

# NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

Q2 2023

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A large yellow tracked bulldozer is shown on the left side of the advertisement, partially obscured by a torn paper effect. The bulldozer is positioned on a dirt surface, and its tracks are visible. The background behind the bulldozer is a blue sky with some clouds.

# Quality

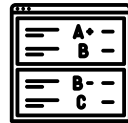
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## NEFA Note

### — A Message from the CEO



Chad Sluss

#### ***Hello NEFA Members & Industry Friends,***

We hope you are doing well and enjoying your summer.

I am excited about the future of NEFA! The organization is fortunate to have a tremendous group of volunteers who serve on the Board of Directors, Committees and taskforces who tirelessly give their time and energy to improve the association for our members.

NEFA has embarked upon developing a comprehensive strategic planning process that we believe will take NEFA to the next level as an association in the equipment finance and leasing industry. The association engaged a strategic planning consultant to facilitate several sessions with Adam Peterson, NEFA President, NEFA past Presidents, and me. The purpose was to understand the past and explore potential opportunities for the future, review the current NEFA Mission and Vision Statements, and review the NEFA value proposition. The second step in the process, which is currently underway, is offering focus groups idea sessions to capture input directly from NEFA members. Once this process is completed, a survey will be conducted and allow those members that missed the focus group sessions to provide feedback. Throughout the summer and into the fall the Board of Directors and NEFA staff will compile the data collected through this process and develop the strategic plan. During the Annual Meeting, at the October 3-6 Funding Symposium in San Antonio, Texas, the strategic plan will be broadly shared.

NEFA has launched a new member campaign with the goal of adding fifty new Broker/Lessor members by year end. Help us reach our goal by referring a new member company for a chance to win a complimentary registration to the 2023 Funding Symposium or refer five new member companies and automatically receive a complimentary conference registration. (Referrals must join NEFA to count). Send referrals to Hannah Kroll, Director of Membership, at [hkroll@nefassociation.org](mailto:hkroll@nefassociation.org).

Below is a list of upcoming events planned for the balance of 2023:

- August 3 – Rising Professionals & BEFN Virtual Networking Event
- August 10 – Midwest Regional Lake Minnetonka Dinner Cruise (Wayzata/Minneapolis, MN)
  - NEFA Masterclass Series: Credit - Module 2: Credit Scoring
    - Will take place in advance of the dinner cruise

## NEFA Note

- August 22 – Southwest Regional Angels Baseball Game (Anaheim, CA)
  - NEFA Masterclass Series: Credit - Module 2: Credit Scoring
    - This session will take place in advance of the baseball game
- September 19 – Chicago Regional Event
- October 3-6 – Funding Symposium (San Antonio, TX)

The NEFA Masterclass Series: Credit is a four-part series which launched July 19th. All sessions will be recorded and available in the NEFA Members only portal.

The NEFA committees and task forces are forming new offerings that benefit the membership through thought provoking education, member benefits and conference enhancements to name a few. Below is a list of committees, regional groups, and taskforces including;

- Broker/Lessor Leadership Group
- Conference Planning Committees (one for each annual conference)
- Funding Source Leadership Group
- Diversity, Equity & Inclusion
- Legal Committee
- Marketing Committee
- Membership Committee
- Membership Benefits
- Philanthropy Committee
- NEFA Rising Professionals Committee
- Women in Leasing
- Regional Committees (Midwest, Northeast, Northwest, South Central, Southeast, Southwest)
- Task Forces
  - Strategic Planning
  - Conference and Event Enhancement
  - Membership Directory

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 the Newslines or NEFA Note. Please contact me or the NEFA Team if you are interested in learning more.

- Alicia Bos – Director of Marketing
- Hannah Kroll – Director of Membership
- Kale Tissue – Director of Events & Operations
- Chad Sluss – Chief Executive Officer

We hope to see you at a NEFA event this year.

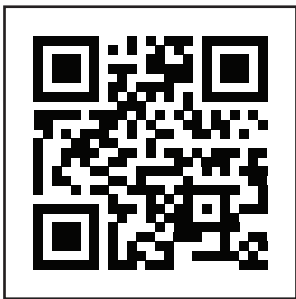
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Chad Sluss, Chief Executive Officer  
csluss@nefassociation.org



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**Alan Justman**

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**Lainie Coeby**

VP Broker Relations, East  
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**Thomas Mills**

Broker Relations Associate  
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(888) 779-4629 Ext. 117

NEFA Note

— Article

# NEFA Philanthropic Committee to Host a Texas Tailgate & Hold'em Charity Tournament

***By: Sean Scampton,  
Leasepath***

In March of 2023, the attendees of the NEFA Finance Summit held in San Diego, California were treated to an event that I have to imagine was a first for the modern equipment finance industry.

