



SUNDAY, SEPTEMBER 11

6:00 – 8:00 pm

New Orleans Ghostly Legends Tour

Location: Hotel Lobby

Are you arriving Sunday evening and looking for something to do in fantastic New Orleans? Well, let's meet in the hotel lobby and enjoy a walking tour of the French Quarter and its infamous **ghostly legends!** This tour combines some of New Orleans haunted locations with the city's history and its people. Hear the stories of murders and crimes of passion of Old New Orleans. *\$30 additional fee to attend. Approximately 2 miles will be covered on a walking tour during this event. Registration is required by September 1st.*

MONDAY, SEPTEMBER 12

8:30 am

Early Registration for the Pre-Conference Session

Location: Grand Foyer, 5th Floor

9:00 am – 11:30 am

PRE-CONFERENCE Session: M&A Strategy Workshop

Location: Grand Ballroom D, 5th Floor

Whether it's the technology infrastructure change, the operational misalignments or the change management aspects, a merger/acquisition is one of the most tumultuous things an organization will go through. This exclusive pre-conference session will help prepare you as a leader for the inevitable headwinds.

During this workshop you will:

- Hear best practices on the technology, operational and people aspects of incredible change resulting from M&A
- Exchange ideas about considerations that can lead to a successful merger
- Learn about blind spots that other industry leaders have encountered
- Take back effective strategies for managing culture waves resulting from incredible change.

Discussion Leaders:

KEITH GOEPFERT

Huntington Equipment Finance

CHELSEY BARRON

LEAF Commercial Capital Inc.

JOE GRAHAM

FIS

JENNIFER MARTIN

Chair, ELFA Operations and Technology Committee
Key Equipment Finance

RON MEYER

Linedata Lending and Leasing

JENA MORGAN

KLC Financial LLC

11:30 am

General Conference Registration

Location: Grand Foyer, 5th Floor

1:00- 2:00 pm

Opening General Session (Joint Session)

Location: Grand Ballroom C, 5th Floor

Welcome

Discussion Leaders:

JOHN BOBER

Chair, ELFA Financial Accounting Committee
IXL Lease Advisory Services, LLC

JENNIFER MARTIN

Chair, ELFA Operations and Technology Committee
Key Equipment Finance

Operations & Technology Excellence Award Award Presentation

Discussion Leaders:

JENNIFER MARTIN

Chair, ELFA Operations and Technology Committee
Key Equipment Finance

TAWNYA STONE, CLFP, CLFP

Chair, Award Sub-Committee
GreatAmerica Financial Services

Top 10 Trends in Equipment Finance Acquisition

Discussion Leaders:

RALPH PETTA

President & Chief Executive Officer
Equipment Leasing and Finance Association

ROBERT NEAGLE

President and CEO
Finova Capital, LLC
Chair Elect, ELFA Board

2:00 - 2:15 pm

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

2:15 – 2:30 pm

Operations & Technology Conference Kick-Off!

Welcome to the ELFA Operations & Technology Conference! This conference is co-located with the Lease Accounting conference with joint general sessions, then we breakout into our own conference sessions. Let the Operations & Technology Fun Begin!

Discussion Leader:

JENNIFER MARTIN

Chair, ELFA Operations & Technology Committee
Key Equipment Finance

2:30 – 3:15 pm

Operations & Technology Excellence Award – 22 Years of Excellence!

Location: Grand Ballroom D, 5th Floor

Now in its twenty second year, the Operations & Technology Excellence Award program is designed to recognize noteworthy achievements in operational and technology innovation in our industry. In this session, we will honor this year's award winner and showcase their award-winning solution. Hear from our award winner as they share insights gleaned from their unique project experiences.

