Captive and Vendor Finance Best Practices Roundtable

April 12, 2022

Hilton Palmer House Chicago, IL



ELFA

EQUIPMENT LEASING AND FINANCE ASSOCIATION Equipping Business for Success



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		
Held		e ral Session and luncheon jointly with the attendees of the Bank, Captive and Vendor Finance, and Small et Roundtables.	
	Welc Ralpł	c ome h Petta, ELFA President & CEO	
	Mike	10 Equipment Acquisition Trends for 2022 DiCecco, Chair, ELFA Board of Directors utive Managing Director, Huntington Asset Finance	
		U.S. Economic Outlook Barry Ripes, SVP, Financial Services Leader, Equifax	
1:30 - 1:45pm	Brea	Break	
1:45 - 4:30pm	Capt	Captive and Vendor Finance Roundtable	
1:45pm-2:00pm		Welcome and Opening Remarks	
		Jayma Sandquist <i>Chair</i> , Captive and Vendor Finance Business Council Steering Committee <i>Chief Marketing Officer, SVP JDF US& CA</i> John Deere Financial	
2:00-3:15pm		New Business Model Innovations	
		Larry Scherzer <i>Senior Director, Global Payment Solutions</i> Cisco Capital	
		Mike Maple <i>Sr. Director, Sales Acceleration & Execution</i> Cisco	
		Mark Thompson <i>Chief Risk Officer</i> 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.

Registration Fees

Member registration fee\$410Bundled 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.

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.

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**.

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.

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.

ELFA CODE OF PROFESSIONAL CONDUCT

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 ELFAsponsored 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 onpremise staff at host events in any formin 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 conferencerelated social events at offsite locations and in related online communities and social media. Participants asked to stop any harassing and/ or noninclusive 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 **Iramirez@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.

RELEASE AND ASSUMPTION OF RISK

As we continue taking important steps to provide for the health and safety of our attendees, we ask that you review our COVID information, wellbeing protocols, and policies below. By registering for this event, you agree to adhere to the below policies to sustain a healthy and safe environment for our attendees. It's important that we all respond responsibly and transparently to these health precautions. Any and all private health and personal data will be treated with confidentiality and sensitivity.

Because COVID is extremely contagious and is spread mainly from persontoperson contact, Equipment Leasing and Finance Association ("ELFA") has adopted preventative measures to reduce the spread of the COVID virus at its conferences and events in accordance with guidance published by the U.S. Centers for Disease Control and Prevention for events and gatherings, in coordination with event host properties. ELFA will comply with all applicable requirements imposed by state, provincial, and local health authorities for the locality in which the conference or event takes place. However, ELFA cannot guarantee that conference attendees will not become infected with COVID.

Individuals who fall within either of the categories listed below should not attend ELFA conferences or events:

- Individuals who are experiencing, or within the 14 days prior to the conference or event have experienced, symptoms associated with COVID.
- individuals who believe that they may have been exposed to a confirmed or suspected case of COVID or have been diagnosed with COVID and are not yet cleared as noncontagious by state or local public health authorities or the health care team responsible for their treatment.

Conference and event attendees should selfmonitor for **signs** and symptoms of COVID19 and are asked to contact ELFA at **meetings@elfaonline.org** if experiencing symptoms of COVID within 14 days after participating in an ELFA conference or event.

WELL-BEING PROTOCOLS

This **document** is regularly updated with information about plans for health and safety protocols for attendees, exhibitors and staff onsite. ELFA is monitoring the evolving public health guidance regarding large gathering settings and will continue to provide updates and additional guidance.