

2020 Annual Schedule of Conferences, Workshops & e-Learning Opportunities



FEBRUARY

February 23-25

EQUIPMENT MANAGEMENT CONFERENCE & EXHIBITION

Omni Championsgate • Orlando, FL

- **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 and 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. Identify strategies that work best for you and recognize when to use them in your work place.
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 (440) 247-1060 or steve@larichadv.com.



MARCH

March 8-10

EXECUTIVE ROUNDTABLE

The Ritz-Carlton Golf Resort Naples • Naples, FL

- **Knowledge Level:** Advanced
- **Program Type:** Group-live event
- **Prerequisite or Advanced Preparation Requirements:** Must be President, CEO or Top Company Leader
- **NASBA Field of Study:** Business Management and Org – 4.0 CPE and 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 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.



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 **two** senior executives 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. Identify strategies that work best for you and recognize when to use them in your work place.
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.

SPONSORSHIP OPPORTUNITIES AVAILABLE

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



March 25

19TH ANNUAL IMN/ELFA INVESTORS CONFERENCE ON EQUIPMENT FINANCE

Union League Club • New York, NY

Now in its 19th 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 19th Annual IMN/ELFA Investors Conference on Equipment Finance, go to www.imn.org/ef2020.

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 7-9

PRINCIPLES OF EQUIPMENT LEASING AND FINANCE WORKSHOP

Chicago, IL

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.**

April 20-21

WOMEN'S LEADERSHIP FORUM

Hilton Palmer House • Chicago, IL

The Women's Leadership Forum will be held April 20-21 at the Hilton Palmer House in Chicago, IL. This event is open to anyone who would like to attend and will focus on leadership development for women at all stages of an equipment finance career. The forum will feature dynamic speakers with plenty of time for attendee interaction and networking with other industry leaders. You'll leave this event with new insight and concrete action steps you can implement when you return to your office. *Sponsored by the ELFA Women's Council.*

Conference
Qualifies for
CLE
Credits

April 21

BANK BEST PRACTICES ROUNDTABLE

CAPTIVE AND VENDOR FINANCE BEST PRACTICES ROUNDTABLE

INDEPENDENT BEST PRACTICES ROUNDTABLE

SMALL TICKET BEST PRACTICES ROUNDTABLE

Hilton Palmer House • Chicago, IL

The Best Practices Roundtables are small, highly-interactive, half-day programs designed to bring senior executives together for information sharing and critical thinking about issues facing you each day as leaders of your organization. The roundtables also provide an unparalleled networking opportunity.

The Best Practices Roundtables begin with a joint luncheon and will be held from noon-4:30pm, immediately preceding the National Funding Conference.

WHO SHOULD ATTEND?

Bank Best Practices Roundtable

The roundtable is open exclusively to senior bank executives of ELFA member bank leasing companies.

Captive and Vendor Finance Best Practices Roundtable

The roundtable is open exclusively to senior executives of ELFA member captive and vendor finance companies.

Independent Best Practices Roundtable

The roundtable is open exclusively to senior executives of ELFA member independent leasing companies.

Small Ticket Best Practices Roundtable

The roundtable is open exclusively to senior executives of ELFA member companies primarily involved in small-ticket transactions.

April 21

EMERGING TALENT NETWORKING EVENT

Hilton Palmer House • Chicago, IL

The Emerging Talent Networking Event is an opportunity to hear from industry leaders and network with your fellow industry colleagues. If you're a future leader, or just interested in meeting more people in the industry, please join us at the Emerging Talent Networking Event. There is no cost to attend but space is limited and you must register in advance. *Sponsored by the Emerging Talent Advisory Council (ETAC).*

April 21-23

32ND ANNUAL NATIONAL FUNDING CONFERENCE

Hilton Palmer House • 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 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 3-5

LEGAL FORUM

Omni Shoreham Hotel • Washington, DC

- **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. Identify strategies that work best for you and recognize when to use them in your work place.

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 20

CAPITOL CONNECTIONS

The Washington Court Hotel • Washington, DC

This annual event presents the united voice of the equipment leasing and finance industry to federal policy makers. 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 Executive Branch officials. There is no registration fee for ELFA members to attend this conference.

