

2015

Annual Schedule of Conferences,
Workshops and e-Learning Opportunities

Gaining Momentum



Business & Professional Development

BUSINESS DEVELOPMENT OPPORTUNITIES

FEBRUARY

February 22-24

Equipment Management Conference & Exhibition

Trump National Doral Miami • Miami, FL

Focusing on the issues concerning asset managers, equipment appraisers and remarketers for over a quarter of a century, this conference and exhibition is a “must attend” event for anyone involved in equipment management. The conference includes multiple sessions that evaluate the current market conditions, portfolio quality and residual values for a variety of equipment segments. Agenda includes live, on-site inspections of specialty vehicles, along with off-site equipment tours at actual worksite locations. In addition, everyone you need to talk to is under one roof at the world-class conference and exhibition.

Conference
Qualifies for A.S.A.
Re-Certification and
CPE Credits

Who Should Attend

Equipment management professionals, including senior managers and their staff, and service providers to the industry. For information on how your company can exhibit at this conference, contact Steve Wafalosky at stevev@larichadv.com or (440) 247-1060.

MARCH

March 12

14th Annual IMN/ELFA Investors Conference

New York Marriott Downtown • New York, NY

Now in its 14th consecutive year, the Investors Conference on Equipment Finance is set to attract increasing attention from analysts, bankers and institutional investors. Nearly half of the delegates represent investors and equipment finance companies who come to network and learn about the latest industry trends and developments. The agenda includes a review of the current landscape for commercial finance and equipment leasing, along with an update on the capital markets.

For more information on the 14th Annual IMN/ELFA Investors Conference on Equipment Finance, please go to www.imn.org

Who Should Attend

CEO/CFO/finance directors of equipment finance companies, investors and providers of private capital, rating agencies, investment bankers, credit enhancers, financial advisors, technology service providers, trustees and attorneys.

March 15-17

Executive Roundtable

PGA National Resort • Palm Beach Gardens, FL

The Executive Roundtable is the premier event for presidents, CEOs and other top leaders within equipment leasing and finance companies. It is designed to bring these leaders together

to discuss the issues of the day, to strategize about the future and to create lasting business relationships. Top-notch speakers and thought leaders have been invited to discuss what it takes to be an effective leader during a time of rapid change and hear results from the Equipment Leasing & Finance Foundation's study on leadership practices across the industry. Also discover the leading indicators of growth in equipment investment, along with an analysis of capital spending in the United States. Other speakers will address changes to the accounting, legislative and regulatory landscape; alternative financing solutions; and understanding the risks and opportunities of electronic transactions and other documents. Attendance is limited to encourage interaction and networking. **International Decision Systems is the exclusive sponsor of the 2015 Executive Roundtable.**

Sponsored by



INTERNATIONAL
DECISION SYSTEMS®

Who Should Attend

The attendance policy has changed for the 2015 Executive Roundtable. Attendance is still limited to the senior executive leadership from ELFA member companies. Executives must hold the position of president, CEO, managing director, COO, be part of the senior leadership team and/or manage a substantial division within the company. However, service provider member companies may now send one senior executive from their company to this Roundtable. ELFA regular member companies may send up to three representatives from their companies.

APRIL

April 21-23

27th Annual National Funding Conference

Fairmont Hotel • Chicago, IL

The ELFA National Funding Conference is the largest gathering of funding sources serving the equipment finance industry. This widely-respected and highly-popular forum provides the optimum atmosphere for funding sources and equipment finance companies to discuss funding programs and options. Confidentiality and access to key players are the main trademarks of this meeting.

If you are interested in becoming a Funding Source Exhibitor, contact Lesley Sterling at lsterling@elfaonline.org.

Who Should Attend

Principals in leasing and finance organizations responsible for funding the company and its transactions, and for participating in transactions, and those who want to meet with current funding sources, establish new relationships to fulfill their funding needs, and keep current on the latest funding issues.

BUSINESS DEVELOPMENT OPPORTUNITIES

MAY

May 3-5 Legal Forum

Sheraton Nashville Downtown • Nashville, TN

The premier event for attorneys serving the equipment finance industry, this conference provides an analysis of current legal issues facing lessors, offers a basic legal review for attorneys new to leasing, improves the professionalism of attorneys involved in leasing matters and creates an environment that encourages networking with peers. The Forum stresses practical solutions and strategies for addressing the practice of law as it affects the equipment leasing and finance community.