Discussion Leader:

TAWNYA STONE, CLFP, CLFP

Chair, Award Sub-Committee
GreatAmerica Financial Services

Award Winner: **Meridian OneCap Credit Corp.**



MICHAEL LAPIERRE

Vice President of Operations & Finance

RISH RAMJIT

Technology Lead

HUGH SWANDEL

President

3:15 – 4:30 pm

Achieve Business Agility Using Product Lifecycle Management

Location: Grand Ballroom D, 5th Floor

Equipment finance is being impacted by disruptive changes converging in the marketplace and in society. Our employees and customers are consumers that expect digital experiences of our firms. To create and deliver exceptional experiences, companies must adopt a new mindset of continuous delivery, with structure and process, allowing employees and customers to create a new future. A future that attracts and retains the best customers and employees. *Session is a little longer than most to accommodate a tabletop strategy workshop.*

Discussion Leaders:

JOE GRAHAM

FIS

RON MEYER

Linedata Lending and Leasing

LISA NOWAK

Solifi

DENIS STYPULKOSKI

Reimagine Advisors

4:30 – 5:00 pm

Exhibitor Lighting Round #1

Location: Grand Ballroom D, 5th Floor

Are you familiar with what our exhibitors have to offer? This fun and informal lightning round gives our exhibitors a short presentation window to convince their audience why they should work with them! This is a highly efficient way for conference participants to shop exhibitors and determine the vendors they want to further conversations with. You won't want to miss this!

Discussion Leaders:

ANDREW COTTER

Somerset Capital Group, Ltd.

DENIS STYPULKOSKI

Reimagine Advisors

5:00 - 5:45 pm

Newcomers Reception

Location: Grand Couteau, 5th Floor

Calling all First Time Attendees! This is a great opportunity to meet with the Conference Planning Committee and fellow First Timers. No need to be intimidated, this is the perfect event for those who are new! Don't miss out on this welcoming event. *There is no extra charge to attend this event.*



5:30 - 7:30 pm

Opening Reception/Exhibits Open

Location: Grand Foyer, 5th Floor

The ELFA Equity Committee welcomes you to a networking reception as we celebrate the contributions of the Hispanic community to the equipment finance industry and kick-off Hispanic Heritage Month!

Hispanic Heritage Month is observed from September 15th to October 15th to recognize and raise awareness to the influence of Hispanic Americans to the history, culture, and achievements of the United States.

All attendees of the ELFA Operations & Technology and Lease & Finance Accountants Conferences are invited to connect and unwind at our Latin-themed reception.

The Exhibit booths will be open as well, and you will have some time to stop by and chat. Lite fare will be served with an open bar. This event is included with all conference registrations.

See you there!



TUESDAY, SEPTEMBER 13

6:00 – 7:30 am

5K Fun Run

Location: Hotel Lobby

Start the day with a little exercise and join your colleagues for a 5K fun run around New Orleans. *There is NO EXTRA FEE to attend this event.* Meet in the hotel lobby to discuss the route.

7:00 - 8:00 am

Continental Breakfast/Exhibits Open

Location: Grand Foyer, 5th Floor

8:00 - 9:00 am

Keynote General Session (Joint Session)

Location: Grand Ballroom C, 5th Floor

Presenter:

JENNIFER MARTIN

Chair, ELFA Operations and Technology Committee
Key Equipment Finance

Keynote Presenter:



DEBORAH J. REUBEN, CLFP, DES

CEO & Founder
TomorrowZone

Deborah "Deb" Reuben, CLFP, DES, is CEO and Founder of TomorrowZone, a technology strategy consultancy inspiring fresh

ideas and collaborations to shape the future of business. She encourages new thinking to explore the art of the possible through

her extensive technical knowledge, equipment finance experience, and passion for challenging the status quo.

Her view on digital transformation and future-readiness is radically different with over two decades of innovating, speaking, and most importantly, real-life, in-the-trenches innovation experience in finance and software industries. Deborah appreciates and shares with audiences that digital transformation is less about the digital and more about the people.

