

# NEFA NOTE

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Q4 2023

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# NEFA Note

## — A Message from the CEO



Chad Sluss

### *Happy New Year Friends!*

I hope you had a wonderful holiday season and 2024 is off to a great start for you and your organization. I am pleased to share highlights from 2023 and provide a sneak peek into what is planned for 2024.

2023 was a fantastic year for NEFA due to your support and involvement. The organization is extremely fortunate to have committed volunteers who serve on the Board of Directors, Committees, and taskforces.

### **2023 Highlights**

#### **Membership Update**

As of this year, NEFA is proudly comprised of 402 member companies, which included 84 new members that joined the association. Additionally, NEFA saw member engagement and involvement increase in 2023.

#### **Conferences, Regional Events, and Virtual Programs**

In 2023, NEFA hosted several successful events with over 1,500 participants collectively:

1. Finance Summit (San Diego, CA) with 376 attendees
2. Funding Symposium (San Antonio, TX) with 351 attendees
3. Eight regional events, collectively hosting 376 attendees
4. Virtual programs, which attracted 384 participants

### **2024 Plans**

#### **Strategic Plan**

NEFA completed 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. [Click here](#) to view the Executive Summary of the Strategic Plan, which includes key findings and initiatives desired by our membership. A few highlights from the plan were created based on information obtained from the strategic planning process last year. NEFA is excited to launch these initiatives in 2024!

#### **Education**

The NEFA membership shared, during the Strategic Planning process, that new and enhanced educational offerings were particularly important. We are pleased to share that a group of industry thought leaders will be presenting educational programs in 2024 including;

## NEFA Note

- Sudhir Amembal – Amembal & Halladay and Bob Rinaldi – Rinaldi Advisory Services
  - Sudhir and Bob will co-present equipment finance and leasing industry topics at four virtual webinars.
- RJ Grimshaw – Able Leadership
  - RJ will present at a regional event.
- Scott Wheeler – Wheeler Business Consulting
  - Scott will present at two regional events.

NEFA will engage other thought leaders for the two annual conferences and others for virtual initiatives in 2024. The association is also in the final stages of hiring a Manager of Education to manage and enhance educational initiatives for NEFA.

## NEFA Community

The NEFA community is the greatest asset the association offers our members.

- Networking and business opportunities
  - NEFA will be enhancing networking and business development opportunities at events to further connect members.
- NEFA Member Spotlight
  - This initiative provides an opportunity for the spotlight to be cast upon a NEFA member while being interviewed by NEFA Leadership. The interview will be pre-recorded and shared with the full membership via email and posted on the NEFA website.
- Knowledge Exchange
  - The Knowledge Exchange virtual roundtable sessions are designed to create an optimal setting for networking, enable peer to peer learning and provide subject matter expert education. Examples of Knowledge Exchange roundtable session topics include, but are not limited to, accounting, leadership, and operations. These sessions are scheduled for the third Tuesday of each month at 1 pm ET.

If you are interested in volunteering for the NEFA Member Spotlight or facilitating a Knowledge Exchange roundtable, please let me know.

## NEFA Events, Virtual Meetups, Webinars and Resources

NEFA will offer two annual conferences, eight regional events and a number of virtual programs in 2024. We look forward to seeing you at a future NEFA event. Please visit the NEFA website for national, regional, and virtual event details. We are actively working on developing best practices materials and resources to benefit our members. A friendly reminder that when you log into the NEFA Member's only community, you will have access to the online member directory, conference, and webinar recordings plus other resources.

Finally, I would like to remind you that the 2024 membership dues renewal process is underway. To ensure your status as a member remains in good standing, please submit your dues payment no later than Friday, February 23, 2024.

