

ELFA EQUITY FORUM

Sheraton New Orleans Hotel • New Orleans, LA

Presented by the ELFA Equity Committee

A Journey That Involves All Of Us

Diversity, Equity, and Inclusion are
Good for Business, Good for Hiring,
and Good for You.



ELFA

EQUIPMENT LEASING AND FINANCE ASSOCIATION
Equipping Business for Success

Invitation to Participate

Please join us at the 2023 ELFA Equity Forum. Our theme this year is “A Journey That Involves All Of Us – Diversity, Equity and Inclusion is Good for Business, Good for Hiring and Good for You.”

We will explore the connection between having a culture with a strong focus on diversity, equity and inclusion and increased shareholder value creation, higher customer satisfaction, and increased employee engagement. We will also examine how to hire with a DEI-mindset and how to create a welcoming and inclusive corporate environment.

Also, we will showcase the accomplishments of ELFA Equity in the four years since it was inaugurated and hear about three other DEI initiatives in the equipment finance industry.

We have designed the Forum to spark new ideas and provide inspiration and tools to help you advance and thrive in your professional career. If you're looking for a comfortable place to meet other people like yourself, learn tips on how to succeed as a diverse person, think about ways to recruit other diverse people to the equipment finance industry, be an outstanding ally or build your professional network, this event is for you.

Learn more and register today to engage with your colleagues from across the industry at www.elfaonline.org/events/2023/EF.

If you have any questions or need assistance, please email ELFA Equity's staff liaison Eboni Preston-Laurent epreston@elfaonline.org



Scott Thacker, founding chair, ELFA Equity, immediate past chair, Equipment Leasing & Finance Foundation, and chief executive officer, Ivory Consulting Corporation.

We look forward to seeing you on September 13 and 14!

SCOTT THACKER
Chair, ELFA Equity Committee

EQUITY FORUM PLANNING SUBCOMMITTEE

Scott Thacker - CEO, Ivory Consulting Corp. Chair, ELFA Equity Committee

Stuart Papavassiliou - Copywriter LEAF Commercial Capital Inc.

Lana Kralik, VP, CLFP - Credit Administration Officer, VP, U.S. Bank Equipment Finance

Amy Weum - Regional Vice President, Farm Credit Leasing

Michael Baez, VP - Professional Services and Customer Strategy Leasepath

Derek A Vander Linden, CLFP - Strategic Projects Business Analyst, Key Equipment Finance

DelRoy Stauffer, CLFP - Director of Sales, Incoming Chair, Equity Committee

Program Highlights

The ELFA Equity Forum is committed to providing space and time where people can connect, share, listen, learn, question, debate, challenge, and explore with one another what it takes in practice—not just in theory—to advance equity in our work and world. Our annual conference brings together equipment and leasing employees from across the states to explore and discuss topics on diversity, equity, and inclusion to shape our workforce and help us better serve the industry. The agenda will feature dynamic speakers and offer time for attendee interaction and networking with other industry leaders. You'll leave this event with valuable insights and powerful tools to enhance your career.

Who Should Attend?

This event is open to all DEI categories and allies. Our goal is to provide a forum to discuss strategies that can influence corporate social responsibility and broaden cross-cultural understanding. There is no limit on the number of attendees.

Get Maximum Exposure for Your Company...Become a Sponsor!

Align your brand with the best in the industry! Expand your commitment, influence, and visibility to Diversity, Equity, and Inclusion. Sponsoring this important event provides excellent exposure for your company. See the next page for details and contact Steve Wafalosky at steve@cvmpmedia.com or (440) 247-1060 for more information.

2023 ELFA EQUITY COMMITTEE

Scott Thacker, CPA, CLFP, *Chair*

Chief Executive Officer, Ivory Consulting Corporation

Michael Baez

Vice President, Professional Services and Customer Strategy, Leasepath

Deborah Baker

Head of Worldwide Leasing and Financing, HP Inc.

