

Funding Source Exhibitor Information

The National Funding Conference March 14-16, 2023

**Hilton Palmer House
Chicago, Illinois**



34 Years Helping the Industry Meet Its Funding Needs

Register now online at:

www.elfaonline.org/events/2023/NFC/

Why Participate as a Funding Source Exhibitor this Year

As a funding source, you are in the best position to fuel your growth. The ELFA National Funding Conference provides you the platform to meet and do business with diverse companies from across the industry. At the same time, the Conference is structured so that you get “face time” with the people you want to meet and consider the transactions attractive to you.

2023 Attendance Expected To Hold Strong

Every year since 2010, attendance has been on the rise at the ELFA National Funding Conference. In 2022, there were 697 attendees. ELFA anticipates that 2023 attendance will continue to grow, along with the number of Funding Sources participating as exhibitors.

2023 Funding Exhibition Planning Committee

MICHAEL J. ASH (*Committee Chair*)
Signature Financial

NICK COLVIN
Fifth Third Bank

SERA OLIVER
Key Equipment Finance

ROBERT BLEE
Healthcare Financial Services, GE
Healthcare

DAN FLUHARTY
Huntington Asset Finance

THOMAS PAGANO
Customers Commercial
Finance, LLC

DAVID R. CARDEW
Element Fleet Management

LEIF GRUNDAHL
Wells Fargo Equipment Finance

ERIC STACZEK
Fifth Third Bank

MICHAEL CLUNE
First American Equipment Finance, an
RBC/City National Company

LINDSEY MCLORG
Mitsubishi HC Capital America, Inc.

JACOB UEHLIN
U.S. Bank

CHRIS MEEKS
Onpoint Capital, LLC

To help Funding Sources conduct business *your way*, and to allow you to make the most of your time during the conference, we offer several participation options:

- 1. Exhibit Booth in the Hall**—where the action is. This is still the best place to be and be seen by all attendees. **Booths are large for comfort and privacy with a 10x15 space.**
- 2. Two Exhibit Booths in the Hall.** The second booth is *not* required to use the ELFA Electronic Appointment Scheduler, giving you **maximum flexibility** in meeting the people you want to meet, and still be part of the action.
- 3. Suite or Meeting Room Only**—greatest privacy*. You schedule your own appointments, but you will still be listed as a Funding Source for the conference. Meeting Room Funding Sources will not be required to have a presence in the exhibit hall, but are encouraged to do so. The ELFA is debuting a new online scheduler which allows suite exhibitors to schedule appointments. Suites and meeting rooms will be available to those companies who only register for the conference. We ask you to update your company profile in the Funding Source Database. If your company chooses a meeting room as a space, the main company contact will receive hotel reservation information to make your meeting room reservation after your ELFA Funding registration has been processed.
- 4. Exhibit Booth and a Hotel Meeting or Suite Room***—gives you the option to hold initial meetings in the exhibit hall and extensive meetings in more private surroundings of a hotel suite or meeting room. If your company chooses a suite as a meeting space, the main company contact will receive hotel reservation information to make your suite reservation after your ELFA Funding registration has been processed.

***Please Note:** Only companies that participate as Funding Sources will be able to reserve suites at the Hilton Palmer House. ELFA members who are not registered for the Funding Conference will not be allowed to reserve suites at the Hilton Palmer House.

The National Funding Conference Offers You the Most Value

- **An Up-To-Date Company Profile Helps Eliminate Mismatched Appointments:** Your time is valuable. You don't want to waste it on meeting with customers that may not be a good fit for your business. The first thing you need to do after you register as a Funding Source Exhibitor is update your Company Profile on the ELFA Website. It's easy! ELFA will provide you with the information on how to do this.
- **Know Who You Are Meeting With:** All attendees are required to complete a detailed profile BEFORE they can schedule appointments with any of the Funding Source Exhibitors. This allows you to be better matched with potential customers. Funding Source Exhibitors who purchase an Exhibit Booth or Suite will have access to *all attendee profiles*, not just the ones who have made appointments with you. This feature allows you to be more pro-active in determining who you want to see. *In addition, attendees will be required to identify whether they are Buyers, Sellers and/or Equity Providers.*
- **Decline Meetings With Companies That Don't Fit Your Funding Profile Now Unlimited:** Funding Source Exhibitors are able to decline an unlimited number of appointments with companies that have scheduled with them online. However, Funding Source Exhibitors must do this **within 5 days or 120 hours** of the appointment being scheduled, otherwise the appointment is set.
- **Flexibility in Scheduling Your Own Appointments:** Funding Sources are able to block up to 50% of the appointment times to schedule their own appointments.
- **On-Site Appointment Scheduling Optional this Year:** Not all Funding Source Exhibitor appointments are filled up prior to the start of the conference. Traditionally, this has allowed potential customers to sign up for an appointment on-site. You now have the choice to **Opt In or Opt Out of taking additional "walk-in" appointments**. Simply indicate your preference on the registration form.

Who Are the Attendees?

