# BRIGHT HORIZONS New Ideas for a New Economy



2014 NAELB Annual Conference Registration Brochure







May 1 - 3, 2014

Caribe Royale Hotel & Resort

Orlando, Florida



The Only Association by Brokers For Brokers.



## **JOIN US IN ORLANDO!**



Wherever you look these days the financial services industry is in transition. In the past few years we have seen our industry change in a multitude of ways, and with it our methods of doing business. We have seen both funders and brokers come and go, however, our customer's need for financing has remained.

At NAELB we are continually asking ourselves how we can best serve in these times of transition. For more than 24 years we have helped Brokers navigate change. This conference is where we all come together in one place to embrace change with courage and ingenuity.

No matter what level you are at in the leasing profession there will be opportunities for you to increase your business potential. The conference committee has worked hard to bring sessions that will give you new ideas to maximize productivity and sessions to show you new ways to earn income by adding more services to your portfolio.

We have asked industry leaders to share their knowledge on marketing, successful e-mail marketing, working capital, invoice factoring, working better with funders, building a portfolio, and even international financing. There is so much being discussed, there will absolutely be something for every level of broker.

Both Linda Kester and Ted Reynolds have volunteered their time to bring us two excellent General Sessions that should not be missed.

So please, make a commitment to yourself to join us in Orlando for the 2014 Annual Conference. Listen to new ideas and share yours. When brokers from all over the country come together, ideas happen, bonds form, and you learn new strategies that can completely revolutionize your business.

Henry Grace

2014 NAELB Annual Conference Chair US Financial Companies



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## 2013-2014 NAELB BOARD OF DIRECTORS

## **President Pro Tem**

Joan Modes, BPB, Gem Commercial Credit, Inc.

#### **Vice-President**

Pete Sawyer, CLP, Sun South Equipment Leasing, Inc.

## **Immediate Past President**

Patrick Sponsel, Sharpe Equipment Leasing, Inc.

## **Secretary-Treasurer**

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Rodney Blecha, Precision Leasing, Inc.
Gary Greene, CLP, BPB, Lease \$mart
Mike Parker, Credential Leasing & Finance

## **Legal Counsel**

Joseph Bonanno, CLP

## **2014 ANNUAL CONFERENCE PLANNING COMMITTEE**

Chair - Henry Grace, US Financial Companies

Board Liaison - Rodney Blecha, Precision Leasing, Inc.

Kevin Anderson, Computer & Equipment Financing

Dwight Galloway, RLC Funding

Linda Kester, Institute for Personal Development

Ted Reynolds, Team Funding

Thank you to members of all of our NAELB committees and task forces. NAELB thrives on a strong volunteer base. To get involved on a committee and make a difference, e-mail headquarters at <a href="mailto:info@naelb.org">info@naelb.org</a>, or contact the chairperson of the committee on which you wish to serve.

## Agenda – Thursday, May 1

6:30 a.m. - 2:00 p.m. NAELB Annual Golf Tournament
Organized by: Rodney Blecha, Precision Leasing, Inc.
(Optional: Additional cost for participation.)

Don't miss your change to network with fellow leasing professional in a relaxed environment during NAELB's 16<sup>th</sup> Annual Golf Tournament. The 18-hole course at the Falcon's Fire Golf Club is recognized both regionally and nationally as one of the finest public golf courses in Orlando. This championship golf course features classic architecture, an exquisitely maintained course and year round playing conditions. Stretching over 7,000 yards from the back tees and providing golfers four sets of tees to choose from, Falcon's Fire offers a challenging yet playable course for a relaxing round with friends or a competitive tournament. Space is limited - be one of the first registered players to ensure your spot! For more information on Falcon's Fire Gold Club, visit www.falconsfire.com.

Cost: \$125 (Includes transportation, lunch, greens fees and cart fees.)