Linda D'Amico

Sr. Director, Global Lead Cisco Refresh, Cisco Capital Compliance Cisco Systems Capital Corporation

Julia Gavrillov

Partner, Moritt Hock & Hamroff LLP

Benjamin Grove

Legislative Director, Thompson Coburn LLP

Lana Kralik, AVP, CLFP

Credit Administration Officer, VP, U.S. Bank

Martin Klotzman, *ETAC Representative*

Senior Manager, Marketing and Product Management Ivory Consulting Corporation

Eric McGriff

Senior Vice President - Chief Risk Officer Wintrust Specialty Finance

Stuart Papavassiliou

Copywriter, LEAF Commercial Capital Inc.

Ricardo A. Rios

President & CEO, Commercial Equipment Finance, Inc.

Sean Scampton

Director of Sales & Marketing, Leasepath

Delroy Stauffer, CLFP

Director, Business Development, Odessa

Motofumi Tohda

Vice President / Information Systems Tokyo Century (USA) Inc.

Ernest Tsorvas

Senior Vice President, National Sales Manager Fifth Third Bank

Derek Vander Linden, CLFP

Strategic Projects Business Analyst, Key Equipment Finance

Amy Weum

Regional Vice President, Farm Credit Leasing

Eboni Preston-Laurent, *Staff Liaison*

Director of Diversity, Equity and Inclusion Equipment Leasing and Finance Association

Emily Winkler, *Staff Liaison*

Meeting Systems Manager Equipment Leasing and Finance Association

WEDNESDAY, SEPTEMBER 13TH

11:30 – 12:30 pm

Registration & Check-In

Location: Oak Alley Foyer

12:30 – 2:30 pm

Equity Forum Welcome Luncheon Keynote – DEI Strategies for Building an Inclusive Workforce

Location: Rodrigue Gallery

Let's Celebrate our Success, New Orleans Style!

Welcome:

SCOTT THACKER

CEO, Ivory Consulting Corp.
Chair, ELFA Equity Committee

Keynote:

NICOLE JOHNSON

Senior Director, Diversity Best Practices
Seramount

2:30 – 2:45 pm

Break

Location: Oak Alley Foyer

2:45 – 3:45 pm

Keynote General Session DEI in the Manufacturing Industry and Beyond: Making the Business Case

Location: Oak Alley

Speakers:

MIKE BAEZ

VP, Professional Services and Customer Strategy
Leasepath

MEGAN YEH

Senior Associate
Keybridge, LLC

3:45 – 4:00 pm

Break

Location: Oak Alley Foyer

4:00 – 5:00 pm

Table Workshop The Hand You're Dealt

Location: Oak Alley

Facilitators:

LANA KRALIK

Credit Administration Officer, VP
U.S. Bank

DELROY STAUFFER

Director of Sales & Business Development
Odessa

DEREK VANDER LINDEN

Strategic Projects Business Analyst
Key Equipment Finance

5:00 - 6:00 pm

People Power Reception, Featuring BEFN

Location: Rodrigue Gallery

6:00 - 9:00 pm

Dine-Around

Location: Hotel Lobby

THURSDAY, SEPTEMBER 14TH

6:30 - 7:15 am

Fun Run/Walk

Location: Hotel Lobby

8:00 - 9:00 am

Networking Breakfast

Location: Rodrigue Gallery

9:00 – 10:15 am

Keynote General Session How to Hire for Diversity – Now and in 2028

Location: Oak Alley

SCOTT THACKER

CEO
Ivory Consulting Corp.

CHRISTIANNE GAROFALO

Partner
Heidrick & Struggles

10:15 - 10:40 am

Break

Location: Oak Alley Foyer

10:40 - 11:55 am

Recruiting in Our Industry

Location: Oak Alley

TONYA MUSE

Consultant
Heidrick & Struggles

JON GERSON

President
Executive Solutions for Leasing & Finance

TANISHA GORDON-FLOWERS

Senior Manager, US_Can Technology Finance
Partners
Cisco Systems Capital Corporation

EBONI PRESTON-LAURENT

Director of Diversity, Equity and Inclusion
ELFA

11:55 - 1:30 pm

**Luncheon with Table Workshop
From Hiring to ERGs – Brainstorming How to
Create a DEI Focus Throughout the Employee
Lifecycle**

Location: Rodrigue Gallery

TONYA MUSE

Consultant
Heidrick & Struggles

CHRISTIANNE GAROFALO

Partner
Heidrick & Struggles

1:30 pm – 2:50 pm

**The ELFA Equity Eco-Sphere – Others are
Jumping In**

Location: Oak Alley

STUART PAPAVALASSILIOU

Copywriter
LEAF Commercial Capital Inc.

