

EQUIPMENT LEASING AND FINANCE ASSOCIATION




RECONNECT REUNITE

60TH Annual Convention

October 24-26, 2021

JW Marriott Hill Country
San Antonio, Texas

CELEBRATING
60 YEARS 1961-2021 ELFA



EQUIPMENT LEASING AND FINANCE ASSOCIATION

60TH ELFA Annual Convention

At the 60th ELFA Annual Convention, industry leaders will reunite, reconnect and exchange best practices for innovating, winning business and leading in an age of rapid change.

The past year presented countless challenges to our nation's economy and ELFA member businesses. Overall, however, the equipment finance industry has demonstrated remarkable resilience and durability. Today, the equipment finance sector is helping the nation get back to business by financing billions of dollars in equipment investment by businesses both large and small.

As the nation looks forward to emerging from the pandemic, the most successful equipment finance companies aren't returning to "business as usual." They are preparing to take advantage of new opportunities in the marketplace and adapting their business models to meet changing customer demands.

Position your business for success by registering for the 60th ELFA Annual Convention!

WHY ATTEND?

The ELFA Annual Convention is the primary forum that industry leaders turn to with assurance when it comes to addressing critical issues and trends. It is the largest, most important annual gathering of equipment leasing and finance professionals.

NEW THIS YEAR: ATTEND IN-PERSON OR VIRTUALLY

ELFA is offering the 60th Annual Convention as a hybrid event! You have the flexibility to choose the option that works best for you:

- **In-Person:** Attend the Convention in-person to reunite and reconnect with colleagues at the JW Marriott Hill Country in San Antonio. Onsite attendees will enjoy unparalleled opportunities to network, do business and uncover ideas to help your business grow—plus discover solutions in a first-rate exhibit hall. All in person attendees will also have access to attend education sessions virtually as well. To ensure safety, ELFA will follow Centers for Disease Control and Prevention recommendations throughout the conference space.
- **Virtual:** Attend the Convention remotely to hear from industry experts from the comfort of your home or office. Watch livestreams of high-quality educational sessions and top-notch keynote speakers when and where it's most convenient for you—for a discounted price.

Registering multiple virtual attendees? Discounted bulking pricing is available for virtual attendees only. Register three or more virtual attendees at the rate of \$695 (original price \$795).

To register for virtual bulk pricing please contact Janet Fianko at 202-238-3420 or jfianko@elfaonline.org.

LOCATION

All convention activities will be held at the JW Marriott Hill Country in San Antonio, Texas. The JW Marriott Hill Country is located just 20 minutes from downtown San Antonio and the airport. The elements of authentic roots, hacienda inspired style, beautiful views, and healing water serve as the inspiration in bringing this magnificent resort to life. This Texas Hill Country Resort features the 36-hole TPC San Antonio Golf Club, the six-acre River Bluff Water Experience, the 26,000-square-foot Lantana Spa, and seven distinct dining options. Guests enjoy an environment of simple elegance where they feel welcome and free to be themselves. The JW Marriott Country experience reflects the very best of the Texas Hill Country, imparts a sense of harmony and wellness, and delivers lasting memories.

BECOME A SPONSOR!

The ELFA Annual Convention provides unmatched opportunities to get noticed through a variety of sponsorship opportunities. To become a sponsor, contact Steve Wafalosky at steve@larichadv.com or 440-247-1060.

Check out the Convention website for the latest information at www.elfaonline.org/events/2021/AC/

Schedule of Events

Sunday, October 24

7:00 a.m.

Breakfast for Golfers

8:00 a.m.

Golf Tournament (Shotgun Start)

JW Marriott Hill Country AT&T Canyons Course



8:00 a.m. – 1:00 p.m.

Jim McGrane Charity Bike Ride

(pre-registration required; additional fee for bike and other equipment)



10:00 a.m. – 8:00 p.m.

Convention Registration

(Attendees & Exhibitors)

1:00 – 2:00 p.m.

Luncheon for Golfers

2:00 – 5:00 p.m.

Exhibitor Setup

2:30 – 4:00 p.m.

Community Service Project:

Build-a-Wheelchair®

(on property; pre-registration required)

4:30 – 5:30 p.m.

New Members and Leadership Reception

5:00 – 6:00 p.m.

Women's Council Reception—All Welcome

6:00 – 8:30 p.m.

Welcome Reception

Exhibits Open

Monday, October 25

7:00 a.m. – 4:30 p.m.

Convention Registration

7:00 – 8:15 a.m.

Group Breakfast

7:00 a.m. – 5:00 p.m.

Exhibits Open

8:30 – 10:00 a.m.