Innovation Beyond the Buzzwords™

Innovation blah blah blah blah. You've heard it all before but still have not figured out how it works in your organization. You've heard all the buzzwords and learned all the jargon and lingo. But still can't figure out how to innovate better, faster, smarter, and move tangibly ahead of competitors as the business landscape is rapidly shifting under your feet.

Innovation is just sitting as a buzzword in a conference room, not tapping into the potential of your people, not making you a dime of extra profit.

Dog training is NOT about the dogs; it's about the human interaction with the dog. Digital transformation is not about digital it's about how your people interact with technology. Woof! You can have the best tech and innovation methodologies, but you are wasting your time and money if you don't get the human side right.

Have you been pulled into initiatives touted as "digital transformation" that did nothing but disrupt, derail, and distract you from the actual work you should be doing, resulting in rework, and wasted time, effort, and resources? When you reflect on it, you only wonder, "What were we thinking?"

Strap in, hang on; your thinking and doing are about to change. Let's make awesome happen together!

9:00 - 9:15am

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

9:15 – 9:45am

Spilling the [T]echnology: Finding Comfort in Failing Forward

Location: Grand Ballroom D, 5th Floor

There's a misconception within project work that failure is a bad thing. Often we do all we can to avoid it! The reality is, failing allows you to learn, grow and move forward. Through failure, leaders often become faster at making decisions, more brave and highly resilient. Join Jason Thomas, Chief Information Officer at Cole, Scott & Kissane, AmLaw 200 as we unpack examples how he (or his industry) has failed, recovered and has seen the organization grow as a result of failure. Attendees will take away

perspective and build skills that will assist in the personal growth needed to lead successful projects.

Discussion Leaders:

CANDACE REINHART, CLFP

CoreTech Leasing, Inc.

JASON THOMAS

Cole, Scott & Kissane, AmLaw 200

9:45 – 10:30 am

Disrupting Client Authentication

Location: Grand Ballroom D, 5th Floor

Client Authentication as part of Originations is a critical step in preventing fraud but can be a drain on internal resources degrading client experience along the way. Can we trust technology to solve these challenges? This session will present simple, secure, fast, and insightful options that eliminate the manual waste, provide a simple omnichannel client experience and increase organizational risk mitigation confidence.

Discussion Leader:

ANIRBAN BASAK

FortifID

OMAR BAKR

Tarana Wireless Inc.

10:30 – 10:45 am

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

10:45 – 11:15 am

Third Parties: Love'em, Leave'em, But You Better Evaluate Them

Location: Grand Ballroom D, 5th Floor

Failing to assess and manage third-party risks exposes your organization to supply chain attacks, data breaches, reputational damage and more. In this session, you will learn the risks along with important ways in which your organization can protect itself and cultivate a trusted bond with third parties.

Discussion Leaders:

KAYLIE HODGE

Middesk

CHAD CARLSON

Tamarack Technology, Inc.

ANDREW COTTER

Somerset Capital Group, Ltd.

RON MEYER

Linedate Lending and Leasing

11:15 – 11:45 am

Exhibitor Lighting Round #2

Location: Grand Ballroom D, 5th Floor

This fun and informal lightning round gives our exhibitors a short presentation window to convince their audience why they should work with them! This is a highly efficient way for conference participants to shop exhibitors and determine the vendors they want to further conversations with. You won't want to miss this!

Facilitators:

ANDREW COTTER

Somerset Capital Group, Ltd.

DENIS STYPULKOSKI

Reimagine Advisors

11:45 - 1:15 pm

Hosted Luncheon

Location: Grand Ballroom A, 5th Floor

All conference attendees are welcome to join for a joint conference networking lunch.

1:15 – 1:45 pm

E-commerce (Yin) How to Automate the Customer Experience without Losing the Personal Touch (Yang)

Location: Grand Ballroom D, 5th Floor

Customers can be hard to get but are most definitely a lot easier to lose. Nearly 43% of customers create an irreversible perception after a disappointing customer service experience. A staggering 34% say that one bad experience is enough to never shop with a company again, and that number is rising as expectations evolve. How do you balance the need to automate and stay on the cutting edge of self-service with the need to provide a balanced human approach at just the right time? Join a diverse panel of experts as we unpack the Yin and the Yang of this ever-evolving challenge.

