout the year and hopes to have a networking opportunity at NEFA's Funding Symposium in San Antonio. Stay tuned for more information from the NextGen Leadership Committee, we look forward to seeing everyone in San Diego!

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San Antonio, Texas



news

MEMBER NEWS

[NewLane Finance hires Talent Acquisition Manager](#)

[Solifi Named Top 10 Banking Tech Solution Provider by MyTechMag](#)

[Civista Bancshares, Inc. To Acquire Vision Financial Group, Inc.](#)

[Regents Capital Closes \\$100.0 Million Bank Credit Facility](#)

[Quality Leasing Adds Robert Wroblewski to Sales Team](#)

[GreatAmerica Announces \\$637 Million Term Securitization](#)

[Tamarack Publishes Whitepaper Series on AI for Equipment Finance](#)

[NORTH MILL ANNOUNCES \\$353MM TERM SECURITIZATION](#)

[Quality Leasing Names Hall as Vice President of Sales](#)

[GreatAmerica Launches Employee Advised Fund—Now Accepting Applications from Non-Profits](#)

[Creative Vision Finance Embrace Digital Transformation with ASPIRE Express](#)

[CLFP Foundation Adds 25; Reaches 1,200-Member Milestone](#)

[LeasePoint Funding Group Reports Record-Breaking \\$35 Million Q3](#)

[Quality Leasing Co., Inc. Rebrands as Quality Equipment Finance](#)

[Tamarack Makes Strategic Shift to Tamarack.ai](#)

[Solifi selected for great places to work list by The Secured Lender](#)

[Solifi ABL passes \\$1B in loans outstanding on SaaS platform](#)

[Moritt Hock & Hamroff Ranked In 2023 Edition Of U.S. News & World Report -Best Lawyers® Best Law Firms](#)

[American Lease Insurance sold to American Bankers Insurance Group](#)

[Broker Success: Looking at Borrowers Through the Eyes of Lenders By Don Cosenza, CLFP](#)

[Solifi's latest ABL release enhances real-time portfolio visibility and risk-management controls](#)

[BOSTON LAW FIRM COHN & DUSSI NAMED TO GREAT PLACES TO WORK LIST BY THE SECURED LENDER](#)

[Victor Finance Powering Digital Transformation with ASPIRE](#)

[Tamarack Whitepaper Examines Application of AI for Prediction Automation](#)

[Northteq Launches Aurora Customer Portal](#)

[LeasePoint Funding Group Honored as Fastest-Growing Company in the 2022 Aggie 100™](#)

[Notarize and Northteq Launch Online Notarization Integration](#)

[American Lease Insurance Sold to American Bankers Insurance Group](#)

[Tamarack Continues Expansion of Artificial Intelligence Solutions Team](#)

[Equipment Leasing & Finance Foundation | Foundation Forecast November 2022](#)

[Fordham Athletics Partners With Moritt Hock & Hamroff LLP For NIL Matters](#)

[LIBERTY COMMERCIAL REBRANDS TO WINGSPIRE EQUIPMENT FINANCE](#)

[CLFP Foundation Adds 20 New Members](#)

[Oakmont Capital Services Implements Tamarack Technology's AI Product Suite](#)

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North Mill Equipment

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Dakota Financial, LLC

Dedicated Financial GBC

Leasepath

NewLane Finance

Northteq

Oakmont Capital Services

Pawnee Leasing Corporation

PEAC Solutions

RTR Services, Inc.

BRONZE:

Liventus

Meridian Equipment Finance

Orion First Financial, LLC



MEMBER NEWS CONTINUED

[JENNIFER FANZ JOINS PEAC SOLUTIONS AS HEALTHCARE NATIONAL SALES MANAGER](#)

[Chris Walker Education Fund Accepting Grant Requests and Announces Availability of \\$20K in Grants to Support Education Initiatives](#)

[Early Bird Registration Is Open for Monitor's 50th Anniversary Celebration in Philadelphia](#)

[LTi Technology Solutions Donate over \\$4,000 to Completely KIDS and a Local School](#)

[Marshall Returns to Quality Equipment Finance](#)

[First Foundation Bank Equipment Finance Department is growing again.....](#)

[Tamarack Whitepaper Models Distributed Workflows for the Equipment Finance Industry](#)

[Disclosure Direct for Salesforce Helps Lenders Comply with New Commercial Lending Regulations](#)

[Liventus Recognized by Clutch as the Top 1000 Global Service Provider of 2022](#)

[CLFP Foundation Adds 17 New CLFPs](#)

[Solifi's Originations powers sophisticated financing models with latest release](#)

[LTi Technology Solutions' Danie Langer Honored in Monitor Daily's Top 50 Women in Equipment Finance](#)

[Tamarack Technology Obtains SOC 2 Type 1 Compliance](#)

[COHN & DUSSI ATTORNEYS RECOGNIZED BY SUPER LAWYERS FOR 2022](#)

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