General Session

Chair's Address and Keynote Address

Speakers:



KRIS SNOW, Chair, ELFA

President, Cisco Systems Capital Corporation



DEDE HALFHILL

Renowned Leadership Expert & Colonel, USAF (Ret.)

10:00 a.m. – Noon

Refreshment Break in Exhibit Area

10:30 a.m. – Noon

Concurrent Breakout Sessions

- Technology Innovation Workgroup Presents: What's REALLY Happening with AI in Equipment Finance?
- The ELFA Women's Council Session
- The Equipment Leasing & Finance Foundation Presents: Lease Syndication in the Digital Age
- The Shift from Hard Assets to Servitization: New Models for Equipment Finance Providers

11:00 a.m. – 3:00 p.m.

Spouse/Companion Event:

Texas Outfitters and Wine Tasting at the JW Marriott

(pre-registration required)

Schedule of Events *continued*

12:15 – 2:00 p.m.

Equipment Leasing & Finance Foundation Luncheon



Speaker:



ROBERT WESCOTT, Ph.D.
President, Keybridge Research LLC

2:00 – 4:00 p.m.

Refreshment Break in Exhibit Area

2:30 – 4:00 p.m.

Concurrent Breakout Sessions

- The ELFA Equality Committee Presents: Shining a Light on Corporate Diversity and Inclusion Efforts
- Strategic Shift: Start Thinking and Operating Like a Digital Company
- Legal Hot Topics for Equipment Finance AND the Kitchen Sink
- Truck and Trailer Transport – Studies, Data & Science To Improve Organizational Bottom Lines

4:30 – 5:30 p.m.

Equality Committee and Emerging Talent Advisory Council Reception—**All Welcome**

5:30 p.m.

Individual Company-Sponsored Receptions and Events

Tuesday, October 26

7:00 a.m. – 3:00 p.m.

Convention Registration

7:00 – 8:15 a.m.

Group Breakfast

7:00 a.m. – 3:00 p.m.

Exhibits Open

8:30 – 10:30 a.m.

General Session

President's Report and Keynote Address

Speakers:



RALPH PETTA
President and CEO, ELFA



DEX HUNTER-TORRICKE
*Former Head of Communications at SpaceX,
Executive Communications Manager at Facebook,
and Executive at Google*

10:30 a.m. – Noon

Refreshment Break in Exhibit Area

11:00 a.m. – 12:30 p.m.

Concurrent Breakout Sessions

- The Emerging Talent Advisory Council Presents: Millennials — A “Vertical” Market Defining the Future
- Automation & Business Operations: Taming the Wild Beast
- Equipment Demand in the Post-Pandemic Small Business Economy
- Cyber Security — Keeping Your Company Safe

11:00 a.m. – 5:00 p.m.

Spouse/Companion Event:

San Antonio Missions Tour and Luncheon (pre-registration required)

RECONNECT REUNITE

12:45 – 2:30 p.m.

Community Luncheon for All Attendees

3:00 – 4:30 p.m.

Concurrent Breakout Sessions

- LIBOR in the New World
- Financing the Intersection of the Circular Economy and the ESG Revolution
- Futureproofing Operational Processes and Technology Transformations

6:30 – 9:30 p.m.

Closing Party and Dinner

Deep in the Heart of Texas!



If you are planning to arrive early, you might want to participate in these activities:

Sunday, October 24

8:00 a.m.

Golf Tournament

AT&T Canyons Course; on property

Additional fee; reserve your spot when registering for the convention.

8:00 a.m. – 1:00 p.m.

Jim McGrane Charity Bike Ride

A guided scenic ride of the Texas Hill Country. Additional fee for the bikes and other equipment. Complete details on page 8 of this brochure.

2:00 – 4:00 p.m.

Community Service Project: Build-a-Wheelchair®

This project will be conducted on the grounds of the JW Marriott Hill Country. No additional fee; reserve your spot when registering for the convention.

IMPORTANT DEADLINE DATES

• Monday, August 9, 2021

Deadline for early-bird discount on convention registration fee. Note: To take advantage of the discount, you must also reserve your accommodations at the JW Marriott Hill Country.

• Friday, October 1, 2021:

Last day to receive the special ELFA convention rate for your accommodations at the JW Marriott Hill Country.

• Friday, October 8, 2021

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.*

Speakers



DEDE HALFHILL

Renowned Leadership Expert and Colonel, USAF (Ret.)

Described by Dr. Brené Brown as one of her “leadership heroes and a total badass,” U.S. Air Force retired Colonel, DeDe Halfhill is a proven leader and communications executive who draws on her 25-year accomplished military career to provide a transparent, real-world perspective on the power of embracing humanness and vulnerability in leadership.

