

AGENDA

Sunday, March 13

7:30 – 9:30 am

Transportation to Golf on Property at Oak Marsh Course

Hotel Lobby

8:00 – 9:00 am

Golf Registration

9:00 am – 3:00 pm

Golf Outing

Oak Marsh Course at Omni Resort

6:00 – 7:00 pm

Hosted Reception

Marsh View Bar and Terrace

7:00 – 9:00 pm

Hosted Dinner

Marsh View Bar and Terrace



Welcoming Remarks:

RALPH PETTA

President and CEO

Equipment Leasing and Finance Association

Monday, March 14

7:30 – 8:30 am

Roundtable Registration

Amelia Ballroom

7:30 – 8:30 am

Hosted Breakfast

8 Flags Patio

8:30 – 10:00 am

Opening Remarks

Amelia Ballroom



MICHAEL DICECCO

Executive Managing Director

Huntington Asset Finance

Chair of the Board, ELFA

War on Talent Keynote Address



Keynote Speaker:

JOHNNY C. TAYLOR

President and Chief Executive Officer

Society for Human Resource Management (SHRM)

Topic: The Great Reset: Survival Tips for Business Leaders

The last two years shook up the world of work, but they've also opened up new possibilities for business organizations. Join SHRM's Johnny C. Taylor, Jr. as he uncovers key leadership lessons and strategies on talent, culture, and other mission-critical issues during this time of economic upheaval and The Great Reset.

10:00 – 10:15 am

Refreshment Break

Amelia Ballroom

10:15 – 11:15 am

War on Talent Industry Panel and Roundtable Discussion

Amelia Ballroom

Panelists:

LAURIE BAKKE

President

Western Equipment Finance

RJ GRIMSHAW

CEO, President

UniFi Equipment Finance, Inc

ROBERT MOSKOVITZ

Chief Financial Officer

Verdant Commercial Capital

DAVE NORMANDIN

President & Chief Executive Officer

Wintrust Speciality Finance 11:15 – 11:30 am

Refreshment Break

Amelia Ballroom

11:30 am – 12:30 pm

Supply Chain and the Impact on Our Industry

How are Vendors, Captives and Service Providers approaching the challenges and opportunities related to the supply chain constraints? What opportunities are being created for innovative pay-over-time overtime solutions?

What does the future hold as we work our way out of the current environment?

Panelists:

KATHY CANUM

Senior Vice President, Administration
Canon Financial Services, Inc.

MIKE JONES

President, Business Capital
CIT

CHRISTOPHER JOHNSON

SVP & President
Pitney Bowes Global Financial Services

MATT KEOWN

US West Regional Head
DLL

LARRY SCHERZER, CLFP

Senior Director
Cisco Systems Capital Corporation

JOEL VAN VARK

Chief Credit Officer
John Deere Credit

12:30 – 1:45 pm

Hosted Luncheon

1:45 – 2:45 pm

2022 Economic Update

Amelia Ballroom



Keynote Speaker:

JOHN E. SILVIA, PH.D.

CEO and Founder, Dynamic Economic Strategy
Managing Director and Chief Economist for
Wells Fargo, Retired

2:45- 3:00 pm

Refreshment Break

Amelia Ballroom

3:00– 4:00 pm

Regulatory Update

Changes in commercial disclosure requirements in California and New York are expected to take effect in 2022 that will have a significant impact on the commercial equipment leasing and finance sector. The new regulations apply to all equipment financing transactions, except true leases, of less than \$500,000 in California and less than \$2.5 million in New York. New disclosure require-

ments have also been introduced in Connecticut, Mississippi, Missouri, New Jersey, North Carolina and Utah. ELFA has been fighting to exclude the equipment leasing and finance industry from these onerous disclosure laws since they were first introduced. This session will highlight the current status of all the Disclosure bills and focus attention on critical informational resources, ELFA has complied to assist and educate the industry on this topic.

Section 1071 has always been on the horizon, but the horizon is coming a lot faster now! Recent proposals from the CFPB have made this off-in-the-distance proposal one that needs to be taken into account in equipment finance companies' budget and planning processes today. Once this provision is implemented, it will dramatically change the process for equipment finance originations and increase compliance costs on an ongoing basis. This session will focus on what Executives need to be thinking about today to prepare their companies for compliance as early as 2024.

ANDY FISHBURN, CLFP

Vice President, Federal Government Relations
Equipment Leasing and Finance Association (ELFA)

DAN NELSON

CEO
Tamarack Technology, Inc.

SCOTT RIEHL

Vice President , State Government Relations
Equipment Leasing and Finance Association (ELFA)

4:00- 4:15 pm

Refreshment Break

Amelia Ballroom

4:15– 5:15 pm

Uncharted Territory – Performance, Pay and Talent Trends in Financial Services

Amelia Ballroom

McLagan (a subsidiary of Aon PLC) is the financial services industry's leading global compensation consulting firm. Each year, the ELFA and McLagan partner to conduct the Equipment Leasing & Finance compensation survey, measuring pay rates as reported by over 70 equipment financing businesses each year. McLagan covers a cross-section of the sector, including independent, bank-owned and captive leasing firms. The presentation will cover human capital / workforce trends in banking and financial services, company retention strategies and highlights from the most recent compensation survey.

Panelists:

STEVEN HURD

Associate Partner
AON Human Capital Solutions

DAVE ROSENTHAL

Senior Consultant
AON Human Capital Solutions

5:15– 6:00 pm

Hosted Reception

Amelia Ballroom Foyer

Dinner on Your Own

Tuesday, March 15

8:30 – 9:30 am

Hosted Breakfast

8 Flags Patio

9:30 – 10:30 am

Leadership in the New World

Amelia Ballroom



Keynote

LINDSEY POLLACK

Multigenerational Workplace Expert
New York Times Best-Selling Author of
*Recalculating: Navigate Your Career
Through the Changing World of Work*

***Recalculating: 5 Rules to Navigate Your Career
Through the Changing World of Work.***

With her signature combination of engaging storytelling, data-driven insights and immediately applicable advice, Lindsey will address such topics as:

- Adopting and maintaining a positive mindset
- Building a resilient personal brand
- Skilling and reskilling for the future
- Mastering the art of virtual communication
- Networking in the “new normal”

Attendees will leave this program with positive encouragement and clear steps to successfully recalculate and thrive in their own career and life journeys.

10:30- 10:45 am

Refreshment Break

Amelia Ballroom

10:45 – 11:45 am

Leadership in the New World Panel and Roundtable Discussion

Amelia Ballroom

Panelists:

JEFF BERG

Global Business Unit President – Advanced Solutions
DLL

ROB BOYER

Equipment Finance Group President
First Commonwealth Equipment Finance, a Division of
First Commonwealth Bank

ELLEN COMEAUX

SVP, Commercial Division Leader
TIAA Bank

MILES HERMAN

President and COO
LEAF Commercial Capital Inc.

11:45 – 12:00 pm

Roundtable Wrap Up

Amelia Ballroom



MICHAEL DICECCO

Executive Managing Director
Huntington Asset Finance
Chair of the Board, ELFA

Save the Date

October 9-11, 2022

ELFA 61ST ANNUAL CONVENTION

JW Marriott Marco Island Beach Resort
Marco Island, FL