



# 2024

# Software Guide

The Leading Software Solutions  
for the Equipment Finance Industry



ELFA



# Table

<b>Invest Wisely in Software and Tech</b> .....	3
<b>ELFA Technology Resources</b> .....	5
<b>Alfa:</b> Alfa Systems .....	6
<b>CODIX LLC:</b> iMX .....	8
<b>Constellation Financial Software:</b> Vision .....	10
<b>Copernicus-USA, LLC:</b> Copernicus .....	12
<b>FIS:</b> FIS Asset Finance .....	14
<b>Integrated Financial Solutions, Inc.:</b> IFSLeaseWorks .....	16
<b>Ivory Consulting Corporation:</b> SuperTRUMP, Portfolio Intelligence, Asset Management Solution ....	18
<b>Leasepath:</b> Leasepath .....	20
<b>Linedata Lending and Leasing:</b> Linedata Ekip360 .....	22
<b>Liventus, Inc.:</b> Custom Software Solution - Equipment Finance .....	24
<b>LTi Technology Solutions:</b> ASPIRE .....	26
<b>NETSOL Technologies Inc.:</b> Ascent, Digital, AppexNow, Otoz .....	28
<b>Northteq:</b> Aurôra - Loan Origination System & Partner Portal .....	30
<b>Odessa:</b> Odessa .....	32
<b>Oracle USA:</b> Oracle Financial Services Lending and Leasing (OFSLL) .....	34
<b>Orion First Financial, LLC:</b> Orion First Portfolio Servicing .....	36
<b>OwlFinancial Technologies:</b> Custom Software Solutions: Equipment Lending & Leasing .....	38
<b>Solifi:</b> Solifi Open Finance Platform .....	40
<b>Syndifi Inc.:</b> Syndifi .....	42
<b>Tamarack Technology, Inc.:</b> Tamarack AI Product Suite .....	44
<b>Wolters Kluwer Compliance Solutions:</b> eOriginal .....	46



# INVEST WISELY IN SOFTWARE AND TECH

Modernizing software and IT systems has become a top priority for many equipment finance companies. After all, the promises are outsized: Meet increasing customer demands and expectations. Streamline processes. Improve efficiency. Reduce costs. Free people to engage in the highest and best use of their time. Gain a competitive advantage.

At the same time, the proliferation of places to invest is head-spinning. From holistic, end-to-end platforms to niche products or solutions that will improve critical functions or customer experience, choosing where to focus a company's technology budget—especially when resources are limited—can be a challenge.

At a minimum, making the best decisions for your organization requires analysis, involvement of key team members, accurate data and an understanding of your business's needs, both now and in the coming years.

## What's driving investment now

As the equipment finance industry changes, so do the trends and circumstances that drive technology decisions. According to industry experts, several important software and IT investment influences are affecting technology and investment decisions now:

- **User experience** - Large e-commerce companies have raised customer expectations about user experience, and equipment finance companies are not exempt from this phenomenon.
- **Platform integration** - Companies often struggle with getting various tools and platforms integrated so they're able to share information more efficiently among stakeholders.
- **Automation** - Manual processes can leave companies open to inefficiency and can inhibit growth, giving companies more incentive to explore automation.
- **Knowledge management and compliance** - As the equipment finance industry becomes more complex, with more automated deal decisions and new products, technology can help team members be more effective while eliminating the potential for non-compliance with regulations.
- **Data and business insights** - When systems begin working together and improved technology allows different solutions and tools to share information, customers often begin to realize the power of their data and reporting mechanisms.
- **Artificial intelligence** - AI is being used to automate mundane tasks, create content and improve customer service. However, AI technology has shown bias and manufactured falsehoods in some uses. Experts advise caution until each use has reliable safeguards.



## Making the right investment decisions

Here are three key steps that can help you identify the best places to focus your software spend.

### 1. Understand the problems that need to be solved.

Start by identifying specific problems to solve. Collaborate with your software provider to focus on solutions rather than just features, mapping out processes to streamline steps and achieve greater efficiency.

### 2. Choose the right partner.

Finding the right vendor—preferably one with experience in the equipment finance industry—is crucial for project success. It's also important to conduct a thorough total cost of ownership (TCO) analysis rather than solely relying on initial pricing to ensure a favorable ROI and consider all potential costs over time.

### 3. Devote internal resources for success.

Ensuring adequate team availability for project development and training is crucial for successful technology implementation.

With today's plethora of technology solutions and options, equipment finance companies have many options to enhance their businesses. The key to successfully making the right investments lies in understanding those opportunities and strategically finding and working with the right partners to deploy them.

## ELFA Technology Resources

In addition to this software guide, turn to the following resources for more on this topic:

- **Operations and Technology Conference:** This annual conference provides direction and support for equipment finance companies using technology to improve business processes, enhance customer satisfaction and increase operational effectiveness. [www.elfaonline.org/events](http://www.elfaonline.org/events)
- **Innovation Roundtables:** Discover new approaches for tackling your innovation challenges at interactive events from ELFA's Innovation Advisory Council and TomorrowZone. [www.elfaonline.org/events](http://www.elfaonline.org/events)
- **Web Seminars:** Get up-to-speed on technology hot topics. [www.elfaonline.org/webinars](http://www.elfaonline.org/webinars)
- **Operations and Technology Page:** Access articles and research studies from ELFA and the Equipment Leasing & Finance Foundation. [www.elfaonline.org/industry-topics/operations-technology](http://www.elfaonline.org/industry-topics/operations-technology)
- **Operations and Technology Excellence Award:** This program recognizes innovative uses of technology in the equipment finance industry. [www.elfaonline.org/about/awards](http://www.elfaonline.org/about/awards)





# Alfa

## Program Name:

Alfa Systems

## Type:

Equipment finance platform for leases, loans and wholesale/inventory finance

## Description:

Alfa has been delivering systems and consultancy services to the global equipment and automotive finance industry since 1990.

Our best practice methodologies and specialized knowledge of equipment finance mean that we deliver the largest and most complex systems transformation projects. With an excellent delivery history over more than three decades in the industry, Alfa's track record is unrivaled.

Alfa Systems, our class-leading technology platform, is the heart and lungs of some of the world's largest and most progressive equipment finance providers. Satisfying leasing software requirements of all sizes, the cloud-native Alfa Systems represents an integrated point solution, a rapid off-the-shelf implementation, or an end-to-end platform for the complex global enterprise.

Alfa Systems supports both retail and corporate business for equipment, automotive, wholesale and dealer finance, including originations, servicing and collections. It manages both high-volume transactions and complex leases and loans, in any region, language and currency.

Fully extensible and providing real-time insights, integrated workflow and business rules, alongside business decisions driven by machine learning, the opportunities that Alfa Systems presents to equipment finance companies are clear and compelling.

## System Configuration:

Key features of Alfa Systems include:

- End-to-end support for all equipment finance products: finance lease, operating lease, loan, hire purchase, per diems
- Easy deployment and integration using the latest technology
- Automated complex decisions
- Multicountry, multicurrency, multi-GAAP

## Comments:

With over 30 current clients and 38 countries served, Alfa has offices all over Europe, Australasia and the Americas.

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Royal Oak, MI 48067  
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 <https://www.facebook.com/alfaworldwide>

 <https://www.linkedin.com/company/alfasystems/>



# Alfa houses outshine their rivals.

Home to America's largest portfolios, Alfa Systems is the standout, cloud-native, single-platform software solution for equipment finance.

Our customers stick with us for the long term, because we deliver value that lasts for decades. Meanwhile, those who compromise often return to us to unlock the flexibility and automation they really need.

Time to turn on the lights?



- Expansive process automation and real-time reporting
- Flexible and configurable product structures
- Proven at volume and across borders
- Fully extensible with backward-compatible APIs
- Total assurance in project delivery

Evolving equipment finance software



Alfa<sup>^</sup>  
start

Preconfigured Alfa Systems,  
rapidly delivered at entry-level cost.  
When will you Start?





# CODIX LLC

## Program Name:

iMX

## Type:

Complete leasing/finance software solution

## Description:

CODIX is an international software company, which has developed iMX – the event-driven enterprise management system. iMX provides a complete functional coverage of the full lifecycle of the leasing products, assets and services related to:

- Auto Finance
- Equipment Finance
- Real Estate Finance
- Consumer Finance
- Fixed Deposit
- Revolving Loans

iMX allows all the business processes to be managed within a single technical structure that can easily be parameterized to meet each company's specific needs. That makes it the leading software in several industries: Commercial Finance, Supply Chain Finance, Debt Collection, Accounts Receivable, Consumer Finance, Leasing, Credit Insurance, etc.

iMX Leasing focuses on: Prospecting; Risk management/Credit decision; Contractualization and Supply Management; Invoicing; Client accounts management/after-sales operations; Pre-collection, early, late and legal collection; Claims: asset damage/death/unemployment & disability; Early termination/normal expiry (with or without purchase); Re-lease/asset sales, etc.

The end-to-end software system iMX is the global, powerful and flexible, multilingual and multicurrency solution, which consists of 3 core modules:

- iMX Internal Access for back office operations
- iMX External Access: self-care web portal for final users
- B.I. Tool

The heart of iMX is the Expert System, a business process modelling tool and workflow execution engine, which automates even the most complex business processes.

