



# RECONNECT REUNITE

## 60<sup>TH</sup> Annual Convention

### October 24-26, 2021

JW Marriott Hill Country  
San Antonio, Texas

## PROGRAM HIGHLIGHTS

CELEBRATING  
60 YEARS  
1961-2021 **ELFA**  
EQUIPMENT LEASING AND FINANCE ASSOCIATION

EQUIPMENT LEASING AND FINANCE ASSOCIATION

# 60<sup>TH</sup> ELFA Annual Convention

At the 60th ELFA Annual Convention, industry leaders will reunite, reconnect and exchange best practices for innovating, winning business and leading in an age of rapid change.

The past year presented countless challenges to our nation's economy and ELFA member businesses. Overall, however, the equipment finance industry has demonstrated remarkable resilience and durability. Today, the equipment finance sector is helping the nation get back to business by financing billions of dollars in equipment investment by businesses both large and small.

As the nation looks forward to emerging from the pandemic, the most successful equipment finance companies aren't returning to "business as usual." They are preparing to take advantage of new opportunities in the marketplace and adapting their business models to meet changing customer demands.

Position your business for success by registering for the 60th ELFA Annual Convention!

## WHY ATTEND?

The ELFA Annual Convention is the primary forum that industry leaders turn to with assurance when it comes to addressing critical issues and trends. It is the largest, most important annual gathering of equipment leasing and finance professionals.

## NEW THIS YEAR: ATTEND IN-PERSON OR VIRTUALLY

ELFA is offering the 60th Annual Convention as a hybrid event! You have the flexibility to choose the option that works best for you:

- **In-Person:** Attend the Convention in-person to reunite and reconnect with colleagues at the JW Marriott Hill Country in San Antonio. Onsite attendees will enjoy unparalleled opportunities to network, do business and uncover ideas to help your business grow—plus discover solutions in a first-rate exhibit hall. All in person attendees will also have access to attend education sessions virtually as well. To ensure safety, ELFA will follow Centers for Disease Control and Prevention recommendations throughout the conference space.
- **Virtual:** Attend the Convention remotely to hear from industry experts from the comfort of your home or office. Watch livestreams of high-quality educational sessions and top-notch keynote speakers when and where it's most convenient for you—for a discounted price. Registering multiple virtual attendees? Discounted bulk pricing is available for virtual attendees only. Register three or more virtual attendees at the rate of \$695 (original price \$795). To register for virtual bulk pricing please contact Janet Fianko at 202-238-3420 or [jfianko@elfaonline.org](mailto:jfianko@elfaonline.org).

## COVID-19 HEALTH & SAFETY PROTOCOLS

As always, the safety of our participants, community and staff is ELFA's top priority. We are actively monitoring the pandemic and our health protocols will be updated on our convention website in accordance with expert guidance published by the U.S. Centers for Disease Control and Prevention (CDC) for events and gatherings, in coordination with event host properties. You can view the latest ELFA COVID-19 health and safety protocols for attendees, exhibitors and staff at [www.elfaonline.org/ac](http://www.elfaonline.org/ac). In addition, the JW Marriott San Antonio Hill Country Resort & Spa has implemented a variety of new protocols and elevated practices in response to the COVID-19 pandemic and is maintaining high standards of cleanliness and a commitment to providing excellent service. Please don't hesitate to reach out with any questions at [meetings@elfaonline.org](mailto:meetings@elfaonline.org).

## BECOME A SPONSOR!

The ELFA Annual Convention provides unmatched opportunities to get noticed through a variety of sponsorship opportunities. To become a sponsor, contact Steve Wafalosky at [steve@larichadv.com](mailto:steve@larichadv.com) or 440-247-1060.

Check out the Convention website for the latest information at [www.elfaonline.org/events/2021/AC/](http://www.elfaonline.org/events/2021/AC/)

# Schedule of Events

All convention activities will be held at the JW Marriott Hill Country in San Antonio, Texas.

## Sunday, October 24

7:00 a.m.

### Breakfast for Golfers

8:00 a.m.

### Golf Tournament (Shotgun Start)

JW Marriott Hill Country AT&T Canyons Course



8:00 a.m. – 1:00 p.m.

