

2016

Annual Schedule of Conferences, Workshops and e-Learning Opportunities

ELFA
EQUIPMENT LEASING AND
FINANCE ASSOCIATION



Unlock Your

Potential



February

February 21-23

Equipment Management Conference & Exhibition

Hyatt Regency Gainey Ranch • Scottsdale, AZ

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.



Who Should Attend

Equipment management professionals, including senior managers and their staff, and service providers to the industry.

Exhibit Opportunities Available

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

March

March 6-8

Executive Roundtable

The Biltmore • Coral Gables, FL

The Executive Roundtable is the premier event for presidents, CEOs and other top leaders within the equipment leasing and finance industry. This two-day session is designed to bring 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 topics such as forecasting trends in the equipment finance landscape; preparing leaders for the workforce of the future; protecting your company’s data; opportunity and challenges in the capital markets; and the new lease accounting rules. Case studies will examine how some companies are managing and staffing regulatory compliance issues, costs and outsourcing. Attendance is limited to encourage interaction and networking and roundtable wrap-ups after each session will serve to pull all this valuable information together. International Decision Systems is the exclusive sponsor of the Executive Roundtable in 2016.

Sponsored by



INTERNATIONAL
DECISION SYSTEMS®

Who Should Attend

The attendance policy has changed for the 2016 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 or COO and 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.

March 22

15th Annual IMN/ELFA Investors Conference on Equipment Finance

Union League Club • New York, NY

Now in its 15th 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 15th Annual IMN/ELFA Investors Conference on Equipment Finance, please go to www.imn.org/ef2016.

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.

APRIL

April 19-21

28th Annual National Funding Conference

Swissôtel • 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 Lisa Ramirez at lramirez@elfaonline.org.

Who Should Attend

Principals in leasing and finance organizations responsible for funding the company and its transactions, and for par-



ticipating in transactions, as well as 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.

MAY

May 1-3

Legal Forum

Hyatt Regency San Francisco • San Francisco, CA

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 4-6

AGL&F Public Sector Finance Forum

Omni Charlotte Hotel • Charlotte, NC

The Association of Governmental Leasing and Finance (AGL&F) offers 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.

Conference
Qualifies for CLE
and CPE Credits

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 18-19

Capitol Connections

The Washington Court Hotel • Washington, DC

This annual event, 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 5-7

Credit and Collections Management Conference & Exhibition

Grand Hyatt Denver • Denver, CO

The ELFA Credit and Collections Management Conference and Exhibition addresses the new and emerging issues relevant to credit and collections professionals in the equipment finance industry. The 2016 conference will include sessions on the state of the economy, the new lease accounting rules, 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.

Conference
Qualifies for CLE
and CPE Credits

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.

Exhibit Opportunities Available

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



SEPTEMBER

September 12-14

Operations & Technology Conference & Exhibition

Hyatt Regency Baltimore at the Inner Harbor • Baltimore, MD

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 development methodologies, survival tips for the accidental project manager, a preview of the 2016 Business Technology Performance Index, managing enterprise risk and information sharing. Also hear from the 2016 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.

Exhibit Opportunities Available

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

September 12-14

Lease and Finance Accountants Conference & Exhibition

Hyatt Regency Baltimore at the Inner Harbor • Baltimore, MD

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 will also include timely sessions on the new lease accounting standard and 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.

Exhibit Opportunities Available

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

OCTOBER

October 23-25

55th Annual Convention

JW Marriott Desert Springs • Palm Desert, CA

The 55th Annual Convention is the equipment leasing and finance industry's premier event. The Convention offers unmatched networking opportunities and high-quality educational sessions.

All 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 Heather Staverman at hstaverman@elfaonline.org.

Who Should Attend

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

Exhibit Opportunities Available

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

Whether you didn't attend an event or attended but couldn't make it to all the sessions, the Conference Resource Center (CRC) ensures that you'll never miss out again! View session recordings and download materials for many of ELFA's outstanding conferences.

If you attended a particular conference, access to the archived sessions is 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.

NEW Lease Accounting Standards

ELFA is planning a number of activities for 2016 to educate you and your company about the new lease accounting rules. Below is a list of resources and events to keep you informed on the latest information:

- **White Paper** - "Changes in Lease Accounting: The Benefits of Equipment Lease Financing Remain" is designed to help ELFA members understand what's in the new accounting rules; educate your sales teams, vendor partners and end-users about the rules; and allay any potential customer fears about the forthcoming changes. View/download the white paper at: www.elfaonline.org/Issues/Accounting/.

