

ELFA 2021 EQUIPMENT MANAGEMENT February 23-24, 2021



Attendee Brochure

SERVING EQUIPMENT MANAGEMENT PROFESSIONALS FOR OVER A QUARTER OF A CENTURY

Register now at

www.elfaonline.org/events/2021/EMC

INVITATION TO PARTICIPATE

Stay Connected and Informed with ELFA Equipment Management LIVE!

For the first time, the ELFA Equipment Management Conference & Exhibition will be delivered as a virtual event with a whole new look, feel and experience. Join us for ELFA Equipment Management LIVE! on Tuesday and Wednesday, February 23 and 24, 2021. As we adjust to a world changed by the COVID-19 crisis, this important event will allow ELFA equipment management professionals from across the industry to connect, share knowledge and learn about the industry, like never before.

Nothing is more important to us than the health and safety of the ELFA community. ELFA Equipment Management LIVE! will offer keynotes, breakout sessions and a virtual exhibit hall. And it will enable us to safely engage with our whole industry through a unique digital conference experience.

When you attend ELFA 2021 Equipment Management LIVE!, you'll invest in the success of your business, your staff, your industry and your career. Don't miss the newest and most important gathering of equipment management professionals, including senior managers and their staff and service providers to the industry. You'll enjoy unparalleled networking opportunities, high-quality educational sessions, a great lineup of keynote presentations and a first-rate virtual exhibit.

We welcome back our long-time supporters and look forward to engaging with new organizations and attendees. There are various ways to be involved. This document outlines the developed sponsorship packages and exhibit experiences. These packages are not fixed, so if you have ideas, let's talk!



*I hope you can join us to connect and
build your company through ELFA
Equipment Management LIVE!*

Thomas Monroe

*Chair, ELFA Equipment Management Committee
Senior Vice President Asset Management
ATEL Capital Group*

To become a Sponsor or Exhibitor, contact Steve Wafalosky
at steve@larichadv.com or 440-247-1060.

SERVING EQUIPMENT MANAGEMENT PROFESSIONALS FOR OVER A QUARTER OF A CENTURY

There is no better place to evaluate current market conditions, portfolio quality and residual values for a variety of equipment segments than this event.

Who Should Attend?

Equipment management professionals, including senior managers and their staff and service providers to the industry.

INNOVATIVE VIRTUAL PLATFORM

Moving to a virtual/digital platform allows ELFA to continue developing the industry and encouraging thought leadership, while safeguarding the health and wellbeing of our members, staff and conference attendees. It also allows participants to stay informed and connected from the comfort of their own home!

We are excited to embrace the opportunities offered by modern technology. Our digital platform provides an advanced forum through which to share knowledge, research, innovative ideas and new business practices. The virtual program includes keynote presentations, live breakout sessions, panel discussions, interactive Q&A and a virtual exhibit hall.

Get Maximum Exposure for Your Company... Become a Sponsor!

Sponsoring ELFA events provides excellent exposure for your company and virtual events are just the same! Contact Steve Wafalosky at steve@larichadv.com or (440) 247-1060 if you are interested in becoming a sponsor of this ground-breaking event.

2021 ELFA Equipment Management Committee

Thomas Monroe
Committee Chair
ATEL Capital Group

Carl Chrappa
The Alta Group LLC

Nicholas Coscia
DLL

Anthony Gordon
Farm Credit Leasing

Thomas Harford
Wells Fargo Equipment Finance

Robert Herb
DLL

Philip Houser
CIT

Elizabeth Jaramillo
Key Equipment Finance

Kelly Lane
Signature Financial

Robert Mercogliano
Bidadoo

James Merz
Fifth Third Bank

Christopher Nugent
Bluechip Asset Management LLC

Rick Pierman
Crestmark Equipment Finance, a division of MetaBank

Jane Rethmeier
Harbor Capital Leasing, Inc.

Joseph Santora
Irontrax

Kevin Sensenbrenner
Stonebriar Commercial Finance

Micheal Smith
RTR Services, Inc.

Kevin Toye
Bank of America Global Leasing

Wade Whitenburg
Ritchie Bros.

Exhibitors at the 2020 Equipment Management Conference

ELFA wishes to thank the following companies who exhibited at this important event in 2020:

Action Machinery Co., Inc.

AmpleTech Refresh

The ARCOA Group / Midwest Copier Exchange

Asset Recovery Services LLC

AVGear US LLC

BigIron Auctions

Centurion Service Group, LLC

Coldiron Companies

Comerford & Orlando Forklifts

Computer Wholesalers Inc.

