

NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

Q3 2023

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NEFA Note

— A Message from the CEO



Chad Sluss

Hello Friends,

We hope you are doing great and having a wonderful year. I wanted to personally thank you for your continued support of the association. The Board of Directors and my team work tremendously hard to serve your needs.

First and foremost, NEFA is having a fantastic year, and I am excited for our future. The organization is extremely fortunate to have committed volunteers who serve on the Board of Directors, Committees and taskforces that give tremendously of their time and energy to improve the association for our members.

In the following sections, we will highlight key achievements and developments within NEFA during 2023.

Strategic Plan

NEFA has embarked on a comprehensive three-year strategic plan, setting the stage for our association's continued growth and success within the equipment finance and leasing industry. Over two hundred members actively participated in focus groups, and more than one hundred members completed the strategic planning survey. The key findings and initiatives desired by our membership have shaped our strategic priorities. The membership's core desires include:

Community Connections: Our members have expressed a strong desire for enhanced opportunities to connect with one another. This includes fostering virtual connections and, more importantly, connections by functional area. We aim to develop member groups in areas such as accounting, credit, operations, marketing, and sales, allowing members to connect, build relationships, and learn together. In addition, we are planning "Meet the Member" virtual programs.

Education: To better serve our members, we are expanding our educational offerings. This includes a wider range of virtual educational programs and educational opportunities at regional events.

Events: We are committed to providing enriched networking experiences at regional events and conferences.

Resources: We are actively working on developing best practices materials and resources to benefit our members.

NEFA Note

Membership Update

As of this year, NEFA proudly comprises 387 member companies, with a continuous influx of new members, currently standing at 75 and growing daily. NEFA is wrapping up a year-end campaign aimed at adding fifty new Broker/Lessor members and reaching a total of four hundred member companies.

Conferences, Regional Events, and Virtual Programs

In 2023, NEFA hosted several successful events:

- March Finance Summit (San Diego, CA) with 376 attendees.
- October Funding Symposium (San Antonio, TX) with 351 attendees.
- Eight regional events, collectively hosting 376 attendees.
- Virtual programs, which attracted 314 participants.

Member Community, Publications, and Resources

Our members enjoy access to an updated Members Only Community, featuring an online directory and downloadable resources, including recordings from webinars and conferences. Additionally, NEFA offers a range of publications, including the Bi-Monthly Newsline Magazine, Bi-Weekly Tidbit Tuesday, Weekly Updates, and the NEFA Note Quarterly Newsletter.

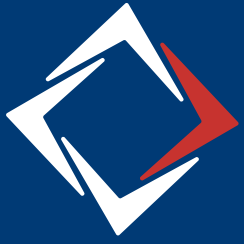
Partnerships and Discount Programs

We have forged valuable partnerships that offer exclusive benefits to NEFA members, including educational programs with Amembal & Halladay, shipping discounts through Corporate Freight Savers, special rates on insurance and investments with Cannaday Bloom, and Monitor Suite special rates.

Recently, NEFA held the 2023 Funding Symposium in San Antonio, Texas under the theme, "Lassoing Opportunities for Success." This conference provided a remarkable platform for education, networking, and industry collaboration. The conference included over six hours of educational programming, nine hours of networking opportunities in the exhibit hall, and best practices round table discussions. Notable networking events such as the Texas Tailgate & Hold'em Charity Tournament, Women in Leasing Luncheon, The NEFA Roundup & Chris Walker Education Fund Fundraiser, and multiple receptions further enriched the experience.

Special thanks to the Funding Symposium planning committee. Their industry expertise and leadership were vital in the planning and execution of this conference:

Anne Dalgaard, CPA, CLFP, Dynamic Rentals, Co-Chair
Mikki Henkelman, CLFP, Oakmont Capital Services, Co-Chair
Samantha Apostolakes, Linedata
Rob Brehm, AIC, Great American Insurance Group
Beth McLean, CLFP, Northland Capital
Jacie Moul, CLFP, AMUR
Kali Paine, Solifi
Cheryl Tibbs, Equipment LeaseCo Inc.
Kit West, C.H. Brown Co., LLC



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- Adam Warner, President at Key Equipment Finance

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NEFA Note

Without the generosity of sponsors and exhibitors, this conference would not have been possible.