Conference
Qualifies for
CLE Credits

ELFA is a recognized sponsor of continuing legal education by most states in the U.S. Attendance at the conference may be used to fulfill your annual continuing education requirements.

Who Should Attend

Internal and external counsel, as well as entry and senior-level attorneys.

May 6-8 AGL&F/ELFA Public Sector Finance Forum

Sheraton Denver Downtown Hotel • Denver, CO

The Association of Governmental Leasing and Finance (AGL&F) has joined forces with ELFA to create a unique conference for equipment leasing and finance professionals who do business in the public sector. The agenda is designed to help these individuals understand trends in the municipal leasing marketplace, and explore opportunities with public sector equipment leasing transactions. Attendees will have ample networking opportunities while gaining new insights into this unique marketplace.

Who Should Attend

Experienced municipal lessors, as well as those new to this market. Business executives, document management specialists, syndicators, rating agencies, municipal bond insurers, investment bankers, government officials, manufacturers, vendors, third-party lessors, attorneys, credit and sales personnel, and individuals interested in pursuing a new business development opportunity.

May 13-14 Capitol Connections

The Washington Court Hotel • Washington, DC

This annual event, which is a component of the ELFA Grassroots Program, is designed to present a united voice for public policy impacting the equipment leasing and finance industry. The program offers unmatched opportunities to develop and maintain relationships with elected officials and key regulators at select federal agencies, and brings important industry issues

to the forefront. ELFA member participation in the political process is critical if policymakers are to understand the nature and scope of public policy issues affecting the equipment finance sector. The conference includes a networking reception, detailed briefings on the latest public policy issues, and meetings with legislators and Administration officials. There is no registration fee for ELFA members to attend this conference.

To find out more about ways to make a difference with your federal legislators, contact Richard Shanahan at rshanahan@elfaonline.org.

Who Should Attend

Presidents, CEOs and senior staff of member companies, including those whose job responsibilities include federal government liaison activities.

JUNE

June 7-9 Credit and Collections Management Conference & Exhibition

Loews Madison Hotel • Washington, DC

The ELFA Credit and Collections Management Conference & Exhibition addresses the new and emerging issues relevant to credit and collections professionals in the equipment finance industry. The 2015 conference will include sessions on the economy, the equipment finance cycle, alternative financing, human capital issues, the legal and regulatory environment, data analytics, risk and bankruptcy, and other relevant topics. Additionally, the conference will provide ample opportunity to network with colleagues in the equipment finance industry.

Who Should Attend

Senior vice presidents and vice presidents of credit, credit managers, credit analysts, documentation specialists, collections managers and service providers to the industry.

Conference
Qualifies for
CLE and CPE
Credits

For information on how your company can exhibit at this conference, contact Steve Wafalosky at stevew@larichadv.com or (440) 247-1060.

SEPTEMBER

September 16-18 Operations & Technology Conference & Exhibition

Hyatt Regency Philadelphia at Penn's Landing • Philadelphia, PA

The ELFA Operations and Technology Conference & Exhibition provides direction and support for member companies using technology to improve business processes, enhance customer satisfaction and increase operational effectiveness. Program highlights include sessions on project selection and building a business case, operational process mapping, application devel-

BUSINESS DEVELOPMENT OPPORTUNITIES

opment methodologies, survival tips for the accidental project manager, a preview of the 2015 Business Technology Performance Index, managing enterprise risk and information sharing. Also hear from the 2015 Operations & Technology Excellence Award winners; this award recognizes equipment leasing and finance companies that have demonstrated best practices in developing and implementing innovative uses of technology or creative business processes to improve operations, enhance customer interactions, enter new markets and build overall ROI.

The ELFA Operations and Technology Conference will again be held concurrently with the ELFA Lease and Finance Accountants Conference. Both conferences will share a table-top exhibit targeting companies that provide lease and finance accounting software and other technology-related processes and systems.



