



September 9-11, 2024 * Embassy Suites Nashville Downtown * Nashville, TN

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SUNDAY, SEPTEMBER 8

7:00 – 9:00 pm

Dine Around – Community Table

Location: Hotel Lobby

Join a community table dinner group! Indicate your initial interest through the ELFA conference registration process and We'll connect you with a group and an opportunity to meet new people and build relationships. To join a dinner group, select "Dine Around" when you register for the conference. Sign-ups will be virtual only and all conference attendees will be emailed prior to the conference with additional specifics. Dinner is PYO and not included with your conference registration. Separate checks will be requested. This event is offered for attendees of both conferences.

CHELSEY BARRON

LEAF Commercial Capital Inc.

SARAH TEZUKA

Solifi

JAY WILENSKY

Sasser Family Companies

JEFF LEZINSKI

Odessa

MAMTA SHORI

Wells Fargo Equipment Finance

DAN COURT

Caterpillar Financial Services Corporation

MONDAY, SEPTEMBER 9

9:00 am

Pre-Conference Registration Opens

Location: Meadow Ballroom Foyer, 2nd Floor

9:00 am – 1:00 pm

Community Service Opportunity - Equipment Finance and Compassion Unite for a Cause! Blood Drive

Location: Riverbed C

ELFA Operations and Technology Conference is partnering with Blood Assurance to host a blood donation event. Join us and help make a difference in the lives of others. Your contribution can make a significant difference!

Schedule your donation: bloodassurance.org/elfa or scan the QR code below.

RAZ GANDHI
Linedata Lending and Leasing



SHARI SCHMIDT
Huntington Equipment Finance



9:30 am – 11:30 am

PRE-CONFERENCE SESSIONS

Pre-conference sessions are offered for attendees of both conferences. These sessions are slightly longer and thus are offered outside of the regular schedule. No additional fees to attend. Please register in advance.

- **Soft Skills Roundtable**
Location: Riverbed D
- **Equipment Leasing – A Roundtable Discussion on Processes, Controls, and Systems**
Location: Riverbed A

11:30 am

General Conference Registration

Location: Meadow Ballroom Foyer, 2nd Floor

1:00- 2:00 pm

Opening General Session

(Hybrid Joint Session)

Location: Meadow Ballroom CD

Welcome:
JAY WILENSKY
Sasser Family Companies
Chair, ELFA Financial Accounting Committee

TAWNYA STONE, CLFP
GreatAmerica Financial Services
Chair, ELFA Operations & Technology Committee

Operations & Technology Excellence Award Presentation

CHELSEY BARRON
LEAF Commercial Capital Inc.
Co-Chair, Award Sub-Committee

PETER HAUG
LTi Technology Solutions
Co-Chair, Award Sub-Committee



Top 10 Trends in Equipment Finance Acquisition

Presenter:
LEIGH LYTLE
CEO & President
Equipment Leasing and Finance Association

2:00 - 2:15 pm

Refreshment Break/Exhibits Open

Location: Meadow Ballroom Foyer

2:15 – 2:30 pm

Operations & Technology Conference Kick-Off!

Location: Meadow Ballroom AB

Welcome to the ELFA Operations & Technology Conference! This conference is co-located with the Lease Accounting conference with joint general sessions, then we breakout into our own conference sessions. Let the Operations & Technology Fun Begin!

Discussion Leader:
TAWNYA STONE, CLFP
GreatAmerica Financial Services
Chair, ELFA Operations & Technology Committee

2:30 – 3:15 pm

Operations & Technology Excellence Award

Location: Meadow Ballroom AB

Now in its twenty-fourth year, the Operations & Technology Excellence Award program is designed to recognize noteworthy achievements in operational and technology innovation in our industry. In this session, we will honor this year's award winner and showcase their award-winning solution. Hear from our award winner as they share insights gleaned from their unique project experiences.

Moderators:
CHELSEY BARRON
LEAF Commercial Capital Inc.
Co-Chair, Award Sub-Committee

PETER HAUG
LTi Technology Solutions
Co-Chair, Award Sub-Committee

Award Winner: Channel

Panelists:

MARK BLAIS

Channel

BRIAN TRI

Channel

ADRIAN HEBIG

Channel



3:15 – 3:30pm

Refreshment Break/Exhibits Open

Location: Meadow Ballroom Foyer

3:30 – 4:30 pm

Keys to Optimize Business Process for Increased Efficiency and Reduced Costs

Location: Meadow Ballroom AB

This session will delve into the use of data, human empowerment, and cultural transformation by exploring the profound impact that operations and technology can have on empowering individuals across all levels of an organization. We'll discuss and analyze case studies and best practices to show how enhanced business processes can drive efficiency and reduce costs. Join us for the opportunity to share and gain insights from your industry peers.

Discussion Leaders:

TIM APPLEGET, CLFP

Tamarack Technology, Inc.