During her time with the Air Force, Halfhill became a trusted advisor to some of our nation’s highest-ranking military leaders, including the Chairman of the Joint Chiefs of Staff and the Secretary of Defense, as well as the lead military spokesperson responsible for implementing plans supporting the Department of Defense’s global communications strategy. Deployed twice during the Iraq War, Halfhill gained first-hand experience leading and advising through the most difficult circumstances, often when lives were at risk, and when there were no easy answers. She understands leadership, not just from studying it, but by actually living it.



DEX HUNTER-TORRICKE

Former Head of Communications at SpaceX, Executive Communications Manager at Facebook, and Executive at Google

With more than a decade working at the heart of the technology industry, Dex Hunter-Torricke has managed communications for some of the most-influential and admired Silicon Valley leaders and corporations of our day. From 2012-2016, he led the executive communications team at Facebook and served as personal speechwriter for Mark Zuckerberg. He then went on to join SpaceX as senior director of communications. He is currently head of communications for the Oversight Board, the independent body that will be making decisions on Facebook and Instagram’s most challenging content issues.



DR. ROBERT WESCOTT

Founder and President, Keybridge Research LLC

Robert F. Wescott is Founder and President of Keybridge Research LLC, an economic consulting firm in Washington, DC, that has served major financial institutions, Fortune 500 companies and leading business associations since 2001. Dr. Wescott concentrates on global macroeconomics, financial risks, and public policy research. He provides global asset allocation advice to high-profile international financial firms and is a frequent speaker to business and financial audiences around the world. Dr. Wescott also testifies as an expert before U.S. Congressional committees on economic, financial, and energy policy matters. Wescott will discuss the state of the economy and what it means for your business, and summarize the Equipment Leasing & Finance Foundation’s 2021 Industry Future Council report, providing a glimpse into the future of the equipment finance industry.

Exhibition

Visit exhibitors to check out the latest available 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 solutions available to help increase the operational efficiency of your company.



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

Corporate Entertainment Functions



Companies wishing to hold private parties may do so at any time. Please send requests for function space at the JW Marriott Hill Country to Lisa Ramirez, VP, Business and Professional Development, at lramirez@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 JW Marriott Hill Country 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 provide recommendations of facilities and activities available for parties.

Community Service Projects

Jim McGrane Charity Bicycle Ride

Sunday, October 24

8:00 a.m. – 1:00 p.m.



The Bicycle Sport Shop out of Austin, Texas will be organizing the 21-mile bike ride through the Texas Hill Country. The terrain features tall, rugged hills and is punctuated by a large number of limestone or granite rocks and boulders. The Texas Hill Country is also home to several native types of vegetation, such as various yucca, prickly pear cactus, cedar scrub and the dry Southwestern tree known as the Texas live oak.

Several professional guides will accompany the riders as you wind your way through the countryside. Refreshments will be provided along the way.

Note: Participants may wish to bring their own riding gear. There is a separate fee for rental of bikes and helmets.

Build-a-Wheelchair®

Sunday, October 24

2:00 – 4:00 p.m.



Make an impact by building a wheelchair for someone in need! This engaging and memorable service event will team up volunteers into wheelchair groups where each team will then build a chair with the help of a facilitator. Afterward, each chair will go through an inspection onsite. Once completed, artistic notes of encouragement are designed and attached to the chairs, adding a personal touch to each chair. Through your generous donation, countless others will be gifted beautiful, brand new wheelchairs.

Become a Sponsor for the Community Service Projects

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

Convention Golf Tournament

Sunday, October 24

7:00 a.m. breakfast; 8:00 a.m. start time

The ELFA golf tournament takes place on the AT&T Canyons Course at the JW Marriott Hill Country Resort. This course, which was designed by Pete Dye, sits on a great piece of land that provides panoramic views of an adjacent 750-acre nature preserve. The design, which measures more than 7,500 yards, is true to nature and the flow of the land. The dramatic elevation changes and hill country views make this course not only challenging, but breathtaking as well.

Prizes will be distributed to the winning teams. Players have the option of forming their own foursomes or being placed into foursomes. The cost of the tournament is \$275, which includes continental breakfast, green fees, cart and lunch. If you are interested in playing in the tournament, please check the appropriate box on the registration form and include \$275 with your registration fees. To put together or join a foursome, visit the online registration page at <https://www.elfaonline.org/golfpairings> after you have registered for golf with the ELFA.



NOTE: There will be no refund of golf after Friday, October 8, 2021

Spouse/Companion Program

San Antonio, Texas is a wonderful destination and ELFA has planned some terrific activities for spouses. We encourage you to bring your spouse 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 equipment finance, 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 Convention Registration

This package includes all convention activities. Spouses or companions who register for the full convention package are entitled to attend all sessions and social activities, including the Sunday Welcome Reception, the Tuesday Night Closing Party, special spouse programs on Monday and Tuesday, and breakfast each morning.

