

NEFA NOTE

BRINGING YOUR ASSOCIATION TO YOU

Q1 2025

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— A Message from the CEO



Chad Sluss

Hello NEFA Members,

As we close out the first quarter of the year, I am pleased to share several highlights and progress updates from across our association.

Membership Growth & Engagement

We have seen a steady increase in membership, including a strong wave of new professionals and companies joining our community. In Q1, NEFA added 26 new member companies to the association roster. Our onboarding initiatives are helping new members quickly find value and get engaged.

Spring Conference Recap

Our Spring Conference was a standout success with 380 attendees, dynamic speakers, and meaningful networking. Feedback from attendees highlighted the value of the educational breakout sessions, relevance of the content to today's market landscape and phenomenal networking amongst attendees. I observed meetings taking place throughout the resort and many conversations taking place in the exhibit hall. Special thanks to the Spring Conference planning Committee:

- John Pfister, CLFP, MAZO Capital Solutions - Chair
- Ashley Bradburn, Alliance Funding Group
- Lindsay Goldstein, Leasepath
- Albert Royale, Lion Technology Finance
- Joe Schmitz, CLFP, F.I.T. Leasing
- Vicki Shimkus, CLFP, Balboa Capital

The Spring Conference would not have been possible without the support of the Partner Program sponsors, exhibitors and supporters. To view the sponsors, [click here](#). For the exhibitors list, [click here](#).

Strategic Plan in Action

We continue to make measurable progress on our three-year strategic plan including:

- Continuing to offer substantive educational programming through monthly Knowledge Exchange programs and at the Spring Conference.

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- Continuing to enhance member connections through system upgrades.
- Coming soon – NEFA online learning platform (LMS) that will allow you and your colleagues to access 35+ hours of educational content. A new NEFA app is nearly ready for launch. The NEFA team continues to update the member portal, which allows the community to connect and utilize the online member directory.

Looking Ahead

The Board of Directors and NEFA staff are hard at work organizing impactful virtual Knowledge Exchange roundtable discussions, regional events and organizing the NEFA Fall Conference. Below you will find the scheduled events for the balance of 2025.

Save the Dates:

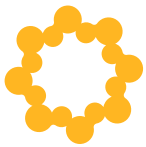
- May 20 - Knowledge Exchange: Collections (Virtual)
- June 17 - Northeast Regional & Equipment Finance Cares Joint Event (Philadelphia, PA)
 - Educational Program and Networking Event
- July 15 - Knowledge Exchange: Sales (Virtual)
- July 31 - Northwest Regional (Seattle, WA)
 - Seafair with Blue Angels & Harbor Cruise
 - Educational program at Great America Insurance Office (in advance)
- August 19 - Knowledge Exchange: Marketing (Virtual)
- August 20 - Southwest Regional - Angels Baseball Game (Anaheim, CA)
 - Educational Program and Networking Event
- September 16 - Knowledge Exchange: Strategy (Virtual)
- October 14-16 - NEFA Fall Conference (Minneapolis, MN)
 - Renaissance Marriott Minneapolis Hotel, The Depot
- October 21 - Knowledge Exchange: Leadership (Virtual)
- November 18 - Knowledge Exchange: Workforce Dynamics (Virtual)
- December 16 - Knowledge Exchange: Technology (Virtual)

We remain committed to delivering value to our members and shaping a vibrant, inclusive future for our industry.

Thank you for your continued support and engagement.

Chad Sluss, Chief Executive Officer

csluss@nefassociation.org



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Culture at LTi Technology Solutions: The Heartbeat of Our Success

***By: Jenny Jarose, VP of
HR & Administration - LTi
Technology Solutions***

For over 35 years, LTi Technology Solutions has been more than just a software provider—we've been a trusted partner in the equipment finance industry. Founded by visionaries [Randy Haug](#) and [Russ Hallberg](#), our journey has been driven by a relentless commitment to integrity, collaboration,

and innovation. Today, as an employee-owned company (ESOP), we don't just build technology—we cultivate a culture where people thrive, ideas flourish, and success is a shared mission.

Living Our Values

At LTi Technology Solutions, culture isn't a buzzword—it's the fuel that drives everything we do. From day one, every team member steps into an environment of transparency, accountability, and teamwork. Whether we're solving

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complex client challenges, refining our ASPIRE platform, or innovating for the future, we live our values every single day.

