

ELFA

EQUIPMENT LEASING AND FINANCE ASSOCIATION

58TH Annual Convention

October 27-29, 2019

Marriott Marquis Washington, DC • Washington, DC



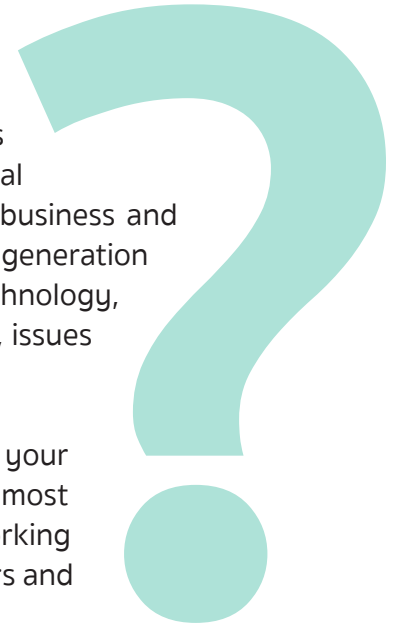
REGISTRATION BROCHURE

Why Attend?

If you're in the equipment finance industry, you can't afford to miss the **2019 ELFA Annual Convention**. This event is the largest and most important annual gathering of leaders in the \$1 trillion equipment finance industry, and this year we are taking this vital force in the economy to our nation's capital, Washington, D.C.!

The vision for the future remains bright, with many equipment finance professionals able to point to real opportunities in a variety of sectors. Come to the ELFA Annual Convention to exchange ideas and share best practices for innovating, winning business and leading in an age of rapid change. We'll also focus on how to prepare for the next generation of equipment finance, from delivering value to customers, to leveraging new technology, to entering new markets. This is the premiere venue to discuss the leading trends, issues and solutions in the equipment finance industry.

When you attend 2019 ELFA Annual Convention, you invest in the success of your business, your staff, your industry and your career. Don't miss the largest and most important annual gathering of industry leaders. You'll enjoy unparalleled networking opportunities, high-quality educational sessions, a great lineup of keynote speakers and a first-rate exhibit.



Check out the Convention section at ELFA online for the latest detailed information at
www.elfaonline.org/events/2019/AC/



Location

The ELFA 58th Annual Convention is being held at the Marriott Marquis Washington, DC, located in Washington, DC. Situated in the beating heart of the nation's capital, the Marriott Marquis Washington, DC is a new, monumental, flagship hotel where business meets pleasure. Find your passion amid celebrated attractions, including Penn Quarter, Chinatown, the National Mall monuments, the Smithsonian Museums and Walter E. Washington Convention Center.

Become a sponsor!

The ELFA Annual Convention provides unmatched opportunities to get noticed, especially through a variety of sponsorship opportunities.

▶ To become a sponsor, contact Steve Wafalosky at stevew@larichadv.com or 440-247-1060.

SCHEDULE OF EVENTS

SUNDAY, OCTOBER 27

9:00 am – Noon
**Jim McGrane Charity
Bike Ride and
Monument Tour**
(pre-registration required,
limited to 60 attendees)



10:15 am – 2:15 pm
Odyssey Brunch Cruise and Tour with Docent
(pre-registration required, limited to 150 attendees)



Donors are eligible for a free or discounted pass. Please see pg. 5 for additional details.

10:00 am – 8:00 pm
Convention Registration

2:00 – 4:00 pm
**Community Service Project–
Community Lodgings**
(on property)
(pre-registration required, limited to 60 attendees)



2:00 – 5:00 pm
Exhibitor Set Up

4:30 – 5:30 pm
New Members & Leadership Reception

5:00 – 6:00 pm
Women's Council Reception

6:00 – 8:30 pm
Welcoming Reception
Exhibits Open

MONDAY, OCTOBER 28

7:00 am – 4:30 pm
Registration Open

7:00 am – 4:00 pm
Exhibits Open

7:00 – 8:15 am
Group Breakfast

8:30 – 10:00 am
Opening General Session



MICHAEL BESCHLOSS
Nation's Leading Presidential Historian and Best-Selling Author

