

Palmer House Hotel • Chicago, IL

EQUIPMENT LEASING AND FINANCE ASSOCIATION
Equipping Business for Success

The Independent Best Practices Roundtable is a small, highly interactive half-day program designed to bring senior independent equipment finance executives together for information sharing and critical thinking about the issues facing you each day as leaders of your organization. The Roundtable will also provide an unparalleled networking opportunity.

Who Should Attend?

The Roundtable is open exclusively to senior executives of ELFA member independent leasing companies.

Independent Best Practices Roundtable Planning Committee

Jonathan Albin (Chair), Nexseer Capital

Hollis Bufferd, Star Hill Financial LLC

Roman Gajda, ENGS Commercial Finance Co.

Chris Pagano, Mitsubishi HC Capital America

Harrison Smith, Stonebriar Commercial Finance (ETAC Liaison)



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/IR.

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.

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:

- mailed to Janet Fianko at ELFA Headquarters:
1625 Eye Street, NW, Suite 850, Washington, DC 20006-1203
- faxed to (202) 238-3457, Attn: Janet Fianko, or
- 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 Independent Best Practices Roundtable qualifies for 5 CPE credits.

Program Details

Prerequisite: None

Preparation: None

Level of Knowledge: Basic, Overview

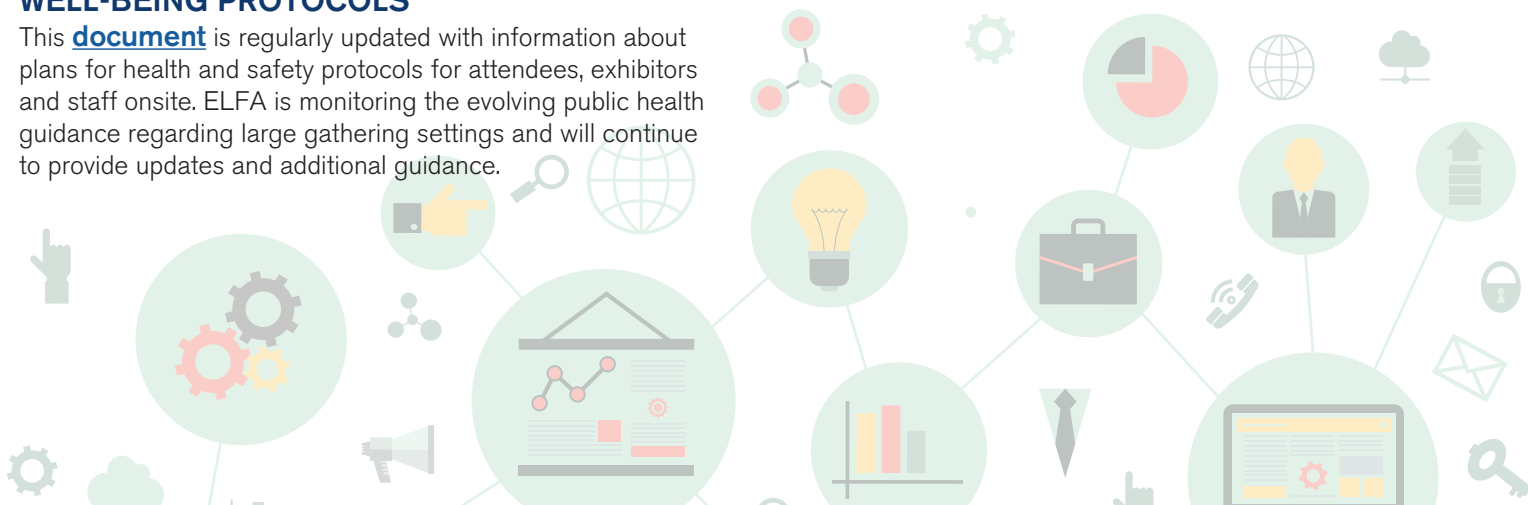
Field of Study: Management: Finance

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.



Independent Best Practices Roundtable

April 12, 2022

Hilton Palmer House, Chicago

11:00am-Noon Check-in

Noon-1:30pm General Session and luncheon

The general session and luncheon will be held jointly with the attendees of the Bank, Captive and Vendor Finance, and Small Ticket Roundtables.

1:30pm-1:45pm Break

1:45pm-4:30pm INDEPENDENT BEST PRACTICES ROUNDTABLE

1:45-2:00pm Introduction

JONATHAN ALBIN

COO, Nexseer Capital

Chair, Independent Business Council Steering Committee

2:00-3:00pm Leadership and Engaging Emerging Talent

In 2021, more than 45 million people, or 33% of the total workforce, voluntarily left their jobs. Millennials and Generation Z led this wave with 2x the resignation rate versus Boomers. Is the Great Resignation a result of a leadership crisis? Are companies adapting to the needs of younger talent? The Independent Business Council has brought together a panel of executives and emerging leaders to discuss how Independents can recruit, train, motivate and retain young talent through innovative and authentic leadership concepts and by adapting their business models to meet the unique needs and wants of emerging talent. This session will be an open discussion covering how both large and small Independents are adjusting their approach to attracting and retaining top talent from the viewpoint of the C-suite and younger managers.

MODERATOR:

HARRISON SMITH

Vice President, Stonebriar Commercial Finance

Member, Independent Business Council Steering Committee

PANELISTS:

JACOB FAHL

Vice President, Mitsubishi HC Capital America, Inc.

STEVEN HOLBEN, CLFP

Director of Digital Sales Strategy, ENGS Commercial Finance Co.

RICHARD MATTE

President, Chief Executive Officer, Encina Equipment Finance, LLC
Member, Independent Business Council Steering Committee

NANCY ROBLES
Chief Operating Officer/Compliance Officer, Eastern Funding LLC

3:00-3:15pm Break

3:15-4:25pm Mining the SEFA Data for Independents

There's a wealth of data available in ELFA's Survey of Equipment Finance Activity. It's the most important source of statistical information available on the nearly \$1 trillion equipment finance industry. At this session you'll:

- Discover key survey findings of interest to Independents, from volume growth to equipment types to residuals.
- See a demo of the cutting-edge resources and benefits—including new digital tools—available to you.
- Learn how to put the data to work for you as an Independent: benchmark your company, discover which sectors are most profitable and stay on top of industry trends.

This will be an interactive session with plenty of time for attendee participation and conversation.

MODERATOR:

ROMAN GAJDA
Director of Financial Technology Solutions, ENGS Commercial Finance Co.
Member, Independent Business Council Steering Committee

PRESENTERS:

RAY JAMES
Chair, ELFA Research Committee
Senior Consultant, Ivory Consulting Corporation

JESSICA O'BRIEN
Member, ELFA Research Committee
Vice President, Citizens Asset Finance, Inc.

BILL CHOI
VP, Research & Industry Services, ELFA

4:25-4:30pm Wrap-up