

2017

ELFA Annual Schedule of Conferences, Workshops and e-Learning Opportunities



Supporting Your Professional Growth

ELFA
EQUIPMENT LEASING AND
FINANCE ASSOCIATION



FEBRUARY

February 26-28 Equipment Management Conference & Exhibition Hilton Americas-Houston • Houston, TX

- Knowledge Level: Basic, Intermediate and Advanced
- Program Type: Group-live Event & Exhibition
- Prerequisite or Advanced Preparation Requirements: None
- NASBA Field of Study: Finance - 2.0 CPE; Specialized Knowledge and Application - 10.0 CPE

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. The 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.



Learning Objectives

- After attending this conference, you will be able to:
1. Be aware of strategies that work best for you and recognize when to use them in your workplace.
 2. Demonstrate the ability to make accurate equipment leasing decisions based on the content provided.
 3. Learners will collectively have brainstormed, articulated, captured and addressed pertinent issues or concerns in their industry.

Exhibit Opportunities Available

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

MARCH

March 12-14 Executive Roundtable The Ritz-Carlton Golf Resort • Naples, FL

- Knowledge Level: Advanced
- Program Type: Group-live Event
- Prerequisite or Advanced Preparation Requirements: Must be President, CEO or Top Company Leaders
- NASBA Field of Study: Business Management and Org - 4.0 CPE; Specialized Knowledge and Application - 10.0 CPE

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 challenge’s 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 2017.



Who Should Attend

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.



Learning Objectives

- After attending this conference, you will be able to:
1. Be aware of strategies that work best for you and recognize when to use them in your workplace.
 2. Demonstrate the ability to make accurate equipment leasing decisions based on the content provided.
 3. Learners will collectively have brainstormed, articulated, captured and addressed pertinent issues or concerns in their industry.

March 22 16th Annual IMN/ELFA Investors Conference on Equipment Finance Union League Club • New York, NY

Now in its 16th consecutive year, the Investors Conference on Equipment Finance is set to attract increasing attention from analysts, bankers and institutional investors. Nearly half of the attendees 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 16th Annual IMN/ELFA Investors Conference on Equipment Finance, go to www.imn.org/ef2017.

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 4-6

29th 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 lr Ramirez@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.

MAY

May 7-9

Legal Forum

Loews Don CeSar Hotel • St. Pete Beach, FL

- *Knowledge Level:* Intermediate, Advanced, Overview
- *Program Type:* Group-live Event
- *Prerequisite or Advanced Preparation Requirements:* None
- *NASBA Field of Study:* Management, Personal Development, Specialized Knowledge & Applications, Taxes, Ethics

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.

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.

Learning Objectives

After attending this conference, you will be able to:

1. Be aware of strategies that work best for you and recognize when to use them in your workplace.



2. Demonstrate the ability to make accurate equipment leasing decisions based on the content provided.
3. Learners will collectively have brainstormed, articulated, captured and addressed pertinent issues or concerns in their industry.

May 17-18

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 policy-makers 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 4-6

Credit and Collections Management Conference & Exhibition

Hyatt Regency Baltimore Inner Harbor • Baltimore, MD

- *Knowledge Level:* Basic, Intermediate, Overview
- *Program Type:* Group-live Event & Exhibition
- *Prerequisite or Advanced Preparation Requirements:* None
- *NASBA Field of Study:* Business Management and Org - 13.0 CPE

The ELFA Credit and Collections Management Conference and Exhibition addresses new and emerging issues relevant to credit and collections professionals in the equipment finance industry. The 2017 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.

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.



Learning Objectives

After attending this conference, you will be able to:

1. Be aware of strategies that work best for you and recognize when to use them in your workplace.
2. Demonstrate the ability to make accurate equipment leasing decisions based on the content provided.
3. Learners will collectively have brainstormed, articulated, captured and addressed pertinent issues or concerns in their 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 11-13

Operations & Technology Conference & Exhibition

The Westin Charlotte • Charlotte, NC

- Knowledge Level: Basic, Intermediate, Overview
- Program Type: Group-live Event & Exhibition
- Prerequisite or Advanced Preparation Requirements: None
- NASBA Field of Study: Business Management and Org - 15.0 CPE

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 2017 Business Technology Performance Index, managing enterprise risk and information sharing. Also hear from the 2017 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.

Learning Objectives

After attending this conference, you will be able to:

1. Be aware of strategies that work best for you and recognize when to use them in your workplace.
2. Demonstrate the ability to make accurate equipment leasing decisions based on the content provided.

3. Learners will collectively have brainstormed, articulated, captured and addressed pertinent issues or concerns in their 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 11-13

Lease and Finance Accountants Conference & Exhibition

The Westin Charlotte • Charlotte, NC

- Knowledge Level: Basic, Intermediate, Advanced, Overview
- Program Type: Group-live Event & Exhibition
- Prerequisite or Advanced Preparation Requirements: None
- NASBA Field of Study: Accounting - 19.0 CPE

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 also includes timely sessions on the new lease accounting standards 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.

Learning Objectives

After attending this conference, you will be able to:

1. Be aware of strategies that work best for you and recognize when to use them in your workplace.
2. Demonstrate the ability to make accurate equipment leasing decisions based on the content provided.
3. Learners will collectively have brainstormed, articulated, captured and addressed pertinent issues or concerns in their 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.