10:00 – Noon
Coffee Break in Exhibit area

- 10:30 – Noon
Concurrent Breakout Sessions
- **Mindset Shift: Looking at Technology & Innovation Through a New Lens**
Sponsored By: ELFA INNOVATION TECHNOLOGY WORKGROUP
 - **Getting into the Weeds – Opportunities & Risks in Cannabis Finance**
 - **Hiring the Best.... Putting Your Gut to the Test**
Sponsored By: ELFA WOMEN'S COUNCIL
 - **Got Illicit Funds? Fraud in the e-World**

11:00 am – 4:00 pm
Spouse/Companion Event



**America's First Home–Mount Vernon Tour
and Luncheon**

12:15 – 2:00 pm

Foundation Luncheon, General Session



MARCI ROSSELL

Former CNBC Chief Economist and Co-Host
of SQUAWK BOX

2:00 – 4:00 pm

Coffee Break in Exhibit area

2:30 – 4:00 pm

Concurrent Breakout Sessions

- Merger-Up and Other Restructures: Lessons Learned and Successful Outcomes
- Diversity and Inclusion from the Inside Out: A Conversation About Us
Sponsored By: ELFA DIVERSITY & INCLUSION COMMITTEE
- E-Docs: How to Stop Using Pens
- The Art & Science of the Customer Experience

4:30 – 5:30 pm

International and Former Directors Reception

Evening Free for Private Entertaining and Company-Sponsored Receptions



TUESDAY, OCTOBER 29

7:00 am – 3:00 pm

Registration Open

7:00 am – 3:00 pm

Exhibits Open

7:00 – 8:15 am

Group Breakfast

8:30 – 10:30 am

General Session



JAKE TAPPER

Award-Winning Journalist; Anchor and Chief
Washington Correspondent, CNN

10:30 – Noon

Coffee Break in Exhibit area

11:00 am – 12:30 pm

Breakout Sessions

- Optimizing Managed Solutions and other Vendor Programs in Periods of Rapid Transformation
- Candid Conversations: Emerging Talent Success Stories
Sponsored By: ELFA EMERGING TALENT ADVISORY COUNCIL
- Economic Waves: Preparing for What Comes Next
- Modernization & Innovation: Leading with Technology Excellence
Sponsored By: ELFA OPERATIONS & TECHNOLOGY EXCELLENCE AWARD

11:00 am – 4:00 pm
Spouse/Companion Event



A Rare Glimpse—Private U.S. Capitol Tour and Luncheon

12:45 – 2:30 pm
NEW!! Community Luncheon for all Attendees



MARK SCHARENBRICH
Author of Nice Bike and Leadership Expert

2:30 – 3:00 pm
Coffee Break in Exhibit area

3:00 – 4:30 pm
Concurrent Breakout Sessions

- **Today's Regulatory Environment – Are You in the Know?**
- **Pillars of Technology: Supporting Your Strategic Vision**
- **Get Social: Leveraging Today's Communication Tools**
Sponsored By: EELFA COMMUNICATIONS COMMITTEE
- **Sustainability in Equipment Finance – New Business Models, Technologies, and Supporting Capital Markets**

6:30 – 9:30 pm
Closing Reception & Dinner at the Smithsonian National Museum of American History
Adults only.



IMPORTANT DEADLINE DATES

- **Thursday, August 1, 2019:** Deadline for early-bird discount on convention registration fee. Note: To take advantage of the discount, you must also reserve your accommodations at the Marriott Marquis Washington, DC.
- **Wednesday, October 2, 2019:** Last day to receive the special ELFA convention rate for your accommodations at the Marriott Marquis Washington, DC.
- **Friday, October 11, 2019:** Last day for online registrations. After this date registrations can be made on-site. **Please note: There are no refunds of registration fees after this date.**

If you are planning to arrive early, you might want to participate in these activities on **Sunday, October 27**

9:00 a.m.