But what truly sets us apart? We don't just state our core values—we embody them:

- Integrity - We do what's right, always. Trust is our currency, and we earn it through our actions.
- Collaboration - Success is never a solo act. We work together, across teams and with clients, to create real impact.
- Excellence - We don't settle. We challenge ourselves, and each other, to refine, improve and push the boundaries of what's possible.
- Innovation - We embrace change, take bold steps, and explore new ideas that drive the industry forward.
- Ownership - Every employee has a stake in our success. We take initiative, drive results, and make things happen.

The Power of Ownership: How Our People Drive Success

Being an ESOP company means that every employee has skin in the game. When our clients succeed, our company thrives and so do our people. This mindset fosters a deep sense of ownership—one that fuels creativity, accountability, and long-term partnerships within the company and with our client partners.

One way we celebrate this? Each week, senior leadership at LTi curates and publishes the “Good News of the Week” celebrating employees who go above and beyond to achieve results. This initiative isn't just about recognition—it's a reflection of our culture in action, reinforcing that our values are not just corporate rhetoric, but the foundation of our lived experience at LTi.

Collaboration and Excellence: The Key to Client Success

Great things happen when talented people work together. At LTi, collaboration is ingrained in our DNA. We break down silos, work across departments, and partner closely with clients to develop innovative solutions that meet clients business challenges.

And, we don't just aim for good—we aim for excellence. Every process we refine, every product we enhance, and every challenge we tackle is an opportunity to raise the bar.

Innovation: More Than a Mindset—A Competitive Advantage

Innovation at LTi isn't just about technology; it's about fostering a culture where bold ideas thrive. Whether it's reimagining workflows, designing new software features, or optimizing the client experience, we give our people the freedom to think big and execute fearlessly.

How do we stay ahead of the curve? Through continuous learning. From industry conferences to internal mentorship, we actively invest in knowledge-sharing, professional development, and seeking cutting-edge strategic insights that keep us—and our clients—ahead of the competition.

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Culture: The Ultimate Differentiator

Culture can provide a strategic advantage in recruiting and retention of our key asset – our team. When employees are engaged, motivated, and aligned with company values, they don't just show up for work—they show up to win. And that energy translates directly to client success.

As one employee recently shared, "LTi's culture is not just about the job—it's about the people, the purpose, and the passion we all bring every day." A long-standing client echoed this sentiment, "LTi' doesn't just deliver software; they deliver partnership, innovation, and a commitment to excellence that's hard to find."

At LTi, our culture isn't just something we talk about—it's something we live every day. Our values—Integrity, Collaboration, Excellence, Innovation and Ownership—are the foundation of our continued success.

Looking ahead, we're committed to strengthening this culture because, at the end of the day, success is not just about business—it's about the people who make it happen.

Are you ready to work with a company that values people and partners as much as performance? Whether you're seeking a business solution, a trusted strategic partner, or a career in a thriving, people-first culture, we invite you to connect with us.

Let's shape the future of equipment finance together.

— Article

The Big Benefits of Micro-Ticket Financing

Accelerating sales cycles, driving repeat business, and expanding your solutions toolbox, FinTech-driven micro-ticket financing has a lot to offer equipment brokers.

Written By: Nicol Henning, Vice President of Sales - TimePayment

Brokers love closing big deals—and scoring the commissions that come with them. But in today's tight lending environment, it pays to think small. With equipment costs rising, demand for micro-ticket financing is growing as businesses look for budget-friendly funding solutions.

Perhaps you've noticed this trend already—last year, 28% of brokers reported an increase in application flow for smaller-ticket transactions under \$50,000*—and adjusted funding sources accordingly.

But if you haven't, here's why micro-ticket financing is worth your focus as a broker.

Speed & Ease

One advantage of micro-ticket deals is speed. Last year, small-ticket deals under \$25K closed 40% faster than mid- or large-ticket transactions when paired with streamlined financing.† In today's market, speed isn't just an advantage—it's a form of currency. When timing is everything, brokers who can move fast gain a serious edge.

"Smaller deals move faster because the financial documentation requirements are simpler compared to larger deals," says Caitlin Keefe, Manager, Third Party Originations for TimePayment. "Brokers and customers are able to pull together the necessary information quickly."

