

The Premier Event for Equipment Finance Accounting Professionals

# Lease & Finance Accountants Conference

**September 11-13**

Sheraton New Orleans Hotel  
New Orleans, LA

- Fraud
- Exploring the Power of Artificial Intelligence and Generative AI
- Top 10 Trends in Equipment Finance Acquisition
- Intro To Leasing and Finance
- Taxation of Leases and Service
- Equipment Lessors: Navigating the Lease Accounting Guidance
- Lease and Loan Pricing Basic
- ESG - How it Effects Leasing
- Sale Leaseback
- What if a Recession Happened?
- How Might One Ripple Through the Economy? Which Business Sectors Would be Hit Hardest?
- Climate Financing
- A Conversation with the FASB & IASB: Where We Are Today and What's Next
- CECL - What to know about the new Credit Loss Standard and Why its Roar is worse than its Bite!
- Lease and Loan Pricing Advanced
- CFO Roundtable
- Securitizations & Syndications - Reaching the Checkered Flag!
- Tax Law Update
- Lease Accounting Impact with the Current Economic Environment As a Service/ Service Contracts with Multiple Elements
- CECL Basics
- Capital Markets Advanced- Securitizations
- Ask the Accountants: Addressing Those Burning Accounting and Audit-related Questions!
- 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@cvmpmedia.com](mailto:steve@cvmpmedia.com) or (440) 247-1060.

Complete conference details coming soon. Please visit the Events and Training Section of the ELFA website [www.elfaonline.org](http://www.elfaonline.org).

Program  
Qualifies for  
NASBA CPE  
Credits



EQUIPMENT LEASING AND FINANCE ASSOCIATION  
*Equipping Business for Success*

**NEW THIS YEAR:****Attend In-Person or Virtually**

ELFA is offering the Lease & Finance Accountants Conference as a hybrid event! You have the flexibility to choose the option that works best for you:

**In-Person:**

Attend the Lease & Finance Accountants Conference in-person to connect with colleagues in New Orleans. Onsite attendees will enjoy unparalleled opportunities to network, do business and uncover ideas to help your business grow. All in person attendees will also have access to attend virtually to education sessions as well.

**Virtual:**

Attend the Lease & Finance Accountants Conference remotely to hear from industry experts from the comfort of your home or office. Watch livestreams of high-quality educational sessions and top-notch keynote speakers when and where it's most convenient for you—for a discounted price.

**2023 ELFA FINANCIAL ACCOUNTING COMMITTEE****Jay Wilensky - Chair**

SASSER FAMILY COMPANIES

**Joseph Guage**FIRST AMERICAN EQUIPMENT FINANCE,  
AN RBC / CITY NATIONAL COMPANY**Steven Pinamonti**

IBM GLOBAL FINANCING

**John Bober - Past Chair**

IXL LEASE ADVISORY SERVICES, LLC

**Shawn Halladay CLFP**PITNEY BOWES GLOBAL  
FINANCIAL SERVICES**Derrick Prine**

JOHN DEERE FINANCIAL

**David Abplanalp**

BMO HARRIS EQUIPMENT FINANCE

**Marc Jerusalem**

PRICEWATERHOUSECOOPERS LLP

**Sumeet Puri**CATERPILLAR FINANCIAL SERVICES  
CORPORATION**Therese Babiash**

GATX CORPORATION

**Gary Kabureck**RETIRED BOARD MEMBER, IASB  
XEROX CORPORATION**Joseph Sebik**

SIEMENS FINANCIAL SERVICES, INC.