8:00 a.m. - 8:00 p.m. Registration Open

9:00 a.m. - 5:00 p.m. CLP Master Review Class

Presented by: Reid Raykovich, CLP

The Certified Lease Professional (CLP) Foundation is pleased to offer the Master Review Class. This comprehensive eight-hour program is taught by CLP members and is an excellent opportunity for a CLP Candidate or anyone in the industry, to ask specific questions of the instructors on the toughest subjects in equipment leasing – lease classification and terminology; leasing law; lease documentation; lease collections; math of leasing and, financial and tax accounting for leases. The materials presented include lease pricing problems and practice balance sheets and income statements to help you prepare for the lease accounting section of the exam. It is the most comprehensive education offered at no cost to conference attendees.

9:00 a.m. - 12:00 p.m. Intro to Advantage 2.0 and alaQuote Training

Presented by: Jim Buckles, Preferred Business Solutions

Join Jim Buckles in his presentation of the two leading software programs that have been specifically designed for today's Equipment Leasing Broker. You will be shown the benefits of automating your leasing processing as well as organizing the communication and follow-up with your sales contacts.

alaQuote is the premiere online Payment Calculator, Quote Letter, Application and Credit Release Authorization tool that can be private-labeled or co-brand for yours and your vendor's websites using your own logos, colors and verbiage. The quoting process can even include such tools as Section 179 and Return On Investment calculators.

Advantage 2.0 has become the industry standard for daily contact management, credit pull, document creation and funding submissions that will ultimately assist you in being more proficient as a broker.

Each of these work great as stand-alone programs or combined as a great overall marketing and transaction tracking package.

## Agenda – Thursday, May 1

10:00 a.m. - 12:00 p.m. Broker 101 (Part 1)

Presented by: Charles (Bud) Callahan, Jr., CLP, BPB, National Equipment Leasing, Inc.

Foun-da-tion (noun: the basis on which a thing stands, is founded or is supported.) The word is simple enough to understand—but do we have a clear concept of just how important a good foundation is to building things that will survive? With a solid foundation, you can build a business that will survive the test of time and concentrate on adding the next success to your portfolio. This class will be for those who are interested in becoming brokers, who are new brokers, who are new to the industry and anyone interested in discussing topics such as:

- The leasing basics: types of leases, credit structures, terminology
- The broker's role: what we bring to the market
- Working with funding sources: the do's and don'ts
- Finding business that your underwriters will want to fund
- Ethical standards for brokers: fiduciary responsibility, it's not just a word
- Protecting your partners: funders, clients, vendors
- Tools of the trade: contact management, pricing, negotiations, structuring
- · Finding business and keeping it
- Leases vs. finance agreements: which are better?
- · ABC's of a cold call
- · What is the rate?

This is just a sampling of what will be discussed as you lay the cornerstone of your foundation as a successful equipment leasing broker. Don't miss this unique opportunity to learn from the NAELB past president.

1:00 p.m. - 3:00 p.m. Broker 101 (Part 2)

Presented by: Charles (Bud) Callahan, Jr., CLP, BPB, National Equipment Leasing, Inc.

Experience the second half of this important course.

1:00 p.m. - 4:00 p.m. Ethics Exam (Brokers Only: Exam fee will apply)

NAELB Best Practices Broker

Demonstrate your knowledge of ethical leasing practices by taking the NAELB Best Practices Broker™ Exam! By passing this ethics exam, you can proudly display the "Best Practices Broker™" designation on your letterhead, business cards and brochures.

You must sign up to take the exam and be approved prior to conference. No walk-ins will be accepted.

3:00 p.m. - 3:30 p.m. Networking Break







## Agenda - Thursday, May 1



## 3:30 p.m. - 4:00 p.m. Gold Sponsor Presentation - Maxim Commercial Capital

Join Maxim Commercial Capital's Business Development Director, Mae Philpott, as she explains Maxim's products and processes.