Save the Dates

We look forward to seeing you at future NEFA events. Please mark your calendars for these upcoming events:

- November 9 – Webinar: "The Economy in 2024: More Questions than Answers," presented by Dr. Elliot Eisenberg.
- December 5 – Webinar: "The Next Generation of Marketing."
- March 25-28, 2024 – Finance Summit at the Hyatt Regency Huntington Beach in Huntington Beach, CA.
- November 11-14, 2024 – Funding Symposium at the JW Marriott in Indianapolis, IN.

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
- Kendra Tygesen – Administrative Assistant
- Chad Sluss – Chief Executive Officer

Finally, I would like to remind you to submit your 2024 membership dues payment promptly.

Sincerely,
Chad Sluss, Chief Executive Officer
csluss@nefassociation.org

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NEFA's Membership Benefits Committee: Unlocking Exclusive Discounts and Value for Members

***By: Tamara McCourt,
Huddle Business Capital***

The membership benefits committee is a newer committee with four members consisting of brokers and lenders. Our mission is to explore and present discount programs to the members. We all know that membership with NEFA brings so many great opportunities from education to

networking, conferences to webinars. This committee is dedicated to bringing value added discount opportunities on products and services that you may already use or have a desire to start using. Since the committee's inception, the committee has been diligent in crafting an array of discount programs. The programs range from educational, insurance, shipping services and industry subscription, with more soon to come.

Among the programs, **The Amembal & Halladay E-Learning Courses** are the most recent discount benefit that has been added. Crafted by the illustrious Sudhir Amembal, these courses hold the potential to enrich your entire workforce. The 5 Self-Paced Courses are: Winning with Leasing, Accounting for Leases – A Customer Perspective, Management Strategies for Success, Profiting from Vendor Leasing Programs, and The 30 Extraordinary Benefits of Leasing! For those eager to delve into the program details, please contact Sudhir at sudhir@amembalandhalladay.com

Cannaday Bloom was perhaps our first discount program. Their expertise lies in reducing expenses and administrative burdens associated with group health insurance and retirement plans. They offer additional related plans available upon request. Countless members have taken advantage of this program and have sung praises about the exceptional service and impressive discounts. If you would like to request a quote, you can get started by contacting Tucker at tucker@cbwealthandinsurance.com

Corporate Freight Savers. With the advancement of technology, the volume of shipping labels has decreased for many members. The impact of this decrease has been rising costs, making this discount program a cost-effective value add. Offering Fedex services at rates as astonishingly low as \$19.00 for Next Day and \$15.50 for 2-Day service, this program operates with unparalleled flexibility —no minimums or pre-pays required. It's a pay-as-you-go model facilitated by an intuitively designed online shipping interface. Not only do you enjoy the convenience of real-time tracking



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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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The committee would like to extend our appreciation to the dedicated NEFA team. Their efforts have been instrumental in making these programs accessible to the membership. Be assured, the Membership Benefits Committee is perpetually striving to introduce additional discount programs to the NEFA Membership. We eagerly anticipate presenting these new programs in the very near future. As we forge ahead, we encourage members to share their ideas or suggestions for future discount programs to enhance your NEFA membership. You can do so by reaching out to Chad or any of the committee members listed below:

Chad Sluss, NEFA – csluss@nefassociation.org / Tamara McCourt, Huddle Business Capital – tamara@huddlebc.com / Maggie Holly, Hanmi Bank – Maggie.holly@hanmi.com / Brad Kissler, MAZO Capital – bkissler@mazocapital.com / Barbara Griffith, SCL Equipment Finance – bgriffith@sclfinance.com



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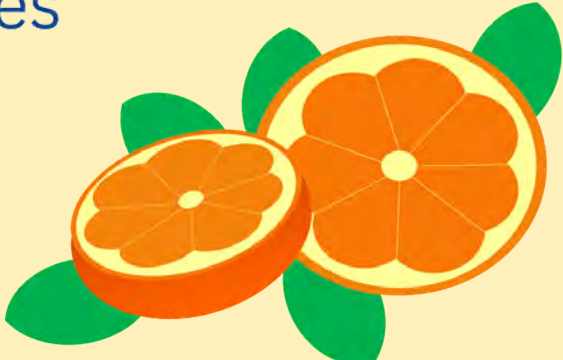
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[WINGSPIRE CAPITAL COMMITS \\$50 MILLION TO TOOLING TECH GROUP](#)