CODIX now operates in 16 countries. The company's top-level multi-disciplinary team is dedicated to the implementation, maintenance and constant evolution of the company's unique product – iMX. The software is currently used in 28 languages by more than 50,000 users in 50+ countries. CODIX is ISO 9001-2015 certified.

## Vendor:

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## Contact:

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## Social Media:

 [https://twitter.com/CODIX\\_SA](https://twitter.com/CODIX_SA)

 <https://www.facebook.com/codix.imx/>

 <https://www.linkedin.com/company/codix/>

 <https://www.youtube.com/watch?v=zGZvFQK58yI>



*Be part of the solution*





# Software Solution for Leasing and Lending

Choose between:  
**Customized Implementation**  
**and Pure Plug & Play**  
**On-premise and Cloud/SaaS**

Take control of your business  
and benefit from our  
unequalled technology



- ▶ Auto Finance
- ▶ Equipment Finance
- ▶ Real Estate Finance
- ▶ Mortgage Loans
- ▶ Term Loans
- ▶ Revolving Loans
- ▶ Consumer Finance

The global, powerful and flexible multi-lingual  
and multi-currency solution for small and large  
finance businesses

All productivity tools: email, SMS, document manager,  
automatic dialer, B.I. tool

Automation of the most complex business processes

A web platform for clients and external partners

iMX Internal Access iMX External Access iMX Analysis and Decision

## WHY CHOOSE CODIX?

100% SUCCESS  
over 30 YEARS  
Presence in more  
than 50 COUNTRIES  
Delivery in 28 LANGUAGES

Strong Project Management  
methodology  
Full PRODUCT LIFE-CYCLE  
coverage in ONE SOFTWARE

100% PERSONALIZATION  
of iMX by more than 860  
DEDICATED EXPERTS  
ISO 9001:2015 and  
ISO 270001 Certification

FIXED PRICE agreement  
Quick and EFFICIENT  
24H SUPPORT

# Constellation Financial Software

## Program Name:

Vision

## Type:

Origination, Portfolio Management

## Description:

### Constellation Financial Software

Our seasoned team of leasing and software experts have been providing innovative software solutions to the leasing and asset financing industry for over 30 years. We deliver flexible front- and back-end solutions to customers across North America. Our platform is end-to-end integrated, or standalone depending on your specific needs. We believe in automation, and the power it has to streamline clunky and painful processes, reduce risk, empower your team to be more efficient, and our equipment finance software is testament to that.

### Asset Finance Software: Vision

Vision Commerce is an intuitive, complete software solution for asset finance. Built by a lending company, for lending companies, Vision is built to automate and streamline the entire lease and loan lifecycle to help increase business velocity while reducing overhead, and to help leverage better data management to facilitate better decision making.

Whether you need an end-to-end origination and portfolio management solution, or a standalone front-end or back-end compatible with whatever software solutions you have and love, Vision has your asset finance problems solved.

## Recent Enhancements

### Vision Commerce enhancements:

- Borrower Self Creation of Login Credentials with multi-factor authorization via Text Message, email, and reCAPTCHA.
- Automated Scorecards including automated corporate name verification and address verification.

- GDPR and CCPA Implementation
- Client Report Writing Tool
- Mandarin Language Support
- Currency Conversion
- Dealertrack Integration
- Salesforce Integration
- Broker API for automated transfer of applications into Vision
- Scheduled automated emails
- Parent/Child Functionality

## System Configuration:

Vision is a web-based application deployed to the customer in a number of ways based on their needs.

## Comments:

Constellation Financial Software provides specialized software solutions that fuel business growth by helping customers streamline operations, increase efficiencies, and reduce costs. We deliver full asset finance life-cycle solutions.

## Vendor:

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Oakville, ON L6K 3W7 Canada  
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# VISION

A Constellation Software company

## Flexible Solutions for Asset Finance

Whether you need an end-to-end origination and portfolio management solution, or a standalone front-end and back-end compatible with whatever software solutions you have and love, Vision has your asset finance problems solved.

**Visit**

**[constellationfs.com/vision](https://constellationfs.com/vision)**  
**to learn more**

**Constellation**  
Financial Software



# Copernicus-USA, LLC

## Program Name:

Copernicus

## Type:

Full Lifecycle Pricing, Origination, Administration and Accounting System for all types of Asset Finance

## Description:

Copernicus is a state of the art web native solution to manage the whole lifecycle of any asset finance product including leasing, loans, conditional sale, progress funding, participation and project finance. Developed over a period of 40 years and recently upgraded, it is the most powerful and technologically advanced solution available. Copernicus is a cost-effective solution for all types and sizes of asset finance organization.

Copernicus' built in calculation engine ensures accurate and consistent results throughout the life of a contract including pricing and accounting for income recognition, full and partial payoffs, back to back and block funding.

Copernicus also has its own integrated double entry accounting system which ensures that you maintain control of every single contract at all stages of its progress. The journals can be exported for incorporation in your General Ledger.

Copernicus can process any payment structure, multiple drawdowns and other complex cash flows, including commissions, subsidies, maintenance, fees and insurance.

Copernicus has its own user-configurable workflow and sophisticated decisioning and credit scoring. You can design your own reports and documents directly using the inbuilt editor, and incorporate fields from the comprehensive database. Bills, reports and other documents can be downloaded to Excel or PDF and emailed directly.

Since it uses the latest web technology Copernicus can be readily integrated with other systems including CRM such as Salesforce and other third party and general ledger systems. Also, options to build Portals to give your

customers, brokers, funders and suppliers a controlled view of data within the Copernicus system.

## Recent Enhancements:

2024 version rewritten to take maximum advantage of Microsoft's Blazor technology. This has increased its speed, control and flexibility.

## System Configuration:

Designed and built using Microsoft's Blazor technology in .NET8 and SQL Server 2019.

## Comments:

Copernicus offers a new approach to asset finance software designed to reduce implementation timescales and costs both upfront and ongoing.

## Vendor:

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## Contact:

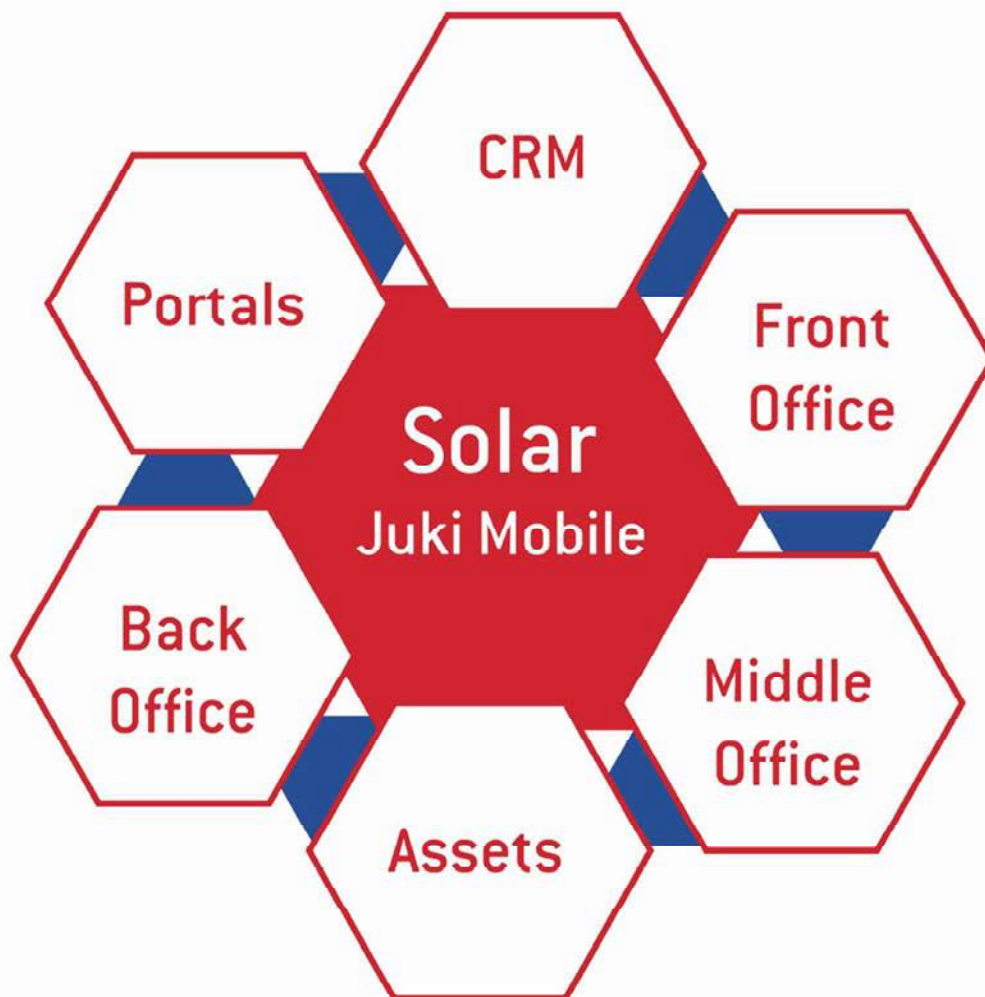
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## SOFTWARE - THE MODERN WAY

EMPOWERING ASSET FINANCE



- Quick to Implement
- Easy to Use
- Affordable Pricing

- Latest Technology
- Cloud Based
- User Configurable

# FIS

## Program Name:

FIS Asset Finance

## Type:

Cloud platform for all types of asset finance including leases, loans and wholesale finance.