- Learn how creative, asset-backed deal structures can be a great fit for your challenging customers
- Understand Maxim's submission and underwriting processes
- Master the art of customizing your close for higher-risk deals
- Have fun while you grow your funder referral base!

# 4:00 p.m. - 4:30 p.m. Gold Sponsor Presentation - Channel Partners, LLC Presented by Jena Lund, Business Development Manager, Abbie DeYonge, Business Development Manager, and Brad Peterson, Managing Member

The short-term working capital space has doubled over the past 4 years to a \$3 billion business. Join Channel Partners to:

- Learn more about the short-term working capital marketplace and why it is growing so rapidly
- Myth Busters get the facts on what is true and what is not!
- How to leverage our expertise to help you be a part of the \$3 billion

And earn a 2 point bonus on your next funded deal just for showing up!

## 6:00 p.m. - 7:00 p.m. First-Timers Reception

If this is your first NAELB conference experience, we invite you to attend a special reception in your honor. This reception is for first-time conference attendees only. It will be a great time to meet the NAELB Board of Directors, sponsors and committee chairs as well as being eligible for a drawing that is only available for first-timers. Get involved and make great connections!

#### 7:00 p.m. - 10:00 p.m. Sponsors' Opening Reception

Meet brokers and funders in your industry for a poolside party! This is your chance to network with business contacts and new friends from all over the country. Mix, mingle and enjoy the Florida atmosphere!



## Agenda - Friday, May 2

7:30 a.m. - 5:00 p.m. Registration Open

8:00 a.m. - 9:00 a.m. Breakfast

9:00 a.m. - 12:00 p.m. Exhibit Hall Open

Enhance your resource network by meeting funding sources and service providers for the latest business solutions.

9:00 a.m. - 9:30 a.m. First-Timers/New Member Orientation Presented by Gary Greene, CLP, BPB,

Lease\$mart

Is this your first NAELB conference? Are you new to NAELB? Would you like to meet other new members? Attend this brief informative session to learn how to get the most out of this conference and your membership!



9:45 a.m. - 10:30 a.m. Professional Development

Presented by Patrick Sponsel, Sharpe Equipment Leasing, Inc.

Are you tired of the same old sales and marketing strategies? Would you like to take it up a notch? Make yourself indispensable as a trusted advisor in the lease/finance industry. Use proven personal and professional development strategies to bring yourself and your business to a whole new level. Patrick will help you to develop these skills and show you how to earn respect in this industry.

10:15 a.m. - 10:45 a.m. Networking Break

12:00 p.m. - 1:30 p.m. Lunch and Prizes

1:45 p.m. - 2:45 p.m. Concurrent Sessions

Brokers are from Mars and Funders are from Venus: How Best to Meet on Planet Earth Moderated by Dwight Galloway, CLP, RLC Funding, with a Panel of Industry Experts

An open-mic, panel led, audience participation forum where experienced brokers and funders will tell their counterparts what they wish the other knew (but evidently don't). Tough questions welcome!!!

## Effective Campaign Marketing (Part 1)

Presented by Mike Ogdon, Swift Page, The World's Largest Email Marketing Company

How technology helps you create, retain and renew business relationships.

- Insights into how people buy and sell
- The keys to relationship development
- The keys to communication
- How technology provides insight to you
- How predictive analytics helps you make better decisions

#### What is Invoice Factoring?

Presented by Kevin Adams, US Financial Companies, Brian Albach, Republic Business Credit, LLC and Eric Benson, Facteon, Inc.

In this class you will learn what is invoice factoring, from spot factoring, non-recourse to recourse. How it works, who qualifies for it and how to sell it. This is an amazing product that offers months if not years of residual income.

2:45 p.m. - 3:00 p.m. Networking Break

## Agenda - Friday, May 2

3:00 p.m. - 4:00 p.m. Concurrent Sessions

#### **Build a Portfolio**

Presented by Pete Sawyer, CLP, Sun South Equipment Leasing, Inc.