Who Should Attend

Executive management; directors of operations and administration; department managers for credit, collections, information technology, documentation, accounting, remarketing and equipment management; as well as representatives of companies providing systems.

For information on how your company can exhibit at this conference, contact Steve Wafalosky at steve@larichadv.com or (440) 247-1060.

September 16-18 Lease and Finance Accountants Conference & Exhibition

Hyatt Regency Philadelphia at Penn's Landing • Philadelphia, PA

The largest annual gathering of lease accountants and those responsible for financial reporting keeps attendees abreast of developments involving rule-making activities of the Financial Accounting Standards Board, international accounting standard-setters, state and federal tax authorities and other regulatory bodies. The agenda includes multiple sessions ranging from basic lease accounting for the newly-hired accountant to discussions of complex and emerging accounting issues and their impact on business practices. A FASB board member participates in the program each year.

The ELFA Lease and Finance Accountants Conference will again be held concurrently with the ELFA Operations and Technology Conference. Both conferences will share a table-top exhibit targeting companies that provide lease and finance accounting software and other technology-related processes and systems.

ELFA is a recognized sponsor of continuing professional education with many State Boards of Accountancy and the National Association of State Boards of Accountancy U.S. (NASBA). Attendance at this conference may be used to fulfill your annual continuing education requirements.

Who Should Attend

Chief financial officers, accountants, controllers and others responsible for financial reporting activity.



For information on how your company can exhibit at this conference, contact Steve Wafalosky at steve@larichadv.com or (440) 247-1060.

OCTOBER

October 25-27

54th Annual Convention

JW Marriott Hill Country • San Antonio, TX

The 54th Annual Convention is the equipment leasing and finance industry's premier event. The Convention offers unmatched networking opportunities and high-quality educational sessions.

All educational sessions are selected from proposals submitted by ELFA members. If you have an idea for a session and would like to submit a proposal for consideration by the Convention Review Committee, please contact Lisa Ramirez at lr Ramirez@elfaonline.org.

Who Should Attend

Presidents, senior staff, marketing directors, division managers, and sales and department directors will all find their experience at the Annual Convention rewarding.

For information on how your company can exhibit at this conference, contact Steve Wafalosky at steve@larichadv.com or (440) 247-1060.



Conference Resource Center

The Conference Resource Center (CRC) ensures that you'll never miss out! View session recordings, download presented session materials, and browse speaker bios for many of ELFA's outstanding conferences.

If you attended a particular conference, access to the archived sessions are free of charge. All others may obtain access to the session recordings for a nominal fee.

Go to: <http://elfa.sclivelearningcenter.com>. For questions about the Conference Resource Center, contact Alexa Carnibella at acarnibella@elfaonline.org or (202) 238-3416.

BUSINESS DEVELOPMENT OPPORTUNITIES

Get Credit!

Continuing Professional Education (CPE) Credit

ELFA is a recognized sponsor of continuing professional education with many State Boards of Accountancy, the National Association of State Boards of Accountancy and many State Bar Associations. ELFA's conferences and web seminars qualify for CPEs, and attendees will be able to receive credit toward their licensing requirements. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. For a complete list of approved accredited courses and credit hours, go to www.elfaonline.org/Events/CEC/.

Continuing Legal Education (CLE)

There are several ELFA conferences that qualify for CLEs, and attendees will be able to receive credit toward their legal education requirements. The ELFA Legal Forum has been approved by many State Bar Associations for CLE credits. For a complete list of approved states and credit hours for the ELFA Legal Forum, go to www.elfaonline.org/events/CEC/?fa=CLE.

Certified Leasing Professional (CLP) Designation

Attendees who possess the Certified Leasing Professional (CLP) designation are required to maintain that designation in a variety of ways, including teaching and attending leasing and finance-related events. If you have your CLP and wish to receive a certificate of attendance to get credit for attending or teaching at an ELFA conference or web seminar, please contact Janet Fianko at (202) 238-3420 or jfianko@elfaonline.org. If you attended an ELFA conference and wish to apply the credits on your certificate of attendance toward your CLP or if you wish to learn more about the CLP, please contact Reid Raykovich at (206) 535-6281 or reid@clpfoundation.org.

If you have questions regarding Continuing Education Credits, please contact Janet Fianko at jfianko@elfaonline.org.