KELLI NIENABER

Executive Director
Equipment Leasing & Finance Foundation

REID RAYKOVICH

CEO
Certified Lease & Finance Professional Foundation
(CLFP)

GEORGE PARKER

Co-Chief Executive Officer
VenSource Capital LLC

SEAN SCAMPTON

Director of Sales & Marketing
Leasepath

MICHAEL ROTHE

President & Chief Executive Officer
Canadian Finance & Leasing Association

2:50 - 3:00 pm

Final Session

Location: Oak Alley

**Lessons Learned, Takeaways, and Closing
Comments**

SCOTT THACKER

CEO, Ivory Consulting Corp.
Chair, ELFA Equity Committee

New Chair Remarks

DELROY STAUFFER

Director of Sales & Business Development
Odessa

Sponsorship Opportunities

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

SPONSORSHIP OPPORTUNITIES

Increased Visibility... Leadership Status... Reinforced Reputation... Industry Supporter Sponsoring events and functions at ELFA meetings provides excellent exposure for your company. As a sponsor, your company is showcased to decision-makers in all facets of the equipment leasing and finance industry. Your sponsorship offers several important benefits, including increased visibility, leadership status and a reputation as an industry supporter. Following are the sponsorship opportunities and benefits available to your company for the 2023 Equity Leadership Forum:

Marquee Sponsor - \$5,000 each

- 1 complimentary registration to the Forum
- Recognition (your logo) as a sponsor on the official meeting website with a link to your website
- Recognition (your logo) as a sponsor on the printed agenda for attendees
- Signage recognition at the event
- Company logo on screen in Opening General Session
- Verbal acknowledgement at the Opening General Session
- Recognition on the event mobile app
- Recognition in the “know before you go” e-newsletter distributed to attendees before the event
- Black and white logo printed on napkins for cocktail reception – all Marquee Sponsor logos will be printed together on the napkin
- A one-time use only Excel Spreadsheet of conference attendees.
- Sponsor ribbons on name badges of all attendees from the sponsoring company
- Thank-you recognition in Equipment Leasing & Finance magazine

Friend of the Women’s Leadership Forum - \$500 each

- Recognition (your logo) as a sponsor on the official meeting website with a link to your website
- Recognition (your logo) as a sponsor on the printed agenda for attendees

- Signage recognition at the event
- Company logo on screen in Opening General Session
- Recognition in the “know before you go” e-newsletter distributed to attendees before the event
- Sponsor ribbons on name badges of all attendees from the sponsoring company
- Thank-you recognition in Equipment Leasing & Finance magazine

All sponsorship fees are payable in advance. For more information or to reserve one of these sponsorship opportunities, please contact Steve Wafalosky at (440) 247-1060 or steve@cvmpmedia.com.

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.

REGISTRATION INQUIRIES:

jfianko@elfaonline.org

REGISTRATION AND GENERAL INFORMATION

Registration fees:

Equity Conference Registration Only: \$295

Attendee all 3 Conferences! Lease and Finance Accountants, Operations and Technology, and The Equity Forum for a discounted rate!

- 1st Member Package (all 3 conferences): \$1,450
- Each additional ELFA Member representative: \$1,405
- First time attendee: \$1355
- Non-Member Package: \$2,890
- Speaker Package: \$905
- Committee Member Package: \$905

CONFERENCE COMPLIANCE

Please Note the Following

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 conference.

Attendee Contact Information

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 and sponsors. For more information contact Eboni Preston-Laurent at epreston@elfaonline.org.

ELFA CODE OF CONDUCT

Thank you for choosing to enhance your professional development by attending this ELFA conference. One of our goals is to ensure that we promote a safe and productive environment for all conference attendees.

We invite you to help us make each ELFA-sponsored conference and live event a place that is welcoming and respectful to all participants, regardless of 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, 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 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 Eboni Preston-Laurent at epreston@elfaonline.org. Thank you for your help in keeping this and all ELFA events professional, welcoming, & respectful to all.

