

The Premier Event for Equipment Finance Accounting Professionals



Lease & Finance Accountants Conference

September 12-14

Sheraton New Orleans Hotel
New Orleans, LA

- Introduction to the Leasing and Finance Industry
- CFO Roundtable
- Taxation of Leases and Service Contracts
- State of the Association and State of the Industry
- Definition of a Lease/ Lease vs. Service Discussion
- Accounting for Leases Acquired in Business Combinations and Asset Acquisitions Under ASC 842
- Transitioning to ACS 842: What You Need to Know
- Capital Markets
- CECL Overview
- Sale Leaseback/ Built to Suit/ Who owns the asset?
- Lease & Loan Pricing Basics
- Lease & Loan Pricing Advanced
- SEC and ISSB: ESG and Long-Term Sustainability
- How the "E" in ESG May Affect Your Lease Accounting
- CECL Guidance (ASC 326)
- Accounting Hot Topics: Lease Modifications, Impairments, Re-Leases, and More!
- Tax Update
- FASB Update
- Next Generation Innovation in A/R and A/P?
- Business Trends in Leasing Accounting and the Supply Chain
- Ask the Auditor and Accountant
- Unmatched networking activities!

Please Note! The ELFA Lease and Finance Accountants Conference will again be held concurrently with the ELFA Operations and Technology Conference. Both conferences will share a table top exhibit targeting companies that provide lease and finance accounting software, and other technology-related processes and systems. To participate in the exhibition or to become a sponsor of this event, please contact Steve Wafalosky at steve@larichadv.com or (440) 247-1060.

Complete conference details coming soon. Please visit the Events and Training Section of the ELFA website www.elfaonline.org.

Program
Qualifies for
NASBA CPE
Credits



EQUIPMENT LEASING AND FINANCE ASSOCIATION
Equipping Business for Success

WHO SHOULD ATTEND?

Accountants, CFOs, controllers, tax managers, treasurers, finance directors and others responsible for financial reporting activities, plus any business professionals or advisors who must be familiar with the impact of accounting on their transactions or activities.

BECOME A SPONSOR!

The ELFA Lease and Finance Accountants Conference will be held concurrently with the ELFA Operations and Technology Conference. Both conferences will share a table top exhibit targeting companies that provide lease and finance accounting software, and other technology-related processes and systems. This is a great opportunity to get in front of an expected combined attendance of about 300 people!

Sponsorships at ELFA events offer several important benefits that allow your company to achieve its marketing and sales objectives. As a sponsor, your company is showcased to decision-makers in all facets of the equipment leasing and finance industry.

If you would like to be a part of the exhibition or a sponsor of the combined conferences, please contact Steve Wafalosky at steve@larichadv.com or 440-247-1060.

2022 ELFA FINANCIAL ACCOUNTING COMMITTEE**Mr. John Bober (Committee Chair)**

IXL LEASE ADVISORY SERVICES, LLC

Mr. David AbplanalpBMO HARRIS EQUIPMENT
FINANCE CO.**Ms. Deborah A. Brady**

KEY EQUIPMENT FINANCE

Ms. Eileen Chan

ERNST & YOUNG LLP

Mr. Kyle Elken

DLL

Mr. Joseph GuageFIRST AMERICAN EQUIPMENT FINANCE,
A CITY NATIONAL BANK COMPANY**Mr. Shawn Halladay**