Jim McGrane Charity Bike Ride and Monument Tour

Marriott Marquis Washington, DC

An additional fee of \$150 is required; reserve your spot when registering for the convention.

Knowledgeable, entertaining guides will lead you on a historical, architectural, cultural, and informative experience while visiting over 55 landmarks in approximately 2.5 hours. Touring the Nation's Capital by bicycle offers an opportunity to visit many memorable (sometimes remote!) places that you otherwise might miss. Guests will be provided with a 21- or 24-speed bicycle, fitted to their appropriate size. Helmets, water bottles, and a light snack are also provided with the additional fee of \$150.



10:15 a.m. – 2:15 p.m.

Odyssey Brunch Cruise and Monument Tour with Docent

Marriott Marquis Washington, DC

An additional fee of \$200 is required; reserve your spot when registering for the convention.

Come aboard Odyssey DC for a special two-hour bottomless mimosa brunch cruise. Enjoy a delicious menu of breakfast and lunch favorites while cruising along the Potomac with a guided docent.

The Odyssey will show you DC from a whole new perspective! Take in the amazing views from the glass-enclosed deck or outdoor observation lounge. Odyssey offers unparalleled views of DC's greatest landmarks, including the Washington Monument and the Lincoln Memorial.



ELFA LeasePac donors at the Leadership Club level (\$500); and above will receive one free ticket; Capitol Club (\$250) donors will receive \$100 dollars off one ticket. To receive this discount please contact Chelsea Neil at cneil@elfaonline.org or 202-238-3421.

2:00 – 4:00 p.m.

Community Service Project–Community Lodgings

This project will be conducted on the grounds of the Marriott Marquis Washington, DC. No additional fee; reserve your spot when registering for the convention.



SPEAKERS



MICHAEL BESCHLOSS

Nation's Leading Presidential Historian and Best-Selling Author

The widely praised author of nine books, he has been called “the nation’s leading Presidential historian” by *Newsweek*. Beschloss uses history to help us understand our own time and find perspective and nuance in current events. He also has the largest Twitter following of any historian on earth, and he appears on *TIME*’s list of the world’s top Twitter feeds. He speaks with eloquence about not only the presidency, but about the men who sat in the Oval Office in times of tumult and change. His history lessons come alive with humanity and enthusiasm, and his lectures are riveting windows into the mind of the most powerful official in the world. By looking at presidents past, Beschloss helps predict the future of presidential politics and the impact of elections. In presentations filled with anecdotes, humor, and stories almost too good to be true, Beschloss gives context to the crucial events of our time. Trained at the Harvard Business School in leadership studies, he offers a look at the leadership that has affected the course of our nation, describing the leadership skills essential to almost every kind of success.



MARCI ROSSELL

Former CNBC Chief Economist and Co-Host of SQUAWK BOX

Marci Rossell electrifies audiences nationwide, speaking on the nexus of economics, politics, culture and the media. Her animated style was honed when she served as the popular, lively Chief Economist for CNBC in the months immediately following September 11th. She takes complex economic issues, often dull in the button-down business press, and makes them relevant to people’s lives, families and careers. Prior to her career in broadcast journalism, Marci served as Corporate Economist and Investment Spokesperson for OppenheimerFunds, one of the nation’s largest mutual fund companies. Before moving to Wall Street, she was an expert witness for Deloitte and Touche in court cases involving economic issues. Marci began her career as an economist with the Federal Reserve Bank of Dallas.