Join other leasing professionals to learn some of the facts and ideas in building a lease portfolio for your business. Find out if a portfolio fits your business plan and gain some knowledge of what it takes to fund it, manage it, and service it

# Learn your Deal - Get Better Approvals and Up Sell More Products Presented by Henry Grace, US Financial Companies

In this session you will get new ideas to get more information out of your customer other than an application, quote and three months of bank statements. Get a wish list, up sell invoice factoring or short term working capital.

## What is Short Term Working Capital?

Presented by Gary Lockwood, AmeriMerchant and Evan Rabinowitz, OnDeck

Find out what short term working capital is, who can qualify for it and how to sell it to your new customer and present it to your existing customers. Another revenue stream doesn't hurt does it?

## Maximize your Returns, Yields and Profits by Learning How to Structure a Deal Presented by Martel Pellerin, TimeValue Software

Learn how to calculate rates and yields. Learn how adding points or payments can affect your rate and to what extent. What is your competition quoting? How to earn more money by knowing how to present a deal. More points, more payments, bigger Purchase Option, etc. This class is designed for everyone.

4:00 p.m. - 4:15 p.m. Networking Break

4:15 p.m. - 5:30 p.m. General Session - How to Stop Being a "Best Kept Secret" - New Tools, Tips and

**Tricks to Market Your Leasing Company** 

Presented by Linda Kester, Institute for Personal Development

You will learn to increase visibility, grow your prospecting data base, find more vendors and build trust with your prospects.





## Agenda - Saturday, May 3

7:00 a.m. - 4:00 p.m. Registration Open

7:45 a.m. - 8:45 a.m. Breakfast

8:45 a.m. - 10:00 a.m. Concurrent Sessions

## Free Marketing - Get your Company Found on the Net Presented by Henry Grace, US Financial Companies

How are customers looking for financing today? If you said the internet, you are right. Can your company be found? Learn how to place your company on different sites for better rankings. Get found in your area easily and attract more business. Takes a little time and effort but the price you will love... FREE.

Ten Best and Worst Ways to Work with your Funder: How to Create and Maintain the Best Funder Relationships for your Business Model

Presented by Dwight Galloway, CLP, RLC Funding

A funder's analysis of 27 years, 100,000+ lease applications and over 3,000 broker relationships in light of today's environment.

## **Effective Campaign Marketing (Part 2)**

Presented by Mike Ogdon, Swift Page, The World's Largest Email Marketing Company

Act! E-marketing: The does and don'ts of email marketing

- Why email and social
- How does this help my business
- Segmenting and targeting is key
- Relevance: know your audience
- Tying it all together. Contact Management and E-marketing.

## What is Invoice Factoring? (Session repeated from Friday.)

Presented by Kevin Adams, US Financial Companies, Brian Albach, Republic Business Credit, LLC and Eric Benson, Facteon, Inc.

In this class you will learn what is invoice factoring, from spot factoring, non-recourse to recourse. How it works, who qualifies for it and how to sell it. This is an amazing product that offers months if not years of residual income.

## What is Short Term Working Capital?

(Session repeated from Friday.)

# Presented by Gary Lockwood, AmeriMerchant and Evan Rabinowitz, OnDeck

Find out what short term working capital is, who can qualify for it and how to sell it to your new customer and present it to your existing customers. Another revenue stream doesn't hurt does it?