THE PITNEY BOWES BANK

Mr. Marc Jerusalem

PRICEWATERHOUSECOOPERS

Mr. Gary R. Kabureck

RETIRED BOARD MEMBER, IASB

Mr. Tim Kolber

DELOITTE & TOUCHE LLP

Mr. Jeff Lezinski

ODESSA TECHNOLOGIES

Mr. Herbert J. Lohmann, CPA

GE HEALTHCARE

Mr. Patrick McCartanCATERPILLAR FINANCIAL SERVICES
CORPORATION**Mr. Scott Muir**

KPMG LLP

Mr. Steven Pinamonti

IBM GLOBAL FINANCING

Mr. Derrick Prine

JOHN DEERE FINANCIAL

Mrs. Mamta Shori

WELLS FARGO EQUIPMENT FINANCE

Mr. Joseph Sebik

SIEMENS FINANCIAL SERVICES

Mr. Charlie Shannon

MOSS ADAMS LLP

Mrs. Jennifer Stembridge

TRUIST FINANCIAL CORPORATION

Ms. Amie SweeneyCBRE CORPORATE CAPITAL
MARKETS**Mr. Jeremy Simons**

ERNST & YOUNG LLP

Mr. Vincent Tesoriero

MARLIN LEASING

Mr. Jay Wilensky

CHICAGO FREIGHT CAR LEASING

Mr. Brian WilsonBANC OF AMERICA GLOBAL
LEASING**Equipment Leasing and Finance
Association Staff Liaisons:****Lisa Ramirez**EQUIPMENT LEASING AND FINANCE
ASSOCIATION**Ralph Petta**EQUIPMENT LEASING AND FINANCE
ASSOCIATION

SUNDAY, SEPT. 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.

MONDAY, SEPT. 12

8:30 am

Early Registration

Location: Grand Foyer, 5th Floor

10:00 am – Noon

Pre-Conference Workshops

- **CFO Roundtable**

Location: Grand Ballroom A

Session Leader:

Jay Wilensky

Chicago Freight Car Leasing Co, a Sasser Family Holdings Company
VP – Accounting and Finance

- **Introduction to the Leasing and Finance Industry**

Location: Grand Ballroom B

Session Leaders:

Amie Sweeney

CBRE Corporate Capital Markets Vice President

Mamta Shori

Wells Fargo Equipment Finance
CFO

Andrew Landers

Citizens Asset Finance
Head of Pricing

- **Taxation of Leases and Service Contracts**

Location: Grand Ballroom E

The economic yield of financing transactions is materially affected by how the transaction is taxed. This session will review the IRS guidance which determines how a transaction should be taxed, whether as a loan, a lease or a service contract. If improperly classified, the IRS has the power to recharacterize the tax treatment of transactions and thus affect their economic yield.

Session Leader:

Joe Sebik

Siemens Financial Services
Director – Tax Reporting

11:30 am - 7:30 pm

General Conference Registration

Location: Grand Foyer, 5th Floor

1:00 - 2:00 pm

General Session (Joint Session)

Location: Grand Ballroom C

Welcome

Presenters:

Jennifer Martin

Chair, ELFA Operations and Technology Committee
Key Equipment Finance

John Bober

Chair, ELFA Financial Accounting Committee
Managing Member
IXL Lease Advisory, LLC

Operations & Technology Excellence Award Award Presentation

Presenters:

Jennifer Martin

Chair, ELFA Operations and Technology Committee
Key Equipment Finance

Tawnya Stone, CLFP

Chair, Award Sub-Committee
GreatAmerica Financial Services

Top 10 Trends in Equipment Finance Acquisition

Presenters:

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 - 3:30 pm

Concurrent Sessions

- **Definition of a Lease/ Lease vs. Service Discussion/ Multiple Element Arrangements**

Location: Grand Salon B

Session Leaders:

Marc Jerusalem

PWC
Director, Accounting & Consulting Services

Vince Tesoriero

Marlin Leasing
VP-Controller

- **Accounting for Leases Acquired in Business Combinations and Asset Acquisitions Under ASC 842**

Location: Grand Salon E

The purpose of this session is to discuss accounting considerations for both lessees and lessors when leases are acquired in a business combination or asset acquisition under ASC 842. This session will cover lease classification, recognition and measurement (including certain valuation topics) and other relevant considerations.

Session Leaders:

Jeremy Simons

Ernst & Young LLP
Partner

Charlie Shannon

Moss Adams LLP
Partner

3:30 - 3:45 pm

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

3:45 - 5:00 pm

Concurrent Sessions

- **Transitioning to ASC 842 - What You Need to Know!**

Location: Grand Salon B

The last wave of companies are now transitioning to ASC 842. This session will share thoughts and perspectives and considerations when implementing the requirements of ASC Topic 842. This includes discussing (1) the need to and related challenges associated with socializing the new lease accounting requirements to both internal and external stakeholders, (2) the organization-wide mindset shift required when adopting the requirements including the need to enhance processes, systems, and controls, and (3) some of the more common pressure points and

related pitfalls when applying certain provisions of ASC Topic 842 (e.g., the lease identification, discount rate, lease term criterion, and applying the presentation/disclosure requirements).

