

Legal Forum 2025



Le Meridien Charlotte, Charlotte, NC
May 4 – 6, 2025

SUNDAY, MAY 4th

9:15 – 9:30am

TopGolf Transportation Loading & Departure

Location: Hotel Lobby

9:30am – 1:00pm

TopGolf Experience

Unleash the FUN at TopGolf - where exciting play meets friendly competition for players of all skill levels.

Brunch bites and beverages will be served while you hit microchipped golf balls to score points in interactive games and team play.

Transportation will depart from the hotel at 9:30am and will return by 1:00pm. *This event is NOT included in your conference registration fee and is \$75 per person. Must register by April 16, 2025.*

2:00 – 6:00pm

Attendee Registration

3:00 – 4:00pm

Concurrent Sessions:

- **Structuring 101**

Speakers:

Matthew Cleaves

Managing Counsel, Equipment Finance and Vendor Financial Services
Wells Fargo Equipment Finance

Mike Tobak

Partner
Kutak Rock LLP

Debby Devassy Babu

Shareholder
Darcy & Devassy PC

- **Vendor Finance**

Speakers:

Christine Brown

Sr. Flex Financial Counsel
Flex Financial, Stryker

Ryan Thompson

Of Counsel
Womble Bond Dickinson

Shari Bacsardi

Partner
Womble Bond Dickinson

- **Air, Rail, Marine Roundtable**

Speakers:

Elieen Brown

Partner
Thompson Coburn LLP

4:00 – 4:15pm

BREAK

4:15 – 5:15pm

Concurrent Sessions:

- **UCC 101 – The Importance of Being Perfected**

This panel discussion will provide foundational information on perfection and priority issues related to UCC Article 9, including the importance of and common pitfalls observed in UCC searches, purchase-money security interests, perfection of specialty collateral, and a discussion on common issues encountered in negotiating landlords lien subordinations and waivers.

Speakers:

Dan Dvorak
Chief Legal Counsel
Choice Financial Group

Shari Bacsardi
Partner
Womble Bond Dickinson

Thomas Makens
Partner
Kutak Rock

Trudie McAdams
Assistant General Counsel
The Huntington National Bank

- **State Law Update**

Speakers:

Moorari Shah
Partner
Sheppard Mullin Richter & Hampton LLC

- **Title Vehicles Roundtable**

Speakers:

William Wilson
Associate General Counsel & Vice President
BMO Transportation Finance

5:15 – 6:00pm
NEWCOMERS RECEPTION

6:00 – 7:30pm
OPENING RECEPTION

MONDAY, MAY 5th

7:00 – 8:00am
BREAKFAST

8:00 – 9:30am
GENERAL SESSION – ELFA Update & Legal Update Part 1

Welcoming Remarks
Presentation of Edward A. Groobert Award for Legal Excellence, 2025

ELFA Update

Leigh Lytle
President and CEO
Equipment Leasing and Finance Association

Legal Update I

Vince Borst
Partner
Latimer LeVay Fyock LLC

Randy Armentrout
Attorney
Nyemaster Goode Law Firm

Larry Holmes
Principal Attorney
Offit Kurman PC

9:30 – 9:45am
BREAK

9:45 – 10:45am

Concurrent Sessions:

- **AI – Intro/ Advanced, Ethical concerns**

Speakers:

Brittany Ogden
Attorney, Partner
Quarles & Brady LLP

- **Workout Discussions – shared experiences Roundtable**

Speakers:

Robert Hornby
Member of the Firm
Chiesa Shahinian & Giantomasi PC

10:45 – 11:00am
BREAK

11:00 – Noon

Concurrent Sessions:

- **Cybersecurity**

Speakers:

Eric Gazin
General Counsel
Verdant Commercial Capital LLC

- **Securitization**

Speakers:

Carla Potter

Lawyer

Cassels Brock & Blackwell LLP

- **Lease & Loan Template Updates: Critical Clauses & E-Leasing Roundtable**

This session will explore the most critical clauses you should add to your lease and loan templates right away and why this is important. The session will also include an e-leasing update.