## Description:

FIS™ is the world's largest global provider dedicated to financial technology solutions. FIS empowers the financial world with software, services, consulting and outsourcing solutions focused on retail and institutional banking, payments, asset and wealth management, security, risk and compliance, and transaction processing.

Headquartered in Jacksonville, Florida, FIS is a Fortune 500 company and is a member of Standard & Poor's 500® Index. We serve more than 20,000 clients in over 130 countries.

FIS Asset Finance transforms your business by consolidating your portfolios into a single system and reduces your operating costs by automating workflows and opening up access to your partners and customers.

## Key Product Features

- AI enabled automation engine
- Intuitive low code business rules engine enables business change to be rapidly delivered
- Flexible integration layer via APIs and industry standard interfaces
- Continuous automated upgrades

## Benefits:

- Reduce total cost of ownership and increase speed to market
- Improve risk management and compliance
- Smarter and more efficient operations
- Improved change cadence

Supporting these product capabilities is a world class delivery methodology and organization staffed by professionals with years of experience in the leasing industry.

## Recent Enhancements

Machine learning capabilities for automated data ingestion.

Low code, drag and drop business logic designer.

Accelerate - products, workflows, processed predefined expediting ROI.

## System Configuration:

The HTML5 user interface provides unmatched usability across any device in any location. Intuitive, and business owned, configuration of rules and workflow delivers a lower TCO and an upgrade path through all versions.

FIS supports any deployment model including FIS Cloud, Public Cloud and On-Premise installations and will provide Application Managed Services according to client needs.

## Comments:

We never lose sight that FIS succeeds only when our clients succeed.

## Vendor:

FIS

601 Riverside Ave.

Jacksonville, FL 32204

Web Site: <https://www.fisglobal.com/en/banking-solutions/lending/commercial-lending/fis-asset-finance>

## Contact:

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Empowering  
the Financial World





**Ambit Asset Finance**

# **IT'S TIME TO BREAK FREE**

---

**Enhance your asset finance  
digital transformation with FIS.**

As the digital economy continues to emerge, discover how modern software with continuous delivery models can transform your asset finance business and raise customer satisfaction.



**Kick-start your digital  
transformation with FIS.**

**Find out more** <https://empower1.fisglobal.com/asset-finance.html>

# Integrated Financial Solutions, Inc.

## Program Name:

IFSLeaseWorks

## Type:

Lease/Loan Accounting, Administration and Originations

## Description:

IFSLeaseWorks is a web-based, touch-enabled application that runs seamlessly on a desktop, tablet, or phone based browser. IFSLeaseWorks efficiently and reliably manages the entire life cycle of a lease or a loan. This application is ideal for organizations of all sizes needing an asset-based, vendor-centric solution to manage originations and administration of lease and loan portfolios. IFSLeaseWorks is comprised of configurable modules that support industry best practices and those practices that make your organization unique.

## Features:

- Customizable work-flow, screens, fields, and field labels
- Configurable asset level accounting
- Support for direct finance leases, operating leases, interim rent leases, progress payment leases, synthetic leases, fixed and floating rate loans, customer lines of credit, securitizations, and syndications
- Support for vendor programs including private-label programs, pass-through AR, residual sharing, blind discounts, and web based vendor/dealer workflow (application workflow, documentation and reporting)
- Automated credit scoring using a rules-based credit engine or Fair Isaac Liquid Credit
- Multiple billing options (ACH, Lock-Box, and Credit Cards)
- Flexible invoicing including unlimited invoice formats and email enabled invoices
- Lease Extensions and re-writes
- User-definable asset-level buyout quotes
- Outbound documentation including unlimited user-defined letters, letter archiving, letter workflow and email enabled transmission

- Configurable collections actions including promise-to-pay and collector productivity tracking capabilities
- Integrated outbound/inbound Texting
- Event driven notifications allow for proactive system monitoring

## Recent Enhancements

- DocuSign interface
- Dealer/Vendor Portal
- Customer Service Portal
- Reporting Portal
- A rich library of Web Services (APIs) to interact with external systems such as Salesforce

## System Configuration:

Client Browser: Chrome, Edge, Safari, IE

Database: Oracle DBMS 11g/12c on Unix/Linux/Windows

Development Platform: jQuery

Licensed on premises or ASP/Hosted Solutions

## Comments:

IFS Offers Custom Development and Implementation Consulting

## Vendor:

Integrated Financial Solutions, Inc.

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Web Site: [www.IFSLeaseWorks.com](http://www.IFSLeaseWorks.com)

## Contact:

Mitchell Kaufman

Phone/Fax: (888) 437-1183/(201) 288-5715

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**New!**  
Complete Salesforce integration



**IFSLeaseWorks** is a complete lease and loan management system that manages the entire lifecycle of a lease or loan from origination through termination... All Under One Roof.

- Create your own application ecosystem using IFSLeaseWorks Web Services/APIs to integrate with external applications such as Salesforce
- Use IFSLeaseWorks core capabilities or extend to Salesforce.com using our front-end, collections and customer service pre-built applications
- Browser-based interface runs on desktop, tablet or mobile devices
- Customizable screens, fields and user-specific notifications and workflow
- Two-way text messaging and tracking for customer communications

**Exceptional** software. **Extraordinary** support.

Contact Us For a Demonstration

1-888-437-1183 | [info@IFSLeaseWorks.com](mailto:info@IFSLeaseWorks.com) | [www.IFSLeaseWorks.com](http://www.IFSLeaseWorks.com)

# Ivory Consulting Corporation

## Program Name:

SuperTRUMP, Portfolio Intelligence, Asset Management Solution

## Type:

Financial modeling software, including lease & loan pricing, portfolio analytics and asset management

## Description:

### SuperTRUMP

Ivory's flagship product, SuperTRUMP, is the proven solution for modeling and pricing complex equipment leases and loans. It incorporates the most up-to-date tax and accounting classification tests, pre-tax and after-tax analyses and pro forma accounting output, as well as many pre-configured industry reports.

SuperTRUMP Oracle Lease & Finance Management Accounting (OLFM) provides complex accounting for OLFM.

SuperTRUMP can be customized to meet your unique needs in many ways, including:

- Adding custom yield calculations and controls
- Developing custom lookup tables for loss given default, money cost or yields
- Creating custom reports

### Portfolio Intelligence

Portfolio Intelligence offers business intelligence and data analytics which enables you to optimize portfolio profitability.

- Measure portfolio profitability by segment, customer, financial product, credit, channel, geography or sales professional across all transactions
- Use "what-if" scenarios to better understand and manage risk factors
- Syndicate all or part of a portfolio for sale or evaluate a portfolio for purchase in a matter of minutes with advanced syndication tools

### Asset Management Solution

Ivory's Asset Management Solution is an end-to-end asset management software solution

designed to make tracking, managing and controlling your entire asset management operation significantly easier than it is today.

- Create and manage asset valuations
- Track mid-term and end-of-term disposition information
- Order and access completed inspection reports, track returned equipment and assign the asset for resale
- Build executive level analyses detailing residual exposure and performance across an entire portfolio

## System Configuration:

SuperTRUMP is deployable via Salesforce, Web & Desktop interfaces

Database products currently run on SQL Server or Oracle.

## Vendor:

Ivory Consulting Corporation  
325 Lennon Lane  
Walnut Creek, CA 94598  
Web Site: [www.ivorycc.com](http://www.ivorycc.com)

## Contact:

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“

First American Equipment Finance has used SuperTRUMP for Salesforce since 2014. The Ivory team brings a level of unmatched expertise to the solutions that they deliver. The custom nature of the solution has allowed us to evolve our pricing tool as our product offering has expanded. SuperTRUMP for Salesforce allows us to intuitively configure complex cash flow scenarios, such as step and progress payments, to deliver comprehensive pricing solutions to our clients. The tool delivers efficiency, simplicity and minimizes risk of user error – reducing time to quote by over 50% as compared to alternative pricing methods that we have utilized. This has allowed our colleagues to spend more time and energy delivering exceptional customer experience.”

**Mike Wiedemer**

*Senior Vice President - National Sales Director*  
First American Equipment Finance

# Leasepath

## Program Name:

Leasepath

## Type:

CRM, LOS, CMS, End-to-End Lease Management, Partner/ Vendor Portals

## Description:

Leasepath is a Microsoft Dynamics-based platform for brokers, finance firms, captives, and banks. Ensuring full visibility across portfolio lifecycles, Leasepath optimizes operations for peak efficiency.

Utilizing the Microsoft Power Platform, Leasepath enables swift deployment, automation, pricing tools, and asset management to streamline processes, boosting profitability and mitigating risks.

Experience a user-friendly CRM with minimal training. Pre-built features enhance productivity and foster growth. Leverage Microsoft AI within Leasepath for task automation and performance optimization in a secure environment.