# Tools for Doing International Deals Presented by Gary Mendell, Meridian Finance Group

Export deals are structured differently from domestic leases, but the result is essentially the same: The vendor gets to make the sale and their foreign customers get competitive payment terms. This session will cover:

- How credit demand in other countries differs from the USA
- Issues vendors and lenders face with international deals
- Evaluating the creditworthiness of foreign companies
- Tools and techniques for getting export business done
- Protecting against nonpayment and political risks





## Agenda - Saturday, May 3



10:00 a.m. - 10:30 a.m. Networking Break

10:30 a.m. - 12:00 p.m. General Session - The Train Runs on Time: How to Operate and Grow a Successful Small Business

Presented by Ted Reynolds, TEAM Funding Solution

This seminar will help brokers identify the process for operating and successfully growing their business. As practitioners of the equipment leasing industry we have opportunities to work with small business owners every day. Some of our customers do a great job of building successful companies. The question becomes: How do we, as small business owners, learn to successfully operate and grow our own businesses?

#### You will:

- Enjoy an interactive, practical approach to planning and developing your business for long term success;
- · Gain insight into where you are now;
- Clearly design the vision of where you want to be;
- Create the next growth step that enables you to achieve success;
- Plus we will discuss 40 short points on how to make "The Train Run on Time".

## 12:00 p.m. - 1:00 p.m. Annual Business Meeting Luncheon

The Board of Directors invites conference participants to attend the Annual Business Meeting Luncheon to hear an overview on NAELB's major initiatives. This is an ideal opportunity for members to join with friends and colleagues and experience the collective power of our efforts and expertise. Don't miss it!.

1:00 p.m. - 5:00 p.m. Exhibit Hall Open

3:00 p.m. - 5:00 p.m. Happy Hour

Cement those funder relationships, courtesy of an open bar and complimentary hors d'oeuvres from your association.





## **Travel Information - Orlando**

#### **Expected Weather**

In May, the average high is 88 degrees and the average low is 66 degrees. Please keep in mind that meeting rooms may feel cool to some conference attendees and a sweater may be helpful.

#### **Your Conference Hotel and Host City**

At the Caribe Royale All-Suite Hotel and Convention Center, business and pleasure go hand in hand. From the very beginning, we've redefined and elevated the standards of the meeting, conference and family vacation experience in Florida. With its gleeful bombast, over-the-top showmanship, and extravagant deployment of dreams as quotidien entertainment, Orlando may be the most "American" city in the nation. It's also the most popular family destination on earth; some 50 million visitors a year flood its theme parks and hotels in ceaseless pursuit of childhood fantasy (or regression). While the vast majority of the crowds orbit the big-ticket amusements furnished by Walt Disney World and Universal Studios Florida, more determined travelers will uncover a surprisingly sophisticated, albeit lesserknown city rooted in Old Florida values if they take the time to seek it out.

# Did You Know You Help NAELB When You Stay Onsite?

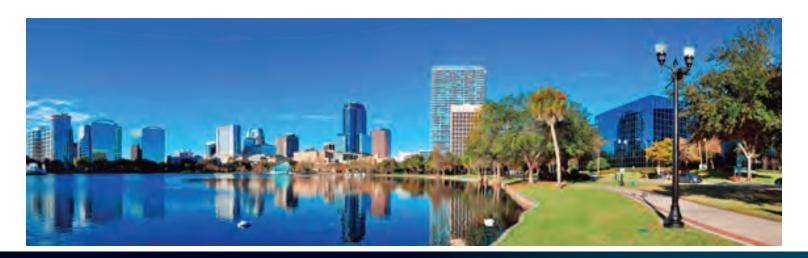
Staying at the conference hotel means getting a great rate, being at the center of all the excitement and spending less time worrying about where to be and when. You will maximize your networking time with other NAELB conference attendees and best of all, you help NAELB meet its commitment to the hotel for this conference.



## Special Disney Meeting and Convention Tickets

Whether you want to spend a truly unforgettable evening with an old friend, share a dazzling nighttime sky with a new contact or experience the all-new. Magical Celebrations excitement with your family, you'll want take advantage of this special ticket offer. And to help you see it all, Disney's special after 2:00 p.m./after 4:00 p.m., Meeting/ Convention Theme Park Tickets are designed to accommodate any agenda and are only available to you, your guests and family members. Inside Disney Parks you'll find entertainment, inspiration and rejuvenation... even if time is of the essence. Get more information and purchase your tickets at www.mydisneymeetings.com/caribe or call 407-566-5600. These tickets are not available at the theme park ticket windows, so be sure to purchase in advance.