BRYAN PARFITT

Northteq

CHELSEY BARRON

LEAF Commercial Capital Inc.

SHARI SCHMIDT

Huntington Equipment Finance

SHELLY TAUER, CLFP

U.S. Bank

4:30 – 5:00 pm

Exhibitor Lightning Round #1

Location: Meadow Ballroom AB

Crowd around for more rootin-tootin vendor presentations! Prepare to be entertained by this fun and informal lightning round giving our exhibitors a short presentation window to convince you why you should work with them! This is a highly efficient way for you to shop exhibitors and determine the vendors you want to further conversations with. You won't want to miss this!

Facilitators:

EMILY KRAUSE

First Citizens Bank Equipment Finance

CHELSEY BARRON

LEAF Commercial Capital Inc.

5:00 - 5:45 pm

Newcomers Reception

Location: Riverbed AB

Calling all First Time Attendees! This is a great opportunity to meet with the Conference Planning Committee and fellow First Timers. There is no extra charge to attend this event.



5:30 - 7:30 pm

Opening Reception/Exhibits Open

Location: Meadow Ballroom Foyer

All attendees of the ELFA Operations & Technology and Lease & Finance Accountants Conferences are invited to connect and unwind at this fantastic reception.

Exhibit booths will be open 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.

TUESDAY, SEPTEMBER 10

6:30 – 7:30 am

5K Fun Run

Location: Hotel Lobby

Start the day with a little exercise and join your colleagues for a 5K fun run around Nashville. There is NO EXTRA FEE to attend this event.

Meet in the hotel lobby to discuss the route.

Leaders:

AMIE SWEENEY

CBRE Corporate Capital Markets

KYLE ELKEN

DLL

7:30 - 8:30 am

Continental Breakfast/Exhibits Open

Location: Meadow Ballroom Foyer

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8:30 - 10:00 am

Keynote General Session: The Future of Tech & Business (Hybrid Joint Session)

Location: Meadow Ballroom CD

Welcome:

TAWNYA STONE, CLFP

GreatAmerica Financial Services

Chair, ELFA Operations & Technology Committee

Keynote Presenter:



Michael Rogers

Columnist, MSNBC's The Practical Futurist, & Futurist-in-Residence of The New York Times

Michael Rogers is a best-selling author, technology pioneer, and futurist, who most recently served as futurist-in-residence for The New York Times. He has worked with companies ranging from FedEx, Boeing, and NBC Universal to Microsoft, Pfizer, and Siemens,

focusing on how companies can think about the future in useful ways. A futurist keynote speaker who combines a deep knowledge of technology with practical business experience, he addresses audiences worldwide, ranging from start-ups to Fortune 500 companies, and from universities and government agencies to the general public, and is a regular guest on radio and television.

Sponsored by



10:00 – 10:15am

Refreshment Break/Exhibits Open

Location: Meadow Ballroom Foyer

10:15 – 11:00am

Data Integrity and Data Management

Location: Meadow Ballroom AB

Data integrity and data management have become critical in the modern financial services ecosystem. But how can banks leverage data to mitigate risk, support regulatory compliance and bolster cybersecurity? How can AI and other tools help create more personalized customer experiences?

Explore how digital infrastructure and technology contribute to operational soundness, data protection and regulatory compliance. This is a can't-miss session for leaders at financial institutions who recognize the power of data and tech and want to dive deeper.

Topics of discussion include:

* Risk Mitigation: Learn how integrated communications for seamless customer journeys reduce risks and enable quick adaptation to regulatory pressures.

* AI & Leveraging Data: Discover the power of real-time data in supporting regulatory compliance and cybersecurity, enhancing customer experiences and anticipating demands.

* Effective Engagement Strategies: Gain insights from real-world case studies on successful implementation of engagement strategies in digital banking.

Moderator:

JOE GRAHAM

FIS

Discussion Leaders:

RICHARD BISHOP

Precisely

GREG MONTANA

Former Chief Risk Officer FIS Global

11:00 – 11:45am

Dodd Frank 1071: What You Should Know

Location: Meadow Ballroom AB

Section 1071's stated statutory purpose is to facilitate enforcement of fair lending laws and to enable the identification of business and community development needs and opportunities for women-owned, minority-owned, and small businesses. Join us for a panel discussion to learn more about the expectations for this rule, what other businesses are doing to comply, and how 1071 may impact you.

Moderator:

ANDY FISHBURN

Equipment Leasing & Finance Association

Panelists:

EMILY KRAUSE

First Citizens Bank Equipment Finance

BRYAN PARFITT

Northteq

SHELLY TAUER, CLFP

U.S. Bank

BRIAN TRI

Channel Partners

11:45am – 12:15pm

Exhibitor Lightning Round #2

Location: Meadow Ballroom AB

Crowd around for more rootin-tootin vendor presentations! Prepare to be entertained by this fun and informal lightning round giving our exhibitors a short presentation window to convince you why you should work with them! This is a highly efficient way for you to shop

exhibitors and determine the vendors you want to further conversations with. You won't want to miss this!