[Oakmont Capital Services Ranks No. 1622 on the 2023 Inc. 5000 List](#)

[Merchant West Group successfully upgrades to Solifi ABL](#)

[TBF celebrates 25 years as innovator in equipment finance](#)

[11 MHH Lawyers Named Best Lawyers in America® & Best Lawyers Ones to Watch in America® For 2024](#)

[Modern Rail Capital \(MRC\) Completes Updated Transformation with LTI's ASPIRE](#)

[CLFP Foundation Adds 17 New CLFPs](#)

[Tamarack strengthens service delivery with the addition of Mitch Peterson as executive vice president of operations](#)

[CLFP Foundation Celebrates CLFP Day: Naming Gibbons 2023 Cindy Spurdle Award of Excellence Winner and Announcing Newest Lifetime Award Members](#)

[Channel Makes 11th Consecutive Appearance on Inc. 5000 Fastest Growing Private Companies List](#)

[Robert Taylor of LTI Appointed as New Chair of AFPA Trust](#)

[Tamarack and Rinaldi Advisory Services form strategic partnership](#)



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

[Introducing Chris DeVeney, Paving the Way for Automation Solutions in Equipment Finance](#)

[Access Capital upgrades to Solifi's SaaS asset-based lending solution](#)

[Solifi named on 2023 IDC FinTech Top 100](#)

[Moritt Hock & Hamroff Expands Real Estate Practice In New York](#)

[Aurora's Upgrades Bring New Possibilities with AI, Fast Funding, and Section 1071 Readiness](#)

[WINGSPIRE CAPITAL PROVIDES A SENIOR SECURED FACILITY TO LENNY & LARRY'S](#)

[LTi Hosts 2nd Annual Leadership Live with Propel Finance and Acquis Data Services as Sponsors](#)

[COHN & DUSSI ATTORNEY ANDREW B. GLAAB NAMED TO 2023 NEXTGEN 40 UNDER 40 LIST BY MONITOR DAILY](#)

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Member News

[Broad Fit Financial launched to serve fitness equipment financing needs](#)

[Liventus Recognized as a Top Workplace in Chicago by Crain's](#)

[LeasePoint Funding Group Earns Prestigious Ranks on National and State Business Growth Lists](#)

[PerCina Report announces new Equipment Value Forecaster feature](#)

[Greg Sting appointed President of the Americas for PEAC Solutions](#)

[23 Moritt Hock & Hamroff Attorneys Named New York Metro Super Lawyers® & 9 Named New York Metro Rising Stars for 2023](#)

[Quality Equipment Finance Makes the Ranks on 2023 Monitor 101+ List](#)

[Moritt Hock & Hamroff Recognized As One Of Long Island Business News' Inaugural 2023 Empowering Women Honorees](#)

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[Solifi Wholesale Finance further enhances dealer and lender experience](#)

[LeasePoint Funding Group Hires Murphy as Head of Growth](#)

[CLFP Foundation Adds 18 New CLFPs](#)

[Solifi is recognized as one of great places to work by The Secured Lender](#)

[Broad Fit Financial expands team with addition of Michael Grant and Corinne Feldman](#)

[Tamarack launches Executive Advisory Insight Reports](#)

[BOSTON LAW FIRM COHN & DUSSI NAMED TO 2023 GREAT PLACES TO WORK LIST BY THE SECURED LENDER](#)

[Star Hill Financial Continues Expansion of Sales Team with Addition of Libby Turner](#)

[Solifi wins Digital Innovation of the Year at the Motor Finance Europe Awards](#)

[Capteris and LTI's ASPIRE – a Powerful Combination](#)

[Republic Bank Recognized as a Best Online Lender by Newsweek](#)

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A large, black and white image of an hourglass is positioned on the right side of the advertisement. The hourglass is tilted, and a stream of sand is falling from the top bulb into the bottom bulb. The sand is dark and granular. The background is black, making the hourglass stand out.