**Deborah Brady**

KEY EQUIPMENT FINANCE

**Tim Kolber**

DELOITTE

**Charlie Shannon**

MOSS ADAMS LLP

**Matthew Derba**

COHN REZNICK LLP

**Jeffrey Lezinski**

ODESSA

**Mamta Shori**

WELLS FARGO EQUIPMENT FINANCE

**Kyle Elken**

DLL

**Herbert Lohmann**HEALTHCARE FINANCIAL SERVICES,  
GE HEALTHCARE**Jeremy Simons**

ERNST &amp; YOUNG LLP

**Matt Esposito**

GRANT THORNTON LLP

**Scott Muir**

KPMG LLP

**Amie Sweeney**

CBRE

**SUNDAY, SEPTEMBER 10**

6:00 – 8:00 pm

**New Orleans Historic Music and Jazz Tour**

\$30 additional fee to attend. Approximately 2 miles will be covered on a walking tour during this event. *Attendees must pre-register to attend this event.*

*Location: Hotel Lobby*

**MONDAY, SEPTEMBER 11**

8:30 am

**Early Registration for the Pre-Conference Sessions**

*Location: Grand Ballroom Foyer, 5<sup>th</sup> Fl.*

9:30 am – 11:30 am

**PRE-CONFERENCE SESSIONS****Anatomy of a Breach: Safeguarding Against Ransomware Attacks**

*Location: Grand Ballroom B, 5<sup>th</sup> Fl.*

Join Howard Shiebler, President at Crossroads Equipment Lease and Finance, who will be sharing his experience with a ransomware attack. Discover the intricate details of the attack, early actions to mitigate the damage, and gain valuable insights on remediation. Learn actionable strategies to fortify your cybersecurity defenses and walk away with tools to help secure your organization from this very real and evolving threat.

*Discussion Leaders:*

**Andrew Cotter**

*EVP, Chief Information Officer*

Somerset Capital Group, Ltd.

**Daniel Gonzalez**

*VP, Business Development*

Odessa

**Howard Shiebler**

Crossroads Equipment Lease and Finance

**Exploring the Power of Artificial Intelligence and Generative AI**

*Location: Grand Chenier, 5<sup>th</sup> Fl.*

In this presentation, we delve into the realm of artificial intelligence (AI) and generative AI, and how they are revolutionizing the business world. This session will demystify these cutting-edge technologies and shed light on their profound implications for industry with an emphasis on use cases in accounting and finance. This session will explain the fundamentals of AI, including generative AI and provide an overview of the landscape for these enablers as well as use cases for how they are deployed today.

*Discussion Leaders:*

**Ed Hayden**

Deloitte

11:30 am - 7:30 pm

**General Conference Registration**

*Location: Grand Ballroom Foyer, 5<sup>th</sup> Fl.*

1:00 - 2:00 pm

**Opening General Session (Joint Session)**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

**Welcome**

*Discussion Leaders:*

**Jay Wilensky**

Chair, ELFA Financial Accounting Committee

**Tawnya Stone, CLFP**

Chair, ELFA Operations and Technology Committee

**Operations & Technology Excellence Award**

Award Presentation

*Discussion Leaders:*

**Tawnya Stone, CLFP**

Chair, ELFA Operations and Technology Committee

**Candace Reinhart, CLFP**  
Chair, Award Sub-Committee

## **Top 10 Trends in Equipment Finance Acquisition**

**Robert Neagle**  
*President and CEO*  
Finova Capital, LLC  
ELFA Board Chair

2:00 - 2:15 pm

### **Refreshment Break/Exhibits Open**

*Location: Grand Ballroom Foyer*

2:15 - 3:30 pm

### **Concurrent Sessions**

- **Intro To Leasing and Finance**

*Location: Grand Ballroom B, 5<sup>th</sup> Fl.*

*Speakers:*

**Mamta Shori**

*CFO*

Wells Fargo Equipment Finance

**Amie Sweeney**

*Vice President*

CBRE

- **Taxation of Leases and Service Contracts**

*Location: Grand Chenier, 5<sup>th</sup> Fl.*

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.

*Speakers:*

**Joe Sebik**

*Director of Tax*

Siemens Financial Services, Inc.