Sincerely,  
Chad Sluss, Chief Executive Officer  
[csluss@nefassociation.org](mailto:csluss@nefassociation.org)





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# The Past, Present and Future of the NEFA Chris Walker Education Fund

***By: Randy Haug, LTi  
Technology Solutions &  
Kim King, BankFinancial***

## **The Past**

Providing educational programming is at the core of the NEFA's mission and remains today one of the Pillars offerings of the NEFA Association. In 2011, NEFA Board Member and tireless

industry advocate, Chris Walker, passed away. Chris was the VP of Business Development for founding NEFA member GreatAmerican Financial Services in Cedar Rapids, Iowa.

When Chris passed away, many current NEFA board members and other industry professionals asked if there was some way they could make a donation in Chris' name to honor him and his unending service to educate



the equipment finance industry. The decision was made by the then NEFA board to rename the “NEFA Member of the Year” award in Chris’s name. Simultaneously, NEFA created the Chris Walker Education Fund. The Chris Walker Education Committee’s (NEFA Volunteer Committee) sole goal was to create fundraising events where all funds collected would be used to create a fund to be disbursed annually under the Committee by Laws. The sole purpose of this fund was to fund educational initiatives for individuals, corporations and associations in the equipment finance industry. This is completely a voluntary effort and 100% of our funding is from industry companies and individuals. There is no overhead, administration or operation fees charged for, by any individual, or by the NEFA or its committee for this effort. In addition, every grant request is reviewed and potential funding determined based on need and the specific guidelines and by laws of the fund.

### **The Present**

Today, 13 years later, The Chris Walker Education Fund Committee (CWEF) and NEFA Leadership jointly continues its annual mission of raising funds through various networking events to help support the mission of the providing education, and the idea of lifetime learning for members of NEFA and our industry. The CWEF has donated grants in the amount of over \$100,000.00 from its inception. In early 2024, the CWEF committee will make its largest single year donation of \$30,000.00 to approved grant requests.



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Funds available through the Chris Walker Education Fund are utilized for any project or need that provides industry education opportunities for leasing professionals. This includes industry related education, initiatives offered by NEFA, educational certifications such as the Certified Lease and Finance Professionals (CLFP) designation for those individuals whose companies will not directly make funding available to them. There are also many other educational initiatives related to the equipment finance industry. All grant requests as well as those who would like to consider donating to the CWEF need to be submitted online through the following link:

<https://www.nefassociation.org/about-us/chris-walker-education-fund/>.

## **The Future**

Being able to provide a means to those who need assistance in pursuing educational opportunities and furthering their education, is the core of what the Chris Walker Education Fund Committee stands for. The future is bright, and the possibilities are endless. As we venture into 2024, there's so much to look forward to. NEFA is expanding its educational offerings through in-depth credit programs, industry best practices and sales leadership training. This is all done by industry veterans who have the experience and expertise to share. With the additions of these educational offerings, the Chris Walker Education Fund Committee will serve an even greater role for those looking to take advantage of continuing their education.

The committee is made up of individuals who are forward-thinking, innovative, and dedicated to the future of our industry. Together, they bring a diverse set of experiences and skills that provide guidance and encouragement to those seeking to further their education and skill sets. They are looking to grow their committee and expand their offerings and welcome those who share a similar passion and interest of the industry and education. If that sounds like you, please reach out to a member of the committee or NEFA staff and they will get you plugged right in!

Best regards,

CWEF Committee Members:

Kim King, CLFP

Vice President – Small Ticket Sales

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[kking@bankfinancial.com](mailto:kking@bankfinancial.com)

P: (760) 574-6328

Randy Haug | EVP/ Co-Founder

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# *NEFA's DEI Committee is Excited to Kick Off its Second Year of Activities*

*Written By: Shannon Wong - Account Manager - Great American Insurance Group*

Last year, we organized two valuable events: a panel discussion at the Finance Summit that covered workplace issues such as recruitment, retention, mental health, work/life balance, and DEI and a presentation at the Funding Symposium by Dr. Tana Session on Generation Competencies. Let's explore some of what the committee has in store for 2024!