Continental Lift Truck Corp

CORPSMART

Duff & Phelps, LLC

Equipment Placement Services, Inc.

EquipmentWatch

FLD Inc.

Fleet Evaluator

Forklift Exchange, Inc.

Forklift Pro, Inc.

HealthCare Appraisers, Inc.

HOB International, Inc.

Iron Solutions, Inc.

Ivory Consulting Corporation

Nassau Asset Management

National Inspection Services

NexTech Operations, LLC

Orion First Financial, LLC

PlanITROI, Inc

Ritchie Bros.

Ross International

Rouse Services LLC

RTR Services, Inc.

Sipi Asset Recovery

Taylor & Martin Appraisals

TFS Recovery Inc.

Transamerican Equipment Corp.

Wisetek Solutions Inc.

ELFA2021

EQUIPMENT MANAGEMENT

February 23-24, 2021

LIVE!

TUESDAY, FEBRUARY 23rd

11:00am – 12:15pm **OPENING GENERAL SESSION**

Welcoming Remarks

Speaker:

TOM MONROE

Senior Vice President, Asset Management

ATEL Capital Group

Equipment Management Committee Chair

The View from Washington: Implications for the Equipment Leasing and Finance Industry

With a newly elected President, House and Senate Members, what can we expect for the next four years? Or better yet, given the constant change of our current environment, what can we expect in the next ten months to conclude 2021? This dynamic panel will discuss various political issues currently facing the American economy and the Equipment Finance industry. With perspectives from both sides of the aisle, this is sure to be a lively and informative discussion.

Speakers:

ANDY FISHBURN

Vice President, Federal Government Relations

Equipment Leasing and Finance Association

JAY HEIMBACH

Partner

Peck Madigan Jones

JEFFREY A. SHAPIRO

Partner

Peck Madigan Jones

12:15 – 12:45pm **EXHIBIT HALL**

Dedicated time for the virtual exhibit hall. Attendees will be automatically placed in the exhibit hall and will be able to visit booths, chat with exhibitors and request live video meetings with booth staff.

12:45 – 1:45pm **CONCURRENT BREAKOUT SESSIONS**

- **Transportation – Truck/Trailer**

Moderator:

TOM HARFORD

Senior Vice President, Equipment Management Group

Wells Fargo Equipment Finance

MIKE HOLCK

Director of Transportation
Irontrax LLC

- **Rail – Where We Are and Where We Are Going?**

This session will discuss the marketplace for North American Rail, the market for new and used rail equipment and trends facing investors and lessors in rail equipment. There will be a discussion of trends in storage and new equipment manufacturing, timing for a market recovery, and managing in a down market. The session will also cover a general outlook for industry recovery, rental rates and the recovery timeline, related issues, with time for questions and discussion at the end of the presentation.

Moderator:

LIZ JARAMILLO

Vice President, Asset Management/New Business Support
Key Equipment Finance

Speakers:

ANDREW FALCONE

Railroad Financial Corporation

DAVID NAHASS

Railroad Financial Corporation

- **Alternative Energy**

The alternative energy marketplace is moving at a breakneck pace with what seem to be daily announcements of carbon-neutral/net-zero legislative mandates and self-imposed corporate goals. Jon Ellis of Crestmark Bank will discuss market trends, new technologies and emerging industry sectors. We will explore economic drivers and risk considerations when exploring lending opportunities in the fast-growing field of renewables.

Moderators:

RICK PIERMAN

Senior Vice President – Strategic Operations
Crestmark Equipment Finance, a division of MetaBank

CHRIS NUGENT

Bluechip Asset Management

Speakers:

JON ELLIS

Crestmark Equipment Finance, a division of MetaBank

MARC MILLER

Bay4 Energy

DENNIS ODDEN

Bay4 Energy

- **IT/Computers/Tech**

Moderator:

KEVIN TOYE

Senior Vice President
Bank of America Global Leasing

Speaker:

JEFF JONES

Apto Solutions

1:45 – 2:00pm

Equipment Walk Around – Video Tours - CONCURRENT SESSIONS

Take a video tour of one of three different large equipment areas from the comfort and ease of a virtual experience! Three experts will facilitate a video tour and offer time for Q&A in these 15-minute video tours.

1. LIVE Brings You a Walk Around of a Ritchie Bros. Lot

This session will show you how to collect the key information you need for your files and to determine values when you only have 15 minutes to inspect a truck tractor. Everybody knows what they are. We'll show you where the money is.

