



FUTURE 360

ELFA

ELFA 62nd **ANNUAL CONVENTION**

October 22-24, 2023

JW Marriott Phoenix Desert Ridge Resort
Phoenix, Arizona

Equipment Leasing and Finance Association

62nd Annual Convention

FUTURE 360

Get Ready to Learn and Network

Why Attend?

If you're in the \$1 trillion equipment finance industry, you can't afford to miss the 2023 ELFA Annual Convention. It's the largest and most important annual gathering of industry leaders. You'll enjoy unparalleled networking opportunities, high-quality educational sessions, a great lineup of keynote speakers and a first-rate exhibit.

FUTURE 360

In today's rapidly changing world, how can you avoid tunnel vision and keep an eye on the big picture to help your business succeed? At the ELFA Annual Convention, you'll get a 360-degree view of the evolving equipment finance marketplace. Join the largest and most important gathering of industry leaders to examine a wide range of critical industry trends and upcoming developments and what they mean for the future.

We have a lot to talk about: new market opportunities... technology innovations... new regulatory requirements... evolving customer desires... changing workforce expectations... the economic outlook... and more. We'll also address critical "people power" issues, from sourcing and developing talent, to driving diversity, equity and inclusion in the workplace, to welcoming the next generation of leaders.

As you evolve your business and your career into the future, you don't want to miss the ELFA Annual Convention. Register today to invest in the success of your business, your staff, your industry and your career.



Location

The ELFA Annual Convention will be held at the JW Marriott Phoenix Desert Ridge Resort & Spa in Phoenix, Arizona, home to nearby Scottsdale and other popular resort communities. Majestic mountain ranges provide a dramatic backdrop to the spectacular property and its championship golf courses.

Need More Information?

Check out the Convention website for the latest detailed information at www.elfaonline.org/events/2023/AC/

BECOME A SPONSOR!

The ELFA Annual Convention provides unmatched opportunities to get noticed, especially through a variety of sponsorship opportunities. To become a sponsor, contact Steve Wafalosky at 440-247-1060 or steve@cvmpmedia.com.

Schedule of Events

Sunday, October 22

8:00 a.m.
Golf Tournament and Luncheon
 (on property)



9:00 a.m.
Pickle Ball Tournament and Luncheon
 (on property)

8:30 a.m. – Noon
Community Service Project – Community Garden Cleanup at Urban Farming Education
ELFA and the Foundation Give Back!
 (pre-registration required, offsite, limited to 60 attendees)



8:30 a.m. – Noon
Jim McGrane Charity Bike Ride
24-mile Route – leaves from the hotel
ELFA and the Foundation Give Back!
 (pre-registration required, limited to 40 attendees)

10:00 a.m. – 8:00 p.m.
Convention Registration
 (Attendees & Exhibitors)

2:00 – 5:00 p.m.
Exhibitor Setup

2:00 – 4:00 p.m.
Community Service Project – Arizona ASPCA Chapter: Build a Dog House
ELFA and the Foundation Give Back!
 (pre-registration required, limited to 70 attendees, on property)

4:30 – 5:30 p.m.
New Members and Leadership Reception

5:00 – 6:00 p.m.
Women's Council Reception

6:00 – 8:30 p.m.
Welcome Reception (in Exhibit Area)

Monday, October 23

7:00 a.m. – 4:30 p.m.
Convention Registration

7:00 – 8:15 a.m.
Group Breakfast

7:00 a.m. – 4:30 p.m.
Exhibits Open

8:30 – 10:00 a.m.
General Session
President's Report and Keynote Address



Speaker:
BOB NEAGLE, ELFA Board Chair



Speaker:
JASON TURNER,
 Chief Investment Strategist & Head of
 Multi-Asset Strategy
 Great Lakes Advisors, LLC, A Wintrust Wealth
 Management Company