Session Leaders:

Tim Kolber

Deloitte

Managing Director | Accounting Advisory
& Transformation Services

Mamta Shori

Wells Fargo Equipment Finance
CFO

- **Capital Markets**

Location: Grand Salon E

Session Leaders:

Kyle Elken

DLL

Controller

Herbert J. Lohmann

GE Healthcare

Global Leasing Controller

Chris Morris

U.S. Treasurer

DLL

Ryan Steel

Assistant Controller

DLL

5:00 - 5:45 pm

Newcomers Reception

Location: Grand Couteau, 5th Floor

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, SEPT. 13

6:00 - 7:30 am

5K Fun Run

Location: Hotel Lobby

Leader:

Amie Sweeney

CBRE Corporate Capital Markets
Vice President

Kyle Elken

DLL

Controller

7:00 - 8:00 am

Continental Breakfast/Exhibits Open

Location: Grand Foyer, 5th Floor

8:00 – 9:00 am

Keynote Session (Joint Session)

Location: Grand Ballroom C, 5th Floor

Presenter:

John Bober

Chair, ELFA Financial Accounting Committee
Managing Member
IXL Lease Advisory, LLC

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 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 - 9:15 am

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

9:15 - 10:15 am

Concurrent Sessions

- **How the "E" in ESG May Affect Your Lease Accounting**

Location: Salon B

To address the environmental aspects of ESG, lessees and lessors may undertake actions and activities that can affect their lease accounting. For example, to align with their climate-related sustainability goals, entities (lessors and lessors) may enter into new types of arrangements that must be assessed as to whether they are or contain leases, modify or terminate existing lease agreements, or lessees may take actions that trigger a reassessment of one or more of their leases.

This session will explore some of these emerging issues and arrangements, and share thoughts and perspectives about their lease accounting effects.

Session Leaders:

Scott Muir

KPMG LLP

Partner, Department of Professional Practice

Jillian Pearce

PWC

Partner

- **Lease & Loan Pricing – Basics**

Location: Salon E

This session will cover the key elements of pre-tax lease and loan pricing from the lessor perspective.

Topics will include an introduction to lease pricing, lessor return measures, pricing policy, various pricing methodologies, and the differences between economic pricing and pricing based on accounting rules.

Questions to be addressed:

- What are the key concepts of lease and loan pricing?
- What are the key metrics used in lease and loan pricing?

Session Leaders:

Scott Thacker

Ivory Consulting Corporation
Chief Executive Officer

Joe Sebik

Siemens Financial Services
Director – Tax Reporting

10:15- 10:30 am

Break

Location: Grand Foyer, 5th Floor

10:30 – 11:45 am

General Session

FASB

Location: Salon C

Session Leader:

John Bober

Chair, ELFA Financial Accounting Committee
Managing Member
IXL Lease Advisory, LLC

Gary Buesser

Board Member
Financial Accounting Standards Board

11:45- 1:15 pm

Hosted Luncheon

Location: Grand Ballroom A, 5th Floor

1:15 – 2:15 pm

Concurrent Sessions

- **Sale Leaseback, Built to Suit, Who Owns The Asset?**

Location: Salon B

This session will provide an overview of the application of the ASC 842 Lease Accounting and ASC 606 Revenue Recognition rules to transactions where the sale leaseback and asset control provisions may apply. The relevant guidance will be reviewed including, but not limited to, determining criteria for sale recognition, specific changes for real estate assets vs equipment assets, the effects of repurchase options, gain or loss recognition, accounting for failed sales, considerations of ownership for assets under construction in build to suits and asset purchasing contexts, etc. The session will illustrate the types of arrangements where the sale leaseback rules will apply and the expected impacts of those rules.