- **Equipment Lessors: Navigating the Lease Accounting Guidance**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

This session will provide thoughts and perspectives about applying the lease accounting guidance to equipment leasing arrangements from the lessor standpoint. The topics discussed will include, but not be limited to: (1) identifying whether an arrangement is or contains a lease including when arrangement includes the use of a “free asset”, (2) applying the lessor practical expedient to not separate lease and nonlease components in equipment leasing arrangements, (3) allocating the consideration in equipment lease arrangements to lease and nonlease components, (4) evaluating the classification of the lease including the impact of ASU 2021-05, Lessor’s accounting for certain leases with variable payments, (5) accounting for fixed and variable structures, (6) applying the sale and leaseback requirements to equipment contracts, and (7) understanding the lease accounting requirements for master lease agreements.

In addition, the discussion may touch on the application of the lease modification framework (time permitting).

*Speakers:*

**Tim Kolber**

*Managing Director | Accounting Advisory  
& Transformation Services*

Deloitte

**Therese Babiash**

*Director of Accounting Policy*

GATX Corporation

3:30 - 3:45 pm

**Refreshment Break/Exhibits Open**

*Location: Grand Ballroom Foyer*

3:45 - 5:00 pm

**Concurrent Sessions**

- **Lease and Loan Pricing Basic**

*Location: Grand Chenier, 5<sup>th</sup> Fl.*

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?

*Speakers:*

**Scott Thacker**

*Chief Executive Officer*

Ivory Consulting Corporation

**Joe Sebik**

*Director of Tax*

Siemens Financial Services, Inc.

- **ESG - How it Effects Leasing**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

*Speakers:*

**John Bober**

*Managing Member*

IXL Lease Advisory Services, LLC

**Lauren Pesa**

*Partner, Audit & Assurance*

Deloitte

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

*Location: Grand Ballroom B, 5<sup>th</sup> Fl.*

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.

*Speakers:*

**Amie Sweeney**

*Vice President*

CBRE

**Matt Derba**

*Partner - National Assurance*

CohnReznick LLP

5:00 - 5:45 pm

**Newcomers Reception**

*Location: Grand Couteau, 5<sup>th</sup> Fl.*

5:30 - 7:30 pm

**Hosted Reception/ Exhibits Open**

*Location:*

## **TUESDAY, SEPTEMBER 12**

6:00 - 7:30 am

**5K Fun Run**

*Location: Hotel Lobby*

*Leaders:*

**Amie Sweeney**

*Vice President*

CBRE

**Kyle Elken**

*Controller*

DLL

7:00 - 8:00 am

**Continental Breakfast/Exhibits Open**

*Location: Grand Foyer Ballroom*

8:00 – 9:00 am

**Keynote Session: 2023 Economic Outlook**

*(Joint Session)*

*Location: Grand Ballroom C, 5<sup>th</sup> Fl*

Welcome:

**Jay Wilensky**

Chair, ELFA Financial Accounting Committee

*Keynote Presenter:*

**Jeff Jensen**

**Vice President**

Keybridge LLC



Keybridge's 2023 Economic Outlook for the equipment finance industry. Jeff will speak about the state of the U.S. economy and implications for the equipment finance industry. His presentation will also highlight several relevant

resources published by the Equipment Leasing & Finance Foundation. When making plans for 2023, you certainly do not want to miss this fantastic presentation!

9:00 - 9:15 am

**Refreshment Break/Exhibits Open**

*Location: Grand Ballroom Foyer*

9:15 - 10:15 am

**Joint General Session: Smart Start Strategies: Solving Tomorrow's Problems Today - Your toolkit for making awesome happen from Day One**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

Change isn't going to be slower than right now. We don't know what we don't know. So, awareness is low. Stakes are high. Risks are high. No time to screw it up. What if we could solve tomorrow's problems today?

This presentation uncovers how to systematically future proof and avoid project drama/anxiety and major failures by starting right. Walk away with a process to transform the way you initiate your next project.