A fashion show, featuring some of the

best and brightest of the business strutting their stuff on an actual catwalk, in support of an amazing local organization called Operation Open Water; a community of surfers and adventurers who provide vital mental health support and adventure to veterans and first responders.

In the end, the event raised more than \$25,000 for Operation Open Water

from the dozens of NEFA member companies represented. With those resources, that team will be able to provide service to another 16 customers that need mental health support; support that will if nothing else provide improved quality of life for a veteran or first responder that needs it.

It was a reminder that, while all of us tend to define ourselves by “what” we do for a living and “how” we do it, identifying and fostering the “why” that empowers us to bring our best for our customers, partners, and colleagues is absolutely critical and maybe a little underacknowledged in our ranks.

Call it a lingering effect of the struggles of COVID, a paradigm shift in how teams express their purposes, or just a natural evolution of an industry built on relationships, but there is a growing desire among equipment finance companies to use their resources to make a positive impact in the world around them. Organizations like Equipment Finance Cares and Dedicated Financial GBC have led that charge, directing that energy towards those causes that impact our community, the NEFA community, and showing us all that a company can have a purpose beyond profit and still be wildly successful.

NEFA has proven to be a willing partner and collaborator; so much so that the Philanthropic Committee was formalized specifically to discover and amplify opportunities to support causes that have affected members and companies that are a part of our association. Its mission is simple: to funnel the love and charitable resources of the NEFA community towards benefitting causes that impact our peers and communities. It will accomplish this mission by keeping its finger on the pulse of the NEFA membership, not to mention plan and execute a charitable kick-off event before each conference that is in keeping with the spirit of the city that we’re visiting.

As October is Breast Cancer awareness month, the NEFA membership told us that this would be a perfect cause to highlight those stories within our community that have walked through the fire of fighting the disease. That’s why this fall’s event will be to benefit organizations that, like Open Water and Beyond Blindness before it, have done incredible work in supporting NEFA members Jen Stich of Falcon Equipment Finance for the Indy Foundation and Linda Tiers of Baystone Government Finance for the National Lymphedema Network.

This October 3rd, NEFA is drawing from the spirit of the Lone Star state by throwing a Texas Tailgate & Hold’em Tournament to benefit these incredible organizations. October 3rd will be NEFA’s most exciting Charity Kick-off event yet, with a full lawn of tailgate games including horseshoes, giant Connect 4, human-sized Jenga, and the king of the tailgate: cornhole (or “bags” if you’re from Wisconsin).

The event will feature a beer and wine bar with a signature cocktail, incredible local BBQ and finger foods, but the headliner is the first ever NEFA Texas Hold'em tournament. More than 80 industry peers will be competing for bragging rights and to take home the grand prize: the NEFA Big Belt Buckle trophy! The winner will get to strut their stuff and show off their dominance on the card table all week!

The Philanthropic Committee is proud to support breast cancer awareness and give space to NEFA members to share their lives, experiences, and passions. I'm humbled and honored to represent this incredible team of professionals and leaders, and excited to see what good we can put out into the world on October 3.

I'm also excited to learn which NEFA members have a strong poker face! Sponsorships are available for the event now, so reach out to NEFA to add your company's logo to a tailgate lawn game, food option, or signature cocktail and show your support for our community.

Thanks to you, the NEFA membership, for growing philanthropic efforts in equipment finance and making the world around us a better place!