Speakers:

Dominic Liberatore

Deputy General Counsel

DLL

Noon – 1:00pm

LUNCH

1:00 – 2:00 pm

Concurrent Sessions:

- **Bankruptcy – Hot Topics**

Speakers:

Jennifer Crastz

Partner

Hemar, Rousso & Heald, LLP

- **Blockchain, UCC, Crypto, Digital Assets**

Speakers:

Barbara Goodstein

Partner

Mayer Brown LLP

- **Inside/Outside Roundtable**

Speakers:

Mary Ann Stathopoulos

Managing Attorney

Cisco Systems Capital Corporation

Matt Giadrosich

Partner

Padfield & Stout, LLP

Katie Riggs

Corporate Counsel

Dext Capital

2:00 - 2:15pm

BREAK

2:15 – 3:15pm

Concurrent Sessions:

- **Advanced UCC**

Speakers:

Eddie Gross

Shareholder

Vedder Price P.C.

- **Industry Fraud**

Speakers:

Alexis Levine

Partner

Blake, Cassels & Graydon LLP

3:15 – 3:30pm

BREAK

3:30 – 4:30pm

Concurrent Sessions:

- **Unlocking Government Finance: Tax-Exempt Leasing and Emerging Issues**

This presentation dives into government finance with a focus on state and local financing, and examines the requirements and documentation for tax-exempt leasing as well as the growing trend toward “alternative” agreements. It also delves into current hot topics and important issues lenders should consider, offering a comprehensive guide to navigating the current landscape of government leasing.

Speakers:

Brad Nielsen

Partner

Kutak Rock, LLP

Matthew McKeon

SVP & Senior Associate General Counsel
The Huntington National Bank

Ben Hall

VP & Senior Legal Counsel
U.S. Bank

- **Advanced Tech Assets**

Drones, autonomous vehicles, tracking device implications, server farms, and other things you need to be careful of.

Speakers:

Joe Davies

Partner
Smith Debnam Narron Drake Saintsing & Myers, LLP

Brittany Ogden
Attorney, Partner
Quarles & Brady LLP

- **Managing the Closing Process - Legal Opinions Roundtable**

Speakers:

Thomas Hotard

VP - Program Management and Contracts
Midland Equipment Finance

4:30 – 4:45pm

BREAK

4:45 – 5:45pm

General Session
4th Annual "It's All Legal!" Trivia Game with Drinks

Led by Chair of the Legal Committee, Mr. Brian Kestenbaum, the "It's All Legal!" trivia game features a diverse range of questions with a playful connection to legal topics. Get ready for two engaging rounds of in-person competition alongside your ELFA Legal Forum companions. Prizes, along with the coveted bragging rights, await the top three participants.

BACK BY POPULAR DEMAND THIS YEAR:
Alcoholic refreshments will be available for all contestants during the game.

FIRST PLACE WINNER WILL RECEIVE FREE REGISTRATION TO 2026 LEGAL FORUM!

Brian Kestenbaum

Senior Vice President and General Counsel
LEAF Commercial Capital Inc.

5:45 – 6:15pm

WOMEN IN LEASING RECEPTION

6:15 – 7:30pm

HOSTED RECEPTION

TUESDAY, MAY 6th

7:00 – 8:00am

BREAKFAST

8:00 – 9:00am

General Session - Legal Update Part 2

Speakers:

Julia Gavrilov

Partner
Moritt Hock & Hamroff LLP

Brittany Ogden

Attorney, Partner
Quarles & Brady LLP

Lisa Peters

Attorney
Kutak Rock LLP

9:00 – 9:15am

BREAK

9:15- 10:15am

Concurrent Sessions:

- **Federal Law Update**

Speakers:

Brad Salyer

Associate General Counsel
U.S. Bank

- **Energy Finance**

Speakers:

Steve Whelan

Partner
Blank Rome LLP

Rafael Castillo-Triana

CEO, Latin American Region
The Alta Group LLC

10:15 – 10:30am **BREAK**

10:30am – 11:30am

**General Session: AI in Law Practice -
Ethics**

Speakers:

Scott Adams

*Vice President Legal & Compliance, North
America*

Volvo Financial Services

Ellen Murphy

Professor of Practice

Wake Forest University School of Law