Manage assets, pricing, and credit bureau integration seamlessly with Leasepath, backed by Microsoft's security and reliability, allowing focus on client relationships and business expansion.

Tailor Leasepath to various workflows, from front-end sales to back-end operations, streamlining operations across industries with its intelligent workplace solution.

## Key Offerings:

- Swift Origination via Cloud Platform
- Low-Code Mobile Tools
- Sales Process Streamlining with Checklists
- Funder Profiles for Deal Matching
- Dynamic Asset Records
- Automated Credit Checks and KYC Searches
- Integration with Contract and Ledger Solutions
- Seamless Exposure Tracking
- Audit Trail and SEC-Compliant Documentation

- Vendor and Broker Collaboration Portal
- Pricing Tools and Amortization Calculators
- Advanced Security and Compliance Features

## Recent Enhancements

- Leasepath Enterprise, the end-to-end solution consolidating front and back office operations into a single, comprehensive platform.
- Streamlined solutions for syndications and securitizations
- APIs with partners like IDology ID Verification, LexisNexis Emailage, Microbilt, 700Credit, Stripe, Great American Insurance, Google etc.

## System Configuration:

Leasepath is deployed on the Microsoft Azure Cloud, embedded within the Dynamics 365 for Sales platform. Customers own their data and environments. Administrators manage their own tenants, and users access with single sign-on Microsoft credentials.

## Vendor:

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 <https://www.linkedin.com/company/leasepath.com/>





# The Path to Customer Servicing Excellence Starts **Here**



Our **single-pane-of-glass platform** gives visibility into the entire lifecycle of your portfolio, which means **your customers** remain at the center of every decision.



# Linedata Lending and Leasing

## Program Name:

Linedata Ekip360

## Type:

Front, Middle and Back Office Automation for Leasing & Lending

## Description:

Close deals faster, assess risk more efficiently, and accelerate the growth of your business with Ekip360; Linedata's digital financing software solution designed for equipment financiers and lessors of any size.

Ekip360's modular front and back-office solutions can stand alone or integrate within your existing credit ecosystem to create a seamless end-to-end experience for your customers. From acquisition to contract management, Ekip360 is built to go beyond. Our smart automated solution and accessible data allow for more informed decisions to be made faster.

Whether you're just starting to digitize your operations or at the cutting-edge of digital transformation, with our experience and expertise, Linedata is here to help you go beyond business as usual.

## Recent Enhancements

Our unparalleled flexible software allows you to run your business, your way. With thousands of API integrations and custom configurations available every step of the way, you can create your ideal credit ecosystem.

Enhance your digital consumer journey with Mobil'Ekip, our state-of-the-art customer-facing mobile solution. If you're looking to utilize your own portal or app, Ekip360's webservices can integrate with your partners to create a digital experience that is sure to exceed customer expectation

## System Configuration:

The Linedata implementation methodology is based on workflow best practices developed with world-class financial institutions. Linedata's products allow financial institutions to streamline existing processes and information flows, replacing inefficient paper-based or free-standing processes with fully integrated end-to-end equipment finance and leasing solutions.

## Vendor:

Linedata Lending and Leasing

260 Franklin Street

Suite 1300

Boston, MA 02110

Web Site: <https://www.linedata.com/lenders-and-lessors/equipment-finance>

## Contact:

Ron Meyer

Phone: (617) 912-4700

Email: [ron.meyer@na.linedata.com](mailto:ron.meyer@na.linedata.com)

## Social Media:



<https://twitter.com/linedata>



<https://www.linkedin.com/company/linedata>





Linedata

# Linedata Ekip<sup>360</sup>

## A full lifecycle solution for lenders and lessors

Drive your business with efficiency, diligence and risk management. Linedata Ekip<sup>360</sup> provides a streamlined path from client acquisition to contract completion with fully configurable workflows, helping you close deals with speed and consistency. Modular front, middle and back office solutions can standalone and integrate within your existing credit ecosystem or be combined for a seamless end-to-end experience.

Linedata offers dynamic and configurable software, data and services with a deep commitment to a partnership approach to help our clients succeed.

Close deals faster  
Manage risk  
Offer a fully digital customer experience  
Grow your business

To learn more, please contact [ll@linedata.com](mailto:ll@linedata.com) or visit [www.linedata.com/linedata-ekip360](http://www.linedata.com/linedata-ekip360)

With 25 years' experience and 700+ clients in 50 countries, Linedata's 1300 employees in 20 offices provide global humanized technology solutions and services for the asset management and credit industries that help its clients to evolve and to operate at the highest levels.



# Liventus, Inc.

## Program Name:

Custom Software Solution - Equipment Finance

## Type:

End to End Business Process Automation

## Description:

Liventus offers comprehensive custom software solutions to transform equipment finance operations. We do not sell software; we make it for you!

Choose Liventus to automate your loan origination, underwriting, payment processing, contract management, reporting and analytics, customer relationship management (CRM), regulatory compliance, and more.

Some Examples of what we can build for you:

- Customer Portals: Secure, personalized platforms to access accounts, services, and support resources online.
- Online Customer Applications: Streamline the application process by allowing customers to submit and track applications digitally.
- Credit Scoring Tools: Analyze financial data to assess the creditworthiness of individuals or businesses.
- Asset Management Tools: Efficiently track, manage, and optimize assets throughout their lifecycle.
- Advanced Data Security: Data protection and regulatory compliance with SOC 2 Type 2 audits, dynamic/static code scans, PCI, and GDPR standards.

## Recent Enhancements

Liventus recently introduced system assessment services. Our consultants work with you to understand your business's technology gap. Based on the findings, our development team crafts custom software solutions.

**Stage 1**—Engagement: We dive deep into your operations, conducting on-site meetings to understand better your business and, therefore, your technology needs.

**Stage 2**—RFI/RFP Discovery: We showcase

potential solutions through demos and system demonstrations, providing comprehensive insights into benefits, costs, and timelines.

**Stage 3**—Contract Negotiation: We facilitate seamless implementation by assisting in negotiating licenses, purchases, support, and service agreements.

**Stage 4**—Project Kickoff: We ensure a smooth launch by developing test plans, integrating components, and designing robust reporting mechanisms.

You can engage us for all the above services or select the ones that suit your needs.

## System Configuration:

As a Microsoft Gold Partner, Liventus specializes in CRM customization, SQL integrations, and seamless data migrations on platforms such as SharePoint, Azure, Power BI, Fabric, and Office 365. We also offer salesforce customization.

## Vendor:

Liventus, Inc.  
3400 Dundee Road, Suite 180  
Northbrook, IL 60062  
Web Site: <https://www.liventus.com>

## Contact:

Danielle Dolloff  
Phone: (847) 443-2593  
Email: [ddolloff@liventus.com](mailto:ddolloff@liventus.com)

## Social Media:



<https://www.linkedin.com/company/liventus-inc./>







# Transform Your Equipment Finance Business

Discover our core services designed to optimize your operations and drive growth.



Staff  
Augmentation

**Custom Solutions,  
Seamless Integration**

Streamline processes and enhance user experience with our custom software that integrates perfectly with your systems.



Consulting

**Strategic Guidance,  
Real Results**

Get actionable insights to optimize operations, cut costs, and achieve your business goals with our expert consulting services.



Software  
Engineering

**Expert Talent,  
On-Demand**

Scale your team with our specialized professionals, providing the skills you need for any project, short or long-term.



Platform  
Development  
& Partners

**Advanced Platforms,  
Better Performance**

Develop platforms such as SharePoint and Microsoft tailored to your needs, enhancing service offerings and customer satisfaction.

**Contact Us Today!**

Visit [www.livventus.com](http://www.livventus.com) or call 847.443.2593

# LTi Technology Solutions

## Program Name:

ASPIRE

## Type:

LTi Technology Solutions offers a comprehensive technology ecosystem designed for equipment finance & asset-based lending products.

## Description:

LTi Technology Solutions is a globally recognized, client-focused company serving businesses of all sizes, across the US, UK, and Canada. We provide a platform solution for equipment finance leases and loans.

**Trusted Partner:** Over 35 years of industry experience, we have established ourselves as a trusted platform in the equipment finance industry.

**Innovative Platform:** Cutting-edge functionality for managing the entire asset lifecycle on a unified platform.

**Certifications:** ASPIRE v5 is AICPA-SOC certified and Veracode Verified.

**Expert Team:** Average tenure of 14 years in the equipment finance industry.

**Top-Tier Clients:** We are the preferred choice for Monitor-ranked companies, with 40% of the Monitor 100 and 50% of the Monitor 30+ Independents using our solutions.

## Recent Enhancements

- Robust functionality for seamless management.
- Enhanced customer communication tooling allows for payment reminders, delinquency notices, and end of term marketing.
- Enhanced data capabilities provide access to real-time data for reporting, analytics.
- Customer Portal providing customers 24/7 access to a variety of self-service options.
- LT iCloud is a purpose-built environment for hosting LTi products.