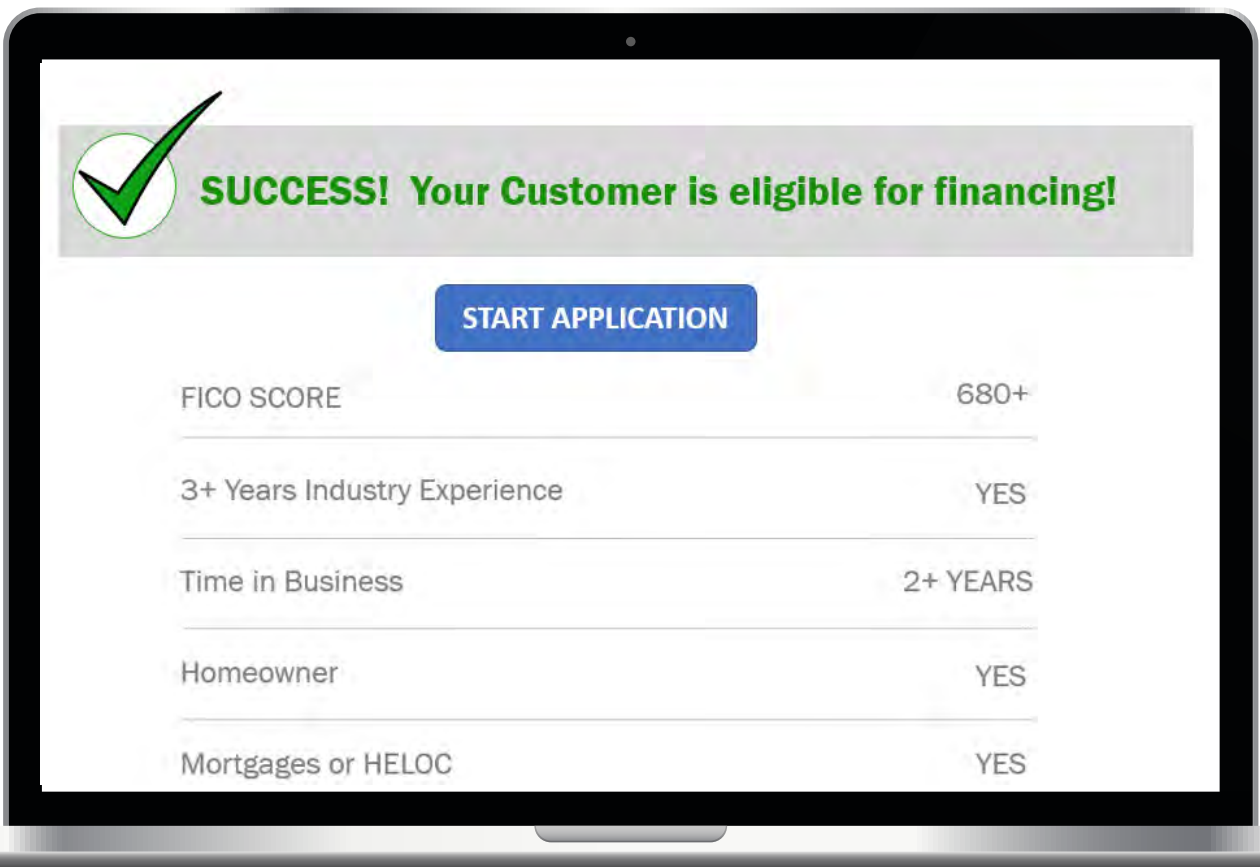


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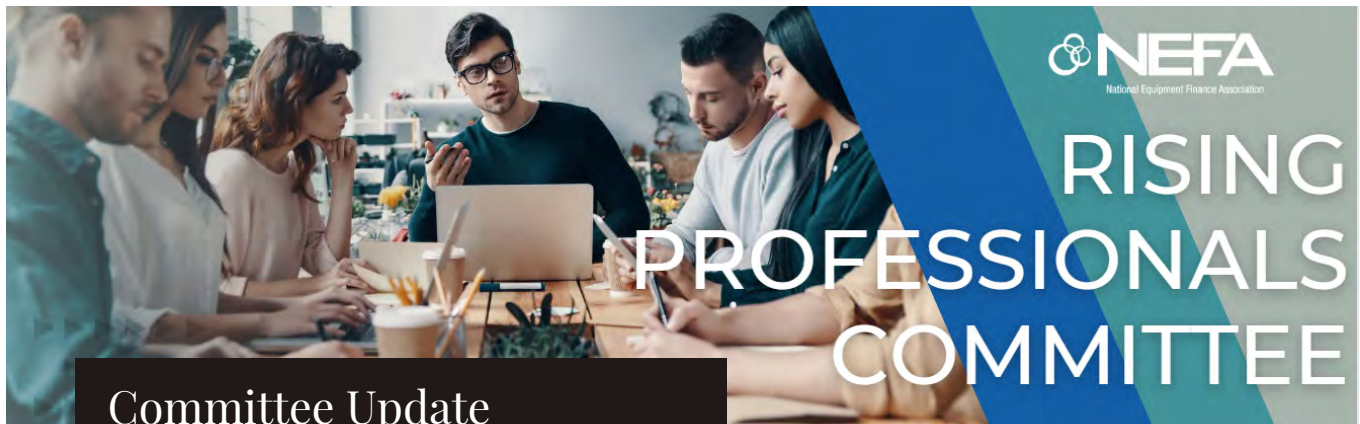
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## NEFA Note