Mark Scharenbroich

Author of Nice Bike and Leadership Expert

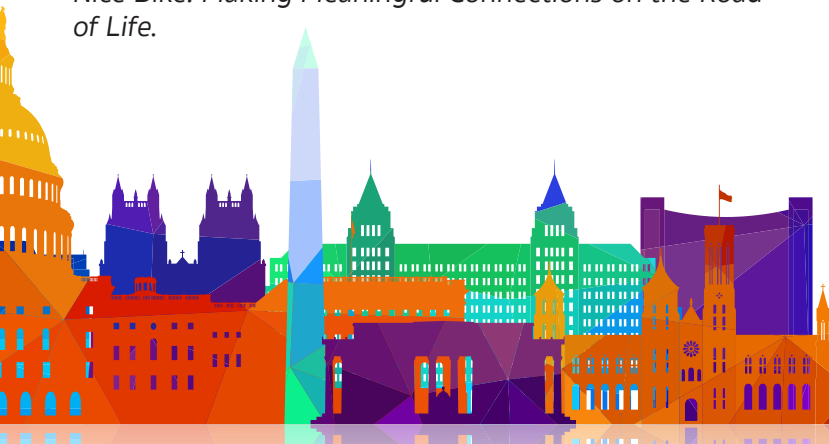
Mark's comedy path started when he founded a comedy troupe, called Mom's Apple Pie that performed at high schools and colleges. When the group disbanded Mark went solo, combining his comedy with leadership training and messages about making connections. He and his wife, Susan founded Scharenbroich and Associates, a motivational speaking and leadership training video production company. Mark quickly became known as a leading connections expert in developing leaders and transforming the culture of an organization. He is an award-winning keynote speaker, winner of an Emmy Award as writer/producer for an ABC TV special, and recipient of several international film awards. He is the author of the award-winning book *Nice Bike: Making Meaningful Connections on the Road of Life*.



JAKE TAPPER

Award-Winning Journalist; Anchor and Chief Washington Correspondent, CNN

Jake Tapper is a hugely influential and award-winning American journalist who currently serves as Chief Washington Correspondent for CNN and the anchor of the network's weekday television news show "The Lead" with Jake Tapper and Sunday morning affairs program "State of the Union." Tapper has been recognized for being a fair and balanced commentator and critic whose unbiased reporting makes him—as media power rankings site Mediate put it—an "equal opportunity skeptic—confronting Democratic politicians just as toughly as he would Republican ones." According to *The New York Times*, Tapper's "The Lead" proved that "it's possible to create an afternoon news show that is intelligent, non-ideological and not horribly boring." He comments on daily news, elections, and popular culture items and brings an unabashedly honest, smart, and to-the-point reporting style to presentations and panels that breaks down tough issues while getting to the heart of the stories that drive American culture today. Likeable, consistent, and up-to-the-minute, Tapper's no-spin commentary makes you think while keeping you entertained.



EXHIBITION

Visit the Exhibit Hall to check out the latest technology and services.

A select group of equipment leasing and finance industry service providers is exhibiting at the Annual Convention, giving you a look at services available to help increase the operational efficiency of your company.



▶ For more information on becoming an exhibitor, contact Steve Wafalosky at stevew@larichadv.com or 440-247-1060.

CORPORATE ENTERTAINMENT FUNCTIONS



Companies wishing to hold private parties may do so on Monday, October 28, any time after 5:30 p.m.

Please send requests for function space at the Marriott Marquis Washington DC to Lisa Ramirez, VP, Business and Professional Development, at lr Ramirez@elfaonline.org or 202-238-3414. Please specify the type of function, timing and number of people expected.

We request that companies planning events outside the Marriott Marquis Washington DC provide ELFA with information about the function in the event of emergencies or inquiries. If assistance is needed with planning an event outside the hotel, Lisa Ramirez can recommend facilities and activities available for parties.

COMMUNITY SERVICE PROJECTS



COMMUNITY LODGINGS

Our group will assist with assembling school supply, personal hygiene and family activity kits for the Youth Education Program clients of Community Lodgings. Participants will be encouraged to write personal notes to the recipients.

Jim McGrane Charity Bike Ride and Monument Tour

Sunday, October 27
9:00 a.m. – 12:00 p.m.