OCTOBER

October 22-24

56th Annual Convention

JW Marriott Orlando, Grand Lakes • Orlando, FL

- *Knowledge Level:* Basic, Intermediate, Advanced, Overview
- *Program Type:* Group-live Event & Exhibition
- *Prerequisite or Advanced Preparation Requirements:* None
- *NASBA Field of Study:* Business Management and Org - 6.0 CPE and Specialized Knowledge and Application - 8.0 CPE

The 56th ELFA 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 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.

Learning Objectives

After attending this conference, you will be able to:

1. Be aware of strategies that work best for you and recognize when to use them in your workplace.
2. Demonstrate the ability to make accurate equipment leasing decisions based on the content provided.
3. Learners will collectively have brainstormed, articulated, captured and addressed pertinent issues or concerns in their industry.

Exhibit Opportunities Available

For information on how your company can exhibit at this conference, contact Steve Wafalosky at stevew@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.

Get Credit!

Continuing Education Credits

Continuing Professional Education (CPE) Credit

ELFA is a recognized sponsor of continuing professional education with The National Association of State Boards of Accountancy and many State Bar Associations. Most of ELFA's conferences and workshops qualify for CPEs or CLEs, 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 CLE credits, 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/CLE.

Certified Lease and Finance Professional (CLFP) Designation

Attendees who possess the 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 or web seminar, contact Janet Fianko at (202) 238-3420 or jfianko@elfaonline.org.

For ALL questions on CLFP or how to apply the credits on the certificate received toward your CLFP, please contact Ms. Reid Raykovich at (206) 535-6281 or reid@clfpfoundation.org.

If you have general 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. CPE credits are listed in the individual brochures for all Roundtable events.

Bank Best Practices Roundtable

April 4 • Swissôtel • Chicago, IL

Captive and Vendor Finance Best Practices Roundtable

April 4 • Swissôtel • Chicago, IL

Independent Best Practices Roundtable

April 4 • Swissôtel • Chicago, IL

Tax Best Practices Roundtable

June 20-21 • Nashville, TN

Human Capital Roundtable

September • ELFA Headquarters • Washington, DC



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.

Dates and locations for Public Workshops:

April 4-6 • Chicago, IL
 June 20-22 • Philadelphia, PA
 September • Denver, CO

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 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 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 **ELFAFUNDCOURSE** 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.



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.

For more information about these courses, visit the ELFA Academy home page: www.elfaonline.org/Events/eLearning/. For questions, please 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 conferences, 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 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.



FEBRUARY

February 26-28

Equipment Management Conference & Exhibition

Hilton Americas - Houston • Houston, TX

MARCH

March 12-14

Executive Roundtable

The Ritz-Carlton Golf Resort, Naples • Naples, FL

March 22

16th Annual IMN/ELFA Investors Conference

Union League Club • New York, NY

APRIL

April 4-6

29th Annual National Funding Conference

Swissôtel Chicago • Chicago, IL

MAY

May 7-9

Legal Forum

Loews Don CeSar Hotel • St. Petes Beach, FL

May 17-18

Capitol Connections

The Washington Court Hotel • Washington, DC

JUNE

June 4-6

Credit and Collections Management Conference & Exhibition

Hyatt Regency Baltimore Inner Harbor • Baltimore, MD

SEPTEMBER

September 11-13

Operations & Technology Conference & Exhibition

The Westin Charlotte • Charlotte, NC

September 11-13

Lease and Finance Accountants Conference

The Westin Charlotte • Charlotte, NC

OCTOBER

October 22-24

ELFA 56th Annual Convention

JW Marriott Orlando, Grande Lakes • Orlando, FL

Best Practices Roundtables

Roundtables are small, one-day meetings designed to facilitate the exchange of information among peers. Attendance is open to ELFA regular member companies only.

- **Bank Best Practices Roundtable**
April 4 • Swissôtel Chicago • Chicago, IL
- **Captive and Vendor Finance Best Practices Roundtable**
April 4 • Swissôtel Chicago • Chicago, IL
- **Independent Best Practices Roundtable**
April 4 • Swissôtel Chicago • Chicago, IL
- **Tax Best Practices Roundtable**
June 20-21 • Nashville, TN
- **Human Capital Roundtable**
September TBD • ELFA Headquarters • Washington, DC



ELFA Mobile Events App

ELFA events have gone MOBILE! The ELFA Events app provides event-specific access to items such as the attendee roster, a customized conference agenda, presentation handouts and much more, all in the palm of your hand. For instructions on downloading and a video demo, visit: www.elfaonline.org/Events/EventsApp.



Conference Resource Center

ELFA's Conference Resource Center is your online portal to educational content from ELFA's conferences. View conference sessions virtually and access speaker handouts, audio streaming presentations, MP3 downloadable files and more. Learn more: 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, go to: www.elfaonline.org/Events/eLearning/.

Principles of Leasing and Finance Workshop

ELFA instructors have been introducing equipment finance company employees to the basics of the business for three decades. For workshop details, visit www.elfaonline.org/events/.

Dates and locations for Public Workshops

April 4-6 - Chicago

June 20-22 - Philadelphia

September 19-21 - Denver

If the 2017 dates and locations do not 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. Contact Alexa Carnibella for further details and pricing, 202-238-3416 or acarnibella@elfaonline.org.