To find out about ways to make a difference with your federal legislators, contact Chelsea Neil at cneil@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 1-3

CREDIT AND COLLECTIONS MANAGEMENT CONFERENCE & EXHIBITION

Hilton Palacio Del Rio • San Antonio, TX

- **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 2020 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. Identify strategies that work best for you and recognize when to use them in your work place.
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 (440) 247-1060 or stewew@larichadv.com.

**Attorneys please email Janet Fianko at jfianko@elfaonline.org in advance of the conference if you would like to receive CLE credits for this conference.*

June 9-10

TAX BEST PRACTICES ROUNDTABLE

Offices of Akerman • Chicago, IL

The Tax Best Practices Roundtable is a two-day forum offered exclusively to tax practitioners of ELFA member companies. The roundtable focuses on federal and state compliance and planning issues, recent developments, and sharing of internal best practices.

WHO SHOULD ATTEND?

Tax practitioners and other professionals that hold a position in tax, planning, research, business unit support or any other position responsible for corporate tax functions. This roundtable is open to ELFA members only.

June 17-19

PRINCIPLES OF EQUIPMENT LEASING AND FINANCE WORKSHOP

ELFA • Washington, DC

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.***

JULY

July 15-16

EMERGENCE2020

Magnolia Hotel Denver • Denver, CO

Emergence2020 is an opportunity for emerging talent in the equipment leasing and finance industry to gather together and hear from industry leaders, network with colleagues and learn about the industry from different perspectives. If you're a future leader please join us at Emergence2020 for this unique experience. Space is limited and you must register in advance. Sponsored by the Emerging Talent Advisory Council (ETAC).

July 15

EMERGING TALENT REGIONAL NETWORKING EVENT

Magnolia Hotel Denver • Denver, CO

The Emerging Talent Networking Event is an opportunity to hear from industry leaders and network with your fellow industry colleagues. If you're a future leader, or just interested in meeting more people in the industry, please join us at the Emerging Talent Networking Event. There is no cost to attend but space is limited and you must register in advance. Sponsored by the Emerging Talent Advisory Council (ETAC).

SEPTEMBER

September 14-16

OPERATIONS & TECHNOLOGY CONFERENCE & EXHIBITION

Sheraton New Orleans • New Orleans, LA

- **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 – 14.0 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, and managing enterprise risk and information sharing. Also hear from the 2020 Operations &

Conference
Qualifies for
14 CPE
Credits





BUSINESS DEVELOPMENT OPPORTUNITIES

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 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. Identify strategies that work best for you and recognize when to use them in your work place.
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 (440) 247-1060 or steve@larichadv.com.

September 14-16

LEASE AND FINANCE ACCOUNTANTS CONFERENCE & EXHIBITION

Sheraton New Orleans • New Orleans, LA

- **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 **updated** 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 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. Identify strategies that work best for you and recognize when to use them in your work place.
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 (440) 247-1060 or steve@larichadv.com.

September 14

EMERGING TALENT REGIONAL NETWORKING EVENT

Sheraton New Orleans • New Orleans, LA

The Emerging Talent Networking Events are an opportunity to hear from industry leaders and network with your fellow industry colleagues. If you're a future leader, or just interested in meeting more people in the industry, please join us at the Emerging Talent Networking Event. There is no cost to attend but space is limited and you must register in advance. Sponsored by the Emerging Talent Advisory Council (ETAC).

September 15-17

PRINCIPLES OF EQUIPMENT LEASING AND FINANCE WORKSHOP

Offices of Stonebriar Commercial Finance • Plano, TX

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.*

OCTOBER

October 25-27

59TH ANNUAL CONVENTION

JW Marriott Austin • Austin, TX

- **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 59th 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. Identify 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 (440) 247-1060 or stewew@larichadv.com.

**Attorneys please email Janet Fianko at jfianko@elfaonline.org in advance of the conference if you would like to receive CLE credits for this conference.*



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 credits 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.

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

BRING THE WORKSHOPS TO YOU!