Having the right funding partner matters. Brokers need to partner with a FinTech company that has a streamlined application and funding process. (TimePayment, for instance, specializes in micro-ticket deals, offering auto-approval on qualified transactions up to \$25K.) Doing so unlocks even more micro-ticket advantages, including:

- **Shorter sales cycles:** Brokers using simplified small-ticket processes cut sales cycles by 15–20 days versus bank-reliant peers.†
- **More closures:** 54% of equipment vendors say fast financing doubles their close rates on small deals.*
- **More buy-in from customers:** 67% of equipment buyers opt for small-ticket financing when approval takes under 48 hours.*

Ease of execution is so important to businesses that it outweighs rates among decision makers, with 68% prioritizing speed and simplicity over rates in small-ticket deals.†

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Building Loyalty & Driving Repeat Business

Micro-ticket deals aren't just quick wins. They're also loyalty builders. A recent Sawbux Marketing survey found that 73% of businesses that used easy, small-ticket financing returned to the same broker within 12 months. (That's nearly twice the repeat rate for bank loans, which stall out at 44%.*)

These brokers were rewarded by earning repeat business. 59% of returning customers increased their deal sizes on subsequent transactions, amplifying broker revenue.* One small transaction turning into larger, repeat transactions is the key to steady income and strong deal flow.

Again, ease and efficiency—achieved through automation—are essential. Clients don't want to spend weeks navigating bank loans; they want their equipment yesterday. Brokers need funding partners they can rely on for a streamlined application and funding process.

- By leveraging easy, small-ticket financing, brokers can shrink the interval from pitch to profit, outpacing competitors stuck in the slow lane by as much as 28% higher deal volume.*
- A streamlined experience earns loyalty. 82% of small businesses cite ease as the reason they stick with their broker over chasing lower rates.† Predictable, hassle-free approvals are a must.

A Ready Safety Net

Building a relationship with a micro-ticket partner ensures you are ready when customers have urgent demands. Every medium or large-ticket client is one bad day away from a micro-ticket need.

Take a recent case that landed on Keefe's desk: A broker reached out on behalf of a longtime customer—typically known for large-ticket orders—who suddenly needed to replace a single piece of micro-ticket equipment due to a breakdown. The broker was at a loss and looking for a funding source to help this customer. "Sometimes the large-ticket customer isn't looking to build out their entire business. They still need a solution. We are there to help."

Ian Mayer, Manager, Third Party Originations for TimePayment, adds, "Supply chain shake-ups and tariffs could change the game as well. Businesses may find themselves sourcing equipment from new vendors or needing used equipment fast. As a broker, you're going to want a funder who can respond quickly when that happens."

The Bottom Line

Micro-ticket financing may deal in small amounts, but for brokers with the right funding partner, the upside is anything but. "If you can handle small deals efficiently, they outpace big deals," says Mayer.

By leveraging your FinTech partner's digital tools—online portals, automated scoring, same-day ACH transfers, etc.—you streamline both the sales and funding cycles. That speed builds trust, wins repeat business, and creates a steady flow of deals that can grow into larger, long-term opportunities. Micro-ticket is not just a financing option—it's a growth strategy.

* Source: [Sawbux Marketing](#), 2024–2025 surveys

† Source: [Secured Research](#)

Why Your Growth Strategies Should Be Data Driven

By: Solifi

High-quality data is an invaluable asset for secured finance lenders, helping them to unlock all of the information they need to drive growth. However, having access to this data is just the first step. Using it to its full potential is not always straightforward, and many lenders may be missing out on the opportunity to have a deeper understanding of both their customers

and the wider market. There is also an added challenge when there are vast amounts of data available.

Data analytic tools are the answer to these challenges. These allow lenders to track performance, make better decisions, protect themselves from risks and offer products that align with their customer's needs. Now, lenders have access to much more sophisticated techniques to reap these benefits. Modern technologies such as AI and

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machine learning are transforming the way in which lenders can use their data. These are known as advanced data analytic tools.

Large volumes of data that are too complex to be processed without modern technologies are referred to as “Big Data”, and is common in the secured finance sector. 89% of enterprises believe that if they do not adopt a Big Data analytics strategy, they risk losing market share and momentum. Even so, only 16% of these enterprises are currently using Big Data analytics to optimize processes and strategies, and just 12% are using them to predict outcomes.