Best Practices Roundtables

Included on the calendar of events are five best practices roundtables. These roundtables are small, one-day meetings designed to facilitate the exchange of information among peers. Attendance is by invitation, and is open to ELFA member companies only.

Bank Best Practices Roundtable

April 21 • Fairmont Hotel • Chicago, IL

Independent Best Practices Roundtable

April 21 • Fairmont Hotel • Chicago, ILL

Captive & Vendor Finance Best Practices Roundtable

April 21 • Fairmont Hotel • Chicago, IL

Tax Best Practices Roundtable

June 23-24 • Offices of GE Capital • Chicago, IL

Human Capital Best Practices Roundtable

September 15 • ELFA Offices • Washington, DC



PROFESSIONAL DEVELOPMENT OPPORTUNITIES

Principles of Equipment Leasing and Finance Workshop

The Principles of Equipment Leasing and Finance workshop has been educating newly-hired personnel in the essentials of the business for more than two decades. This workshop helps your sales force become more confident when meeting with potential customers, and provides your operations staff with a greater understanding of how the leasing and finance business works, and where their individual responsibilities fit into the workflow.

Who Should Attend

Newly-hired staff, new ELFA members, operations staff, sales personnel, marketing personnel, outside providers, lessees, vendors, manufacturers.

Confirmed dates:

April 13-15 • Oak Brook, IL

June 15-17 • Philadelphia, PA

July 27-29 • Irvine, CA

September 14-16 • Dallas, TX

For additional information on these workshops, contact Alexa Carnibella at acarnibella@elfaonline.org.

Bring These Workshops In-House!

Hosting a workshop at your own facility gives you the flexibility and convenience to address specific learning needs of your employees, establish collective knowledge, a shared skill-set, and achieve even your most challenging business goals. Our instructor comes to you and works with you to customize the content to your group's needs. If you've got at least 10 people to train, this might be a more affordable alternative for you.

Principles of Equipment Leasing and Finance Workshop – 2 days

The in-house Principles workshop helps employees become more valuable members of your corporate team. That means getting a full understanding of the basics of the business within the context of what is happening now in the marketplace. The agenda includes: Industry Terminology; Lifecycle of a Lease; Legal, Tax and Accounting Rules and Regulations; Types of Lease and Finance Transactions; Law and Documentation; Lease Accounting; Benefits of Leasing; Fraud Prevention and Detection and much more!

Beyond the Basics Workshop – 1 day

Beyond the Basics is an in-house workshop that takes attendees beyond their basic knowledge of the industry and immerses them in an intensive one-day, real-world case study. Current and anticipated changes in tax, accounting and legal areas impact the pricing and underwriting process, as well as the life cycle of the transaction from origination to termination. An in-depth analysis of an actual transaction, including pricing, three (3) credit approvals and accompanying documentation, will be covered during the workshop.

Want in-house training for your company?
Contact Alexa Carnibella at (202) 238-3416 or
acarnibella@elfaonline.org.



**The ELFA Academy –
Be Your Best From Your Desk!**

The ELFA Academy provides high quality, interactive training and resources in the essentials of equipment finance via online courses and web seminars.

Fundamentals of Equipment Leasing and Finance

The industry's only web-based equipment leasing and finance specific course, the Fundamentals of Equipment Leasing and Finance is a self-paced, online course designed to get you started in the equipment leasing and finance industry.

- Discover why equipment financing is good business;
- Follow the lifecycle of a transaction, from origination to termination;
- Learn about the tax laws, legal issues, and accounting practices and regulations that govern the industry; and
- Examine the various ways to structure a transaction and maximize customer satisfaction.

Audience

Designed for those new to the equipment leasing and finance industry. Those with more experience may use it as a reference or refresher tool.

Special Offer For ELFA Members!

ELFA members pay just \$175 for the Fundamentals course (normally \$350)! Take advantage of this limited time offer. [Log in to the Course Catalog](#) and register for the course. Enter the promotional code ELFAFUNCOURSE at check out to receive the discount!

Financial Statement Analysis

Developed in conjunction with Moody's Analytics, Financial Statement Analysis is the only course of its kind available specifically for leasing credit and risk professionals.