- Boost clarity and shared understanding.
- Accelerate collaboration.
- Avoid catastrophe.

Is this you? Are you:

- Participating in game changing projects to shape the future of your business.
- streamlining processes or procedures?
- implementing new policies or even a new system?
- fighting to keep your project on budget?

Transformational project success begins before kicking off. Join Deb Reuben, CLFP for an exploration of what it takes to start smart.

*Speaker:*

**Deb Reuben CLFP, DES**  
*CEO & Founder*  
 TomorrowZone

10:15- 10:30 am

#### **Break**

*Location: Grand Foyer*

10:30 – 11:45 am

#### **General Session: A Conversation with the FASB & IASB: Where We Are Today and What's Next**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

This panel will cover the current technical agenda of the Financial Accounting Standards Board and International Accounting Standards Board and areas of focus as well as other emerging topics of relevance to the leasing industry and capital markets as a whole.

*Speakers:*

**John Bober**  
*Managing Member*  
 IXL Lease Advisory Services, LLC

**Bob Uhl**

*IASB Member*  
 International Accounting Standards Board

**Ashley Tisckos**

*Project Manager*  
 Financial Accounting Standards Board

11:45- 1:15 pm

#### **Hosted Luncheon**

*Location: Grand Ballroom A, 5<sup>th</sup> Fl.*

1:15 – 2:15 pm

#### **Concurrent Sessions**

- **CECL - What to know about the new Credit Loss Standard and Why its Roar is worse than its Bite!**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

This session provides an overview of the CECL standard as well as a discussion of key technical implementation challenges and lessons learned from those companies that have already adopted this highly subjective standard. The following will be discussed: The general principles of CECL; What to consider for your CECL implementation plan; and Practical guidance based on lessons learned from those who have already adopted the standard.

*Speakers:*

**Matt Esposito**  
*Partner*  
 Grant Thornton LLP

**Stephen McKinney**

*Director, National Office*  
 Deloitte

- **Lease and Loan Pricing Advanced**

*Location: Grand Chenier, 5<sup>th</sup> Fl.*

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?

*Speakers:*

**Scott Thacker**

*Chief Executive Officer*

Ivory Consulting Corporation

**Joe Sebik**

*Director of Tax*

Siemens Financial Services, Inc.

- **Business Advisory Skills (Soft Skill) Roundtable**

*Location: Grand Couteau, 5<sup>th</sup> Fl.*

Professional success in our industry is more than just what you do, it's just as critical how you do it. As information technologies continue to advance and access to expert knowledge increases, it is the ability to master the often neglected soft skills that will distinguish each one of us professionally. In this session, you will have an opportunity to discuss, share and learn from your peers how to better leverage soft skills and increase the impact you can have on your organization and career.

*Speakers:*

**Joe Guage**

*Chief Financial Officer*

First American Equipment Finance, an

RBC / City National Company

**Jay Wilensky**

*Senior Vice President, Accounting & Finance*

Sasser Family Companies

2:15 – 2:30 pm

**Refreshment Break/ Exhibits Open**

*Location: Grand Foyer*

2:30-3:30 pm

**Concurrent Sessions**

- **CFO Roundtable**

*Location: Grand Couteau, 5<sup>th</sup> Fl.*

This session will provide an opportunity for CFOs, Controllers, and senior level management to engage in a peer led discussion covering current market and economic trends, talent development, and other organizational matters.

*Speakers:*

**Jay Wilensky**

*Senior Vice President, Accounting & Finance*

Sasser Family Companies

**Mamta Shori**

*CFO*

Wells Fargo Equipment Finance

**Tim Kolber**

*Managing Director | Accounting Advisory & Transformation Services*

Deloitte

- **Securitizations & Syndications – Reaching the Checkered Flag!**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*



While many of us race to the finish our lease or loan sale accounting, this session will provide an overview of common accounting potholes associated with securitization and financing transactions. While keeping your eyes on that first-place finish, this session will make you aware of common warning flags when analyzing securitization vehicles for consolidation and necessary accounting pit stops to make when determining whether leases transferred may be accounted for as financial sales.