### Committee Update

The NEFA Rising Professionals Committee, formerly known as the NextGen Leadership Committee, has rebranded in effort to avoid any confusion with similar industry groups. The Rising Professionals Committee's mission and goals remain the same, to identify young professionals within NEFA, determine their specific needs and expectations, and develop initiatives designed to meet those needs. The Rising Professionals Committee will work to recommend educational, networking, and other programs and initiatives to the NEFA staff and Board of Directors. You can stay up to date by [subscribing to our mailing list](#) and following our group on [LinkedIn](#).



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#### GENERAL INFORMATION

**Company Type** Independent  
**In Business Since** 2002  
**Trade Associations** ELFA, NEFA, AACFB

#### TRANSACTION INFORMATION

**Asset Categories** Construction, Machine Tool  
Trucks and Trailers  
**Credit Quality** "B", "C" and Start up

#### FUNDING INFORMATION

**Funding Source Type** Lender  
**Source of Funds** Internal, Bank Lines

#### TRANSACTION PROFILE

**Deal Size Range** \$10,000 –\$400,000  
**Term** 1–3 Years  
**Average Term** 30-36 Months  
**Products Offered** True Lease & EFA's  
**Scope of Geography Activity** National

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# Member News

[Tamarack and Vision Commerce Form Strategic Partnership to Accelerate the Use of Origination Data to Drive More Value](#)

[WINGSPIRE CAPITAL AGENTS \\$125 MILLION CREDIT FACILITY FOR COSMETICS COMPANY](#)

[Regents Capital Ranks in Monitor's Top 30 Private Independents for 2023](#)

[Leading South African financial institution upgrades to Solifi's SaaS working capital solution](#)

[Tamarack New Hire Supports Data Integrations that Fuel Artificial Intelligence Solutions](#)

[CLFP Foundation Adds 20 New CLFPs](#)

[Tamarack and Sandhills Global Form Strategic Partnership to Leverage AI and Market Asset Values for Enhanced Portfolio Management](#)

[WINGSPIRE CAPITAL PROVIDES \\$230MM+ OF COMMITMENTS IN 1Q23](#)

[Odessa appoints Eric Bernstein as CEO; Co-Founders Madhu Natarajan and Jay Mehra to Executive roles on the Board of Directors](#)

[Assurant Partners with CNH Industrial Capital, the Captive Finance Company of CNH Industrial, to Provide Equipment Protection and Insurance Products through their Dealer Network](#)

[Channel Closes \\$75MM Facility](#)

[Republic Bank Appoints Vidya Ravichandran to Board of Directors](#)

[Q2 2023 Equipment Leasing & Finance Industry Snapshot Now Available](#)

[New York Law Firm Moritt Hock & Hamroff Expands Florida Footprint](#)

[BRITECAP FINANCIAL FORMED BY AFFILIATES OF NORTH MILL EQUIPMENT FINANCE](#)

[WINGSPIRE CAPITAL PROVIDES \\$30 MILLION REVOLVER TO GTT COMMUNICATIONS](#)



# Member News

[Northteq and Mitsubishi HC Capital Canada Launch Partner Portal](#)

[Wingspire Equipment Finance Upsizes Credit Facility to \\$195MM Led by Texas Capital Bank](#)

[Northteq Announces New Product Upgrades to Streamline Lending Process, Eliminating Email](#)

[MHH Partners To Discuss Legal Trends & Best Practices At ELFA Forum](#)

[Republic Bank Expands Downtown Louisville Presence, Renews Commitment to Revitalization Effort](#)

[Oakmont Capital Services Adds Five Employees to Growing Team](#)

[What Is the FTC Safeguards Rule and Who Does It Impact?](#)

[CLFP Foundation Adds 14 New CLFPs](#)

