

# Hilton Palmer House Chicago, IL



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

### **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 (Chair)**, John Deere Financial  
**Mark Bainbridge**, Caterpillar Financial Services Corporation  
**Joseph Banister**, LEAF Commercial Capital Inc.  
**Jon Biorkman**, Healthcare Financial Services, GE Healthcare  
**Brian Bower**, Bank of America Global Leasing  
**Todd Clegg**, Huntington Equipment Finance  
**Mike Elmasry**, IBM Global Financing  
**Dan Hathcoat**, Summit Funding Group, Inc.  
**Xiang Ji**, Toyota Industries Commercial Finance, Inc.  
**Christopher Johnson**, Pitney Bowes Global Financial Services  
**Sherrie Kalajian**, Presidio Technology Capital, LLC  
**Mark Lombardi**, Healthcare Financial Services, GE Healthcare  
**Brian Lowe**, Verdant Commercial Capital LLC  
**Jeremy McCulloch**, Wells Fargo Vendor Financial Services  
**Chris Meeks**, OnPoint Capital, LLC  
**Kara Miyasato**, CLFP, Stryker, Flex Financial  
**Vincent Mollica**, CIT  
**Dan Nuss**, U.S. Bank Equipment Finance  
**Sarah Palmer**, Key Equipment Finance  
**Larry Scherzer, CLFP**, Cisco Systems Capital Corporation  
**Eileen Schoonmaker**, DLL  
**Justin Tabone**, TIAA Bank  
**Greg Vandewalker**, GreatAmerica Financial Services  
**Camtu Vo**, ETAC Liaison, DLL  
**Daniel Willems Van Dijk**, CNH Industrial Capital LLC

**Captive and Vendor Finance Best Practices Roundtable**  
**April 12, 2022**  
**Palmer House Hilton**

**Agenda**

---

**11:00am – Noon**      **Check-in/Registration**

**Noon – 1:30pm**      **General Session and luncheon**

Held jointly with the attendees of the Bank, Captive and Vendor Finance, and Small Ticket Roundtables.

**Welcome**

Ralph Petta, ELFA President & CEO

**Top 10 Equipment Acquisition Trends for 2022**

Mike DiCecco, Chair, ELFA Board of Directors

Executive Managing Director, Huntington Asset Finance

**U.S. Economic Outlook**

Barry Ripes, SVP, Financial Services Leader, Equifax

**1:30 – 1:45pm**      **Break**

**1:45 – 4:30pm**      **Captive and Vendor Finance Roundtable**

**1:45pm-2:00pm**      **Welcome and Opening Remarks**

**Jayma Sandquist**

*Chair, Captive and Vendor Finance Business Council Steering Committee*

*Chief Marketing Officer, SVP JDF US& CA*

*John Deere Financial*

**2:00-3:15pm**      **New Business Model Innovations**

**Larry Scherzer**

*Senior Director, Global Payment Solutions*

*Cisco Capital*

**Mike Maple**

*Sr. Director, Sales Acceleration & Execution*

*Cisco*

**Mark Thompson**

*Chief Risk Officer*

*Toyota Commercial Finance*

**TBD**

*Toyota Commercial Finance*

**3:15pm-3:30pm** Break

**3:30pm-4:30pm** **Digitalization**

**Mark Thompson**

*Chief Risk Officer*

Toyota Commercial Finance

**Jennifer Martin**

*SVP, Sales Enablement & Initiative Support*

Key Equipment Finance

**Joe Leonard, CLFP**

*CEO*

Oakmont Capital Services

Sponsored by



## REGISTRATION AND GENERAL INFORMATION

Register by Friday, **April 3, 2020** to ensure that your name appears on the list of attendees. Please note: you must register for this conference via the ELFA website: [www.elfaonline.org/events/2022/CBP](http://www.elfaonline.org/events/2022/CBP).

### Registration Fees

Member registration fee \$410

#### **Bundled Pricing:**

Roundtable + Funding	\$1025 (first attendee)
Roundtable + Funding	\$975 (additional attendee)

If you will be attending both the roundtable and the Funding Conference, please go to: [www.elfaonline.org/events/2022/NFC](http://www.elfaonline.org/events/2022/NFC).

### 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 fees will be given for cancellations received on or after April 1, 2022.

*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:

- a. mailed to Janet Fianko at ELFA Headquarters:  
1625 Eye Street, NW, Suite 850, Washington, DC 20006-1203
- b. faxed to (202) 238-3457, Attn: Janet Fianko, or
- c. emailed to Janet Fianko at [jfianko@elfaonline.org](mailto:jfianko@elfaonline.org).

#### **Substitutions**

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

#### **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](mailto:jfianko@elfaonline.org).

### Hotel Reservations

A block of rooms is being held for attendees of the Best Practices Roundtables at the Hilton Palmer House in Chicago, located at 17 E Monroe St, Chicago, IL in the popular theatre and financial district of Chicago and near Millennium Park. A special conference rate of \$235 plus tax, single/double occupancy, is offered to attendees. Check in time is 3:00pm, and check-out time is 11:00am. Please call Reservations at (312) 726-7500, provide your arrival and departure dates and mention ELFA Room Block in order to receive the ELFA group rate.

#### **Make Hotel Reservations Online:**

We strongly encourage you to make your Funding Conference hotel reservations online. Please use this link: <https://book.passkey.com/go/AnnualNationalFunding22>

#### **Make Hotel Reservations by Monday, March 21, 2022!**

Reservations after this date are based on availability and may be at a higher rate.

### Continuing Professional Education (CPE) Credit

The Captive and Vendor Finance Best Practices Roundtable qualifies for 5 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](http://www.learningmarket.org).

### 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.