## **Provide resources to assist our members in taking the necessary action to create an inclusive and equitable workplace.**

Business leaders must work towards a bold, yet achievable DEI vision linked to their company's mission. They should align their strategies with measurable analytics with a clear baseline to identify needed interventions, while also performing a methodical assessment of progress to ensure accountability and momentum. Companies should identify capabilities and mobilize resources to build essential, impactful DEI initiatives. Finally, business leaders need to monitor progress over time to allow for a change in direction and sustained momentum.

## **Create a robust library of tools for members to use that will aid in fostering an equitable and inclusive workplace.**

There will be a wealth of articles and websites for our members to utilize to assist with their learning and cultivating programs for their organizations. The library will also include links to other training resources, including NEFA webinars that will dive deeper into specific DEI topics.

## **DEI Learning Opportunities in 2024**

After receiving the results from the NEFA survey in October 2023, the committee is narrowing down topics for discussion that will enhance the DEI work for all members. The committee is also looking for speakers to present on a topic relevant to our members virtually or in person in 2024.



## NEFA Note

The committee is thrilled and committed to providing these resources to help shape the culture of the association and the many businesses its membership represents. Shaping the culture will promote mutual respect and ensure that professionals from diverse backgrounds thrive within the equipment finance industry.

We welcome any suggestions or feedback. The DEI Committee derives its impact from our diversity of thought and ideas. We are always open to welcoming new members who are passionate about DEI. Please contact a [committee member](#) to share your feedback or express your interest in joining the group.



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### — Article

# *A Look Back at 2023 and What the Future Holds for NEFA*

*Written By: Bob Hanna - Director of National Sales and Marketing - Cohn & Dussi, LLC*

As the chairperson of the NEFA Membership Committee I want to first say that 2023 was an extraordinary year and given the dynamics of our economy and the markets our industry serves, we expect 2024 to be more exciting. As our immediate past President Adam Peterson said, "Now is the time to join. We are living in a time of economic uncertainty. Lenders are changing, partners are changing, the regulatory environment is ever changing. Now is the time to be a part of the community that can help all of us make it through this tougher economic time." He was right on target with this statement and the numbers speak for themselves with our committee scoring 84 new lessors, funders, brokers, and service providers as members in 2023. We not only beat our goal of 75 but also managed to maintain an 86% retention rate which brings us to an impressive 402 member organizations for 2023. Considering we had 370 member companies in 2022, our strategy is working, and we have to thank not only our committee members for their time but also the NEFA staff including Hannah Kroll, Director of Membership at NEFA.

Turning to our strategy, everything NEFA does has always been focused around "value." You can see and experience it with just three of NEFA's deliverables:

- **Education** – Be it at our two national conferences or our ever-expanding chapter events we always take the time to research and focus on the subjects that are meaningful for our members. Topics that are always on top of the list include compliance, security, legal, accounting and best practices in credit, collections and customer service. We also help keep our members ahead of the curve with discussions around evolving technologies such as Artificial Intelligence as well software applications that address operational needs such as CRM, underwriting, collateral valuation, etc. While you are not at a NEFA event you can count valuable information around the clock on our website and direct to you in the Newsline and NEFA Note publications.
- **Services** – While being a member entitles you to unique NEFA discounts for specific services, members also have access to the many service providers who too are NEFA members supporting our industry. Many of those service providers operate in the following spaces: underwriting software, repossessions, collections, legal, UCC management, scoring and accounting just to name a few.

## NEFA Note

- **Networking** – Where else can you find an assembly of lessors, funders, brokers and service providers all under one roof with a common goal of being best in class? The answer is simply NEFA. Whether in person attending an event or in a virtual setting, members are part of a family. You can see it in action where everyone is making valuable connections and looking for answers to their questions that will take them to the next level. New members also do not have to network in solo mode. Here at the membership committee we marry a committee member with the new NEFA member to facilitate introductions. You can see that effort in play at the Ambassador's Reception held at our spring and fall conferences.

Regarding our plan for 2024, it's more of same without diverting from our core competency – value – and the strategy is working with 8 new members enlisting in January; and we still have 11 more months of growth.

