



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

### SUNDAY, SEPTEMBER 8

7:00 – 9:00 pm

#### Dine Around – Community Table

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 4-weeks 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.*

#### CHELSEA BARRON

LEAF Commercial Capital Inc.

#### SARAH TEZUKA

Solifi

### MONDAY, SEPTEMBER 9

9:00 am

#### Pre-Conference Registration Opens

9:00 am – 1:00 pm

#### Equipment Finance and Compassion Unite for a Cause!

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!



#### 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**

Discussion Leaders:

**RICK THOMPSON**

Bank of America Global Leasing

**JAY WILENSKY**

Sasser Family Companies

*Chair, ELFA Financial Accounting Committee*

- **Process and Controls Roundtable**

Discussion Leader:

**TIM KOLBER**

Deloitte

11:30 am

#### General Conference Registration

1:00- 2:00 pm

#### Opening General Session *(Hybrid Joint Session)*

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 Award Presentation

**CHELSEA 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:

**ROBERT BOYER**

President

First Commonwealth Equipment Finance

*ELFA Board Chair*

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2:00 - 2:15 pm

**Refreshment Break/Exhibits Open**

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2:15 – 2:30 pm

**Operations & Technology Conference Kick-Off!**

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*

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2:30 – 3:15 pm

**Operations & Technology Excellence Award**

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.

Discussion Leaders:

**CHELSEA BARRON**

LEAF Commercial Capital Inc.

*Co-Chair, Award Sub-Committee*

**PETER HAUG**

LTi Technology Solutions

*Co-Chair, Award Sub-Committee*

**MELISSA GODISH**

TD Equipment Finance, Inc.

**JOE GRAHAM**

FIS

**BRYAN PARFITT**

Northteq

**SHELLY TAUER, CLFP**

U.S. Bank

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3:15 – 3:30pm

**Refreshment Break/Exhibits Open**

3:30 – 4:30 pm

**Keys to Optimize Business Process for Increased Efficiency and Reduced Costs**

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:

**DARREN TAUER**

Tamarack Technology, Inc.

**BRYAN PARFITT**

Northteq

**CHELSEA BARRON**

LEAF Commercial Capital Inc.

**SHARI SCHMIDT**

Huntington Equipment Finance

**SHELLY TAUER, CLFP**

U.S. Bank

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4:30 – 5:00 pm

**Exhibitor Lightning Round #1**

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

**CHELSEA BARRON**

LEAF Commercial Capital Inc.

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5:00 - 5:45 pm

**Newcomers Reception**

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**

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**

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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**

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7:30 - 8:30 am

### **Continental Breakfast/Exhibits Open**

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8:30 - 10:00 am

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

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.

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10:00 – 10:15am

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

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10:15 – 11:00am

### **Data Integrity and Data Management**

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.

Discussion Leaders:

#### **JOE GRAHAM**

FIS

#### **BRYAN PARFITT**

Northteq

#### **TAWNYA STONE, CLFP**

GreatAmerica Financial Services

*Chair, ELFA Operations & Technology Committee*

#### **DARREN TAUER**

Tamarack Technology, Inc.

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11:00 – 11:45am

### **Dodd Frank 1071: What You Should Know**

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

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11:45am – 12:15pm

### **Exhibitor Lightning Round #2**

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

**CHELSEA BARRON**

LEAF Commercial Capital Inc.

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12:15 - 1:15 pm

**Hosted Luncheon**

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

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1:15 – 2:15 pm

**Technology Trends & Using AI** *(Hybrid Joint Session)*

Discussion Leaders:

**SHELLY TAUER, CLFP**

U.S. Bank

**JAY WILENSKY**

Sasser Family Companies

*Chair, ELFA Financial Accounting Committee*

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2:15 – 2:30pm

**Refreshment Break/Exhibits Open**

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2:30 – 3:30pm

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

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 EVERSHERD**

John Deere Financial

**BRENDAN CRONIN**

Great American Insurance Group

**RAZ GANDHI**

Linedata Lending and Leasing

**SHARI SCHMIDT**

Huntington Equipment Finance

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3:30 – 4:00 pm

**Spotlight Success Stories**

Now that you have heard from the Operations & Technology Excellence Award Winning project, take some time to hear from other companies who submitted projects over the past couple of years. Learn how these initiatives transformed their businesses and explore the compelling stories behind their success. Don't miss this chance to gain insights and be inspired by these noteworthy achievements!

Discussion Leaders:

**BRYAN PARFITT**

Northteq

**CHELSEA BARRON**

LEAF Commercial Capital Inc.

**EMILY KRAUSE**

First Citizens Bank Equipment Finance

**PETER HAUG**

LTi Technology Solutions

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4:00 – 5:00pm

**Technology Therapy: Confronting Fear in the Age of Innovation**

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

**JOE GRAHAM**

FIS

**SARAH TEZUKA**

Solifi

**SHARI SCHMIDT**

Huntington Equipment Finance

**STEVE NIPPAK**

Odessa

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5:00 – 5:15pm

**Exhibitor Lightning Round #3**

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

**CHELSEA BARRON**

LEAF Commercial Capital Inc.

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5:30 – 7:00pm

### Hosted Reception/ Exhibits Open

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!



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## WEDNESDAY, SEPTEMBER 11

7:00 - 8:00 am

### Continental Breakfast/ Exhibits Open

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

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8:00 - 9:15 am

### KEYNOTE PRESENTATION: 2024 Economic Outlook *(Hybrid Joint Session)*

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 to 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.

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9:15 – 9:30am

### Refreshment Break/Exhibits Open

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

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9:30 – 10:15 am

### ESG Integration in Equipment Finance: Charting a Sustainable Future

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.

Speakers:

**SARAH TEZUKA**

Solifi

**CHRISTINE EVERSHERD**

John Deere Financial

**EMILY KRAUSE**

First Citizens Bank Equipment Finance

**RAZ GANDHI**

Linedata Lending and Leasing

**STEVE NIPPAK**

Odessa

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10:15 – 10:45am

### Crafting Continuity Beyond Compliance

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.

Discussion Leaders:

**MELISSA GODISH**

TD Equipment Finance, Inc.

**CHELSEA BARRON**

LEAF Commercial Capital Inc.

**DARREN TAUER**

Tamarack Technology, Inc.

**EMILY KRAUSE**

First Citizens Bank Equipment Finance

**PETER HAUG**

LTi Technology Solutions

**TAMARA DARNOW**

Key Equipment Finance

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11:00 – 11:30am

**Regulations vs Customer Experience: How Does B2B Software Deliver?**

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.

**BRENDAN CRONIN**

Great American Insurance Group

**EMILY KRAUSE**

First Citizens Bank Equipment Finance

**SARAH TEZUKA**

Solifi

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11:30 – 11:45am

**Lessons Learned / Take-a-ways / Wrap-up**

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

Discussion Leader:

**TAWNYA STONE, CLFP**

Chair, ELFA Operations and Technology Committee