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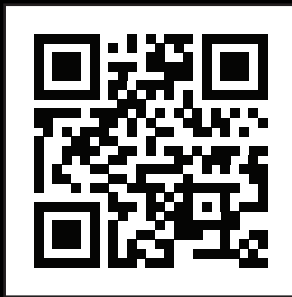
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Thomas Mills

Broker Relations Associate
thomas@4hourfunding.com
(888) 779-4629 Ext. 117

Upcoming NEFA Events

March 25-27



NEFA Finance Summit

March 25-27, 2024

Hyatt Regency Huntington Beach
Huntington Beach, CA

November 11-13



NEFA Funding Symposium

November 11-13, 2024

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The Crucial Role of Employee Financial Wellness Programs in Uncertain Economic Times

Written By: Tucker Rohde, CLPF - Financial Representative, Principal Securities Registered Representative, Financial Advisor - Cannaday Bloom

In today's dynamic economic landscape, characterized by sudden disruptions and uncertainties, employee financial wellness programs have emerged as a critical component of a company's benefits package. These programs are not just nice-to-have but a growing necessity, as they play a pivotal role in supporting and safeguarding employees during challenging times. For my fellow NEFA members, I wanted to explore the growing importance of employee financial wellness programs and how they are helping both employees and employers navigate uncertain economic waters.

A Holistic Approach to Employee Well-Being

Employee financial wellness programs incorporate a range of resources and initiatives designed to enhance an employee's overall financial health. They address not only traditional financial topics like budgeting, saving, and investing but also delve into areas such as debt management, estate planning, and retirement preparedness. This holistic approach acknowledges that financial well-being is intrinsically linked to an individual's overall well-being.

Stress Reduction and Enhanced Productivity

One of the most noticeable impacts of financial stress is its effect on employee productivity. A financially stressed employee is more likely to be distracted and less focused at work. By offering comprehensive financial wellness programs, employers can help alleviate this stress, ultimately resulting in a more focused and productive workforce (1).

Improved Employee Retention

Uncertain economic times often lead to layoffs, downsizing, and employees searching for something better. In such situations, employees who feel secure in their financial well-being are more likely to stay with their current employer. Financial wellness programs send a message that the company cares about its employees' long-term stability, which can boost loyalty and retention rates (1). Retaining experienced talent is crucial during periods of economic instability.

NEFA Note

Enhancing Overall Employee Health

The connection between financial stress, physical and mental health is well-documented. Chronic financial concerns can lead to anxiety, depression, and even physical health issues (1). By proactively addressing financial wellness, employers contribute to improved employee well-being across the board. Healthy employees are happier, more productive, and less prone to chronic health issues (1).

Support for Retirement Planning

In times of economic uncertainty, retirement planning becomes increasingly complex. Employees often worry about the security of their retirement savings. Financial wellness programs provide valuable education on retirement planning, including investment strategies, income sources, and risk management. They empower employees to make informed decisions about their financial future.

Final Thoughts

In a world where economic stability is far from guaranteed, companies that prioritize their employees' financial wellness are not only fostering a healthier and more productive



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workforce but also strengthening their own position in the marketplace. By addressing financial well-being holistically, reducing stress, improving retention rates, enhancing overall health, and offering support for retirement planning, these programs provide a wide array of benefits for both employees and employers. It's a win-win that deserves the attention and investment of forward-thinking organizations.

This is why Cannaday Bloom prioritizes providing a diverse financial wellness program to all employees of its health insurance and retirement plan clients. If you haven't had an opportunity to explore what NEFA's new health insurance and retirement plan program could bring to the table for you and your employees, don't hesitate to reach out and learn more.

1. Herron, Andrea. "Financial Stress in the Workplace: How to Help Employees Cope." WebMD Health Services, 9 May 2023, www.webmdhealthservices.com/blog/financial-stress-in-the-workplace-how-to-help-employees-cope/.

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DACITECH - Service Provider

David Kashfian - Broker/Lessor

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New NEFA Members

- FX Financial, LLC** - Broker/Lessor
- Jigyasa Analytics LLC** - Service Provider
- Keifer Law Firm, LLC** - Service Provider
- Liberty Capital Solutions, Inc.** - Broker/Lessor
- Loan Consigliere, LLC** - Broker/Lessor
- MCF Fund Corporation** - Broker/Lessor
- Padfield & Stout, LLP** - Service Provider
- Sheppard Mullin** - Service Provider
- Solar Builders Investments** - Broker/Lessor
- Verity Capital Advisors** - Service Provider
- World King Equipment Finance, Inc.** - Broker/Lessor

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