

**Independent Best Practices Roundtable**  
**April 16, 2024**  
**Hilton Palmer House, Chicago**

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<b>11:00 am – Noon</b>	<b>Check-in/Registration</b>
<b>Noon – 1:15 pm</b>	<b>Networking luncheon</b> Held jointly with the attendees of the Bank, Captive and Vendor Finance, and Small Ticket Roundtables.  <b>Welcome</b> <b>Leigh Lytle</b> President and CEO Equipment Leasing and Finance Association
<b>1:15 – 1:30 pm</b>	<b>Break</b>
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<b>1:30 – 4:00 pm</b>	<b>INDEPENDENT BEST PRACTICES ROUNDTABLE</b>
<b>1:30 – 1:35 pm</b>	<b>Introduction</b>  <b>Jonathan Albin</b> COO Nexseer Capital Chair, Independent Business Council Steering Committee
<b>1:35 – 3:05 pm</b>	<b>IT WORKS IN PRACTICE, BUT DOES IT WORK IN THEORY?</b> <b>Exploring Alternative Financing and the Change Management Necessary for Success</b>  The times they are a-changin', and lenders are exploring new ways to reach a more diverse and technologically-capable clientele. Software, data, cloud-computing, equipment, IoT, hardware, monitoring and many other tools have become products under the "As A Service" label. For lending institutions, there are dozens of avenues to explore for alternative financing. In this session, we will explore some of these alternative financing products and models, along with examples and impacts regarding the sharing economy. This will be an interactive session with plenty of time for attendee participation and conversation.  <b>Moderators</b> <b>James Currier</b> Chief Revenue Officer Finloc USA Inc.

**Autumn Heseltine**

Treasurer & Vice President  
Insight Investments, LLC

**Speakers**

**Tim Appleget**

Director of Technology Services  
Tamarack Technology, Inc.

**Zachary Kimball**

Co-Founder & CEO  
Hardfin

**Sohini Roy, CPA**

President  
Roy Consulting

**3:05 – 3:15 pm**

**Break**

**3:15 – 3:45 pm**

**CHANGE MANAGEMENT**

We will conclude with a speaker who will offer insights on the change management principles and practices that are necessary within organizations to ensure successful transitions into the alternative lending space. This will be an interactive session with plenty of time for attendee participation and conversation.

**Speaker**

**Roman Gajda**

Director of Financial Technology Solutions  
Mitsubishi HC Capital America, Inc.

**3:45 – 4:00 pm**

**Wrap-up**