[WRIGHT LAW GROUP PROMOTES JARED ROUGEAU TO PARTNER](#)

[Moritt Hock & Hamroff Bolsters Its M&A And Tax Practice](#)

[Elevate Your Credit Underwriting Today with PerCina Report—The Cloud-Based Solution for Streamlined, Secure, and Market-Ready Credit Memorandums.](#)

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# Member News

[GreatAmerica Places Half Billion in Bonds](#)

[Tamarack adds Rachel Rouillard to Professional Services Team](#)

[CLFP Foundation Adds 15 New CLFPs](#)

[Societe Generale Equipment Finance Selects Odessa to Help Drive Continuous Innovation](#)

[Channel Announces Regional Sales Manager Promotion](#)

[New Baystone Government Finance Website Offers Gateway for Tax-Exempt Municipal Leasing](#)

[GLOBALCAPITAL ABS DEAL OF THE YEAR](#)

[AMEMBAL & HALLADAY ANNOUNCE THE LAUNCH OF FIVE E-LEARNING COURSES](#)

[CLFP Foundation Adds 19 New CLFPs](#)

[DataScan Appoints Keaton Summerlin as Dedicated Equipment Finance Account Manager](#)

[COHN & DUSSI ATTORNEY WILLIAM J. DELANEY NAMED TO 2023 SUPER LAWYERS LIST](#)

[CLFP Foundation Adds 21 New CLFPs – First CLFP in Pakistan](#)

[PEAC Partners Financing Solutions with Atlas Copco's Industrial Ideas](#)

[Leslie Berkoff, Theresa Driscoll Named To Lawdragon's 500 Leading U.S. Bankruptcy & Restructuring Lawyers For 2023](#)

[Channel Earns Second Consecutive Top 200 Workplace Recognition](#)

[REPUBLIC BANK COMPLETES MERGER WITH COMMERCIAL INDUSTRIAL FINANCE, REBRANDS DIVISION AS REPUBLIC BANK FINANCE](#)

[Channel Successfully Completes \\$85MM ABS Securitization](#)

[Regents Capital Named One of the Best Places to Work in Orange County](#)

[WILLIAM NASRI JOINS PEAC SOLUTIONS AS GLOBAL HEAD OF MARKETING AND COMMUNICATIONS](#)

[Beacon Funding and Transit Pros Announce Partnership](#)

[Tamarack's latest whitepaper explores using AI to drive organizational transformation](#)

[Patrick O'Connor Honored in Monitor's NextGen 40 under 40 List](#)

[CLFP Foundation Adds 19 New CLFPs](#)

[Solifi's Director, Go-To-Market Strategy is highly commended within the AFC Rising Star Award 2023](#)

[North Star Leasing Implements Tamarack's TrailView™ Customer Service Portal](#)

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# Member News

[First Business Bank Chooses Odessa for Key Role in Digital Transformation](#)

[Liventus Launches New Podcast Series - LivByte](#)

[Oakmont Capital Services Continues to Develop Talent While Expanding its Teams](#)

[Tamarack joins Salesforce Consulting Partner program](#)

[WINGSPIRE CAPITAL PROVIDES A SENIOR CREDIT FACILITY TO SUNLAND ASPHALT](#)

[LTi Technology Solutions Achieves Veracode Verified Standard Tier Status](#)

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# Upcoming NEFA Events

September 19



### Chicago Regional Event

September 19, 2023  
6:30 - 9:00PM CT  
Chicago, IL

October 3-6



### NEFA Funding Symposium

October 3-6, 2023  
JW Marriott San Antonio Hill Country Resort & Spa  
San Antonio, TX

An advertisement for the Aurora Partner Portal. The background is teal with colorful confetti (yellow, orange, pink) and a large white circle in the center. At the top of the circle is an illustration of a computer monitor displaying a login form with fields for 'Username' and a password, and an 'Enter' button. Below the monitor, the text reads 'email is so 90s. embrace the future of lending.' in a mix of purple and green. Underneath is a rounded rectangular button with the text 'find out more'. At the bottom of the circle is the 'aurora' logo in a stylized font, with 'partner portal' and 'loan origination system' written below it. In the bottom left corner of the overall image is the 'nôrthteq' logo, and in the bottom right corner is the 'salesforce powered' logo.