- Focus on Availability, Performance and Security with contracted SLAs.
- Private Cloud solution leveraging multiple Tier 3+ Data Centers.
- Security from the ground up, certified SSAE 18 SOC 1 & SOC 2 Compliant.
- Multiple hosting options for Production, Test and DR Services.
- Managed by expert LTi internal team.
- Improved customer support interaction through our Support Help Center and robust Knowledge Base.

## System Configuration:

LTi Solutions are hosted in the LTi Cloud.

## Comments:

Contact Sales at (402) 493-3445.

Travis Melchior [tmelchior@ltisolutions.com](mailto:tmelchior@ltisolutions.com)

Tara Aasand [taasand@ltisolutions.com](mailto:taasand@ltisolutions.com)

## Vendor:

LTi Technology Solutions  
4139 S. 143rd Circle  
Omaha, NE 68137

Web Site: [www.ltisolutions.com](http://www.ltisolutions.com)

## Contact:

Travis Melchior

Phone: (402) 493-3445

Email: [tmelchior@LTiSolutions.com](mailto:tmelchior@LTiSolutions.com)

## Social Media:



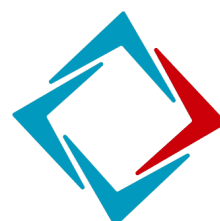
[https://twitter.com/LTi\\_Solutions](https://twitter.com/LTi_Solutions)



<https://www.facebook.com/LTiSolutions/>



<https://www.linkedin.com/company/lti-technology-solutions/>



**LTi**  
Technology  
Solutions



**LTI**  
Technology  
Solutions

**40%**  
of the



**Trusted By More Top  
Financial Services Teams  
Than Any Other Lease &  
Loan Ecosystem**

40% of the MONITOR 100

53% of the INDEPENDENTS 30

36% of the BANK 50

45% of the VENDOR 40

CELEBRATING

**35**  
YEARS

**> LTiSolutions.com**

# NETSOL Technologies

## Program Name:

Ascent, Digital, AppexNow, Otoz

## Type:

Omni-Channel Credit Origination, Lease/Loan Management, Wholesale Floorplan Financing, API-first Products, Digital Retail

## Description:

NETSOL Technologies, founded in 1996, delivers advanced solutions for the equipment finance and leasing industry, serving financial institutions in over 30 countries. Known for its expertise and customer-centric approach, NETSOL builds strong client partnerships.

NETSOL's flagship platform, NFS Ascent, automates the financing and leasing cycle. The NFS Digital suite offers comprehensive digital transformation solutions.

AppexNow provides API-first products for global credit, finance, and leasing. Otoz, a SaaS platform for OEMs, finance companies, and dealers, delivers a seamless digital retail experience.

NETSOL's innovations, ethical practices, and sustainability focus empower businesses worldwide, solidifying its position as a trusted partner.

## Recent Enhancements

### NFS Ascent

NETSOL advances NFS Ascent, its next-generation solution for equipment and asset finance and leasing. Upgrades include .NET 8 and microservices architecture, enhancing performance and adaptability. The improved web-based UI eliminates the need for client-side installations, strengthening its SaaS and PaaS offerings.

### Otoz

Otoz 2.0 is NETSOL's upgraded digital retail and mobility platform for OEMs, dealerships, and finance providers. Enhanced by AI and machine learning, it optimizes customer interactions and offers predictive insights.

## Appex Now

Appex Now's Flex product features a Step Payments Structure Option and Cost of Funding Calculation. These tools allow for adjustable monthly payments and precise profit calculations, supporting strategic financial decisions.

## System Configuration:

NFS Ascent supports the latest interfacing standards for easy third-party integration and offers real-time configurability with an advanced Business Rules Engine, Business Process Management, Workflow Management, and an Integration Hub.

## Comments:

With over four decades of experience and global offices in North America, Europe and across Asia Pacific, NETSOL has over 200 clients worldwide with over 25,000 users globally – all while maintaining its 100% implementation success rate.

## Vendor:

NETSOL Technologies  
16000 Ventura Blvd, Suite 770  
Encino, CA 91436  
Web Site: [www.netsoltech.com](http://www.netsoltech.com)

## Contact:

Haider Naqvi  
Phone/Fax: (818) 222-9195/(818) 222-9197  
Email: [haider.naqvi@netsoltech.com](mailto:haider.naqvi@netsoltech.com)

## Social Media:



<https://twitter.com/netsoltech>



<https://www.linkedin.com/company/netsol-technologies-inc-/>



<https://www.youtube.com/watch?v=hsyWSPP7vXc>







NETSOL®



# TRANSCEND THE LIMITS OF TECHNOLOGY

From AI-powered equipment finance solutions  
to innovative cloud services.

# Northteq

## Program Name:

Aurôra - Loan Origination System & Partner Portal

## Type:

Loan Origination System , Partner Portal, Turnkey Salesforce Apps

## Description:

Powered by Salesforce, Northteq's loan origination system (LOS) and partner portal, aurôra, was built on a UX/UI driven infrastructure, enabling lenders to fully automate the loan origination experience – from application to documentation in just 3 minutes.

### Aurôra LOS

Northteq's automated end-to-end LOS eliminates manual processes and disconnected workflows, making it easy to originate, score, decision, and document deals in minutes. Turn opportunities into funded transactions faster with aurôra.

### Aurôra partner portal

Northteq's partner portal empowers vendors, brokers, and partners to seamlessly self-service their deals. Experience touchless deal submissions, real-time status updates, and frictionless collaboration with vendors and borrowers. Eliminate the endless email threads and enable your partners to sell equipment faster.

### Turnkey salesforce apps

By partnering with leading fintech providers such as Ekata, Tvalue, Middesk, PayNet, Plaid, and many others, Northteq's turnkey salesforce apps enable lenders to create a customized, embedded loan origination experience.

Trusted by over 175 lenders, Northteq has established itself as a go-to partner for equipment finance lenders seeking automated and intuitive salesforce powered solutions.

## Recent Enhancements:

- Aurôra Fraud360 combines powerful third-party tools from industry leaders like Plaid, Ekata, Middesk, Experian, and Ocululus for a comprehensive view of your borrower. Biometric verification, document analysis, and behavioral risk checks help you safeguard your business and build trust with borrowers.
- Aurôra Syndicate Lender Portal allows you to effortlessly streamline syndication decisions, manage syndication partners, send deals with just a few clicks, and ensure seamless, secure information sharing – all within one simple platform.

## System Configuration:

Salesforce.com is a 100% cloud based open architecture.

## Comments:

For more information, please visit [northteq.com](https://northteq.com).

## Vendor:

Northteq  
729 North Washington Avenue, 6th Floor  
Minneapolis, MN 55401  
Web Site: <https://northteq.com/>

## Contact:

Kristian Dolan, CLFP  
Phone: (612) 483-1210  
Email: [kdolan@northteq.com](mailto:kdolan@northteq.com)