Session Leaders:

Jay Wilensky

Chicago Freight Car Leasing Co, a Sasser Family Holdings Company
VP – Accounting and Finance

Brian Wilson

Banc of America Global Leasing
Director - Leasing

Amie Sweeney

CBRE Corporate Capital Markets
Vice President

- **CECL**

Location: Salon E

This session will provide a quick review of CECL guidance (ASC 326) and share perspectives and lessons learned from companies that have adopted the standard over the past few years. The discussion will include a focus on changes that have occurred as certain

pandemic related impacts have eased and businesses evaluate the go forward approach to their models. The presentation will also include updates from the standard setters related to troubled debt restructurings and vintage year disclosures (ASU 2022-02).

Session Leaders:

Derrick Prine

John Deere Financial
Controller, US & Canada

Steven Pinamonti

IBM Financing
Senior Manager - Technical Accounting

Brian Brandenburg

Director - Accounting Advisory Services
KPMG

2:15 – 2:30 pm

Refreshment Break/ Exhibits Open

Location: Grand Foyer, 5th Floor

2:30-3:30 pm

Concurrent Sessions

- **ASC 842 – Navigating the ‘Day 2’ Accounting Considerations for Lessees**
Location: Salon B

After the adoption of ASC 842, companies still need to navigate the ongoing lease accounting requirements. This requires understanding the accounting requirements as well as having processes and controls in place. The purpose of this session is to share thoughts and perspectives about the ‘Day 2’ accounting and process considerations when accounting for changes to leases, with the primary focus being (1) lease reassessment events, (2) ROU asset impairment and abandonment, (3) lease modifications, and (4) applicability of ASC 420 post

adoption of the new guidance.

Session Leaders:

Kristi Marks

Deloitte
Senior Manager

Kyle Elken

DLL
Controller

Jeremy Simons

Ernst & Young LLP
Partner

- **Tax Update**

Location: Salon E

Certain tax laws have entered a scheduled change commencing this year and are also scheduled to change next year. Additionally, much discussion in Congress is focused on alternative energy tax incentives and investments in such assets are becoming more prevalent. This session will review the scheduled changes, touch upon the economics of them and introduce the evolving landscape of the Tax Code as it pertains to financing investments.

Session Leader:

Joe Sebik

Siemens Financial Services
Director – Tax Reporting

3:30 – 4:00 pm

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

4:00 – 5:15 pm

**General Session
ISSB**

Location: Salon C

Session Leader:

John Bober

Chair, ELFA Financial Accounting Committee
Managing Member
IXL Lease Advisory, LLC

Max Le Merle

International Sustainability Standards Board
Technical Staff

5:15 – 6:45 pm

Hosted Reception/Exhibits Open

Location: Grand Foyer, 5th Floor

WEDNESDAY, SEPT. 14

7:00 – 8:00 am

People Power Breakfast

Location: Grand Chenier, 5th Floor

Breakfast Leaders:

Sumeet Puri

Caterpillar Financial Services Corporation
Controller and Principal Accounting Officer

Sheila Oliver

John Deere Financial
Global Product Manager, Retail Product Families

7:00 - 8:00 am

Continental Breakfast/Exhibits Open

Location: Grand Foyer, 5th Floor

8:00 - 9:15 am

General Joint Session

Next Generation Innovation in A/R and A/P?

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 cryptocurrency on the equipment finance industry.

Discussion Leaders:

Scott Nelson

Tamarack Technology, Inc.
Chief Digital Officer

Jeff Lezinski

Odessa Technologies
SVP, Solutions Architecture

Deborah Reuben

TomorrowZone
CEO and Founder

Anirban Basak

FortifiD

David Schwietz

Technology and Strategy Consultant

9:15 - 9:30 am

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

9:30 - 10:45 am

Concurrent Sessions

- **Lease & Loan Pricing – Advanced**

Location: Grand Salon B

This session is a continuation of Lease & Loan Pricing – Basics. It will cover the most often used advanced concepts in lease and loan modeling and pricing and from the lessor perspective, including the impacts of taxes.