There is a huge gap in the market to take advantage of modern data analytic technologies to drive growth. Here’s why:

Crack Down on Risk

Risks for lenders start at the very beginning of a loan. With predictive modelling, lenders can access important information such as the borrower’s credit history, behaviors, and payments, to assess the likelihood of defaults. Using this information, lenders can ensure more favorable loan terms.

Once the loan has been agreed, lenders can also proactively react to unusual activity within their accounts. These tools can detect patterns and identify any issues, which could easily be missed.

Predictive models to tackle risks can also weigh up risk versus return using the valuable data lenders already have, leaving much less margin for error while ensuring that profits are maximized.

Personalized Products

Every customer has different needs and circumstances. A “one-rule-for-all” approach could leave lenders more at risk, and causes them to miss out on a wider range of customers. With advanced data analytics, lenders can examine the customers’ needs and habits and offer a product that suits them, such as a higher credit limit.

An Accelerated Loan Process

In the past, loan processing has been a manual task, taking up a lot of time and resulting in less applications being processed. Advanced analytic tools can automate the decision-making process, leading to a higher volume of accepted applications in much less time. It also ensures the decision-making process is far more accurate.

Want to learn more about advanced data analytics, alongside the other current top trends in secured finance? [Download Solifi’s eBook](#).



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Mentorship Magic: How the Relationship Embodies Mutual Development

By: Sean Mckenna, Sales Manager, Great American Insurance Group Specialty Equipment

I've learned in a mentorship relationship, it's common to focus on the mentee specifically and all the benefits/growth they can realize. But in reality, mentorship benefits actually go both ways for both the mentee and mentor! The relationship creates space that mutually enhances career and

psychosocial development, and provides opportunities for behavioral learning - creating an impactful experience for everyone. Let's explore this through two key lenses: 1) mentorship functions and outcomes, and 2) social learning concepts. Exploring these two things have helped me understand the two-way street and why prioritizing both formal and informal mentorship relationships should be a top priority for you and your teams.

Mentorship Functions and Outcomes

Mentorship can support growth in two ways: through career functions and

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psychosocial functions. The table¹ below details how each function drives personal and organizational development.

Career Functions <i>Aspects of the mentorship that primarily enhance career advancement</i>	Psychosocial Functions <i>Aspects of the mentorship that primarily enhance sense of competence, confidence, and effectiveness of the managerial role</i>
<ul style="list-style-type: none">- Sponsorship- Exposure and visibility- Coaching- Protection- Challenging assignments	<ul style="list-style-type: none">- Role modeling- Acceptance and confirmation- Counseling- Friendship

In practice, both the mentor and mentee can use these functions: the mentor earns recognition within the organization for coaching and developing the junior member, thereby enhancing their own exposure and visibility. Concurrently, the mentee receives valuable guidance on various dilemmas, bolstering their confidence to effectively manage future situations. When each party employs these functions, overall performance increases, enhancing opportunities for growth both personally and within the organization.

Mentorship Providing Social Learning Concepts

Everyone learns differently whether visually, auditorily, or through practical experience. Beyond training that incorporates these traditional learning techniques, mentorship provides opportunities to learn behaviors by observing their consequences. This idea is encapsulated in Albert Bandura's Social Learning Theory in which, "... learning occurs through observation, imitation, and modeling and is influenced by factors such as attention, motivation, attitudes, and emotions."²

In a mentorship, this theory is exemplified when the mentor models how they successfully navigated a challenging assignment. The mentee, when later faced with a similar situation, is likely to imitate the mentors' skills and behaviors that led to a positive outcome.

This modeling allows both individuals to learn and solve problems more efficiently than if they had not experienced the model situation originally, as we are likely to repeat behavior that resulted in a positive consequence.

Prioritizing Mentorship in Your Career

A mentor/mentee relationship can be formed and maintained in various ways; from a formal matchup in a program to an organic meet at a NEFA event. Many of the mentorship relationships that I have had throughout the years in NEFA have been more informal and provide the same benefits as ones where I have been formally matched. The important thing is that you have a mentorship relationship – no matter your position – to take advantage of those developmental interactions to support career goals and growth.

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Mentorship is just one way we can professionally develop ourselves to continually seek improvement. I enjoy talking about my experiences and how mentorship has enhanced my development over the years, reach out if you'd like to continue the conversation spmckenna@gaig.com.