This session will provide an overview of securitization transactions, consolidation analysis, legal opinions, and other special sale considerations.

*Speakers:*

**Matt Esposito**

*Partner*

Grant Thornton LLP

**Ryan Steel**

*Assistant Controller*

DLL

- **Tax Law Update**

*Location: Grand Chenier, 5<sup>th</sup> Fl.*

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.

*Speaker:*

**Joe Sebik**

*Director of Tax*

Siemens Financial Services, Inc.

3:30 – 4:00 pm

**Refreshment Break/Exhibits Open**

*Location: Grand Foyer*

4:00 – 5:15 pm

**General Session: Lease Accounting Impact of the Current Economic Environment**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

Companies across the spectrum are experiencing economic disruption in the form of high inflation, rising interest rates and geopolitical events. Given these, companies are faced with lease accounting challenges that they might not experience in a more stable economic environment. This session will tackle those challenges, addressing the effects of inflation, rising interest rates, and more on entities' lease accounting.

*Speakers:*

**Jeremy Simons**

*Partner*

Ernst & Young LLP

**Scott Muir**

*Partner - Department of Professional Practice*  
KPMG LLP

5:30 - 7:00 pm

**Hosted Reception/Exhibits Open**

*Location:*

**WEDNESDAY, SEPTEMBER 13**

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7:00 - 8:00 am

**Continental Breakfast/Exhibits Open**

*Location: Grand Foyer*

8:00 - 9:15 am

**General Session - Joint Session**

**As a Service/ Service Contracts with Multiple Elements**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

This session will cover the intricacies of evaluating "As-a-Service" arrangements and their potential to include embedded lease components. "As-a-Service" models have revolutionized various industries, offering flexible and scalable solutions. However, these arrangements may contain embedded lease components that require careful evaluation in order to arrive at the accurate financial impact and assessment.

Join us as we unravel the complexities of embedded lease impacts in "As-a-Service" arrangements. We will discuss how these contracts combine both service and lease components, making it crucial to understand their implications from an accounting and financial perspective.

Through practical examples and an interactive discussion, you will gain a comprehensive understanding of the evaluation process and how to apply lease accounting standards effectively in "As-a-Service".

*Speakers:*

**Jeff Lezinski**

*SVP Solution Architecture*

Odessa

**Steve Pinamonti**

*Senior Technical Accounting Manager*

IBM Financing

**Daniel Gonzalez**

*VP, Business Development*

Odessa

**Chelsey Barron**

*Vice President of Sales Operations*

LEAF Commercial Capital Inc.

**Tim Kolber**

*Managing Director | Accounting Advisory &*

*Transformation Services*

Deloitte

**Scott Muir**

*Partner - Department of Professional Practice*

KPMG LLP

9:15 - 9:30 am

**Refreshment Break/Exhibits Open**

*Location:*

9:30 - 10:45 am

**Concurrent Sessions**

- **CECL – What to Know About the New Credit Loss Standard and Why its Roar is Worse Than its Bite! [REPEAT]**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

This session provides an overview of the CECL standard as well as a discussion of key technical implementation challenges and lessons learned from those companies that have already adopted this highly subjective standard. The following will be discussed: The general principles of CECL; What to consider for your CECL implementation plan; and Practical guidance based on lessons learned from those who have already adopted the standard.

*Speakers:*

**Brennan Palladino**

*Manager, Technical Accounting*

DLL

**Charlie Shannon**

*Partner*

Moss Adams LLP

- **Capital Markets Advanced-Securitizations**

*Location: Grand Chenier, 5<sup>th</sup> Fl.*

The use of unsecured borrowing to fund new leasing transactions is not a viable option for many companies in our industry. Several of these businesses turn to the securitization market to fund their ongoing liquidity needs. In this session we will discuss how companies can leverage this market to provide the necessary funding for their operations.