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### — Article

# *Making Continued Development and Industry Involvement a Goal in 2023*

*Written By: Mel Vinson, CLPF - VP of Marketing and Development, CLFP Foundation*

Writing this, I am in disbelief that we are over halfway through August, which means that we are more than halfway through 2023. It seems that not too long ago we were kicking off a new year, setting new goals, preparing for spring conferences, team meetings, and calendar scheduling. As we use up our PTO during the summer months and anticipate fall conferences and end of year planning, my mind is centered on setting my next goals and objectives for myself, how I can continue being involved in building our industry and how I can support my peers that are doing same. This year, I have seen a continual theme amongst my network of being in a similar mindset of continued development and finding ways to be connected and involved in the equipment leasing and finance industry.

There are a variety of goals that can be set and met – taking a professional development course, accessing the resources available across various industry associations to further our knowledge, or pursuing a new degree or additional credentials. Many also set goals of community contribution: volunteering, joining a committee, participating in a panel, or even being a peer mentor. Be it continued development or giving back to this industry we love so much, maintaining a proactive and nimble approach to our continued development are important considerations when establishing our roadmaps and plans for success.

For many, setting goals is a rhythm that can come naturally, but for others, it can be intimidating. If setting goals isn't the most natural thing for you, I can tell you that everyone starts somewhere, and development and goal setting might not look linear. I myself often draw inspiration for my goals by observing others and their passions and ambitions. In my current role, I have had the opportunity to interact with many goal-driven industry participants who have the specific desire to earn their Certified Lease & Finance Professional (CLFP) designation this year. I started the first week of 2023 facilitating a preparation course – the Academy for Lease & Finance Professionals (ALFP) - with a class planning to achieve their CLFP. Seven months later, we have completed 13 AFLPs in 2023, and have had hundreds of industry professionals achieve or are on their way to achieving their goals of becoming a CLFP. This is a huge milestone, and a true testament to the tenacity and dedication of many goals being set and achieved. It reminds me daily of my own goals that I set years ago to continue building my knowledge of the industry and earning the designation for myself.

## NEFA Note

To be in constant contact with ambitious professionals is nothing short of inspiring. Another positive element of witnessing developmental goals be set and met is that there is also of outlook of gratitude, and the desire to give back. Many of those same participants who earned their CLFP this year have graciously given the gifts of their time and knowledge to not only support additional CLFP Candidates, but to positively network with other industry professionals, participate and moderate on panels, and volunteer in their respective communities.

In short, there are various types of goals we may set for ourselves. It may be your goal to try and volunteer twice a year. It may be an ambition to earn your MBA. Another objective might be to feel confident leading a team meeting. Whatever mindset you are in, establishing objectives for development and/or industry involvement are truly positive means to work towards success. My encouragement to you reading this would be to hopefully inspire you to check in on your current 2023 goals, or perhaps establish a new intention for yourself for the remainder of the year. I also hope that you might consider continuation of learning and development as paths for goals, or also contemplate giving back to our industry and your community. Who knows what you can and will achieve if you believe in yourself and go for it?



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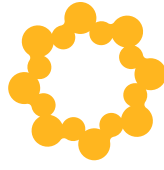
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# New NEFA Members

**777 Equipment Finance LLC** - Broker/Lessor

**Acquis Insurance** - Service Provider

**Amembal & Halladay** - Service Provider

**ARF Financial, LLC** - Broker/Lessor

**Bidadoo** - Service Provider

**Canyongate Financial LLC** - Broker/Lessor

**Cashmere Valley Bank** - Funding Source

**CLA (CliftonLarsonAllen LLP)** - Service Provider

**Consult Disrupt** - Service Provider

**Flatbay Capital** - Funding Source

**Full Skope** - Service Provider

**Five Star Leasing, LLC** - Broker/Lessor

**Happy Manufacturing, Inc.** - Service Provider

**Impel Union, Inc** - Broker/Lessor

**Lantern Capital** - Broker/Lessor

**Micah Group** - Service Provider

**Mobilease, Inc.** - Broker/Lessor

**National Business Capital** - Funding Source

**PAC Western Financial** - Funding Source

**Parthenon Equipment Finance LLC** - Broker/Lessor

**Ridge Commercial Capital LLC** - Broker/Lessor

**SEO Expert** - Service Provider

**TAB Bank** - Funding Source

**Tech. Finance Co., LLC** - Broker/Lessor



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Kyin Lok, CEO, Dext Capital

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