Topics will include all after-tax pricing methodologies, targeted returns, true leases, synthetic leases, quasi leases, renewable energy and municipal (tax-exempt) lease pricing.

Questions to be addressed:

- What factors need to be considered in after-tax pricing?
- What are the tax laws considered in lease pricing?

Session Leaders:

Scott Thacker

Ivory Consulting Corporation
Chief Executive Officer

Joe Sebik

Siemens Financial Services
Director – Tax Reporting

- **Business Trends That Impact Your Business Model**

Location: Grand Salon C

Our current business environment is changing, with labor shortages, supply chain issues, inflation along with other economic trends having a direct impact on our business models. Shawn Halladay will lead a discussion on how these issues are affecting companies in our industry as well as their near- and long-term implications.

Session Leader:

Shawn Halladay

Pitney Bowes Bank
Chief Financial & Operating Officer

during the conference (e.g., revenue recognition, lease accounting, CECL) and (2) the expectation of the external auditor when it comes to auditing the initial adoption and continued application of the new accounting standards.

Session Leaders:

Jeff Lezinski

Odessa Technologies
SVP, Solutions Architecture

Tim Kolber

Deloitte
Managing Director | Accounting Advisory & Transformation Services

Marc Jerusalem

PWC
Director, Accounting & Consulting Services

Jeremy Simons

Ernst & Young LLP
Partner

10:45 – 11:00 am

Refreshment Break/Exhibits Open

Location: Grand Foyer, 5th Floor

11:00 am – 12:00 pm

General Session

Ask the Accountant: Addressing Those Burning Accounting and Audit-Related Questions!

Location: Grand Salon C

After more than two and a half days of operational and accounting discussion at this conference, there are certainly a number of open questions that participants may have on their minds. This session will provide conference attendees the opportunity to ask the accounting firm professionals any questions that are lingering about (1) the application of the new accounting standards that were discussed

REGISTRATION AND GENERAL INFORMATION

Please register as far in advance as possible. Register by **Monday, August 22, 2022** to ensure that your name appears on the list of attendees. Please note: you may also register for this conference via the Internet at ELFA online: www.elfaonline.org/events/2022/LAC/.

Registration fees:

ELFA Member (1st Person).....	\$1,255
Each additional ELFA Member representative.....	\$1,210
*First time attendee.....	\$1,075
Non-members.....	\$2,515
Spouse/Companion Fee.....	\$250
Committee Member Fee.....	\$250
Speaker Fee (<i>attending entire conference</i>).....	\$625
Speaker Fee (<i>if attending day of presentation/ one day only</i>).....	waived

***See speaker/committee registration and policy under "Registration and General Information" for fee clarification.**

***First Time Attendee Fee:** First time attendee fee applies only to representatives from ELFA member companies. If at least one individual from your company is registered to attend this conference **at the full ELFA member rate**, and you have never previously attended the ELFA Lease and Finance Accountants Conference, you may register at the first time attendee rate.

To learn more about ELFA membership and its benefits, please contact Julie Benson at jbenson@elfaonline.org or 202-238-3432.

Speaker/Committee Registration Fee and Fee Policy

All speakers and Financial Accounting Committee members must complete and return the registration form. Member speakers attending the entire conference pay half the registration fee (in this case \$625). Non-member speakers attending the entire conference must pay the non-member rate (\$2,515). The fee is waived for any speaker who is attending only on the day of their presentation. Financial Accounting Committee members, regardless of length of stay at the conference, pay half the registration fee (\$625). Please make sure you check the appropriate box on the registration form. If you have questions regarding these policies, please contact Lisa Ramirez at (202) 238-3414 or lr Ramirez@elfaonline.org.

Spouse/Companion Fee

A spouse/companion attending any of the social functions must be registered and must pay the spouse/companion fee (\$250). Please mark the appropriate box on the registration form. If your spouse/companion is employed in the equipment leasing and finance industry and wishes to attend any portion of the conference content and social functions, the full attendee (ELFA member) registration fee is due.