ELFA and the Equipment Leasing & Finance Foundation have teamed up to create a memorable cycling experience for a good cause. Attendees will view many of Washington, DC's magnificent monuments and sights on a DC Bike Tour.

Knowledgeable, entertaining guides will lead you on a historical, architectural, cultural, and informative experience while visiting over 55 landmarks in approximately 2.5 hours. Touring the Nation's Capital by bicycle offers an opportunity to visit many memorable (sometimes remote!) places that you may otherwise miss. Guests will be provided with 21- or 24-speed bicycles, fitted to their appropriate size. Helmets, water bottles, and a light snack are also provided with the additional fee of \$150.

Community Service Project – Community Lodgings

Sunday, October 27
2:00 – 4:00 p.m.

Community Lodgings (CLI) was founded in 1987 with the goal of building the foundation for a better life for Alexandria, VA's working poor and families transitioning from homelessness to self-sufficiency. With 45 below-market rent apartments, CLI gives disadvantaged local families access to affordable housing while also offering high-quality supportive services to families transitioning to self-sufficient lives.

In addition to housing, CLI provides children and parents with an educational foundation for success. The Youth Education Program promotes education and self-sufficiency to 163 children and their families all living below the poverty threshold. The strong emphasis on academics includes parental involvement, individualized instruction and a stable place to be after school. CLI's philosophy is that education is the ticket out of poverty.



► If you would like to be one of the sponsors for this year's community service projects, please contact Steve Wafalosky at stevew@larichadv.com or 440-247-1060.

SPOUSE/COMPANION PROGRAM

WASHINGTON, DC is a fun destination and ELFA has planned some terrific activities for spouses and companions. We encourage you to bring your family this year.

A spouse or companion attending any portion of the convention or social function must be registered and pay the appropriate spouse/companion fee. If he or she is employed in the equipment finance industry, the full member attendee registration fee is due.

For your enjoyment during the ELFA Annual Convention, we are offering different packages for spouse/companion attendees. Choose the package that fits into your plans.

Package #1

Full Spouse/Companion Convention Registration

Spouses and companions who register for the full convention package are entitled to attend all social activities, including the Sunday opening reception, the Tuesday night closing party, special spouse and companion activities on Monday and Tuesday, and breakfast each morning.

Package #2

Evening Events Only

This package includes the Sunday Opening Reception and the Tuesday Night Closing Party only.

Package #3

Spouse/Companion Day Activities Only

This package includes the special events planned specifically for spouses and companions on Monday and Tuesday. Descriptions of each of these special events follow.



America's First Home— Mount Vernon Tour and Luncheon

Monday, October 28

11:00 a.m. – 4:00 p.m.

Attendees will take a private tour of Mount Vernon Estate, home of the first U.S. President George Washington. Situated on a grassy, shaded slope overlooking the Potomac River, Mount Vernon is a place all Americans should visit in their lifetime. The estate, gardens, and farm totaled some 8,000 acres in the 18th century, and today 500 acres of this historic property have been painstakingly preserved along the banks of the Potomac River. Within its boundaries are an exceptional collection of historical treasures, stories, and exhibits that are not to be missed. *Luncheon will be served on property at Mount Vernon.*



A Rare Glimpse—Private U.S. Capitol Tour and Luncheon

Tuesday, October 29

11:00 a.m. – 4:00 p.m.

On this city's most prominent hill lies Washington's revered institution, the U.S. Capitol. You will be offered a rare glimpse of the Capitol on a private tour. Your tour will take you through this magnificent building where the laws of the land are still being created in its chambers.

Escorted by a former member of Congress along with professional US Capitol Historic Society docents, you will visit the Rotunda, where heads of state and our country's honored have laid in repose, and Statuary Hall where Congress was originally held and where traditionally the Presidential Inaugural Luncheon is hosted. If Congress is not in session, you will be invited by the Sergeant of Arms in the House of Representatives or Senate chambers to stand on the floor where your representatives' votes are cast. If you've ever watched C-Span, you'll be impressed by the stateliness of these rooms in person. Exploring the many nooks and crannies located in the Capitol, you will be privy to the anecdotes and fables from the past as shared by your escorts.