About Great American Insurance Group, Specialty Equipment

Great American's Specialty Equipment Division goes beyond physical damage insurance to provide embedded insurance solutions to businesses across the U.S. and Canada. Dedicated to speed, ease and trust, Great American Specialty Equipment leverages digital solutions, a team-based consultative approach and 40+ years of industry expertise to create valuable customer experiences across your entire leasing lifecycle. In the US, policies are underwritten by Great American Insurance Company, Great American Assurance Company and Great American Spirit Insurance Company, authorized insurers in all 50 states and the DC. 301 E Fourth St., Cincinnati, OH 45202

[Click here](#) for more information about Great American Specialty Equipment.

Note: The information provided in this article is for educational purposes only.

1. Kram, Kathy. (1985). Mentoring at Work: Developmental Relationships in Organisational Life. *Administrative Science Quarterly*. 30. 10.2307/2392687.

2. Cherry, K. (2024, July 15). How Social Learning Theory Works. Verywell Mind. <https://www.verywellmind.com/social-learning-theory-2795074#a-few-applications->

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June 17



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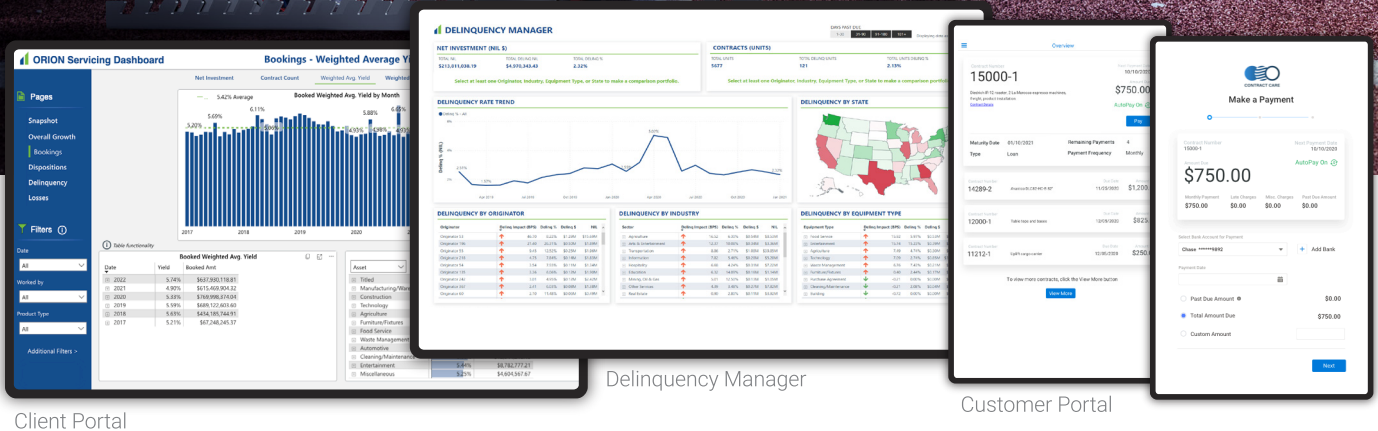
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Big Think Capital - Broker/Lessor

Blu Axxess Financial - Broker/Lessor

Calqulate - Broker/Lessor

DataCRaiM, Inc. - Service Provider

Dominion Leasing Software - Service Provider

East Bay Talent - Service Provider

Elevex Capital, LLC - Broker/Lessor

First Internet Bank - Funding Source

Five Star Financial - Broker/Lessor

Forklifts & Equipment LLC - Service Provider

Heron Data - Service Provider

ILex - Broker/Lessor

Kaaj - Service Provider

Law Office of Kenneth C. Greene - Service Provider

Lights On Leasing LLC - Broker/Lessor

Majha Capital Inc - Broker/Lessor

Matrix Business Capital - Broker/Lessor

North America Leasing Inc. - Broker/Lessor

New NEFA Members

Onset Financial Inc - Funding Source

Pitney Bowes Bank - Funding Source

Purple Wave Auction - Service Provider

QuantEFi - Broker/Lessor

Sand Castle Field Services - Service Provider

Starpoint Commercial Asset Recovery - Service Provider

Summers Engineered Capital - Broker/Lessor

Swanson, Martin & Bell LLP - Service Provider

Tower Capital - Broker/Lessor

TURBO-Lease - Service Provider



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