Package #2 Evening Events Only

This package includes the Sunday Welcome Reception and the Tuesday Night Closing Party. Spouses or companions registering for this package may also attend any business sessions they like.

Package #3 Special Spouse/Companion Activities

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

Texas Outfitters and Wine Tasting at the JW Marriott Monday, October 25 11:00 a.m. – 3:00 p.m.

Spouses have the opportunity to look the part and gear up for the Closing Party, Deep in the Heart of Texas, with a custom hat fitting over a Texas-inspired lunch and wine tasting. This come-and-go event will also feature other Texas surprises you'll treasure forever!



San Antonio Missions Tour Tuesday, October 26 11:00 a.m. – 5:00 p.m.

See the rich history of San Antonio through a guided tour of four mission sites: Mission San Jose, Mission Concepcion, Mission San Juan, and Mission Espada, all dating back to the early 1800s. A nearby lunch will be included, and the group will return just in time for a night of fun with the Closing Party, themed Deep in the Heart of Texas.



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 & Registration

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

Register by Monday, August 9, 2021 to receive the discounted registration fee!

To take advantage of this discounted fee, you must also reserve your accommodations at the JW Marriott Hill Country Resort.

Convention Registration

Registering online at the ELFA website is the FASTEST and EASIEST way to register for the convention. Go to: www.elfaonline.org/events/2021/AC/.

Mail Address:

ELFA
Attn: Accounts Receivable
1625 Eye Street, NW • Suite 850
Washington, DC 20006

All participants must be registered in advance. Registration is mandatory to attend 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 mail-in and online registration is Friday, October 8, 2021. Registrations received after this date will still be honored, but your name may not be included in the Attendee Roster. Registrations and substitutions can also be made on-site. **Please note: There are no refunds of registration fees after this date.**

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 (package 1, 2 or 3). If he/she is employed in equipment finance, the 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 for hotel accommodations but provides reservation information for registrants. Anyone making a hotel reservation at the JW Marriott Hill Country 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.

A block of rooms is being held for attendees of the 2021 ELFA Annual Convention at the JW Marriott Hill Country Resort, 23808 Resort Parkway, San Antonio, TX 78261. Please make your hotel reservations **no later than Friday, October 1, 2021** in order to obtain accommodations at the special ELFA Annual Convention rate of \$309 single/double. Accommodation requests received after the cut-off date are subject to availability and may be at a higher rate.

Those planning to arrive early to participate in the ELFA sports tournaments or community service projects on Sunday, October 24, are urged to make hotel reservations early.

Online Hotel Reservations!

You may make your hotel reservations directly online at the JW Marriott Hill Country website. Follow these simple instructions:

Log on to: <https://book.passkey.com/go/ELFA2021>

Enter: Arrival and Departure Dates

Enter: Number of rooms needed and number of guests

Click on: Search

Once the reservation is complete, you will receive an instant confirmation number via e-mail (as long as your e-mail address has been entered).

Suite Reservations

A number of suites have been reserved for private entertaining. 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.

General Information & Registration *continued*

Getting There

The resort is conveniently located just north of San Antonio International Airport. While the resort does not provide transportation from the Airport, convenient taxi service is available. In addition, Hertz Car Rental is located at the resort.

Driving directions to the hotel are available on the hotel website: www.jwsanantonio.com/

For further information about the JW Marriott Hill Country and all it has to offer, please visit their website at www.jwsanantonio.com/

What To Pack

Business casual dress for education sessions is encouraged. The temperature range in San Antonio during October is high 70's to low 80's (daytime) to high 50's to mid 60's (nighttime).

Suggested dress for social events is as follows:

Sunday Evening Welcoming Reception
business casual

Monday/Tuesday Optional Spouse Programs
casual attire, comfortable shoes, jacket or sweater

Tuesday Night Party
casual attire, comfortable shoes, jacket or sweater

Deadline Dates, Cancellations & Substitutions

Deadline Dates at a Glance

- **Monday, August 9, 2021:** deadline to receive the special early bird registration fee
- **Friday, October 1, 2021:** cutoff date to make hotel reservations at the JW Marriott Hill Country
- **Friday, October 8, 2021:** last day for online registrations. After this date registrations can be made on-site. *There are no refunds of registration fees after this date.*

Cancellation Policy

Cancellations to the Annual Convention must be emailed or written. This can be:

- a. mailed to Janet Fianko at ELFA Headquarters:
1625 Eye Street NW, Suite 850, Washington, DC 20006
- b. 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 8, 2021**. ELFA regrets that refunds will not be given for no-shows.

Substitutions

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