Mail-In-Address – Please Note New Remittance Address

Mail completed registration form and payments to:
ELFA, Attn: Accounts Receivable
1625 Eye Street, NW, Suite 850
Washington, DC 20006

Register Online

Visit ELFA Online at www.elfaonline.org for information about this and other educational programs. Go to the Events & Training section for details on the agenda, speakers, location and registration information. You can register directly online via American Express, MasterCard, Discover, Diners Club or VISA on our secure server. You will receive a confirmation from the website.

Register By Fax

You may also fax your completed registration form to ELFA at (202) 238-3457. Please be sure to include the appropriate credit card information. An email confirmation will be sent to you.

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 **Monday, August 22, 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.

Photographs Taken at the Conference – Please Note the Following

Photographs of speakers and attendees may be taken at this conference. These may appear in ELFA publications or on the ELFA website. By registering for this conference, you authorize ELFA the right to use any photographs taken of you during the course of the Lease and Finance Accountants Conference.

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 ELFA-sponsored 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 on-premise staff at host events in any form—in 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 conference-related social events at off-site locations and in related online communities and social media. Participants asked to stop any harassing and/or non-inclusive 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 lr Ramirez@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.



Pre-Conference Workshops

Three workshops have been scheduled prior to the start of the conference on Monday morning, September 12 from 10:00 am – Noon. If you would like to attend one of these workshops, please check the appropriate box on the registration form.

Continuing Professional Education

Individuals attending this conference will receive 15 CPE credits. The Equipment Leasing and Finance Association (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 addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN 37219-2417. Web site: www.nasba.org. For more details regarding your CPE credits please contact Janet Fianko at jfianko@elamail.com or you may call her at 202-238-3420. You may also contact her regarding administrative policies such as complaints.

Membership Information

If you are interested in joining ELFA, please call ELFA Member Services at (202) 238-3418, or check the appropriate box on the registration form.

People Power Breakfast

Members of the ELFA Financial Accounting Committee have planned a People Power Breakfast, Wednesday, Sept. 14th from 7:00 – 8:00 am. If you would like to participate in this event, please check the appropriate box on the registration form.

Obtain all Handouts from this Conference from the Conference Resource Center

Handouts from all ELFA conferences are accessible electronically through the Conference Resource Center located at the ELFA website: <http://www.elfaonline.org/Events/?fa=crc>. As a registered attendee of the Lease and Finance Accountants Conference you may download all handouts (and audio files if available) associated with this conference at no charge. An email will be sent to you when the handouts are available for download. Be sure to log onto the site using your user name and password. For complete information about the Conference Resource Center, please contact Alexa Carnibella at 202-238-3416 or acarnibella@elfaonline.org.

Exhibitor Opportunities

An exhibition is held in conjunction with the Operations & Technology and Lease and Finance Accountants Conference. Visit the ELFA website to obtain additional details about exhibiting at these events <http://www.elfaonline.org/Events/Exhibit/> or contact Steve Wafalosky at (440) 247-1060 or steve@larichadv.com.

Sponsorship Opportunities

Sponsoring events and functions at ELFA meetings provides excellent exposure for your company. Visit the ELFA website to obtain additional details about exhibiting at these events <http://www.elfaonline.org/Events/Sponsor/> or contact Steve Wafalosky at (440) 247-1060 or steve@larichadv.com.

(All pricing includes access to both conferences (Operations & Technology + Lease & Finance Accountants))

Online Attendee Handouts	\$4,000
Conference Mobile App	\$4,000
Conference bags (eco-friendly)	\$4,000
Lanyard with company logo	\$4,000
Wi-Fi	\$4,000
Hotel Card Keys with logo	\$4,000
Keynote Speaker	\$8,000
Pens with Company Logo	\$3,000
Coffee Sleeves	\$3,000
Napkins	\$3,000

Networking Events

Newcomers Reception (Monday)	\$2,000
Reception (Monday or Tuesday)	\$3,000
Luncheon (Tuesday)	\$2,500
General Breakfast (Monday or Tuesday)	\$2,000



Inquiries

If you have a question about this conference not related to registration, please call Janet Fianko at (202) 238-3420.