Bottom line is all our members enjoy an ROI that exceeds their investment in money and time. If we focus in the latter point, the benefits our members enjoy are directly proportional the level of the member involvement. With over 15 years of membership experience my recommendation to all new members is to volunteer and participate. Join a committee, attend a conferences and regional events, organize a local event, contribute to a panel or be a subject matter expert. You will never regret the experience.

Wishing everyone health, prosperity, and peace in 2024.

Bob







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# Member News

[TomorrowZone and Tamarack Form Strategic Partnership](#)

[Solifi releases new features for its equipment finance solutions](#)

[Moritt Hock & Hamroff Sees Continued Growth Across Its Three Offices](#)

[Sudhir Amembal Webinar on "The 30 Extraordinary Benefits of Leasing!"](#)

[Pioneering Female Leadership and Fintech Innovation](#)

[Moritt Hock & Hamroff Recognized in Best Lawyers® 2024 Best Law Firms® Report](#)

[CLFP Foundation Adds 26 New CLFPs](#)

[Broad Fit Financial earns WBENC Women's Business Enterprise Certification](#)

[CLFP Foundation Adds 17 New CLFPs](#)

[Channel Announces Alecia Kramer as SVP of Sales – West Region](#)

[Tamarack Technology releases whitepaper on AI-powered next-generation risk management for equipment finance companies](#)

[Sudhir Amembal Webinar on FMV Leases Attended by Over 300 Industry Professionals](#)

[COHN & DUSSI ATTORNEYS RECOGNIZED BY SUPER LAWYERS FOR 2023](#)

[Channel Announces Successful Close of \\$190MM Securitization](#)

[Northteq Announces Strategic Investment from Arthur Ventures to Accelerate Vision and Enhance Customer Experience](#)



# Member News

[Liventus Honored as a Clutch Champion and Global Leader for 2023](#)

[CLFP Foundation Adds 21 New CLFPs](#)

[Channel Hires Ceribelli as Chief Revenue and Innovation Officer](#)

[Jupiter Financial Announces Exciting Rebrand as Jupiter Equipment Finance](#)

[Monitor names Solifi's Kristie Kosobuski on 2023 Top 50 Women in Equipment Finance list](#)

[CLFP Foundation Adds 10 New CLFPs](#)

[Tamarack expands AI team depth with addition of Khrystyna Voloshyn](#)

[EPG Insurance is Now Assurant Commercial Equipment](#)

[Catherine Podlesny joins PEAC Solutions as Vice President Human Resources](#)

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# Member News

[FMI Equipment Announces Leadership Transition: Brett Davis Assumes Role as President](#)

[Moritt Hock & Hamroff Announces 2024 Attorney Promotions](#)

[Moritt Hock & Hamroff Welcomes Sean E. Mitchell](#)

[LTi Technology Solutions Appoints Jen Martin as Chief Product Officer](#)

[360 Equipment Finance Launches Next-Generation Loan Origination Platform with Full Scope](#)

[Mathew Petrick Joins PEAC Solutions as Chief Financial Officer](#)

[LTi Technology Solutions Promotes Ryan Ledden to VP of Deployment Operations](#)

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# Upcoming NEFA Events

January 24



## **Ice Fishing on Lake Minnetonka**

January 24, 2024

Wayzata, MN

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March 25-28



## **NEFA Spring Conference**

March 25-28, 2024

Hyatt Regency Huntington Beach

Huntington Beach, CA

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Nov. 11-14



## **NEFA Fall Conference**

November 11-14, 2024

JW Marriott Indianapolis

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### — Article

# ***STRIPES Leadership Program: EF's Solution to Leadership Development***

*Written By: Brianna Wilson - Editor - MonitorDaily*

STRIPES Leadership Program was founded in 2021 in partnership with Monitor with the mission of inspiring change and transformation in the hearts and minds of leaders in our evolving world. STRIPES targets the “best and brightest” in equipment finance to unleash their leadership potential and expand and deepen existing skillsets to open a world of endless possibilities.