### Jim McGrane Charity Bike Ride

(pre-registration required; additional fee for bike and other equipment)



10:00 a.m. – 8:00 p.m.

### Convention Registration

(Attendees & Exhibitors)

1:00 – 2:00 p.m.

### Luncheon for Golfers

2:00 – 5:00 p.m.

### Exhibitor Setup

2:30 – 4:00 p.m.

### Community Service Project:

#### Build-a-Wheelchair®

(on property; pre-registration required)

4:30 – 5:30 p.m.

### New Members and Leadership Reception

5:00 – 6:00 p.m.

### Women's Council Reception—All Welcome

6:00 – 8:30 p.m.

### Welcome Reception

Exhibits Open

## Monday, October 25

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

#### Chair's Address and Keynote Address

Speakers:



**KRIS SNOW**, Chair, ELFA

*President, Cisco Systems Capital Corporation*



**DEDE HALFHILL**

*Renowned Leadership Expert & Colonel, USAF (Ret.)*

10:00 a.m. – Noon

### Refreshment Break in Exhibit Area

10:30 a.m. – Noon

### Concurrent Breakout Sessions

- The Shift from Hard Assets to Servitization: New Models for Equipment Finance Providers
- Capital Markets Review: Funding in the Digital Age  
Supported by: Equipment Leasing & Finance Foundation
- The New Leadership Playbook: How to Ignite Performance at Every Level  
Supported by: ELFA Women's Council
- Technology Innovation Workgroup Presents: Real AI in Equipment Finance

# Schedule of Events *continued*

11:00 a.m. – 3:00 p.m.

## **Spouse/Companion Event:**

### **Texas Outfitters and Wine Tasting at the JW Marriott**

(pre-registration required)

12:15 – 2:00 p.m.

## **Equipment Leasing & Finance Foundation Luncheon**



*Speaker:*



**ROBERT WESCOTT, Ph.D.**  
*President, Keybridge Research LLC*

2:00 – 4:00 p.m.

## **Refreshment Break in Exhibit Area**

2:30 – 4:00 p.m.

## **Concurrent Breakout Sessions**

- Corporate Diversity, Equality and Inclusion – The Realities, Challenges and Goals  
Supported by: ELFA Equality Committee
- Back to the Future: Hot Legal Topics for ELFA's 75th Anniversary
- Fleet Modernization – Utilizing Data and Analytics from Acquisition through Remarketing
- Strategic Shift: Start Thinking and Operating Like a Digital Company

4:30 – 5:30 p.m.

## **Equality Committee and Emerging Talent Advisory Council Reception—All Welcome**

5:30 p.m.

## **Individual Company-Sponsored Receptions and Events**

## **Tuesday, October 26**

7:00 a.m. – 3:00 p.m.

## **Convention Registration**

7:00 – 8:15 a.m.

## **Group Breakfast**

7:00 a.m. – 3:00 p.m.

## **Exhibits Open**

8:30 – 10:30 a.m.

## **General Session**

### **President's Report and Keynote Speaker (TBD)**

*Speaker:*



**RALPH PETTA**  
*President and CEO, ELFA*

10:30 a.m. – Noon

## **Refreshment Break in Exhibit Area**

11:00 a.m. – 12:30 p.m.

## **Concurrent Breakout Sessions**

- Equipment Demand in the Post-Pandemic Small Business Economy
- Transforming Process and Perception with FinTech Innovation
- The Emerging Talent Advisory Council Presents  
Supported by: ELFA Emerging Talent Advisory Committee
- Cyber Security — Keeping Your Company Safe

11:00 a.m. – 5:00 p.m.

## **Spouse/Companion Event:**

### **San Antonio Missions Tour and Luncheon**

(pre-registration required)

12:45 – 2:30 p.m.

## **Community Luncheon for All Attendees**



3:00 – 4:30 p.m.

### Concurrent Breakout Sessions

- Financing the Intersection of the Circular Economy and the ESG Revolution
- Futureproofing Operational Processes and Technology Transformations  
Supported by: ELFA Operations & Technology Committee, Operations & Technology Excellence Award
- Leaving LIBOR Behind - What's Next?