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 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

BE THE BOSS with the Fundamentals of Equipment Leasing and Finance Online 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.



This course is divided into 7 micro-lessons (8-10 minutes each), allowing learners to review the vital information every person new to the industry should know. Badges are earned for completing each micro lesson.

Next - take what you've learned and "be the boss" at Strategic Equipment Leasing and Finance, Inc. (S.E.L.F) – navigating through customer interactions, identifying the departments and individuals that should be involved in each step, and earning badges and upgrades as they go! From closing the sale to fielding customer requests and reviewing end-of-lease options, the learner will experience it all and will receive guided feedback to reinforce learning.

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 tool.

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





Get Noticed!

MARKETING OPPORTUNITIES

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

Conference Sponsorships

ELFA offers a fantastic 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. Many of the conference sponsorships offer creative and unique methods to showcase your company and we are always open to new ideas and suggestions from industry providers.

The following events offer sponsorship programs:

Equipment Management Conference & Exhibition

February 23-25, 2020

Executive Roundtable

March 8-10, 2020

ELFA Women's Leadership Forum

April 20-21, 2020

Legal Forum

May 3-5, 2020

Credit and Collections Management Conference & Exhibition

June 1-3, 2020

Emergence2020

July 15-16, 2020

Operations & Technology Conference & Exhibition

September 14-16, 2020

Lease and Finance Accountants Conference & Exhibition

September 14-16, 2020

ELFA 59th Annual Convention

October 25-27, 2020

For more information about the ELFA conference sponsorship program and specific conference sponsorships, visit the ELFA website at www.elfaonline.org/events/sponsor or contact Steve Wafalosky at stevew@larichadv.com or (440) 247-1060.

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.

The following conferences offer exhibit booth or table top opportunities:

Equipment Management Conference & Exhibition

February 23-25, 2020

Credit and Collections Management Conference & Exhibition

June 1-3, 2020

Operations & Technology Conference & Exhibition

September 14-16, 2020

Lease and Finance Accountants Conference & Exhibition

September 14-16, 2020

ELFA 59th Annual Convention

October 25-27, 2020

Additional information regarding each conference and specific offerings for exhibit space including scope of attendees, booth cost, floor plans, specific booth details and more may be found in the Exhibit Prospectus for each individual conference. If you would like information on exhibiting at ELFA conferences, visit the ELFA website at www.elfaonline.org/Events/Exhibit or contact Steve Wafalosky at (440) 247-1060 or stevew@larichadv.com.

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 (202) 238-3432 or jbenson@elfaonline.org.

BE THE BOSS

ELFA's *NEW* Fundamentals of Equipment Leasing and Finance Online Course!

Welcome to the new (and improved!) Fundamentals of Equipment Leasing and Finance course—the only course of its kind for the equipment finance industry!

This course is divided into 7 micro-lessons (8-10 minutes each), allowing learners to review the vital information every person new to the industry should know. Badges are earned for completing each micro lesson.

Lesson 1 – Introduction to Equipment Leasing and Finance

Lesson 2 – Origination Phase of the Transaction Lifecycle

Lesson 3 – Administration and Termination Phases

Lesson 4 – Leasing Law

Lesson 5 – Lease Accounting and Federal Tax

Lesson 6 – Types of Finance

Lesson 7 – Creating Successful Solutions

Be the Boss

Take what you've learned and "be the boss" at Strategic Equipment Leasing and Finance, Inc. (S.E.L.F) – navigating through customer interactions, identifying the departments and individuals that should be involved in each step, and earning badges and upgrades as they go! From closing the sale to fielding customer requests and reviewing end-of-lease options, the learner will experience it all and will receive guided feedback to reinforce learning.

Who Should Take the Course?

This course is designed for those who are new to the equipment finance industry, or as a refresher for those with more experience.

Pricing

Individual:

ELFA Members - \$500/license

Non-Members - \$775/license

Bulk:

Bulk pricing is available for purchases of 11 or more licenses.

Questions?

Contact Alexa Carnibella at acarnibella@elfaonline.org for more information.



www.elfaonline.org/events/fundamentals



EQUIPMENT LEASING AND FINANCE ASSOCIATION
Equipping Business for Success

Let ELFA Know What's Important to You!