10:00 – 10:45 a.m.
Break

10:45 a.m. – 11:45 a.m.
Issue Breakout Sessions

- Sustainable Innovation: Driving Climate Finance in Today's Market
Supported by the ELFA Climate Financing Committee
- Future Supply Chain Impacts on the US Equipment Leasing & Finance Industry
Supported by the Equipment Leasing & Finance Foundation
- AI 1.0 – Practical Applications of AI and the Future of Equipment Finance
- Benefits of Inclusion - Greater Shareholder Value, Higher Customer Satisfaction & Increased Employee Engagement
Supported by the ELFA Equity Committee

11:00 a.m. – 4:00 p.m.
Spouse/Companion Event: Grapes and Gravel
 ATVing and Luncheon (pre-registration required)



Schedule of Events *continued*

12:15 – 1:45 p.m.

Equipment Leasing & Finance Foundation Luncheon



Speakers:



Dr. CHRIS HOWARD, Executive VP and COO, Arizona State University



NANCY PISTORIO, Chair, Board of Trustees



KELLI NIENER, Executive Director, Equipment Leasing & Finance Foundation

2:30 – 3:30 p.m.

Issue Breakout Sessions

- Lending in the Digital Age: Enhanced Underwriting with Non-Traditional Data
- Optimizing Talent Acquisition: The Power of Fractional Hiring in Leadership
- AI 2.0 – A Panoramic View of Its Role in the Future of Equipment Finance
- Legal News CEOs Can Use

3:30 – 4:00 p.m.

Break

4:00 – 5:00 p.m.

Equity and ETAC Reception

5:00 p.m.

Individual Company-Sponsored Receptions & Events

Tuesday, October 24

7:00 a.m. – 3:00 p.m.

Convention Registration

7:00 – 8:15 a.m.

Group Breakfast

7:00 a.m. – 4:00 p.m.

Exhibits Open

8:30 – 10:15 a.m.

General Session

Chair's Address and Keynote Address



Speaker:

RALPH PETTA, President and CEO, ELFA



Speaker:

TIM URBAN, Blogger, Author, Illustrator, and Speaker

10:15 – 11:00 a.m.

Break

11:00 a.m. – 12:00 p.m.

Issue Breakout Sessions

- Intelligent Automation & Fraud Management: Cutting-Edge Strategies to Safeguard Your Business
- Lessons Learned When Listening to, Learning from, and Acting On Behalf of Your Customers
- Leading Process and Technology Transformation for the Future
Winners of the ELFA 2023 Operations & Technology Excellence Award
- Section 1071 is Here – How Should Your Business Prepare and Where to Start

11:00 a.m. – 4:00 p.m.

Spouse/Companion Event: Musical Instrument Museum VIP Tour and Luncheon



12:15 – 2:00 p.m.

Community Luncheon

2:00 – 2:30 p.m.

Break

2:30 – 3:30 p.m.

Issue Breakout Session

- Analyzing Trends and Market Outlook for Large Equipment Financing: A Comprehensive Update
- Accelerating Innovation: The Transformative Role of Industry Standards in Equipment Finance
Supported by the ELFA Technology Innovation Council

5:00 – 8:00 p.m.

Closing Party

8:00 – 9:30 p.m.

After Glow Party



Speakers



TIM URBAN

Blogger, Author, Illustrator, and Speaker

There's a reason that Tim Urban's rabid fanbase includes the likes of Elon Musk, Mark Zuckerberg, Sheryl Sandberg, Twitter co-founder Evan Williams, and TED curator Chris Anderson: He's the smart person's equivalent of a cool underground club. Some folks are trendsetters and tastemakers; Tim's a thoughtsetter and meaningmaker. Driven by an infectious curiosity and armed with hundreds of hours of research, he unravels mysteries about our world and humanity with an electrifying blend of intellect and humor. Tim is the creator of the wildly popular blog *Wait But Why*, where his illustrated long-form articles first made him a cult favorite amongst the intelligentsia before the secret got out and he went viral with what quickly became the third most-watched TED talk ever.