Luncheon will be served at a nearby Capitol Hill restaurant.

On the registration form, select the package or packages that best fit your plans, and include the appropriate fees with your convention registration.

GENERAL INFORMATION AND REGISTRATION

Several important deadline dates are listed here. *Please review carefully.*

Register by Thursday, August 1, 2019, to receive the discounted registration fee!

To take advantage of this discounted fee, you must also reserve your accommodations at the Marriott Marquis Washington DC.



Overnight Mail Address:

ELFA
Attn: Accounts Receivable
1650 Eye Street, NW • Suite 850
Washington, DC 20006

All participants must be registered in advance. Registration is mandatory to attend the convention and spouse functions. Registration is for the entire convention. No partial registration is available. Only individuals registered and wearing a badge may attend convention events. The full registration fee is payable in advance in U.S. funds. *No registrations will be considered complete until payment is received.*

The deadline for online registration is Friday, October 11, 2019. Registrations and substitutions can also be made on-site. **Please note: there are no refunds of registration fees after this date.**

The fee includes all convention business sessions, social activities, breakfasts and luncheons.

Spouse/Companion Registration Fees

A spouse/companion attending any portion of the convention or social functions must be registered and pay the appropriate spouse/companion fee. If he/she is employed in the equipment finance industry, the regular full attendee registration fee is due.

First-Time Attendee

This fee is for any *individual* who has NEVER attended an ELFA Annual Convention in the past but currently works for an ELFA member company. This applies even if your current company has sent others to the Annual Convention previously.

Non-Members: Please read carefully

1. A non-renewing, Regular Member organization will be permitted to attend one ELFA conference as a nonmember and pay the applicable non-member registration fee. If the company wishes to attend another ELFA conference thereafter, it must join as a Regular Member.
2. An organization that has never been a member of ELFA, and is qualified to be a Regular Member, is subject to the same attendance policy that applies to the non-renewing ELFA Regular Member: i.e., they will be permitted to attend one ELFA conference as a non-member and pay the applicable non-member registration fee. If the company wishes to attend another ELFA conference thereafter, it must join as a Regular Member.
3. New members will receive a discount (the difference between the non-member and member registration fee) toward their dues if they attend a conference as a nonmember, pay the non-member registration fee, and subsequently join ELFA within 60 days.

To learn more about ELFA membership and its benefits, please contact Julie Benson at jbenson@elfaonline.org or 202-238-3432.

Conference Compliance

Please Note the Following

Photographs Taken at the Conference – Photographs of speakers and attendees may be taken at this conference. These may appear in ELFA publications or on the ELFA website. By registering for this conference, you authorize ELFA the right to use any photographs taken of you during the course of the ELFA Annual Convention.

Attendee Contact Information – By registering for this conference, attendees authorize ELFA to share your contact information, including but not limited to email address and telephone number with other registered attendees, sponsors, and exhibitors.

For more information please contact Janet Fianko at jfianko@elfaonline.org.

ELFA CODE OF CONDUCT

Thank you for choosing to enhance your professional development by attending this ELFA conference. One of our goals is to ensure that we promote a safe and productive environment for all conference attendees.

We invite you to help us make each ELFA-sponsored conference and live event a place that is welcoming and respectful to all participants, regardless of race, gender, gender identity and expression, age, sexual orientation, disability, physical appearance, national origin, ethnicity, political affiliation, or religion. We do not condone, nor will we tolerate harassment of our participants, including ELFA and facility staff, in any form—in person or online.

Examples of harassment include offensive comments, verbal threats or demands, sexualized images in public spaces, intimidation, stalking, harassing photography or recording, sustained disruption of sessions or events, and unwelcome physical contact or sexual attention.