Facilitators:

EMILY KRAUSE

First Citizens Bank Equipment Finance

CHELSEY BARRON

LEAF Commercial Capital Inc.

12:15 - 1:15 pm

Hosted Luncheon

Location: Riverbed

All conference attendees are welcome to join for a joint conference networking lunch.

1:15 – 2:15 pm

Technology Trends & Using AI

(Hybrid Joint Session)

Location: Meadow Ballroom AB

Join us for a thought-provoking discussion on current and upcoming technology trends, including the impact of artificial intelligence (AI), that will help shape the future of our industry and provide for innovation and growth. Technology is helping companies improve operational efficiencies, helping leaders make more informed decisions and improving overall customer experience. Hear from our panelists who are members of the Equipment Leasing & Finance Foundation's Industry Future Council (IFC) and have knowledge of the trends and themes outlined in the forthcoming IFC report that focuses on the use of technology and AI across our industry.

Moderator:

NATE GIBBONS, CLFP

QuickFi

Panelists:

TAWNYA STONE, CLFP

GreatAmerica Financial Services

Chair, ELFA Operations & Technology Committee

ANDREW COTTER

Somerset Capital, Ltd

ZACK MARSH, CLFP

AP Equipment Financing

2:15 – 2:30pm

Refreshment Break/Exhibits Open

Location: Meadow Ballroom Foyer

2:30 – 3:30pm

Future Proof Your Career: Upskilling and Reskilling in Equipment Finance and Leasing

Location: Meadow Ballroom AB

We know the way we work is changing. How do we ensure our workforce has skills of the future? What are the skills of the future?

You don't want to miss this interactive table discussion that will explore essential topics shaping the future of work. Uncover effective strategies for upskilling and reskilling yourself and your employees and gain valuable insights and actionable takeaways that can be implemented.

Join us for a thought-provoking session that promises to inspire, inform, and prepare you for the transformative journey ahead in the world of work.

Discussion Leaders:

CHRISTINE EVERSLED

John Deere Financial

BRENDAN CRONIN

Great American Insurance Group

RAZ GANDHI

Linedata Lending and Leasing

SHARI SCHMIDT

Huntington Equipment Finance

3:30 – 4:00 pm

Spotlight Success Stories

Location: Meadow Ballroom AB

After a cyber incident in 2023, Crossroads Equipment Lease & Finance (Crossroads) had to rebuild a lot of IT systems and infrastructure quickly. In this spotlight discussion, Crossroads CTO Goutham Balaraman will share his experience on the challenges dealing with the fallout from a cyber-attack, delve into his approach to accelerating the development of technology projects, and discuss ideas on building a technology product roadmap that is impactful on the business.

Discussion Leaders:

BRYAN PARFITT

Northteq

GOUTHAM BALARAMAN

Crossroads Equipment Lease & Finance

4:00 – 5:00pm

Technology Therapy: Confronting Fear in the Age of Innovation

Location: Meadow Ballroom AB

Join us for an engaging session where we confront the challenges of technological advancements head-on. Gain actionable strategies to turn apprehension into opportunity, mastering the complexities of technological change through dynamic exercises and insightful discussions. Learn to manage fear, cultivate adaptability, and balance innovation with preserving what matters most. Transform your perspective and lead with confidence in an era of rapid innovation.

Discussion Leaders:

PETER HAUG

LTi Technology Solutions

SARAH TEZUKA
Solifi

SHARI SCHMIDT
Huntington Equipment Finance

STEVE NIPPAK
Odessa

5:00 – 5:15pm

Exhibitor Lightning Round #3

Location: Meadow Ballroom AB

Crowd around for more rootin-tootin vendor presentations! Prepare to be entertained by this fun and informal lightning round giving our exhibitors a short presentation window to convince you why you should work with them! This is a highly efficient way for you to shop exhibitors and determine the vendors you want to further conversations with. You won't want to miss this!

Facilitators:

EMILY KRAUSE
First Citizens Bank Equipment Finance

CHELSEY BARRON
LEAF Commercial Capital Inc.

5:15 – 6:45pm

Hosted Reception/ Exhibits Open

Location: Meadow Ballroom Foyer

Join your fellow conference attendees for an evening reception. This is a great time to mingle and chat with the fantastic exhibitors attending the conference!



WEDNESDAY, SEPTEMBER 11

7:00 - 8:00 am

Continental Breakfast/ Exhibits Open

Location: Meadow Ballroom Foyer

Be sure to take some time to visit with our fantastic exhibitors. Booths will be closing at 9:30am.