JASON TURNER

Chief Investment Strategist & Head of Multi-Asset Strategy

Jason Turner is the Chief Investment Strategist of Great Lakes Advisors. He is a member of the firm's investment committee, authors market and economic commentary, regularly presents in the media and to professional conferences, and works with client portfolio managers to support institutional and private clients. As the Head of Multi-Asset Strategy, he is responsible for portfolio strategy, asset allocation, and for overseeing the firm's manager due diligence and selection efforts. He is also a member of the firm's Operating Committee and Management Committee. Prior to joining Great Lakes in 2009, Jason served in various roles for Skyline Asset Management and Aon Hewitt Investment Consulting.



DR. CHRIS HOWARD

Executive Vice President and Chief Operating Officer of Arizona State University

Dr. Chris Howard is the Executive Vice President and Chief Operating Officer of Arizona State University. He is a distinguished graduate of the US Air Force Academy and earned a doctorate in politics from the University of Oxford as a Rhodes Scholar. He also earned an MBA with distinction from Harvard Business School. Dr. Howard's military career included service as a helicopter pilot and an intelligence officer, and he was awarded a Bronze Star for service in Afghanistan. As a member of the Aspen Strategy Group, Dr. Howard co-edited the report "Re-Engineering American Security: Cultivating Talent for Competitiveness." He unveiled the report's key findings during the 2023 Aspen Security Forum, sharing a panel with former Secretary of State Condoleezza Rice. Previously, he served as President of Robert Morris University and Hamden Sydney-College and had a successful corporate career with GE and Bristol-Myers Squibb.

IMPORTANT DEADLINE DATES

- **Friday, October 6, 2023:** Last day for online registrations. After this date registrations can be made on-site. Please note: There are no refunds of registration fees after this date.

Exhibition

Visit exhibitors to check out the latest technology and services.

A select group of equipment leasing and finance industry service providers is exhibiting at the Annual Convention, giving you a look at services available to help increase the operational efficiency of your company



For more information on becoming an exhibitor, please contact Steve Wafalosky at steve@cvmpmedia.com or 440-247-1060.

Corporate Entertainment Functions

Companies wishing to hold private parties may do so on Monday, October 23, any time after 5:00 p.m.

Please send requests for function space at the JW Marriott Desert Ridge to Lisa Ramirez, VP, Business and Professional Development, at lramirez@elfaonline.org or 202-238-3414. Please specify the type of function, timing and number of people expected.



We request that companies planning events outside the JW Marriott Desert Ridge provide ELFA with information about the function in the event of emergencies or inquiries. If assistance is needed with planning an event outside the hotel, Lisa Ramirez can provide recommendations of facilities and activities available for parties.

Community Service Projects ELFA and the Foundation Give Back!



Community Garden Cleanup at Urban Farming Education Sunday, October 22

8:30 a.m. – Noon

Attendees will travel to a local school(s) and prepare sprout kits and garden signs and build planter boxes. Once all materials are ready, the group will then install the garden and prepare the planters with soil and seeds. During this experience the group will also have the opportunity to



further learn about sustainability, soil, vermiculture, pollination and agriculture. In Arizona, close to one million people are struggling with hunger, and over one-third of those are children. The mission of this program is to target schools in low-income areas and create a garden where the students can go to learn, garden, and grow fresh produce for their schools, creating a step forward in the fight to end child hunger.



Jim McGrane Charity Bike Ride Sunday, October 22

8:30 a.m. – Noon.

ELFA and the Equipment Leasing & Finance Foundation have teamed up to create a memorable cycling experience for a good cause. Starting from the JW Marriott Desert Ridge, riders will go on a 24-mile trip through the city of Phoenix. Riders will be guided by experienced tour guides and a SAC car will trail behind offering refreshments. Participants should bring their own riding gear, but there is a separate fee for rental of bikes and helmets.



Arizona ASPCA Chapter - Build a Dog House Sunday, October 22

2:00 – 4:00 p.m.