6:30 – 9:30 p.m.

### Closing Party and Dinner

**Deep in the Heart of Texas!**



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

**Sunday, October 24**

8:00 a.m.

### Golf Tournament

*AT&T Canyons Course; on property*

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

8:00 a.m. – 1:00 p.m.

### Jim McGrane Charity Bike Ride

A guided scenic ride of the Texas Hill Country.  
Additional fee for the bikes and other equipment.

2:00 – 4:00 p.m.

### Community Service Project: Build-a-Wheelchair®

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

## IMPORTANT DATES

### • Friday, October 1, 2021:

Last day to receive the special ELFA convention rate for your accommodations at the JW Marriott Hill Country.

### • Friday, October 8, 2021:

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.**

# Speakers



## **DEDE HALFHILL**

*Renowned Leadership Expert and Colonel, USAF (Ret.)*

Described by Dr. Brené Brown as one of her “leadership heroes and a total badass,” U.S. Air Force retired Colonel DeDe Halfhill is a proven leader and communications executive who draws on her 25-year accomplished military career to provide a transparent, real-world perspective on the power of embracing humanness and vulnerability in leadership.

During her time with the Air Force, Halfhill became a trusted advisor to some of our nation’s highest-ranking military leaders, including the Chairman of the Joint Chiefs of Staff and the Secretary of Defense, as well as the lead military spokesperson responsible for implementing plans supporting the Department of Defense’s global communications strategy. Deployed twice during the Iraq War, Halfhill gained first-hand experience leading and advising through the most difficult circumstances, often when lives were at risk, and when there were no easy answers. She understands leadership, not just from studying it, but by actually living it.



## **DR. ROBERT WESCOTT**

*Founder and President, Keybridge Research LLC*

Robert F. Wescott is Founder and President of Keybridge Research LLC, an economic consulting firm in Washington, DC, that has served major financial institutions, Fortune 500 companies and leading business associations since 2001. Dr. Wescott concentrates on global macroeconomics, financial risks, and public policy research. He provides global asset allocation advice to high-profile international financial firms and is a frequent speaker to business and financial audiences around the world. Dr. Wescott also testifies as an expert before U.S. Congressional committees on economic, financial, and energy policy matters. He will discuss the state of the economy and what it means for your business, and summarize the Equipment Leasing & Finance Foundation’s 2021 Industry Future Council report, providing a glimpse into the future of the equipment finance industry.

# RECONNECT REUNITE

# Spouse/Companion Program

**San Antonio, Texas** is a wonderful 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 equipment finance, 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**

### **Full Convention Registration**

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 Welcome Reception, the Tuesday Night Closing Party, special spouse programs on Monday and Tuesday, and breakfast each morning.

## **Package #2**

### **Evening Events Only**

This package includes the Sunday Welcome Reception and the Tuesday Night Closing Party. Spouses or companions registering for this package may also attend any business sessions they like.

## **Package #3**

### **Special Spouse/Companion Activities**

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.

## **Texas Outfitters and Wine Tasting at the JW Marriott** **Monday, October 25**

**11:00 a.m. – 3:00 p.m.**

Spouses have the opportunity to look the part and gear up for the Closing Party, Deep in the Heart of Texas, with a custom hat fitting over a Texas-inspired lunch and wine tasting. This come-and-go event will also feature other Texas surprises you'll treasure forever!



## **San Antonio Missions Tour** **Tuesday, October 26**

**11:00 a.m. – 5:00 p.m.**

See the rich history of San Antonio through a guided tour of four mission sites: Mission San Jose, Mission Concepcion, Mission San Juan, and Mission Espada, all dating back to the early 1800s. A nearby lunch will be included, and the group will return just in time for a night of fun with the Closing Party, themed Deep in the Heart of Texas.



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



# Thank You...

... To All Our Convention Sponsors (as of August 17, 2021)

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To become a sponsor for either the convention or the community service projects, contact Steve Wafalosky at [steve@larichadv.com](mailto:steve@larichadv.com) or (440) 247-1060.