8:00 - 9:15 am

KEYNOTE PRESENTATION: 2024 Economic Outlook

(Hybrid Joint Session)

Location: Meadow Ballroom Foyer, 2nd Floor

Welcome

JAY WILENSKY

Sasser Family Companies

Chair, ELFA Financial Accounting Committee



Keynote Presenter:

Jason Turner

Chief Investment Strategies & Head of Multi-Asset Strategy
Wintrust

Jason Turner is the Chief Investment Strategist of Great Lakes Advisors. He is a member of the firm's investment committee, authors market and economic commentary, regularly presents in the media and for professional conferences, and works with client portfolio managers to support institutional and private clients.

As the Head of Multi-Asset Strategy, he is responsible for portfolio strategy, asset allocation, and for overseeing the firm's manager due diligence and selection efforts. He is also a member of the firm's Operating Committee and Management Committee.

During this presentation, Jason will share his unique insights into the current economic climate, investment strategies, and trends impacting the finance industry. Whether you're a seasoned professional or just starting out in the field, Jason's presentation promises to offer valuable takeaways that can help you stay ahead in today's competitive landscape.

9:15 – 9:30am

Refreshment Break/Exhibits Open

Location: Meadow Ballroom Foyer

The exhibitors will be closing after this break, so make sure you have those last conversations and share contact details.

9:30am – 11:30am

Exhibit Booths Closing

Exhibitors will be breaking down their booths.

9:30 – 10:15 am

ESG Integration in Equipment Finance: Charting a Sustainable Future

Location: Meadow Ballroom AB

Join us for an insightful session where we examine the core of Environmental, Social, and Governance (ESG) principles and their expanding impact on the equipment finance sector, in harmony with overarching regulations. Despite challenges in quantifying the impact across various equipment categories, discover how innovative companies are evolving and fostering progress. Engage in a panel discussion with industry leaders who will share practical steps being

implemented to weave ESG considerations into business strategies, securing a sustainable and responsible path forward.

Moderator:
SARAH TEZUKA
Solifi

Panelists:
DANIELLE CONKLING
First Citizens Bank

ANDY FISHBURN
Equipment Leasing and Finance Association

KRISTIE KOSOBUSKI
Solifi

Session Planners:
EMILY KRAUSE
First Citizens Bank Equipment Finance

STEVE NIPPAK
Odessa

10:15 – 10:45am

Crafting Continuity Beyond Compliance

Location: Meadow Ballroom AB

Unlock strategies for real operational preparedness in this insightful session where we will delve into the human side of business continuity and examine the essentials of real operational preparedness. Let's discover how to differentiate between mere compliance and genuine readiness. We'll explore how to manage crises with a human-centered approach, acknowledging the roles of management, employees, clients, and third parties in navigating diverse crises – from cybersecurity threats to natural disasters. This is a preparedness paradigm, from policies to practicality, and motivation to embrace a comprehensive strategy designed to work when it matters most.

Speaker:
TAMARA DARNOW
Key Equipment Finance

Discussion Leaders:
MELISSA GODISH
TD Equipment Finance, Inc.

CHELSEY BARRON
LEAF Commercial Capital Inc.

EMILY KRAUSE
First Citizens Bank Equipment Finance

PETER HAUG
LTi Technology Solutions

11:00 – 11:30am

Regulations vs Customer Experience: How Does B2B Software Deliver?

Location: Meadow Ballroom AB

Customers have come to expect ease, but regulators require compliance. What can equipment finance do to reconcile the two? In this session we'll share tips and best practices for delivering a great customer experience that meets our expectations as consumers while also keeping pace with changing regulatory considerations.

Discussion Leaders:
BRENDAN CRONIN
Great American Insurance Group

EMILY KRAUSE
First Citizens Bank Equipment Finance

SARAH TEZUKA
Solifi

11:30 – 11:45am

Lessons Learned / Take-Aways / Wrap-up

Location: Meadow Ballroom AB

Stay for a great wrap-up with Operations and Technology Committee Chair, Tawnya Stone. This will be a great end to a fantastic few days of learning and growing. Write down those take-aways so you can go back to your office with tangible changes!

Discussion Leader:
TAWNYA STONE, CLFP
GreatAmerica Financial Services
Chair, ELFA Operations and Technology Committee

Stop by These Exhibit Tables:

Acquis Insurance
Alfa Financial Software Inc
CLFP Foundation
CSC
ECS Financial Services, Inc.
ELFA
ELF Foundation
Great American Insurance Group, Specialty
Equipment
Ivory Consulting Corporation
JDR Solutions, Inc.
Leasepath
Liventus, Inc.
LTi Technology Solutions
NETSOL Technologies Americas, Inc.
Northteq
Odessa Technologies, Inc.
OwlFinancial Technologies
RVI Group
Tamarack Technology, Inc.
Vertex Inc.