

VIRTUAL

Captive and Vendor Finance Best Practices Roundtable

June 17, 2021



The Captive and Vendor Finance Best Practices Roundtable is designed to bring together the leaders of captive and vendor finance companies for information sharing about strategic business issues they are facing, and to learn from one another how each is addressing these issues daily.

Who Should Attend?

The Roundtable is open exclusively to senior executives of ELFA member captive and vendor finance leasing companies.

Captive and Vendor Finance Business Council Steering Committee

Jayma Sandquist, *Committee Chair*, John Deere Financial

Mark Bainbridge, Caterpillar Financial Services Corporation

Jon Biorkman, Healthcare Financial Services, GE Healthcare

Brian Bower, Bank of America Global Leasing

Todd Clegg, TCF Capital Solutions, a division of TCF National Bank

Mike Elmasry, IBM Global Financing

Troy Graziani, Toyota Industries Commercial Finance, Inc.

Dan Hathcoat, Summit Funding Group, Inc.

Dominic Janney, Canon Financial Services, Inc.

Christopher Johnson, Pitney Bowes Global Financial Services

Sherrie Kalajian, Presidio Technology Capital, LLC

Brian Lowe, Verdant Commercial Capital LLC

Chris Meeks, OnPoint Capital, LLC

Kara Miyasato, CLFP Stryker, Flex Financial

Vincent Mollica, CIT

Sarah Palmer, Key Equipment Finance

Larry Scherzer, CLFP Cisco Systems, Inc.

Justin Tabone, TIAA Bank

Bruce Trachtenberg, DLL

Greg Vandewalker, GreatAmerica Financial Services

Jeffrey Walker, CIMC Capital, Inc.

David Walton, Caterpillar Financial Services Corporation

Daniel Willems, Van Dijk CNH Industrial Capital LLC

Barbara Zweig, Raymond Leasing Corporation

REGISTRATION AND GENERAL INFORMATION

Register by **June 4, 2021** to ensure that your name appears on the list of attendees. Please note: you must register for this event via the ELFA website:

www.elfaonline.org/events/2021/CBP.

There is no fee to attend the Virtual Captive and Vendor Finance 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 Captive and Vendor Finance 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:

www.learningmarket.org.

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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 activity 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.

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.