These beautiful doghouses and care packages come into creation only with team collaboration and hard work! Teams create an amazing heartfelt moment as they donate their doghouse full of supplies for families who are thoughtful enough to adopt an animal in need. Upon completion of the dog houses and care packages, teams will have the opportunity to interact with dogs provided by the Maricopa County Animal Shelter. A member of the program, a local charity or school representative will address the group and thank you for your donation.



Become a Sponsor for the Community Service Projects

If you would like to be one of the sponsors for this year's community service projects, please contact Steve Wafalosky at steve@cvmpmedia.com or 440-247-1060.



Tournaments

CONVENTION GOLF TOURNAMENT

Sunday, October 22

8:00 a.m. start time

The ELFA Golf Tournament will take place at the Wildfire Golf Club at the JW Desert Ridge. The Palmer Signature Course plays up to 7,145 yards, providing an unmatched scenic golfing experience. The expansive fairways allow golfers to remain in play even on an errant shot. The flashed bunkering on Palmer is superb and the putting greens carry plenty of undulation, like many Arnold Palmer designs.



Prizes will be distributed to the winning teams. Players have the option of forming their own foursomes or being placed into foursomes. The cost of the tournament is \$250, which includes continental breakfast, green fees, cart and lunch. If you are interested in playing in the tournament, please check the appropriate box on the registration form and include the \$250 with your registration fees. Then, to put together or join a foursome, visit the online scheduler at www.elfaonline.org/golfpairings. **NOTE: There will be no refund of golf fees after Friday, October 6, 2023.**

CONVENTION PICKLEBALL TOURNAMENT

Sunday, October 22

9:00 a.m. start time

Try something new this year at the ELFA Annual Convention! The ELFA Pickleball Tournament will be held at the JW Desert Ridge Pickleball Courts. The tournament includes a 30-minute warm-up clinic and refreshments. Pickleball is a paddle sport (similar to a racquet sport) that combines elements of badminton, tennis, and table tennis. Two or four players use solid paddles made of wood or composite materials to hit a perforated polymer ball, like a wiffle ball, over a net. If you are interested in playing in the tournament, please check the appropriate box on the registration form. There is an additional fee to participate in the Pickleball Tournament.



If you are planning to arrive early, you might want to participate in these activities:

Sunday, October 22

8:00 a.m.

Golf Tournament and Luncheon (Men and Women)

JW Marriott Wildfire Golf Club

Additional fee; reserve your spot when registering for the convention.

8:30 a.m. - Noon

Jim McGrane Charity Bike Ride

24-mile route – leaves from the hotel
(Additional fee; pre-registration required, limited to 40 attendees)

8:30 a.m. - Noon

Community Service Project – Community Garden Cleanup at Urban Farming Education

No additional fee; reserve your spot when registering for the convention. Transportation to the facility, continental breakfast and lunch provided.

9:00 a.m.

Pickleball Tournament and Luncheon (Men and Women)

JW Marriott Desert Ridge Pickleball Courts
Additional fee; reserve your spot when registering for the convention.

2:00 – 4:00 p.m.

Community Service Project – Arizona ASPCA Chapter: Build a Dog House

This project will be conducted on the grounds of the JW Marriott Desert Ridge. No additional fee; reserve your spot when registering for the convention.

Spouse/Companion Program

Phoenix is a fun destination and ELFA has planned some terrific activities for spouses/companions. We encourage you to bring your spouse/companion this year.

A spouse or companion attending any portion of the convention or social function must be registered and pay the appropriate spouse/companion fee. If he or she is employed in the equipment finance industry, the full member attendee registration fee is due.

For your enjoyment during the ELFA Annual Convention, we are offering different packages for spouse/companion attendees. Choose the package that fits into your plans.