The ELFA National Funding Conference attracts the principals in leasing and finance organizations responsible for funding the company and its transactions, and for participating in transactions. They come to the National Funding Conference to meet with current funding sources and to establish new relationships to fulfill their funding needs.

Breakfast Meetings? Schedule Them for the Empire Room!

Once again, the ELFA has planned for two, full sit-down breakfasts to facilitate networking. These breakfasts are scheduled for Wednesday and Thursday mornings, March 15 and 16 from 7:00 – 8:30 am in the Empire Room. No need to make a reservation at the hotel restaurant and waste valuable time waiting in line for a table.



SCHEDULE OF EVENTS

TUESDAY, MARCH 14

11:00 am – Noon

Best Practices Roundtable Registration

(Separate registration fee from The Funding Conference)

- Bank Best Practices Roundtable
- Captives and Vendor Finance Best Practices Roundtable
- Independent Best Practices Roundtable
- Small Ticket Best Practices Roundtable

Roundtables are for senior executives from bank leasing companies, independent finance companies, captive finance companies and vendor finance companies, and Small Ticket companies respectively. The goal is to get a group of like-minded individuals together to discuss current issues they are facing and to learn from one another how each is addressing these issues. To receive more information on any of these Roundtables, please contact Alexa Carnibella at acarnibella@elfaonline.org.

Noon – 1:30 pm

Best Practices Roundtable Hosted Luncheon and General Session

The luncheon and General Session will be held jointly with attendees from all four Roundtables.

1:45 – 4:30 pm

Bank Best Practices Roundtable

Captives and Vendor Finance Best Practices Roundtable

Independent Best Practices Roundtable

Small Ticket Best Practices Roundtable

2:30 – 7:00 pm

Funding Conference Registration

2:30 – 4:30 pm

Exhibitor Set Up

5:00 – 7:00 pm

Opening Reception

WEDNESDAY, MARCH 15

7:00 – 8:30 am

Full Breakfast to Facilitate Networking

8:30 am – Noon

Individual Appointments with Funding Source Exhibitors

Noon – 2:00 pm

Hosted Luncheon

2:00 – 5:00 pm

Individual Appointments with Funding Source Exhibitors

5:00 – 6:30 pm

Hosted Reception

THURSDAY, MARCH 16

7:00 – 8:30 am

Full Breakfast to Facilitate Networking

8:30 am – Noon

Individual Appointments with Funding Source Exhibitors

Noon – 3:00 pm

Exhibitor Tear Down



REGISTRATION AND GENERAL INFORMATION

Funding Source Information

There are four different options to participate as a Funding Source Exhibitor:

1. Exhibit Booth in Hall
2. Two Exhibit Booths (one funding source may purchase two exhibit booths, only one of which must use the electronic appointment scheduler)
3. Exhibit Booth *and* a Hotel Suite/Meeting Room*
4. Hotel Suite/Meeting Room Only* (Please note: electronic scheduling of appointments is now available to all funding source exhibitors. Suites/Meeting Rooms and Booths.)

*Please Note: *Only companies that participate as Funding Sources will be able to reserve suites at the Hilton Palmer House. ELFA members who are not registered for the Funding Conference will not be allowed to reserve suites or meeting rooms at the Hilton Palmer House.*

Fees

Option No. 1: Exhibit Booth in the Hall

\$2,300 ELFA Member Funding Sources

\$4,600 Non-Member Funding Sources

- This fee includes two registered attendees, plus a one year listing in the FundingSource™.

Option No. 2: Two Exhibit Booths in the Hall

\$4,600 ELFA Member Funding Sources

\$9,200 Non-Member Funding Sources

- This fee includes four registered attendees, plus a one year listing in the FundingSource™.

Option No. 3: Exhibit Booth in the Hall *and* a Hotel Suite/Meeting Room

\$3,300 plus cost of Suite; \$240 a night for a One Bed Suite or \$450 a night for a Parlor Suite

- This fee includes two registered attendees, plus a one year listing in the FundingSource™.
- Once Funding Source registration is complete the key contact will receive emailed hotel information to reserve their meeting suite at a rate of \$240 or \$450. Meeting rooms can be reserved at a lower rate than the discounted hotel rate of \$269 per day.

Option No. 4: Hotel Suite/Meeting Room Only

\$2,800 plus cost of Suite, \$240 a night for a One Bed Suite or \$450 a night for a Parlor Suite

- This fee includes two registered attendees, plus a one year listing in the FundingSource™.
- Electronic appointment scheduling will not be available to those funding sources who select this option.
- Once Funding Source registration is complete the key contact will receive emailed hotel information to reserve their meeting suite at a rate of \$240 or \$450. Meeting rooms can be reserved at a lower rate than the discounted hotel rate of \$269 per day.

Each additional Funding Source Exhibitor: **\$825**

(available to individuals whose companies have already purchased a booth or meeting room)

Planning Committee Exhibitor Attendee: **\$415**

Requirements for Hotel Meeting Room and Suite-Only Exhibitors

To enhance the experience of the National Funding Conference for all, we ask that Hotel Suite-Only Funding Sources follow these requirements:

- Arrange your appointments as closely as possible to the same schedule used in the Exhibit Hall
- Allow ELFA to provide your suite number to individuals who have an appointment with you & need the information.