Email for registration inquiries:

jfianko@elfaonline.org

(Note: no registrations can be made by telephone)

Email for conference brochure:

jfianko@elfaonline.org

Hotel Information:

A block of rooms is being held for attendees of the 2022 Lease & Finance Accountants Conference at the Sheraton New Orleans Hotel, 500 Canal St., New Orleans, LA 70130 at a discounted rate of \$219+tax. Check in time is 3:00 pm and check-out time is 11:00 am. Please call Reservations at 1 (855) 516-1090 or use the web link below before August 24, 2022. Reservations made after August 24, 2022 are based on availability and may be at a higher rate.

Make Hotel Reservations Online!

We strongly encourage you to make your hotel reservations online. Please go to this link to register online:

https://book.passkey.com/event/50337925/owner/111/home?utm_campaign=289531759.

Make your hotel reservations by August 22, 2022 to receive the discounted ELFA room rate.

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

Getting There

The Sheraton New Orleans is about 13 miles from the Louis Armstrong New Orleans International Airport (MSY). Cost from the airport to the Sheraton New Orleans is approximately \$36.00 one-way with a taxi and \$24.00 one-way via airport shuttle.

For further information about this property, including driving directions, visit their website at <https://bit.ly/3OwmNAJ>.

Attire

Business casual is appropriate for this meeting.

CONFERENCE REGISTRATION FORM

Please complete and return this registration form and mail with payment to: ELFA, Attn: Accounts Receivable, 1625 Eye Street, NW, Suite 850, Washington, DC 20006.

Please use one form per registrant: copy form for additional registrations. **To ensure your name appears on the list of attendees, ELFA must receive your registration form and payment no later than Monday, August 22, 2022.**

Please note: you may also register for this conference online at www.elfaonline.org/events/2022/LAC/.

Individual: ELFA Member (1st Person):	\$1,255
Each additional ELFA Member representative:	\$1,210
*First Time Attendee:	\$1,075
*Non-Members:	\$2,515
Spouse/Companion Fee:	\$250
Committee Member Fee:	\$625
Speaker Fee: <i>(attending entire event)</i>	\$625
Speaker Fee: <i>(if attending only on the day of presentation/one day only):</i>	waived
Spouse/Companion Fee:	\$250

*First Time Attendee Fee

The First Time Attendee Fee only applies to individuals from ELFA member companies. If you have not previously attended the Lease and Finance Accountants Conference, and at least one other individual from your company is registered at the first person attendee fee of \$1,225, you may register at the first time attendee fee of \$1,075.

***Non-members:** To review the registration policy, please refer to the General Information section of this brochure.

☐ Cancellation Policy: I have read and agree to the ELFA cancellation policy (registration will not be complete unless box is checked)

☐ Yes, I would like to attend one of the following **Pre-Conference Workshops**, scheduled Monday, September 12, from 10:00 am – Noon.

- ☐ Introduction to the Leasing and Finance Industry
- ☐ Taxation of Leases and Service Contracts
- ☐ CFO Roundtable

☐ Yes, I would like to attend the **People Power Breakfast** on Wednesday morning, September 14.

☐ Yes, I would like to attend the **Newcomer Reception** on September 12 at 5pm.

☐ Yes, I would like information about my company becoming a member of ELFA.

Name _____

Nickname for Badge _____

Title _____

Company _____

Address _____

City/State/Zip _____

Telephone (____) _____

Fax (____) _____

E-mail _____

Spouse/Companion *(if attending)* _____

For Credit Card Reservations:

FAX this form to (202) 238-3457 Attn: Meetings Dept.

☐ VISA ☐ Mastercard ☐ Amex ☐ Discover ☐ Diners Club

Total Amount to be Charged \$ _____

Card Number _____

Exp. Date _____ CVV _____

Name and address as it appears on billing statement

(please print) _____

Signature _____

Confirmations will be forwarded after registrations are received and processed.

For Office Use Only:

Date _____ Approval Code _____ Amount _____ Account # 4110-0307