Package #1	Package #2	Package #3
<p>Full Convention Registration</p> <p>This package includes all convention activities. Spouses or companions who register for the full convention package are entitled to attend all sessions and social activities, including the Sunday Opening Reception, the Tuesday Night Closing Party and Afterglow Party, special spouse programs on Monday and Tuesday, and breakfast each morning.</p>	<p>Evening Events Only</p> <p>This package includes the Sunday Opening Reception and the Tuesday Night Closing Party.</p>	<p>Special Spouse/Companion Activities</p> <p>This package includes the special events planned specifically for spouses and companions, separate from convention sessions on Monday and Tuesday. Descriptions of each of these special events follow.</p>

Monday, October 23
11:00 a.m. – 4:00 p.m.
Grapes & Gravel - ATV

Not your typical wine pairing! That’s why it’s “crushing” it in popularity. This unlikely blend of a favorite Southwest tour combined with one of the most well-known wine cafes in Arizona creates the perfect balance. Experience an exhilarating off-roading adventure in a custom ATV with expert guides leading the way through the Sonoran Desert along the gravel of the Four Peaks Wilderness Area. After the thrilling ride through impossible terrain, you’ll find yourself enjoying liquid grapes and deliciously crafted food at a favorite wine café. This fun-filled afternoon of adventure and delicious delights will find you suitably satiated and delivered back to the hotel safe and sound!



Tuesday, October 24
11:00 a.m. – 4:00 p.m.
Musical Instrument Museum VIP Tour with Lunch

Opened in 2010, the Musical Instrument Museum is the largest museum of its type in the world, providing a one-of-a-kind experience with more than 15,000 musical instruments and associated objects from 200 of the world’s countries and territories. See and listen to state-of-the-art displays or actually play instruments from around the world in the Experience Gallery. Discover authentic instruments used by music icons such as John Lennon, Taylor Swift, Elvis Presley, Carlos Santana and many more in the Artist Gallery. Be amazed by the beauty and diversity of sound from across the globe, enriched by the stories the instruments tell during this unique experience.



On the registration form, select the package or packages that best fit your plans, and include the appropriate fees with your convention registration.

General Information and Registration

Several important deadline dates are listed here. Please review carefully.

- **Friday, October 6, 2023:** Last day for online registrations. After this date registrations can be made on-site. **Please note: There are no refunds of registration fees after this date.**

CONVENTION REGISTRATION

Registering online at the ELFA website is a fast and easy way to register for the convention.

Go to: www.elfaonline.org/events/2023/AC/

Overnight Mail Address:

ELFA

Attn: Accounts Receivable

1625 Eye Street, NW • Suite 850

Washington, DC 20006

Registration is mandatory to attend the convention and spouse functions. Registration is for the entire convention. No partial registration is available. Only individuals registered and wearing a badge may attend convention events. The full registration fee is payable in advance in U.S. funds. No registrations will be considered complete until payment is received.

Spouse/Companion Registration Fees

A spouse/companion attending any portion of the convention or social functions must be registered and pay the appropriate spouse/companion fee. If he/she is employed in the equipment finance industry, the full attendee registration fee is due.

First-Time Attendee

This fee is for any *individual* who has NEVER attended an ELFA Annual Convention in the past but currently works for an ELFA member company. This applies even if your current company has sent others to the Annual Convention previously.

Photographs Taken at the Convention

By registering for this conference, you authorize ELFA to use any photographs taken of you during the course of the ELFA Annual Convention. Photographs may be used in promotional materials or stories that appear in professional publications.



Attendee Contact Information

By registering for this conference, attendees authorize ELFA to share your contact information, including but not limited to your email address and telephone number, with other registered attendees, sponsors and exhibitors. For more information, please contact Janet Fianko at jfianko@elfaonline.org.

Hotel Accommodations

Residence Inn Overflow Hotel

Open For Reservations

The 2023 ELFA Annual Convention will be held at the JW Marriott Phoenix Desert Ridge Resort & Spa, 5350 East Marriott Drive, Phoenix, AZ 85054. The ELFA room block is now full at the JW Marriott Phoenix and we encourage attendees to book at our overflow hotel, Residence Inn Phoenix Desert View at Mayo Clinic, 5665 E. Mayo Boulevard, Phoenix, AZ 85054 for the discounted rate of \$299 USD per night.