Presenter:

WADE WHITENBURG

Strategic Accounts: Finance & Insolvency Management
Ritchie Bros.

2. LIVE Brings You Medical Equipment

Presenter:

ROBERT HERB

Vice President, Global Asset Manager, Healthcare & Clean Technology
DLL

3. LIVE Brings You Solar Equipment

Bay4 Energy is a leading independent renewable energy service provider, with more than 30 years of asset performance and portfolio management experience. Bay4 provides a comprehensive offering of energy and asset performance management services designed to keep owners, investors, and operators in touch with their renewable assets, while delivering optimized energy production and financial returns. This tour will show Bay4's Tucson demonstration and R&D facility, and its control room in which Bay4 monitors its XX GW of operating solar projects under management globally. In this control center Bay4 constantly monitors power output, inverter and other component functionality, for its customers for which it is providing O&M services for solar projects. In this way Bay4 knows about system problems before its customer does.

Presenter:

CHRIS NUGENT

Managing Director
Bluechip Asset Management LLC

2:00 – 2:30pm

EXHIBIT HALL

Dedicated time for the virtual exhibit hall. Attendees will be automatically placed in the exhibit hall and will be able to visit booths, chat with exhibitors and request live video meetings with booth staff.

2:30 – 3:30pm

CONCURRENT BREAKOUT SESSIONS

- **Construction**

In this presentation, we will discuss the latest market trends for construction equipment as observed through the secondary trading activity across retail and auction sales channels. In addition, we will explore how data can be used to enable more efficient and more accurate residual value estimates in connection with lease underwriting processes.

Moderator:

JOE SANTORA

Managing Partner

Irontrax

Speaker:

DAN MELNYK

Director, Asset Management

Tadano America Corporation

- **Inland Marine Transportation Market**

Three industry experts will discuss the state of the Inland Marine transportation market. This will include insights into current market conditions, supply and demand trends and forecasts for the tank barge, hopper barge and tow markets.

Speakers:

DENNIS BOLTON

Managing Director

Gordon Brother Group, LLC

TOM HARFORD

Senior Vice President, Equipment Management Group

Wells Fargo Equipment Finance

KEVIN SENSENBRENNER

Senior Vice President/Senior Managing Director, Head of Asset Management

Stonebriar Commercial Finance

- **Return and Maintenance Agreements – Protect Your Asset Investments**

This session will review and catalog the best in class Return and Maintenance Agreement language as practiced by prudent equipment lessors. The objective of this session is to equip asset managers with current and standardized Return and Maintenance language for use in lease contracts. Proper equipment care and maintenance is important for preservation of equipment value and to protect your residual investments. Well written Return and Maintenance language helps to eliminate the uncertainty of equipment condition at lease termination, assists equipment lessors and asset managers to more accurately forecast asset depreciation, and facilitates greater recoveries in equipment remarketing. In this session we will discuss the wide variety of requirements for RMAs, have an open discussion and listen to all of your experiences, and cover everything from medical imaging to yellow iron to corporate aircraft.

Speakers:

KELLY LANE

Vice President, Asset Management

Signature Financial

CHRIS NUGENT

Managing Director

Bluechip Asset Management LLC

- **Distressed Accounts/Repos**

This session will explore the some of the best practices when handling distressed accounts and repossession in the current and a post COVID environments. We'll also offer tips on what you should be expecting from your service provider and the information they need in order to maximize your opportunities of a successful recovery. The goal is to give asset managers a solid feel of the current recovery environment and what it might look like later this year, so that your better prepared to manage the risk ahead.

Moderator:

MIKE SMITH

President & CEO

RTR Services, Inc.

Speaker:

KEVIN DAVIS

TFS Recovery Inc.

3:30 – 3:45pm

EXHIBIT HALL

Dedicated time for the virtual exhibit hall. Attendees will be automatically placed in the exhibit hall and will be able to visit booths, chat with exhibitors and request live video meetings with booth staff.

3:45 – 4:45pm

CONCURRENT BREAKOUT SESSIONS

- **Data Analytics in Equipment Management**

A general discussion around data analytics focusing on Construction, Transportation & Aviation Assets.