*Speakers:*

**Joseph Guage**

*Chief Financial Officer*

First American Equipment Finance, an  
RBC / City National Company

**Christopher Morris**

*U.S. Treasurer*

DLL

**Don Sivick**

*Managing Director, Head US Auto and  
Equipment ABS*  
RBC Capital Markets

10:45 – 11:00 am

**Refreshment Break/Exhibits Open**

*Location: Grand Foyer*

11:00 am – 12:00 pm

**General Session**

**Ask the Accountants: Addressing Those Burning  
Accounting and Audit-related Questions!**

*Location: Grand Ballroom C, 5<sup>th</sup> Fl.*

After more than two and a half days of  
operational and accounting discussion at this

conference, there may be a number of open questions that participants have on their minds. This session will provide conference attendees the opportunity to ask the accounting firm professionals their lingering questions about (1) the application of the accounting standards and related requirements that were discussed during the conference (e.g., lease accounting, revenue recognition, business combinations, CECL) and (2) expectations of the external auditor when it comes to auditing the application of the new accounting standards.

*Speakers:*

**Matt Esposito**

*Partner*

Grant Thornton LLP

**Marc Jerusalem**

*Managing Director, Accounting & Consulting  
Services*

PricewaterhouseCoopers LLP

**Tim Kolber**

*Managing Director | Accounting Advisory &  
Transformation Services*

Deloitte

**Scott Muir**

*Partner - Department of Professional Practice*  
KPMG LLP

**Jeremy Simons**

*Partner*

Ernst & Young LLP

**Jeffrey Lezinski**

*SVP Solution Architecture*  
Odessa

## REGISTRATION AND GENERAL INFORMATION

Please register as far in advance as possible. Register by **Monday, August 21, 2023** 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/2023/LAC/](http://www.elfaonline.org/events/2023/LAC/).

### Registration fees:

ELFA Member (1st Person).....	\$1,355
Each additional ELFA Member representative.....	\$1,305
*First time attendee.....	\$1,160
Non-members.....	\$2,715
Spouse/Companion Fee.....	\$200
Committee Member Fee.....	\$625
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](mailto: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 (\$2,715). 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](mailto: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 (\$200). 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](http://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 21, 2023**.

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](mailto: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](mailto: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.



## 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](http://www.nasba.org). For more details regarding your CPE credits please contact Janet Fianko at [jfianko@elamail.com](mailto: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.

## Pre-Conference Workshops

Three workshops have been scheduled prior to the start of the conference on Monday morning, September 11 from 10:00 am – Noon. If you would like to attend one of these workshops, please be sure to book the appropriate hotel accommodations. You do not need to pre-register for these sessions.

## 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](mailto: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@cvmpmedia.com](mailto:steve@cvmpmedia.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@cvmpmedia.com](mailto:steve@cvmpmedia.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](mailto:jfianko@elfaonline.org)

(Note: no registrations can be made by telephone)

## Email for conference brochure:

[jfianko@elfaonline.org](mailto:jfianko@elfaonline.org)

## Hotel Information:

A block of rooms is being held for attendees of the 2023 Lease & Finance Accountants Conference at the Sheraton New Orleans Hotel, 500 Canal St., New Orleans, LA 70130 at a discounted rate of \$229+tax. Check in time is 4:00 pm and check-out time is noon. Please call Reservations at 1 (855) 516-1090 or use the web link below before August 21, 2023. Reservations made after August 21, 2023 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/e/50489033>.

**Make your hotel reservations by August 21, 2023 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>.

## Parking

Limited self-parking is available at the hotel for \$35.00 per day as a hotel guest and valet parking is available for \$48.00 per day.

## Attire

Business casual is appropriate for this meeting.