Shuttle transportation will be provided by ELFA to and from the Residence Inn and the JW Marriott Phoenix Desert Ridge beginning on Sunday, October 22 at 6:00 a.m., through Tuesday, October 24 at 11:00 p.m. Shuttles will run every 30-minutes during the convention.

Those planning to arrive early to participate in the ELFA sports tournaments or community service projects on Sunday, October 22 are urged to make hotel reservations early.

Online Hotel Reservations!

Passkey Link: <https://www.marriott.com/event-reservations/reservation-link.mi?id=1692724624277&key=GRP&app=resvlink>

Enter: Arrival and Departure Dates

Enter: Number of rooms needed and number of guests

Click on: Search

Once the reservation is complete, you will receive a confirmation number via e-mail (as long as your e-mail address has been entered). Reminder: Cut-Off Date to Book in Group Block: September 29, 2023

Suite Reservations

A number of suites have been reserved for private entertaining. Companies wishing to hold private parties should plan to schedule these on Monday, October 23 any time after 5:00 p.m. Please contact Lisa Ramirez, VP Business and Professional Development, at lr Ramirez@elfaonline.org or 202-238-3414 to reserve a suite. Please specify the type of function, timing and number of people expected.

Getting There

The JW Marriott Phoenix Desert Ridge Resort & Spa is located in Phoenix, AZ. The resort's location allows guests to explore nearby Phoenix attractions like TPC Scottsdale, Pinnacle Peak, Cave Creek and Desert Ridge Marketplace.

The Resort is accessible from Phoenix Sky Harbor International Airport (PHX), from Deer Valley Road and from 51 North. The resort is 22 miles from Sky Harbor and an approximate \$60-dollar cab ride. For directions, please go here:

<http://www.marriott.com/hotels/maps/travel/phxdr-jw-marriott-phoenix-desert-ridge-resort-and-spa/>.

Transportation

CM Driving Services- Private Car

(480) 567-9786

Info@cmdrivingservices.com

Yellow Cab Arizona

The provider of taxi service at Phoenix Sky Harbor Airport. For more information about Yellow Cab please visit their website at <https://yellowcabaz.com/> or call (480) 888-8888.

Onsite Hotel Car Rental

Go Rentals JW Marriott Phoenix Desert Ridge
5350 E Marriott Dr

Phoenix, AZ 85054

Phone: (800) 464-8267

<https://gorentals.com/location/jw-marriott-phoenix-desert-ridge>

Uber and Lyft

On demand rides

What To Pack

Business casual dress for education sessions is encouraged. The temperature range in Phoenix during October is a high of 86° (daytime) to a low of 62° (nighttime).

Suggested dress for social events is as follows:

Sunday Evening Welcome Reception – business casual

Monday/Tuesday Optional Spouse Programs – casual attire, comfortable shoes

Tuesday Night Closing Party – casual attire

Deadline Dates, Cancellations & Substitutions

Deadline Dates at a Glance

- **Friday, October 6, 2023:** Last day for online registrations. After this date registrations can be made on-site. **Please note: There are no refunds of registration fees after this date.**

Cancellation Policy

Cancellations to the Annual Convention must be made in writing. This letter may be:

- a.) emailed to Janet Fianko at jfianko@elfaonline.org
 - b.) mailed to Janet Fianko at ELFA Headquarters: 1625 Eye Street, NW, Suite 850, Washington, DC 20006
- **Refund minus \$100:** Should you need to cancel, refunds will be processed less a \$100 processing fee.
 - **No refund:** No refunds of registration fees will be given for cancellations received on or after **Friday, October 6, 2023**. ELFA regrets that refunds will not be given for no-shows.

Substitutions

Substitutions for the entire program may be made at any time including at on-site registration.