## Social Media:



<https://www.linkedin.com/company/northteq/>

# nôrthteq



^ loan origination system

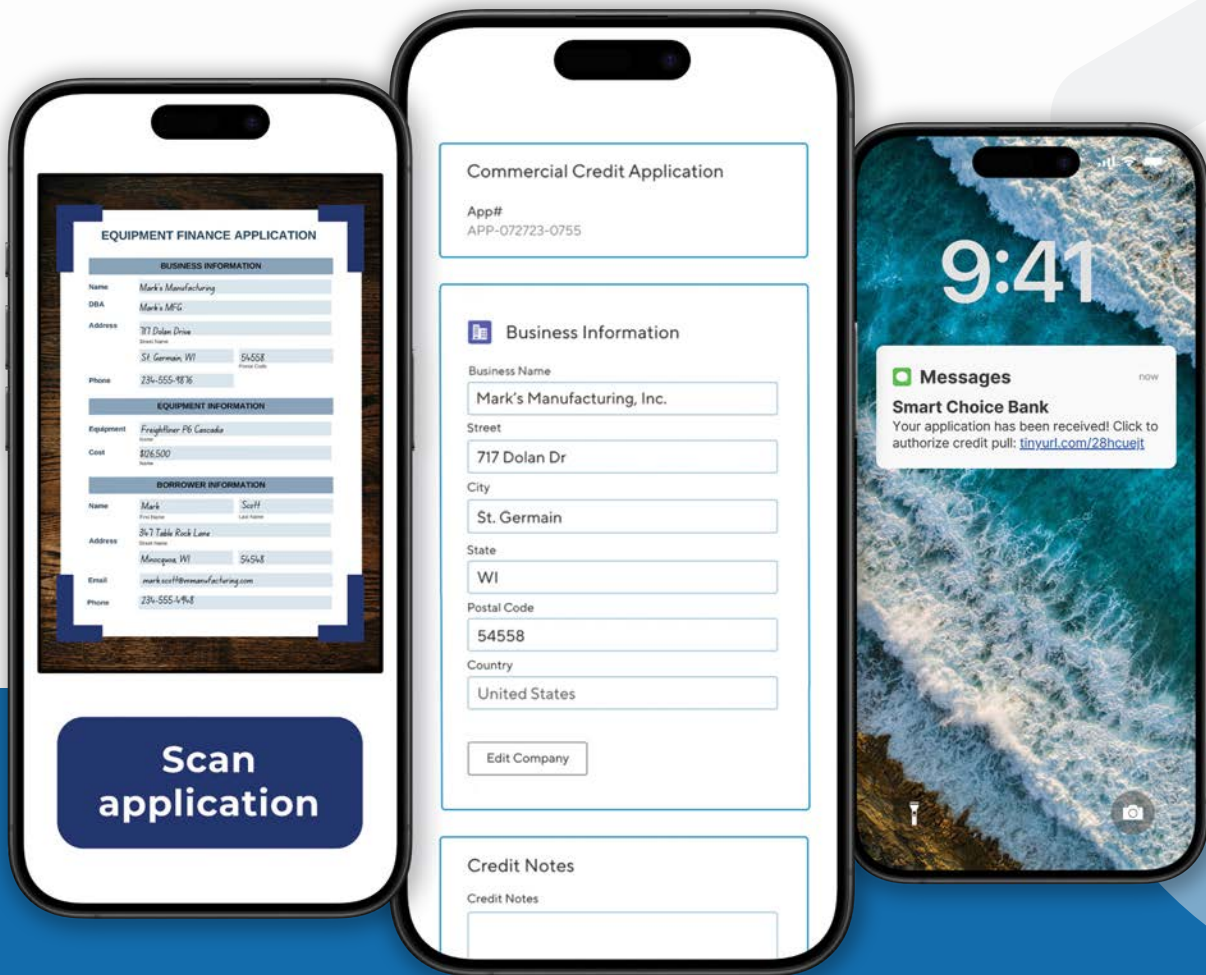
^ partner portal

^ turnkey salesforce apps

# application to documentation in under 3 minutes

Automated loan origination technology solutions for equipment finance lenders.

check out our automation in action



salesforce powered

nôrthteq



# Odessa

## Program Name:

Odessa

## Type:

A modern, end-to-end lease and loan management platform

## Description:

Odessa is the world's leading software provider dedicated to asset finance, with a team of 1,000+ professionals around the globe. Headquartered in Philadelphia, PA and with offices in Bangalore, London, and Belgrade, Odessa's modular leasing and loan finance platform provides an end-to-end solution for banks, captives, and independent finance companies in 110+ countries.

From origination to servicing to remarketing, we live and breathe asset finance, combining deep industry expertise and leading-edge technology to help customers unlock new opportunities, expand their reach, and grow their business.

A customer-driven platform that's a step ahead. We're working every day to build and deliver a best-in-class asset finance solution that stays ahead of an evolving market and positively impacts the way our customers think, work, and grow.

Passionate people invested in your success. We're fully committed to your success, becoming an extension of your team to leverage the full power of our resources and technology to help you achieve your goals and grow at your own pace.

A team of experts who embrace change. Our knowledge of asset finance is unmatched and our belief in sharing our insights unwavering. We embrace and adapt to the evolving market — and help you do the same.

## Recent Enhancements

Recent platform enhancements include support for everything-as-a-service business models, subscription management capability, IoT-ready component-level asset tracking and data management, one-click deployment in the Cloud, and extensibility via low-code development and test automation.

## System Configuration:

Current Version: Odessa 5

Odessa Platform: .NET 4.8

Language: C#, ASP.NET, VISUAL STUDIO 2017/2019

Database: SQL Server 2017/2019

## Vendor:

Odessa

Two Liberty Place

50 S. 16th Street

Suite 1900

Philadelphia, PA 19102

Web Site: [www.odessainc.com](http://www.odessainc.com)

## Contact:

Steve Nippak

Phone/Fax: (416) 434-8228/(949) 863-9097

Email: [steve.nippak@odessainc.com](mailto:steve.nippak@odessainc.com)

## Social Media:



<https://twitter.com/OdessaTech>



<https://www.facebook.com/OdessaInc>



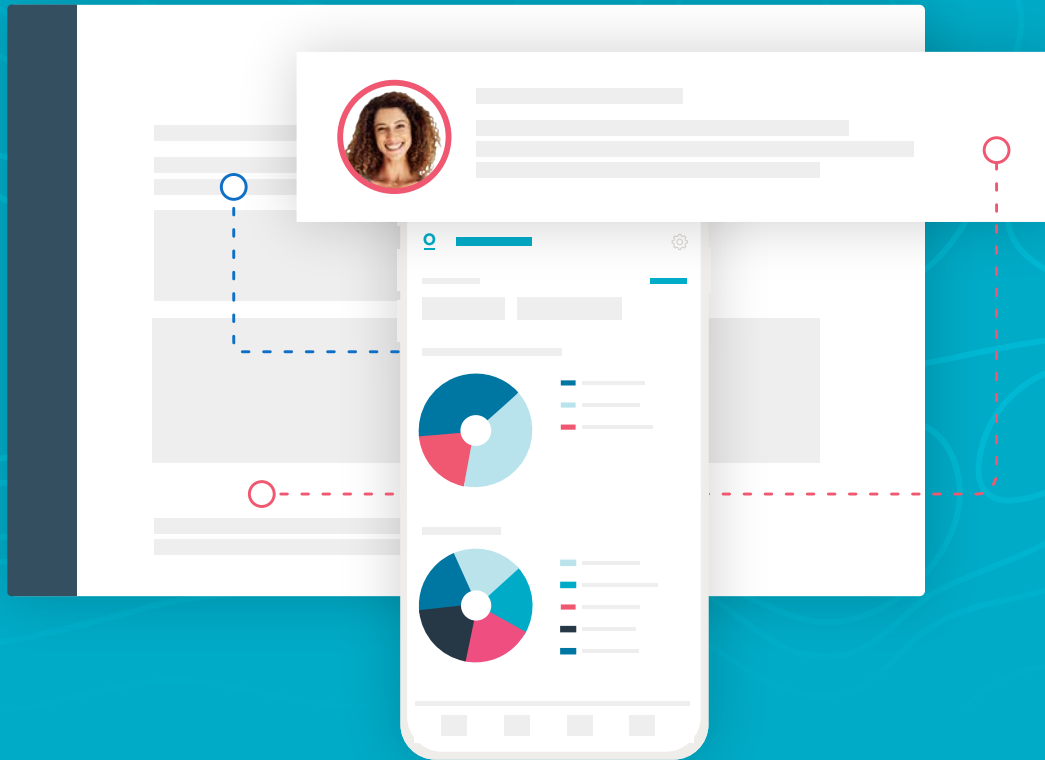
<https://www.linkedin.com/company/odessa-inc/>



# Adapt easily, build confidently, scale faster

Design asset finance experiences that succeed today - and can be easily changed tomorrow. The Odessa Platform provides one single solution - from origination to remarketing - and enables you with intelligent, integrated low code configuration and development. This is your platform, your way.

**odessa**



[www.odessainc.com](http://www.odessainc.com)



# Oracle USA

## Program Name:

Oracle Financial Services Lending and Leasing (OFSLL)

## Type:

End-to-end equipment finance management platform for leases, loans, and lines

## Description:

Oracle Financial Services Lending and Leasing (OFSLL) streamlines each stage of the loan and leasing lifecycle. A flexible, end-to-end platform built on proven, configurable processes transforms origination, servicing, collections and asset management for leases, loans and lines.

## Value differentiators:

- Optimize customer experience with predefined finance processes inclusive of global best practices to accelerate growth.
- Increase automation, improve workflow oversight and manage risk & compliance standards with a robust business rules engine defining rules for each process, adhering to the lender's policies.
- Powered by cloud architecture, enable manufactures and their dealers to share common information, predict and adapt to market opportunities and produce informed, faster and consistent decisions.
- Centralize and manage customer information, creating a common relationship view across products, yielding better customer service, quicker resolution to queries and improved productivity from service personnel.
- Oversee investor portfolios by providing lenders with responsive tools, capable of creating a pool of receivables for sale using attributes such as customers, contracts and assets.
- Improve specialized collection activities for tracking all instances and history related to bankruptcies, repossessions, end-of-term, re-marketing and recovery management.

## Recent Enhancements:

- Subscription based lending
- Usage based lending (i.e. Hours)
- IoT integrations
- Chatbot for consumer self service

## System Configuration:

Key benefits/features of OFSLL include:

- Configurable workflow
- End-to-end support of: subscription, usage, rental, lease, loan and line
- SaaS/Cloud deployment & integrations, including IoT and Chatbot
- Real-time backdating capabilities
- Multi-lingual, multi-country and multi-currency

## Vendor:

Oracle USA  
500 Oracle Parkway  
Redwood Shores, CA 94065  
Web Site: [www.oracle.com/OFSLL](http://www.oracle.com/OFSLL)

## Contact:

Mike Stoutenburg  
Phone: (770) 286-4265  
Email: [mike.stoutenburg@oracle.com](mailto:mike.stoutenburg@oracle.com)

## Social Media:



<https://twitter.com/oraclefs>



<https://www.facebook.com/OracleFS>



<http://www.linkedin.com/company/oraclefs>

**ORACLE**  
Financial Services

# ORACLE

## Financial Services

Reduce latent system complexity, channel conflict and innovation challenges to remain modern by ensuring reliable, responsive and simplified network experiences across your equipment leasing lifecycle.



