

Your Technology Roadmap: Challenges, Solutions and What's Next

Where is your company on its technology journey? Come engage in a lively discussion on this topic with your fellow Independent equipment finance executives.

We all know the importance of digital transformation, but it's tricky to navigate. As much as we may want a "set it and forget it silver bullet solution," the truth is silver bullets kill, and there is no "done." Digital transformation is not a destination; it's a journey. It takes both hindsight AND foresight to chart the course for your future. With so many challenges to overcome and so many opportunities to capture, where do you even begin? No matter where you are in your journey, whether beginning to plan your path, partway down the road, or suddenly recalculating due to the unexpected, this session is for you.

Join Ricky Rios and Deborah Reuben for a practical and timely discussion about building your technology roadmap.

First, Deborah Reuben will set the stage for our roundtable discussions with an overview of five crucial considerations for building your technology roadmap in a rapidly changing world. Next, we invite you to join small group breakout discussions with industry peers. To tie it all together we will regroup for a facilitated share-back discussion to capture the breakout takeaways the you can apply in your business.

Discussion themes will include:

- What technology challenges is your company facing or have you overcome?
- What technology solutions have your found or are you considering?
- What capabilities are you working on?
- What's next?

This is your chance to exchange ideas, questions, and best practices with other Independent equipment finance executives. We'll meet on an interactive online platform that will allow you to connect, share knowledge and learn like never before. Space is limited to 90 participants, so register at your earliest convenience!

Brought to you by the Independent Business Council Steering Committee

Who Should Attend

The Independent Best Practices Roundtable is open exclusively to senior executives of ELFA member independent equipment finance companies.

Independent Business Council Steering Committee

Ricardo Rios, Commercial Equipment Finance, Inc.
(Chair)

Kimberly Adair, Amur Equipment Finance

Jonathan Albin, Nexseer Capital

Conrad Eimers, Vision Financial Group, Inc.
(Board of Directors Liaison)

Roman Gajda, ENGS Commercial Finance Co.

Autumn Heseltine, Insight Investments, LLC

Richard Matte, Encina Equipment Finance, LLC

Zoe Mitchell, Macquarie Specialized and Asset Finance

Jennifer Sablowski, Lease Plan U.S.A., Inc.

Mark Scardigli, Marlin Capital Solutions

Howard Shiebler, Crossroads Equipment Lease
& Finance LLC

Harrison Smith, Stonebriar Commercial Finance
(ETAC Liaison)

Bruce Winter, CLFP, FSG Capital, Inc.



REGISTRATION AND GENERAL INFORMATION

Register by **Friday, April 16, 2021** to ensure that your name appears on the list of attendees. This event is limited to 80 attendees, so please register early to secure your spot. Please note: you must register for this conference via the ELFA website:

www.elfaonline.org/events/2021/IR.

There is no fee to attend the Virtual Independent Best Practices Roundtable.
Note - this event is for ELFA members only.

Attendee Contact Information – Please Note the Following

By registering for this event, 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.

Continuing Professional Education (CPE) Credit

The Independent Best Practices Roundtable qualifies for 2 CPE credits.

Program Details

Prerequisite: None

Preparation: None

Level of Knowledge: Basic, Overview

Field of Study: Management: Finance

Delivery Method: Group Live

ELFA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website:

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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.

Photographs Taken at the Conference – Please Note the Following

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

Independent Best Practices Roundtable
April 29, 2021

Agenda

1:00-1:15pm **Welcome and Introduction: Your Technology Roadmap**
Review the five crucial considerations for building your technology roadmap in a rapidly changing world.

RICKY RIOS, CFA, CLFP

Chair, Independent Business Council Steering Committee
COO, Commercial Equipment Finance, Inc.

DEBORAH REUBEN, CLFP

Chair, Technology Innovation Workgroup
CEO & Founder, TomorrowZone

1:15 - 1:20pm **Travel to virtual Round Tables**

1:20-2:10pm **Table Discussions: Your Technology Roadmap**
Join small group breakout discussions with industry peers.

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- What technology challenges is your company facing or have you overcome?
- What technology solutions have you found or are you considering?
- What capabilities are you working on?
- What's next?

Facilitators:

ROMAN GAJDA

Member, Independent BCSC
Director of Financial Technology Solutions, ENGS Commercial Finance Co.

DEBORAH REUBEN, CLFP

Chair, Technology Innovation Workgroup
Founder & CEO, TomorrowZone

RICARDO RIOS, CFA, CLFP

Chair, Independent BCSC
COO, Commercial Equipment Finance, Inc.

JENNIFER SABLOWSKI

Member, Independent BCSC
Senior Vice President, Truck & Equipment Business, Lease Plan U.S.A.,
Inc.

MARK SCARDIGLI

Member, Independent BCSC
Senior Vice President of Indirect Sales, Marlin Capital Solutions

Additional facilitators to be announced.

2:10 - 2:15pm Travel back to the general session room

2:15-2:45pm Table Reports and Discussion

We will regroup for a facilitated share-back discussion to capture the breakout takeaways that you can apply in your business.

Facilitator:

DEBORAH REUBEN, CLFP

Chair, Technology Innovation Workgroup
CEO & Founder, TomorrowZone

2:45-3:00pm Wrap-Up

We'll synthesize top themes from the discussion and tie it all together back to the main theme, with a call to action or next steps for learning more.

RICKY RIOS, CFA, CLFP

Chair, Independent BCSC
COO, Commercial Equipment Finance, Inc.

DEBORAH REUBEN, CLFP

Chair, Technology Innovation Workgroup
CEO & Founder, TomorrowZone