Cost Includes

1. Full conference registration for TWO people per funding source fee. If you decide to purchase two booths, the conference registration fee entitles you to FOUR attendees per funding source fee. (Additional individuals from registered funding source companies may register at \$825 each.)
2. Your company name in the online Attendee Brochure.
3. A one-year listing in **FundingSource™**. The ELFA Funding Database contains the most comprehensive listing of funding sources in the equipment leasing and finance industry. Each listing allows you to detail your company's funding programs, desired credit criteria, the size of transactions you prefer and finally, to describe your company core business focus. The **FundingSource™** database is used daily by member leasing companies seeking funding partners.
4. 10 HOURS of scheduled appointment time for each Funding Source/Attendee (each appointment is scheduled for 20 minutes).
5. Identification sign for each booth purchased.
6. Piping, draping, table and chairs for each booth.

A processing fee of \$500 will be applied to all Funding Source Exhibitor cancellations. **Due to the nature of the conference, no Funding Source registration fees will be refunded after Monday, February 27, 2023.**

Assignment of Space

Booths will be assigned alphabetically, with the exception of the Hotel Suite/Meeting Room-Only Funding Sources.

Important Feature for Appointment Scheduling On-Site Appointment Scheduling Optional This Year:

Not all Funding Source Exhibitor appointments are filled up prior to the start of the Conference. Traditionally, this has allowed potential customers to sign up for an appointment on-site. Funding Sources now have the choice to **Opt In or Opt Out of taking additional "walk-in" appointments**. Simply indicate your preference on the registration form.

Sponsorship Opportunities

In addition to the many benefits of exhibiting, sponsoring events and functions at the ELFA Funding Conference provides excellent exposure for your company. Contact Steve Wafalosky at steveuw@larichadv.com or 440-247-1060 if you are interested in sponsoring any of the events/items listed below:

Elevator Clings on meeting floor (4 total)	\$10,000
Mirror Cling on meeting floor	TBD
Pillar Decal on meeting floor	TBD
Wi-Fi in Meeting Area	\$6,000
Mobile App	\$6,000
Attendee Bag	\$5,000
Lanyard with Company Logo	\$5,000
Hotel Card Key	\$6,000
Pens with logo	\$3,000
Coffee sleeves	\$3,000
Napkins with logo	\$3,000

Sit-Down Networking Breakfast

Wednesday, March 15	\$3,000
Thursday, March 16	\$3,000

Luncheon	\$5,000
Women's Council Reception	\$3000
Opening Reception	\$7,000
Closing Reception	\$5,000

Hotel Reservations

A block of rooms is being held for attendees of the 34th Annual National Funding Conference 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 \$240 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/ELFA-2023FundingConference>.

***Make Hotel Reservations by
Friday, February 10, 2023!***

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

Hotel Reservations for Funding Sources Suites at Hilton Palmer House

A block of suites has been reserved for this exhibition at the Hilton Palmer House in Chicago, located at 17 E Monroe St, Chicago, IL. A special group rate of \$240 a night for a One Bed Suite or \$450 a night for a Parlor Suite. Following your Funding Exhibitor registration completion, you will receive a separate email containing contact information with our assigned ELFA Reservation Coordinator at the Palmer House to reserve your Suite. Meeting rooms can be reserved at a lower rate than the discounted hotel rate of \$250 per day.

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Getting There

The Hilton Palmer House is located in the popular theatre and financial district of Chicagoland. Approximately 18 miles from Chicago-O'Hare International Airport, 11 miles from Chicago Midway Airport. If renting a car, the Hilton Palmer House has valet parking and self-parking from \$47 per day. Visiting by Metro - When taking public transportation from O'Hare International Airport, take the Blue Line train to Monroe/Dearborn stop. Take Monroe east to the hotel. The Palmer House is on the south side of the street. From Midway Airport, take the Orange Line from Midway to downtown. Get off at the Adams/Wabash stop. The Palmer House is located on the west side of Wabash Avenue.

For additional transportation information, please visit the hotel website at <https://www3.hilton.com/en/hotels/illinois/palmer-house-a-hilton-hotel-CHIPHHH/maps-directions/index.html>

Photographs Taken at the Conference

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 National Funding Conference.

Attendee Contact Information

Please Note the Following: By registering for this conference, 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.

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.

WELL-BEING PROTOCOLS

This [document](#) is regularly updated with information about plans for health and safety protocols for attendees, exhibitors and staff on-site. ELFA is monitoring the evolving public health guidance regarding large gathering settings and will continue to provide updates and additional guidance.

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, well-being 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 person-to-person 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; or 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 non-contagious by state or local public health authorities or the health care team responsible for their treatment.

Conference and event attendees should self-monitor for **signs and symptoms** of COVID-19 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.