Unify your dealer, customer and employee ecosystems into a single network



Optimize customer channel choice preferences



Capitalize on the demand for Servitization by offering scalable usage and subscription-based programs



Keep control by leveraging business owner configurability rights



Maximize automation in Originations, Servicing, Collections and Recovery

### Connect with us



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[twitter.com/oraclefs](https://twitter.com/oraclefs)



[oracle.com/OFSLL](https://oracle.com/OFSLL)



# Orion First Financial, LLC

## Program Name:

Orion First Portfolio Servicing

## Type:

Lease / Loan Portfolio Servicing

## Description:

Orion First offers a portfolio management & software suite designed to meet the specific requirements of commercial loan and lease servicing. Our solutions offer transparency, control, and integration with your existing systems.

Our mission is to provide deeper insight, stronger portfolio results, and a highly satisfying borrower experience for small business lenders. Our focus and investment on innovation means we're always advancing our technology to give you portfolio management tools that align with our mission. And that's why the best small commercial lenders entrust us with the care of their customers and portfolios.

## Delinquency Manager

Delivers a highly customizable dashboard for instant insights into trends and factors driving delinquency. Access automatically updated data to see trends in delinquency that have the biggest impact on portfolio health. Interactive analysis tools let you compare performance across delinquency buckets, portfolio categories, and custom criteria. Develop delinquency forecasts with interactive roll rate analysis, empowering you to make strategic, data-driven decisions.

## Client Portal

Gives you real-time insights into performance trends, key metrics, and borrower account histories. Monitor essential customer records and generate custom reports you need to drive informed decision-making.

## Customer Portal

Provides your borrowers with a streamlined and intuitive experience to manage their accounts. Features like easy payments, contract details, payoff requests, and direct access to customer service promote a sense of control and build trust in your services. Empower your customers with 24/7 account access and a user-friendly interface.

## Vendor:

Orion First Financial, LLC  
5403 Olympic Dr NW  
Gig Harbor, WA 98335  
Web Site: [www.orionfirst.com](http://www.orionfirst.com)

## Contact:

Kim Riggs-Mounger CLFP  
Phone: (253) 857-9614  
Email: [kriggs-mounger@orionfirst.com](mailto:kriggs-mounger@orionfirst.com)

## Social Media:

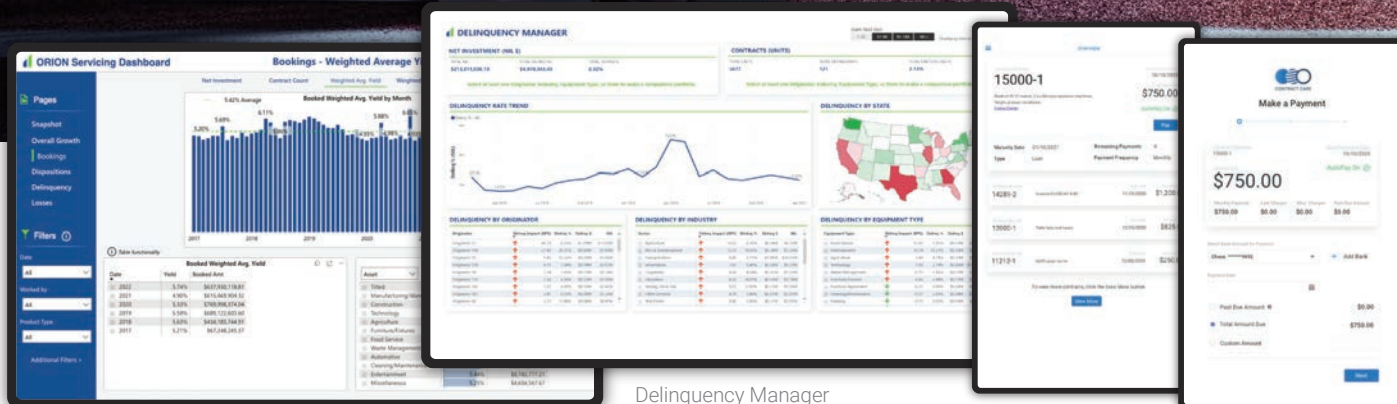
 <https://www.linkedin.com/company/orion-first-financial-llc/>





# Ready. Set. Scale.

Supporting your growth with  
advanced technology and  
experienced teams.



Client Portal

Delinquency Manager

Customer Portal

At Orion First, our focus on innovation means we're always advancing our technology to give you portfolio management tools that offer transparency, scalability, and control.

Our leading-edge systems and skilled teams seamlessly integrate with your operations, ensuring efficiency from booking to payoff.

Say goodbye to in-house software management and say hello to the forefront of portfolio management with Orion First.

- ✓ Commercial Loan & Lease Servicing
- ✓ Commercial Collections
- ✓ Default Management
- ✓ Client Portal
- ✓ Customer Portal
- ✓ Delinquency Manager

SERVING THOSE WHO FUND SMALL BUSINESS  
[ORIONFIRST.COM](https://ORIONFIRST.COM)



# OwlFinancial Technologies

## Program Name:

Custom Software Solutions: Equipment Lending & Leasing

## Type:

Application Development, Quality Assurance & Testing, Gateways, API (Application Program Interface) Development, Services Integration, Cloud Data Mana

## Description:

OwlFinancial Technologies, a cloud business unit of ValueMomentum, serves Community & Regional Banks, Credit Unions, Lending & Leasing Institutions and Independent Mortgage Banks. Our clients have trusted us in their As-a-Service, Core and Digital Transformation journeys. We are helping clients build their tech & data stacks to simplify operations, speed up innovation and distribute through partner ecosystems.

Our Offerings include Application Development, Quality Assurance & Testing, Gateways, API Development, Services Integration, Cloud Data Management BI & Analytics, Case Workflow & Task Automation, Cloud Infrastructure Management and Online Presence.

We have extensive experience in working with diverse financial services firm and strive to help our clients shape the future of their business through advanced technology solutions. We are large enough to scale and small enough to provide the personalized attention to all our customers.

## Vendor:

OwlFinancial Technologies  
220 Old Newbrunswick Rd, Suite 100  
Piscataway, NJ 08854  
Web Site: <https://owlft.com/asset-lending-and-leasing/>

## Contact:

Rajesh Nambiar  
Phone: (732) 371-1614  
Email: [rajesh.nambiar@owlft.com](mailto:rajesh.nambiar@owlft.com)

## Social Media:

 <http://www.linkedin.com/company/owlfinancialtechnologies>





# Grow Your Business

Helping **Equipment Lending & Leasing Institutions**, **Banks** and **Credit Unions** modernize their technology by providing customized solutions around Digital Experience, Integration, Data and Analytics.



DIGITAL  
PRESENCE



DATA & BI



CLOUD



INTEGRATIONS

# Solifi

## Program Name:

Solifi Open Finance Platform

## Type:

Originations, Portfolio Management, ABL, Factoring, Wholesale, Automotive, Equipment Finance

## Description:

At Solifi, we're reshaping finance technology. Our focus is on strengthening your market position by unifying proven solutions into a singular platform which is built to last, with scalable capabilities that grow with your business.

Our Open Finance Platform gives you the tools to maximize efficiency and simplify management tasks for your teams and clients, so you can deliver exceptional customer service.

Solifi's award-winning technology can help you:

- Make informed business decisions with tools and real-time data insights
- Improve processes through automated workflows
- Enable you to comply with the latest regulations
- Scale your operations quickly and seamlessly
- Utilize the platform to its full capacity with best-in-class integrations

## Recent Enhancements:

Our Open Finance Platform has been designed to futureproof your business and offers:

- Data streaming, designed to provide near real-time access to data analytics and business intelligence
- Enhanced API-based services to connect disparate systems, gain meaningful insights, and create seamless workflows
- Rapid-launch microservice applications, e.g. pricing, process automation, email

- ESG Portfolio Management, supporting automotive finance lenders in assisting clients on their decarbonisation strategies
- 24/7 self-service through portals

## System Configuration:

Our architecture is built on an open framework and intuitive, browser-based user interface. We leverage industry-leading technology to ensure stability, security, and performance across our Open Finance Platform.

## Comments:

Discover how Solifi technology can unleash your potential at [www.solifi.com](https://www.solifi.com).

## Vendor:

Solifi  
TractorWorks Building  
800 Washington Avenue North, Suite 901  
Minneapolis, MN 55401  
Web Site: <https://www.solifi.com>

## Contact:

Michelle Lansdowne  
Phone: (612) 851 3200  
Email: [mlansdowne@solifi.com](mailto:mlansdowne@solifi.com)

## Social Media:

 <https://www.linkedin.com/company/solifi-global/>







All our solutions come with  
an elasticated waistband.  
Growth is inevitable.



THE TRUSTED PROVIDER OF  
SCALABLE SECURED FINANCE  
SOFTWARE TECHNOLOGY



[solifi.com](https://solifi.com)

# Syndifi Inc.

## Program Name:

Syndifi

## Type:

CRM, Online Syndication Platform

## Description:

Syndifi is an online syndication platform built specifically for the Equipment Finance industry enabling Buyers and Sellers to transact securely with their trusted partners in the cloud. The Syndifi platform is built to modernize the Syndication process around secure file sharing. Syndifi transforms traditional syndication so Buyers and Sellers can syndicate smarter.