Discussion Leaders:

CHELSEY BARRON

LEAF Commercial Capital Inc.

DEREK VANDER LINDEN

Key Equipment Finance

NICK FONG, CLFP

AP Equipment Financing

JOE GRAHAM

FIS

CANDACE REINHART, CLFP

CoreTech Leasing, Inc.

MOTO TOHDA

Tokyo Century

1:45 – 2:45 pm

A Fresh Cut on the Talent Bouquet: Empowering a More Diverse, Creative, and Impactful Workforce for the Future

Location: Grand Ballroom D, 5th Floor

Research shows that companies with more diverse workforces innovate faster and have significantly increased revenue opportunity than those that don't. How do you ensure you've got all the tools to bring in the best talent? Join industry leader and speaker Nancy Robles, COO of Eastern Funding as we learn how to make diversity, equity and inclusion a priority in your hiring and staff development processes including evolution of job descriptions, interviewing, career pathing and evaluating performance.

Armchair Interview with:

NANCY ROBLES

Eastern Funding

Moderated by:

JENNIFER MARTIN

Chair, ELFA Operations and Technology Committee
Key Equipment Finance

2:45 – 3:15 pm

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

3:15 – 3:45 pm

The New Dress Code - What WFH and RTO Mean to Culture

Location: Grand Ballroom D, 5th Floor

Your offices have undergone tremendous transformation in the last couple of years. The people of your teams, their needs, and expectations have changed just as much. In this table topic session, sit with your cohort in a facilitated discussion to team up on some of your organization's challenges and ways to solve those problems. This collaborative session will send you back to your remote, in-office, or hybrid work environment inspired by new ideas on engaging the team and building a great culture.

Discussion Leaders:

Lisa Nowak

Solifi

CANDACE REINHART, CLFP

CoreTech Leasing, Inc.

CHELSEY BARRON

LEAF Commercial Capital Inc.

PETER HAUG

LTi Technology Solutions

3:45 – 4:15 pm

Exhibitor Lightning Round #3

Location: Grand Ballroom D, 5th Floor

This fun and informal lightning round gives our exhibitors a short presentation window to convince their audience why they should work with them! This is a highly efficient way for conference participants to shop exhibitors and determine the vendors they want to further conversations with. You won't want to miss this!

Facilitators:

ANDREW COTTER

Somerset Capital Group, Ltd.

DENIS STYPULKOSKI

Reimagine Advisors

4:15 – 5:15 pm

Spark! Ignite Innovation and Employee Engagement

Location: Grand Ballroom D, 5th Floor

Establishing a culture fueled by innovative thought can arguably be the most successful step an organization takes in responding to rapidly increasing velocity of change. Workplaces that foster a culture of innovation generally subscribe to the belief that innovation is not the province of top leadership but can come from anyone in the organization. In this session you will gain insight into the power of a successful innovation culture and bring home tools that allow you to grow your own skills for leading transformation.

Discussion Leaders:

CHAD CARLSON

Tamarack Technology, Inc.

ANDREW COTTER

Somerset Capital Group, Ltd.

KEITH GOEPFERT

Huntington Equipment Finance

JENNIFER MARTIN

Chair, ELFA Operations and Technology Committee
Key Equipment Finance

TAWNYA STONE, CLFP

GreatAmerica Financial Services

DENIS STYPULKOSKI

Reimagine Advisors

5:15 – 6:45 pm

Hosted Reception/ Exhibits Open

Location: Grand Foyer, 5th Floor

Join your fellow conference attendees for a joint reception with both the Operations and Technology Conference and the Lease Accounting Conference attendees. This is a great time to mingle and chat with the fantastic exhibitors attending the conference!