As an ELFA member, you may choose the types of notifications you wish to receive from the association. From the *EL&F magazine* to **event alerts** to **advocacy newsletters**, you can opt-in to receive relevant communications straight to your inbox. Follow the steps below to update your preferences today!

Six Easy Steps to Update Your Communication Preferences

1. Visit the ELFA website at www.elfaonline.org
2. Click on **User Login** in the top right corner of the page and enter your credentials
3. Click on **Account Tools** in the top right corner of the page.
4. Under **My Account**, click on **Update Communication Preferences**.
5. Select and update your preferences accordingly.
6. Please verify that **Exclude Email** is not selected to ensure delivery of timely information in your inbox.

Please contact ELFA membership at membership@elfaonline.org with questions.

2020

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

FEBRUARY

February 23-25

EQUIPMENT MANAGEMENT CONFERENCE & EXHIBITION

Omni ChampionsGate • Orlando, FL

MARCH

March 8-10

EXECUTIVE ROUNDTABLE

The Ritz-Carlton Golf Resort, Naples, FL

March 25

19TH ANNUAL IMN/ELFA INVESTORS CONFERENCE

Union League Club • New York, NY

APRIL

April 7-9

PRINCIPLES OF EQUIPMENT LEASING AND FINANCE WORKSHOP

Offices of Accenture • Chicago, IL

April 20-21

WOMEN'S LEADERSHIP FORUM

Hilton Palmer House • Chicago, IL

April 21

BANK BEST PRACTICES ROUNDTABLE

Hilton Palmer House • Chicago, IL

April 21

CAPTIVE AND VENDOR FINANCE BEST PRACTICES ROUNDTABLE

Hilton Palmer House • Chicago, IL

April 21

INDEPENDENT BEST PRACTICES ROUNDTABLE

Hilton Palmer House • Chicago, IL

April 21

SMALL TICKET BEST PRACTICES ROUNDTABLE

Hilton Palmer House • Chicago, IL

April 21-23

32ND ANNUAL NATIONAL FUNDING CONFERENCE

Hilton Palmer House • Chicago, IL

April 21

EMERGING TALENT NETWORKING EVENT

Hilton Palmer House • Chicago, IL

MAY

May 3-5

LEGAL FORUM

Omni Shoreham Hotel • Washington, DC

May 20

CAPITOL CONNECTIONS

The Washington Court Hotel • Washington, DC

JUNE

June 1-3

CREDIT AND COLLECTIONS MANAGEMENT CONFERENCE & EXHIBITION

Hilton Palacio Del Rio • San Antonio, TX

June 9-10

TAX BEST PRACTICES ROUNDTABLE

Offices of Akerman • Chicago, IL

June 17-19

PRINCIPLES OF EQUIPMENT LEASING AND FINANCE WORKSHOP

ELFA • Washington, DC

JULY

July 15-16

EMERGENCE2020

Magnolia Hotel Denver • Denver, CO

July 15

EMERGING TALENT NETWORKING EVENT

Magnolia Hotel Denver • Denver, CO

SEPTEMBER

September 14-16

OPERATIONS & TECHNOLOGY CONFERENCE AND EXHIBITION

Sheraton New Orleans • New Orleans, LA

September 14-16

LEASE AND FINANCE ACCOUNTANTS CONFERENCE

Sheraton New Orleans • New Orleans, LA

September 14

EMERGING TALENT NETWORKING EVENT

Sheraton New Orleans • New Orleans, LA

September 15-17

PRINCIPLES OF EQUIPMENT LEASING AND FINANCE WORKSHOP

Offices of Stonebriar Commercial Finance • Plano, TX

OCTOBER

October 25-27

ELFA 59TH ANNUAL CONVENTION

JW Marriott Austin • Austin, Texas



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. To learn more go to: elfa.sclivelearningcenter.com.



ELFA ACADEMY

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 EQUIPMENT 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/.

If the 2020 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.

For the latest information and updates go to:
www.elfaonline.org/events/calendar/