Moderator:

NICK COSCIA

Equipment Manager, Asset Management Americas CT&I

DLL

Speakers:

RICHARD BERKEMEIER

American Society of Appraisers

LOGAN MELLOTT

Vice President

Ritchie Bros. Asset Solutions

- **Material Handling - Market Trends and Technology Update: What are the New Dynamics Driving the Material Handling Industry?**

This session will focus on market trends, equipment acquisition strategies, new technologies, and equipment values. Speakers will discuss current market trends, technology advancements, provide perspective on how lessees are acquiring and managing their MH fleet, and how these trends are impacting equipment values.

Moderators:

PHIL HOUSER

Director, Asset Management
CIT

JANE RETHMEIER

CEO
Harbor Capital Leasing, Inc.

Speakers:

MIKE SIBULKIN

Continental Lift Truck Corp

ANDY GUILD

Machine Maxx USA

JIM COMERFORD

Comerford-Orlando Forklifts

- **How to Conduct a Virtual Evaluation of Equipment?**

In our new business environment, everything is remote and virtual, but what about equipment evaluations? Don't you need to be onsite and in person for a truly valuable evaluation? In this session you will hear from a "virtual world" expert from the popular YouTube channel, Ask Tractor Mike. Mike will share his tips, tricks and techniques for offering a virtual video equipment inspection. With plenty of experience in training dealers and equipment companies in how to utilize YouTube and video for their marketing efforts, Mike will emphasize the importance of getting the content right because that's what sells, not polished production.

Moderator:

TONY GORDON

Manager of Asset Management
Farm Credit Leasing

Speakers:

BOB MERCOGLIANO

Strategic Account Manager – Financial Services
Bidadoo

MIKE WILES

AskTractorMike YouTube Channel

- **How to Choose, Manage, and Work with Outside Appraisers?**

This session will discuss best practices for selecting, managing, and working with outside appraisers to help manage equipment risk. When engaging new financing, performing workout on accounts, or dealing with end of lease valuation, it is often necessary to secure outside appraiser assistance. Many larger organizations have large asset management staffs with adequate coverage of equipment types, but sometimes due to workloads or unusual asset classes, outside appraisers are engaged. This session will discuss how to hire smart, get the project done on time and on budget, and get the appraisal done correctly to help manage your equipment risk.

Moderators:

CHRIS NUGENT

Managing Director
Bluechip Asset Management LLC

WADE WHITENBURG

Strategic Accounts: Finance & Insolvency Management
Ritchie Bros.

Speakers:

RAFFI AHARONIAN

Managing Director
Rouse Services LLC

LEE DANHAUER

Vice President, Finance and Insolvency Appraisal Group
Ritchie Bros.

4:45 – 5:15pm

EXHIBIT HALL

Dedicated time for the virtual exhibit hall. Attendees will be automatically placed in the exhibit hall and will be able to visit booths, chat with exhibitors and request live video meetings with booth staff.

5:15 – 5:45pm

CLOSING GENERAL SESSION

Closing Remarks

Speaker:

TOM MONROE

Senior Vice President, Asset Management
ATEL Capital Group
Equipment Management Committee Chair

State of the Association and State of the Industry Report

Speakers:

RALPH PETTA

President & Chief Executive Officer
Equipment Leasing and Finance Association

KRIS A. SNOW

President, Cisco Capital
Cisco Systems Capital Corporation
ELFA Chair

5:45 – 6:15pm

VIRTUAL RECEPTION

This year our evening reception will be a little different. We will be using the online platform Rally to gather and network. See below for some quick tips for using the platform!

Mix an Equipment Management “vocktail” and join us during our evening reception.

Equipment Management Mule

2 ounces of vodka or bourbon
½ ounce of freshly-squeezed lime juice
4 ounces of ginger beer
Ice

or

Equipment Management Mule Mocktail

1 cup of ginger beer
4 tablespoons of lime juice
1/3 cup of club soda or sparkling water
Ice



WEDNESDAY, FEBRUARY 24th

11:00am – 12:15pm **WELCOME TO DAY 2 – KEYNOTE GENERAL SESSION**

Welcome Remarks

Speaker:

TOM MONROE

Senior Vice President, Asset Management

ATEL Capital Group

Equipment Management Committee Chair

Industry Memoriam

ELFA and the Equipment Management Committee would like to take a moment to reflect and recognize a few key industry leaders who have passed on. It is with great admiration for their career contributions that we recognize these leaders.

Keynote Address

NICE BIKE: MAKING CONNECTIONS TO FUEL GROWTH



MARK SCHARENBRICH, CSP, CPAE

Author of Nice Bike and Leadership Expert

Mix thousands and thousands of black leather, bandana wearing, tattoo bearing Harley-Davidson riders with a 100th Anniversary and one beige rental car and the end result will be the perfect metaphor for connecting with others: "Nice Bike."