We expect all participants—attendees, speakers, sponsors, volunteers, and staff—to follow the Code of Conduct during the conference. This includes conference-related social events at off-site locations and in related online communities and social media. Participants asked to stop any harassing behavior are expected to comply immediately. Conference participants violating this Code of Conduct may be expelled from the conference without a refund, and/or prohibited from attending future ELFA events, at the discretion of ELFA.

Please bring any concerns to the immediate attention of the event staff, or contact Lisa Ramirez, ELFA Vice President of Business and Professional Development, at lramirez@elfaonline.org. You may also report violations by calling call +1 202-238-3414. Thank you for your help in keeping this and all ELFA events professional, welcoming, and respectful to all.



Hotel Accommodations

ELFA does not arrange attendee hotel accommodations, but provides reservation information for registrants.

Please register as an attendee to the convention before making your hotel reservations. Anyone making a hotel reservation at the Marriott Marquis Washington DC who does not register for the ELFA Annual Convention will be excluded from the ELFA block. Those reservations will be based solely on availability and will be at the regular guest room rate.

Convention Hotel Sold Out

The ELFA room block is now full at the Marriott Marquis. For other local hotels near the Marriott Marquis Washington, [please visit Expedia](#).

Those planning to arrive early to participate in the ELFA hosted tours or the community service project on Sunday, October 27 are urged to make hotel reservations early.



WASHINGTON, DC

Suite Reservations

A number of suites have been reserved for private entertaining. Companies wishing to hold private parties should plan to schedule these on Monday, October 28 any time after 5:30 pm. Please contact Lisa Ramirez, VP Business and Professional Development at lramirez@elfaonline.org or 202-238-3414 to reserve a suite. Please specify the type of function, timing and number of people expected.



Getting There

The Marriott Marquis is located in the heart of Washington, DC. Find your passion amid celebrated attractions, including Penn Quarter, Chinatown, the National Mall monuments, the Smithsonian Museums and Walter E. Washington Convention Center.

The hotel is accessible from Ronald Reagan Washington National Airport (DCA) and Washington Dulles International Airport (IAD). The hotel is 4.6 miles from DCA and an approximate \$20 cab ride. From IAD, the hotel is 27.6 miles and an approximate \$75 cab ride.

For directions, please go here:

<https://www.marriott.com/hotels/maps/travel/wasco-marriott-marquis-washington-dc/>.

What To Pack

Business casual dress for education sessions is encouraged. The temperature range in Washington during October is a high of 69° (daytime) to a low of 46° (nighttime). Suggested dress for social events is as follows:

Sunday Evening Welcoming Reception –

Business Casual

Monday/Tuesday Optional Spouse and Companion Activities –

Casual attire, comfortable shoes

Tuesday Night Closing Party –

Casual attire

Deadline Dates, Cancellations & Substitutions

Deadline Dates at a Glance

- **Thursday, August 1, 2019:** Deadline for early-bird discount on convention registration fee. Note: To take advantage of the discount, you must also reserve your accommodations at the Marriott Marquis Washington, DC.
- **Wednesday, October 2, 2019:** Last day to receive the special ELFA convention rate for your accommodations at the Marriott Marquis Washington, DC.
- **Friday, October 11, 2019:** Last day for online registrations. After this date registrations can be made on-site. **Please note: There are no refunds of registration fees after this date.**

Cancellation Policy

Cancellations to the Annual Convention must be made in writing. This letter may be:

- a. mailed to Janet Fianko at ELFA Headquarters:
1625 Eye Street, NW, Suite 850, Washington, DC 20006
 - b. faxed to (202) 238-3457, Attn: Janet Fianko, or
 - c. emailed to Janet Fianko at jfianko@elfaonline.org
- **Refund minus \$100:** Should you need to cancel, refunds will be processed less a \$100 processing fee.
 - **No refund:** No refunds of registration fees will be given for cancellations received on or after **Friday, October 11, 2019**. ELFA regrets that refunds will not be given for no-shows.

Substitutions

Substitutions for the entire program may be made at any time including at on-site registration.