The course not only covers the fundamentals that all credit professionals need to know, as well as future-focused skills like projections and forecasting necessary in today's environment.

Audience

Designed to help credit analysts, underwriters, portfolio managers and credit officers increase their proficiency in assessing risk and evaluating the creditworthiness of middle market companies through financial statement analysis in order to make thoughtful and well informed credit decisions.

To check out any of these courses, visit the ELFA Academy Home Page: www.elfaonline.org/Events/eLearning/.

For questions, contact Alexa Carnibella,
acarnibella@elfaonline.org or (202) 238-3416.

GENERAL INFORMATION

Get Noticed!

Marketing Opportunities

ELFA offers a number of marketing opportunities including exhibits and sponsorships to put you in touch with a network of industry representatives who are valuable prospects.

Exhibits

Don't miss opportunities to showcase your company's products and services to key decision makers and influencers in the equipment leasing and finance industry. ELFA's conferences are tailored to unique audiences within the industry, and so are our exhibit opportunities. Whatever your target audience, you're certain to get the most for your investment. If you would like information on exhibiting at ELFA conferences, go to the ELFA website at www.elfaonline.org/Events/Exhibit/ or contact Steve Wafalosky at stevew@larichadv.com or (440) 247-1060.

Sponsorships

ELFA offers a conference sponsorship program as an additional opportunity for industry providers to network with industry executives. As a sponsor, your company is showcased to decision-makers in all facets of the equipment leasing and finance industry. For more information about the ELFA conference sponsorship program, please go to the ELFA website at www.elfaonline.org/events/sponsor/ or contact Steve Wafalosky at stevew@larichadv.com or (440) 247-1060.

Non-Member Conference Attendance Policy

1. A non-renewing Regular Member organization will be permitted to attend one ELFA conference as a non-member and pay the applicable non-member registration fee. If the company wishes to attend another ELFA conference thereafter, it must join as a Regular Member.
2. An organization that has never been a member of the ELFA, and is qualified to be a Regular Member, is subject to the same attendance policy that applies to the non-renewing ELFA Regular Member: i.e., they will be permitted to attend one ELFA conference as a non-member and pay the applicable non-member registration fee. If the company wishes to attend another ELFA conference thereafter, it must join as a Regular Member.
3. New members will receive a discount (the difference between the non-member and member registration fee) toward their dues if they attend a conference as a non-member, pay the non-member registration fee, and subsequently join ELFA within 60 days.

To learn more about ELFA membership and its benefits, please contact Julie Benson at jbenson@elfaonline.org or (202) 238-3432.



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Legal Forum

Sheraton Nashville Downtown • Nashville, TN

May 6-8

AGL&F/ELFA Public Sector Finance Forum

Sheraton Denver Downtown Hotel • Denver, CO

May 13-14

Capitol Connections

The Washington Court Hotel • Washington, DC

JUNE

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Credit and Collections Management Conference & Exhibition

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Operations & Technology Conference & Exhibition

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April 21 • Fairmont Hotel • Chicago, IL
- **Captives Best Practices Roundtable**
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- **Human Capital Roundtable**
September 15 • ELFA Offices • Washington, DC



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The ELFA Academy provides high-quality, interactive training and resources for you and your staff. For a complete listing of the on-line self-study courses and web

seminars available through the ELFA Academy, please go here: www.elfaonline.org/Events/eLearning/

Principles of Leasing and Finance Workshop

Dates and locations for Public Workshops

April 13-15 - Oak Brook, IL • June 15-17 - Philadelphia, PA

July 27-29 - Irvine, CA • Sept 14-16 - Dallas, TX

ELFA instructors have been introducing leasing and finance company employees to the basics of the business for three decades. Companies have a choice of workshops: the original Principles of Leasing and Finance and Beyond the Basics. Both workshops will be available either as a custom, in-house program designed especially for your employees, or as a public workshop. Public workshops are scheduled throughout the year based on demand. To learn more, contact ELFA Professional Development at 202-238-3400.

Don't forget!

Always check the ELFA website for updates and additional programming. For complete details, please visit the Events and Training section of the ELFA website: www.elfaonline.org/events/ or contact ELFA headquarters at 202-238-3400.