Nice Bike acts as a powerful catalyst to help build

stronger, more unified teams. The message inspires audience members to be more engaged and passionate about connecting with others.

Join Emmy award-winning speaker, Mark Scharenbroich as he takes you for a fun ride on how to be effective at making meaningful connections in both your professional and personal life. His Nice Bike principle is supported by three strong actions: Acknowledge, honor and connect.

Part motivational speaker, part thought-provoker and pure comedic entertainer – Mark Scharenbroich will inspire, teach and engage you with Nice Bike.

Credentials: Emmy award, Global Gurus 2020 Top 30 Motivational Speakers recognition, National Speakers Hall of Fame inductee, award-winning author, several international film and production awards - Golden Apple, Silver Screen, Telly, Remi, Aurora, International Health and Medical Film award.



Don't miss this inspirational and meaningful session!

12:15 – 1:00pm

Exhibit Hall

Dedicated time for the virtual exhibit hall. Attendees will be automatically placed in the exhibit hall and will be able to visit booths and chat with booth staff.

1:00 – 1:45pm

Closing Virtual Reception

This Virtual Reception will be a terrific opportunity to catch up and network with industry colleagues. It's not just another zoom meeting. The Rally networking platform was built to simulate a live venue. You can hop between breakout rooms with one click while hearing the exciting chatter of tables around you. Join any table you like or start your own table.

Here are a few tips for participating:

- Please join through Google Chrome on your desktop or laptop computer--the platform is not mobile friendly.
- To join as a Guest, just type in your name and click Join!
- You will need a webcam and mic to join.



Registration and General Information

Please register as far in advance as possible. Register by **Tuesday, February 9, 2021** to ensure that you receive the Early Bird discounted registration rate. Please note: you may also register for this conference online at: www.elfaonline.org/events/2021/EMC/.

Registration fees:

ELFA Member (until Feb. 9, 2021):	\$595
ELFA Member (8 or more from a Member company):	\$500
First time attendee from ELFA member company:	\$595
Non-Member:	\$795
Committee fee:	\$295
Speaker Fee – attending entire conference:	\$295
Speaker Fee – attending their session only:	\$0

Speaker/Committee Registration Policy

All speakers and committee members must complete and return the registration form, or register online. Speakers attending the entire conference pay \$295. The fee is waived for speakers who are attending only their virtual presentation. Committee members pay \$295. Please make sure you check the appropriate box on the registration form. If you have questions regarding these policies, contact Emily Winkler at (202) 238-3415, ewinkler@elfaonline.org.

Get Credit Towards Your ASA Re-Accreditation

Attendees of the Equipment Management Conference may obtain credit toward their American Society of Appraisers (ASA) re-accreditation requirements.

Cancellations & Substitutions

Cancellation Policy

- **Refund minus \$100:** Should you need to cancel, refunds will be processed less a \$100 administrative fee.
- **No refund:** No refunds of registration or exhibit fees will be given for cancellations received on or after Tuesday, February 9, 2021.

Please Note: Cancellations by telephone will be accepted, but must be followed up with a letter that includes the name of the ELFA staff member who accepted the cancellation. This letter may be: faxed to (202) 478-0980, Attn: Janet Fianko, or emailed to Janet Fianko at jfianko@elfaonline.org

Substitutions

Substitutions for the entire program may be made before February 18, 2021. After February 18, 2021, NO substitutions will be accepted.

Membership Information

If you are interested in joining ELFA, please call ELFA Member Services at (202) 238-3432, or check the appropriate box on the registration form.

Inquiries

If you have a question about this conference not related to registration, please call ELFA Professional Development at (202) 238-3400.

Email for registration inquiries:

jfianko@elfaonline.org

(Note: no registrations can be made by telephone)

Email for conference brochure:

rjordan@elfaonline.org

Virtual Conference Compliance

Please Note the Following:

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 PROFESSIONAL CODE OF CONDUCT

Thank you for choosing to enhance your professional development by participating in ELFA activities. Our goal is to ensure that we promote a safe, inclusive and productive environment for all participants.

We ask that you help us make each ELFA-sponsored activity welcoming and respectful to all participants, regardless of their 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, or the on-premise staff at host events 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 and/or non-inclusive 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 lr Ramirez@elfaonline.org. You may also report violations by calling +1 202-238-3414. Thank you for your help in keeping this and all ELFA events professional, welcoming and respectful to all.