Nancy Robles, president of Eastern Funding, has enrolled 10 employees in STRIPES and personally delivers a Master Talk as part of STRIPES’ curriculum. “Leadership is a skillset, and being a leader requires having some innate qualities and honing your skills. Training and development is very critical to leadership at any level,” Robles says. “Leadership has also changed over time. The skills and the traits that were important 20 years ago are not impactful today. Whether you’ve been a leader for 20 years or you’re an up-and-coming leader, you need to change your skillset over time to be applicable in the current environment.”

Robles’ commitment to leadership development through STRIPES has spanned over two years, with investment in STRIPES’ past four cohorts. “I personally have invested a lot of time in their leadership development, but there’s only so far I can take them on my own. In 10 months, they learned years’ worth of what would’ve been mentoring from me,” Robles says. “STRIPES is an amazing investment in that what you get in return is a future leader for the organization. And what’s more important than that?”

Brad Peterson, CEO of Channel, has had three employees enrolled over two STRIPES cohorts and has participated in STRIPES’ Mentor/Mentee Program as a mentor to two of his participants so far. “Leadership development is crucial for fostering success in various aspects,” Peterson says, giving examples of honing competence in one’s role, cultivating a collaborative and empowered team and the ability to think strategically, make tough decisions and foster a positive organizational culture. “These skillsets equip leaders to navigate challenges and drive sustainable success.”



## NEFA Note

According to Peterson, investing in STRIPES has been a game-changer for Channel. "The program stands out by challenging existing beliefs, fostering fresh perspectives and seamlessly integrating its strategies into real, hands-on projects aligned with individual roles," Peterson says. "This practical approach has ensured the lessons learned in STRIPES translate directly into enhanced leadership skills, benefiting both our people and our overall organization success."

Suzann Fakhoury, vice president of operations at Crossroads Equipment Lease and Finance, identifies herself as a "manager of managers" who has had a few of her direct reports enroll in STRIPES Leadership Program. "A company is only as good as its people. Leadership development and the success of a company are directly linked," Fakhoury says. "It's one thing to point out to my direct reports their needed areas of improvement. It's another thing for my direct reports to go through the STRIPES program and then come back to me and say: 'Here's what I know I need to work on, and here are the goals that I'm setting for myself to make it happen.' Performance and development conversations are not an uncomfortable topic anymore, but rather a welcome conversation."



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STRIPES delivers a curriculum of 12 interrelated components:

- An in-person Transformational Leadership Launch hosted in Philadelphia preceded by a rigorous onboarding process involving:
  - An intake interview and completion of an Onboarding form
  - A pre-course leadership assessment
  - 360 assessments
- Monthly Transformational Group Coaching sessions
- Check-in meetings with:
  - Participants, managers and mentors
  - Managers only
  - Mentors only
- Master Talks delivered by recognized industry leaders
- Master Workshops delivered by leadership experts
- Independent Working Cohort Groups
- Mentor/Mentee Program
- Individual Program Coaching and/or one-on-one Transformational Coaching
- Leadership Development Plans
- The creation and execution of an ambitious capstone project related directly to participants' work responsibilities

STRIPES has graduated three cohorts since its foundation and currently has two cohorts underway. Cohort 4 will graduate in February, and cohort 5 just kicked off their leadership journeys in November 2023.

STRIPES is open to all leaders at any level and is actively enrolling for its 6th cohort, which will launch in Philadelphia in April 2024. Apart from its in-person launch, STRIPES is delivered virtually and spans over 10 months, providing a unique and critical amount of time to develop its participants. For more information about STRIPES, please visit [stripesleadership.com](https://stripesleadership.com) or reach out to STRIPES SVP – Client Partner, Scott Preiser, at [scott.preiser@stripesleadership.com](mailto:scott.preiser@stripesleadership.com).





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# New NEFA Members

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**Mak Global Corporation** - Broker/Lessor

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**Ten Oaks Commercial Capital LLC** - Broker/Lessor

**TomorrowZone** - Service Provider

**Truck Master Warranty** - Service Provider

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