## Platform Features Include:

- Individual Deal Reports
- Deal Pools
- Deal Pool Reports
- Platform Messaging with email integration
- Deal Activity Dashboard
- Deal Activity Tracking
- Contact Database
- Industry News Resource

## Syndifi Offers:

- Data security protection for secure transactions and the protection of sensitive deal information
- Deal tracking for ultimate deal visibility and to accelerate settlement times
- Deal reports for an organized visual summary to inform and enhance the decision making process
- Built in CRM functions including Buyer company profiles used to match deals with AI tools
- Integration with front and back end systems to limit data input redundancy
- Dual Buyers and Seller roles for syndicators who syndicate as both
- Custom NDA per deal

## Recent Enhancements:

New Document Management System which enables Syndicators to upload complete document folders and all subfolders and files directly from their desktop right into Syndifi with one click of a button. Dealmakers can manage all their folders and files from within Syndifi and securely share with their trusted partners. Saving their partners hours of time using antiquated, unsecure methods like email, encrypted email, or multiple platforms to share sensitive information.

## Vendor:

Syndifi Inc.  
180 North Wacker Drive  
Suite 1  
Chicago, IL 60606  
Web Site: [www.syndifi.com](http://www.syndifi.com)

## Contact:

Alistair Canal  
Phone: (315) 408-3064  
Email: [alistair@syndifi.com](mailto:alistair@syndifi.com)

## Social Media:

 <https://www.linkedin.com/company/syndifi-inc/>





*Forget everything you know about antiquated syndication processes...*



## Rethink...

*the security of every transaction, dealing with trusted partners in the cloud.*

## Reimagine...

*the process with our fully integrated all-in-one syndication platform.*



## Recharge...

*your syndications and reach new heights with Syndifi.*



FAST ◊ SECURE ◊ ALL IN ONE ◊ 1-800-495-1878 ◊ [syndifi.com](https://syndifi.com)

# Tamarack Technology, Inc.

## Program Name:

Tamarack AI Product Suite

## Type:

SaaS platform for best-in-class business intelligence, customer support and AI application for risk management and productivity.

## Description:

Tamarack AI aggregates and organizes data across all enterprise systems to deliver productivity improvement and reduce the risk to capital with business intelligence through the analysis of financial, operational and market/customer data. The AI product platform standardizes and transforms digital workflows to produce better outcomes, faster.

1. Business Intelligence: Access and analyze all data in a single location. Leverage a comprehensive set of best-in-class business intelligence reports designed for equipment finance companies. DataConsole and ExecutiveAIR deliver actionable insights for both operational teams and executives to drive growth, productivity and financial performance. SyndicationBuilder allows capital market teams to quickly create comprehensive data tapes for the syndication of pools of contracts to improve portfolio performance and access more capital.
2. TrailView empowers clients to access and manage their accounts 24/7/365 – when it is convenient for them. TrailView provides a higher level of customer service and satisfaction in addition to reducing live customer service inquiries.
3. AI Predictors provide more informed risk engagement and better credit decisions faster. AI Predictors can augment team performance and/or automate with quantified risk policies to increase the volume of the right deals closed.

## Recent Enhancements:

1. DataConsole 2.0 added SyndicationBuilder; AI forecasting for sales; Y-over-Y visuals; Static Loss Pools; transaction size matrix; more accurate Approval Ratios reporting, Look-to-Book, and Win Rates; new measures for Portfolio Run-Off and Delinquency Roll Rates; and ExportPro for data sharing in the organization.
2. TrailView 2.0 added payment history, ACH, document exchange, task management, variable field labels, secure customer notifications and secure partner access for associated customer support.

## Comments:

Tamarack is a fintech company providing products and services that enable equipment finance companies to improve performance and growth through data-centric technologies.

## Vendor:

Tamarack Technology, Inc.  
550 Vandalia Street, Suite 309  
Saint Paul, MN 55114  
Web Site: [www.tamarack.ai](http://www.tamarack.ai)

## Contact:

Daniel Nelson, CLFP  
Phone: (651) 269-7680  
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## Social Media:

 <https://www.linkedin.com/company/tamarack-technology/>





# Managing risk through AI innovation.

## Tamarack AI™ Product Suite

Equipment Finance customers use Tamarack AI SaaS Products to manage **more than 50,000 contracts** with combined Contract Balance Receivables of **over \$5 billion**.

**DataConsole™** | All your data in one place for comprehensive business intelligence along with both standard and custom reporting

**AI Predictors™** | More informed credit decisions and automated quantified risk policies to increase the speed at which deals are created and closed

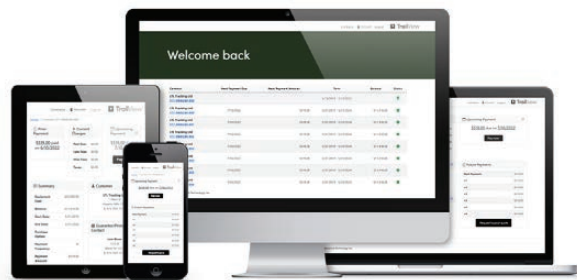
**ExecutiveAIR™** | Real-time data analysis for executives who need to make actionable decisions impacting the current and future performance of their portfolios

**TrailView™** | Single point of collaboration between lessors and customers, 24/7 access, and streamlined workflows that drive customer service productivity

**SyndicationBuilder™** | Accelerated portfolio syndication process with comprehensive asset pool analysis and design, coupled with automated data tape generation

Increase your organization's productivity, reduce operational costs and better manage risk through automation, business intelligence and a quantifiable approach to risk management.

Enable higher customer satisfaction with a self-service experience that produces retention and repeat business.



Unlock financial intelligence with Tamarack AI.



**Tamarack**<sup>TM</sup>  
Guiding financial innovation

# Wolters Kluwer Compliance Solutions

## Program Name:

eOriginal

## Type:

Digital Lending, Electronic asset management

## Description:

Wolters Kluwer Compliance Solutions is a leading provider of digital technology and expert professional services. We offer solutions across the entire equipment leasing and financing lifecycle, including eSign and eContracting, public records search and filing, and regulatory change management.

ELFA members can benefit from the Wolters Kluwer eOriginal eAsset® Management solution, to streamline the leasing process from the start of financing through the entire transaction lifecycle.

## We help members:

- Simplify the loan origination process and pool contracts faster and more efficiently
- Reduce sales cycles and provide a first-class customer experience
- Manage loans and leases from the start of financing through collateralization or securitization
- Leverage a solution vetted by major banks, as well inside and outside counsel, industry advisors, and investment groups

The eOriginal platform is used in micro, small, mid, and large ticket equipment leasing companies to enable millions of transactions annually. The technology is also integrated with established leasing channel partners, enabling an end-to-end industry solution.

Members can also benefit from Wolters Kluwer Lien Solutions—the nation's leading lien services partner and a long term ELFA member. For more than 40 years, Lien Solutions has delivered expert lien services, recording services, and life-of-loan solutions to the equipment lease and financing industry.

Lien Solutions helps customers efficiently and effectively navigate lien perfection and risk reduction. Our focus on public records search, filing, and lien management helps customers focus on the leasing and financing of commercial and industrial equipment—and their own customer relationships.

## System Configuration:

The eOriginal cloud platform is designed for rapid deployment and scale using the latest in Rest API and features modern integration capabilities purpose-built, for equipment lease and finance

## Vendor:

Wolters Kluwer Compliance Solutions  
100 S. Fifth Street  
Minneapolis, MN 55402

Web Site: [www.wolterskluwer.com/en/solutions/eoriginal](http://www.wolterskluwer.com/en/solutions/eoriginal)

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## Social Media:



<https://twitter.com/WoltersKluwerFS>



<https://www.facebook.com/WoltersKluwerFinancialServices/>



<https://www.linkedin.com/company/wolterskluwerfs/>



Wolters Kluwer



# Simplify the Complex

The road to digitization is here — what is fueling your journey?



We can help you create a fully compliant and secure digital lease and finance strategy — to “start digital and stay digital.”

From digitizing the signing ceremony, to centrally managing your digital assets, to monetizing those assets in the secondary market by sale, collateralization or securitization.

## Wolters Kluwer is your trusted partner

- \$5.7 billion global financial and legal compliance company built on a 185-year legacy, and ELFA member since 2000
- Supports digital lending origination, risk management, lien perfection, UCC filings, ongoing regulatory compliance, and data capture, analytics, and reporting
- Wolters Kluwer Compliance Solutions
  - Acquired market leader eOriginal® in 2020.
  - Integrated Wolter Kluwer Lien Solutions.
  - The most extensive suite of lending compliance tools and products.



Wolters Kluwer can help you advance your digital capabilities, reduce risk, gain cost and efficiencies, improve customer experience, and is at the core of your secure digital lease and finance strategy.



# Get the Latest Software Listings!

The 2024 ELFA Software Guide is your resource for the leading companies delivering software solutions to the equipment finance industry.

To see the latest information updated throughout the year, go to the online software listing at:

**[www.elfaonline.org/Directories/Software/](http://www.elfaonline.org/Directories/Software/)**



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