WEDNESDAY, SEPTEMBER 14

7:00 - 8:00 am

Continental Breakfast/ Exhibits Open

Location: Grand Foyer, 5th Floor

Be sure to take some time to visit with our fantastic exhibitors. Booths will be closing at 9:30am.

7:00 - 8:00 am

People Power Breakfast

Location: Grand Chenier, 5th Floor

This event is open to all interested in improving Diversity in the leasing industry. We hope that means everyone! We will discuss mentoring, hiring strategies, workplace initiatives and much more in an interactive, informal session. *No additional fee for conference registrants; however, we do ask that all participants register for this event through the online conference registration. Space is limited, so be sure to register early.*

Discussion Leader:

SUMET PURI

Caterpillar

SHEILA OLIVER

John Deere Financial

8:00 - 9:15 am

Next Generation Innovation in A/R and A/P

(Joint Session)

Location: Grand Ballroom C, 5th Floor

Disruptive technologies, increased client expectations and ever evolving fraud threats are transforming the payments world. The paradigm shift offers both threat and opportunity. Join a panel of industry leaders and experts as we unpack the possibilities technology provides in the worlds of accounts receivable and accounts payable. Additionally, take a look into the future of this space as the panel unravels the accounting, operational and technology impact of crypto currency on the equipment finance industry.

With:

JEFF LEZINSKI

Odessa

Moderator

ANIRBAN BASAK

FortifID

Panelist

SCOTT NELSON

Tamarack Technology, Inc.

Panelist

DEBORAH REUBEN

TomorrowZone

Panelist

DAVID SCHWIETZ

Consultant

Panelist

9:15 – 9:30 am

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

9:30 – 10:15 am

With Great Power Comes Great Responsibility: What You Need to Know to Take Advantage of Low/No-Code Platforms

Location: Grand Ballroom D, 5th Floor

Low/no-code platforms promise a world in which business leaders can take control of their processes. Companies can easily systematize existing processes and adjust as business goals, customer expectations, and regulations change.

Sounds great, right?!

There is more to consider than just platform cost. Have you thought about process controls, change management, staffing, and compliance?

Join us for an interactive session where we'll discuss these topics and help you navigate to more process autonomy!

Discussion Leaders:

PETER HAUG

LTi Technology Solutions

LISA NOWAK

Solifi

ANDREW COTTER

Somerset Capital Group, Ltd.

10:15 – 11:45 am

Human Centered Design Workshop

Location: Grand Ballroom D, 5th Floor

Human Centered Design thinking is a creative problem-solving process and mindset that is used to imagine, create and deliver optimized client experiences. Human-centered design thinking concepts include gathering insights through empathy sessions, collaborating to generate a diverse set of ideas and building innovative solution prototypes. Join our human design thinking experts as we take an operational business problem from cradle to grave using these concepts. Collaborate with your industry and learn new skills that will be immediately transferrable to the office and can help you deliver optimized, client-based solutions to any size business problem within your organization.

Discussion Leaders:

JENNIFER MARTIN

Chair, ELFA Operations and Technology Committee

Key Equipment Finance

KEELIE FITZGERALD

Odessa

STEVEN SCHROTH

Key Equipment Finance, Digital Design Studio

AARON SIMMONS

Key Equipment Finance, Digital Design Studio

OMAR BAKR

Tarana Wireless Inc.

ANIRBAN BASAK

FortifID

11:45 am – 12:00 Noon

Lessons Learned / Take-a-ways / Wrap-up

Location: Grand Ballroom D, 5th Floor

Stay for a great wrap-up with Operations and Technology Committee Chair, Jennifer Martin. This will be a great end to a fantastic few days of learning and growing. Write down those take-a-ways, so you can go back to your office with tangible changes!

Discussion Leader:

JENNIFER MARTIN

Chair, ELFA Operations and Technology Committee
Key Equipment Finance