- **Web Seminar** - A 60-minute web seminar will be held in February 2016 and will give a high-level overview of the final lease accounting standard and its impact on you and your customers.
- **1-day Workshop** - Join a team of lease accounting experts to learn the details of the new rules and take a deeper look at how they will impact prospective lessees, existing customers, vendors and funding sources.

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 19 • Swissôtel • Chicago, IL

Captive and Vendor Finance Best Practices Roundtable

April 19 • Swissôtel • Chicago, IL

Independent Best Practices Roundtable

April 19 • Swissôtel • Chicago, IL

Tax Best Practices Roundtable

TBD

Human Capital Roundtable

TBD

Get Credit!

Continuing Education Credits

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 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 Lease and Finance Professional (CLFP) Designation

Attendees who possess the Certified Lease and Finance Professional (CLFP) 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 CLFP and wish to receive a certificate of attendance to get credit for attending or teaching at an ELFA conference, 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 CLFP or if you wish to learn more about the CLFP, please contact Ms. Reid Raykovich at (206) 535-6281 or reid@clfpfoundation.org.

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

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.

This workshop is designed to teach the fundamentals of “business-to-business” commercial equipment leasing and finance for entry-level personnel and/or individuals with business experience who do not have a complete overview of the industry.

Who Should Attend

Newly-hired staff, new ELFA members, operations staff, sales personnel, marketing personnel, outside providers, lessees, vendors and manufacturers. It is recommended that attendees have at least 3-6 months in their current position before attending.

Confirmed dates:

April 19-21 - Chicago

June 14-16 - Philadelphia

September 12-14 - Los Angeles

For additional information on the 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 and 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 Workshops – 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 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 on-line 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

The Fundamentals of Equipment Leasing and Finance is 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, but goes BEYOND to teach future-focused skills necessary in today's environment.

MOODY'S
ANALYTICS

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.



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 con-

ferences, please visit the ELFA website at www.elfaonline.org/Events/Exhibit/ or contact Steve Wafalosky at steve@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 visit the ELFA website at www.elfaonline.org/events/sponsor/ or contact Steve Wafalosky at steve@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 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.



Mobile App Information

Your on-site experience is going **totally green....Introducing the new ELFA Events app**. No longer will you have to carry around large packets of information on-site. Now you can access all conference information with the touch of a button.

In the ELFA Events app you can find the agenda, list of attendees, speaker bios, exhibitor listings, presentations, sponsors, and also enter real-time session evaluations. Not only will this make it easier for you to stay up to date with the latest information, but ELFA is doing its part to reduce waste and our carbon footprint.

You'll receive information on how to download the ELFA Events app three weeks prior to the conference date.

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The Washington Court Hotel • Washington, DC

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Operations & Technology Conference & Exhibition

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Lease and Finance Accountants Conference

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April 19 • Swissôtel Chicago • Chicago, IL
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April 19 • Swissôtel Chicago • Chicago, IL
- **Independent Best Practices Roundtable**
April 19 • Swissôtel Chicago • Chicago, IL
- **Tax Best Practices Roundtable**
Date and Location To Be Announced
- **Human Capital Roundtable**
Date and Location To Be Announced

Conference Resource Center



ELFA's Conference Resource Center (CRC) is your online portal to educational content from ELFA's conferences. The CRC allows you to view conference sessions virtually and includes speaker handouts, audio streaming presentations, MP3 downloadable files and more. Whether you attended a meeting and want to revisit a session, or you're browsing for information on a particular topic, the CRC is your place to find that information. For a complete listing of the educational materials available, please go here: <http://elfa.sclivelearningcenter.com>.



The ELFA Academy provides high-quality, interactive training and resources for you and your staff. For a complete listing of the online 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

ELFA instructors have been introducing leasing and finance company employees to the basics of the business for three decades. To view the workshop agenda and to register, go to the Events & Training section of www.elfaonline.org. For questions, contact Alexa Carnibella at 202-238-3416.

Dates and locations for Public Workshops

April 19-21 - Chicago - Fifth Third Bank • June 14-16 - Philadelphia - Dilworth Paxson
Sept 12-14 - Los Angeles - Frandzel Robins Bloom & Csato, L.C.

If the 2016 dates and locations don't fit your schedule and you have 10 or more employees you would like to send to the workshop, ELFA can bring the workshop to you. For further details and pricing, contact Alexa Carnibella at acarnibella@elfaonline.org or 202-238-3416.

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.