Caribe Royale offers \*COMPLEMENTARY\* scheduled shuttles to the Walt Disney World® Theme Parks and an evening shuttle to the Downtown Disney® area. Please visit the Guest Services desk for arrangements.





#### Reservations

Hotel reservations for the Caribe Royale Hotel may be made by calling the reservation desk and identifying yourself as an attendee on the NAELB 2014 Annual Conference, or by going online to <a href="https://www.naelb.org">www.naelb.org</a> and clicking on the hotel link.

Our special conference rate is \$139/night for single/double or \$159/night for king deluxe, from Wednesday, April 30 - Saturday, May 3. **The cut-off date for hotel reservations at the conference rate is Wednesday, April 16, 2014.** After this date, the hotel will honor reservations on a space and rate availability basis. We encourage you to book reservations at your earliest opportunity.

#### **Caribe Royale Hotel**

8101 World Center Drive, Orlando FL 32821

Reservations: 1-888-258-7501

Hotel Check-In: 3:00 p.m., Check-out: 11:00 a.m.

## **Orlando Airport**

Information on the Orlando International Airport (MCO) can be found at <a href="http://www.orlandoairports.net">http://www.orlandoairports.net</a>.

#### **Ground Transportation To/From MCO**

The distance from the hotel is 17.5 miles, with a drive time of about 20 minutes. Shuttles are available for \$36.00 roundtrip through Mears Transportation; taxis average \$44 each way. For more information, please visit <a href="https://secure.mearstransportation.com/?referrer=cariberoyale">https://secure.mearstransportation.com/?referrer=cariberoyale</a>.

#### **Hotel Parking**

Valet Parking is available at Caribe Royale. The costs are as follows: \$9 plus tax Day Guest Valet (per day) and \$12 plus tax Overnight Valet (per night). Complimentary self-parking is also available.

## **Hertz Meeting Services Discount**

The NAELB has secured discounted rental car rates through Hertz. To reserve special meeting rates, please include the CV#022L4038 when making reservations. Reservations can be made by calling 1-800-654-2240 or 1-405-749-4434 or online at www.hertz.com.

At the time of reservation, meeting rates will be automatically compared to other Hertz rates and the best rate will apply. Rates available from all Florida Hertz locations for rental start dates April 25 - May 10, 2014. Click here for more information regarding Hertz discounts for the NAELB Annual Meeting.



## **Registration Information**

#### **Conference Fee**

The conference registration fee includes the cost of attendance at all general and concurrent sessions, social functions and planned meals. The golf tournament, Ethics exam and CLP exam are offered at an additional cost. Please refer to the enclosed registration form for the appropriate fee structure or contact the appropriate person for the CLP exam. If you have any questions regarding the registration process, please call NAELB Headquarters at 1-800-99-NAELB.

## **Registration Payment**

No registration will be processed without proper payment accompanying the registration form. Registration must be completed by **Friday, April 18, 2014** to have your name listed in the printed attendee list. Registration information and fees are available at <a href="https://www.naelb.org">www.naelb.org</a>.

## **Optional Events (Additional Cost for Participation)**

The golf tournament, Ethics exam and CLP exam are considered optional events. The cost for participation varies; please check the registration form for pricing details. Please see the agenda for individual descriptions for each of these events.

#### **Guest Fees**

For a fee, guests may participate in the social functions and planned meals during the conference. Reservations must be made in advance for each function and the appropriate charges should be included in the payment that accompanies your registration form. Guest fees are offered as an accommodation for guests accompanying registered conference participants. If a guest wishes to attend the general or concurrent sessions, they must purchase a full conference registration at the appropriate member or non-member rate.

## **Confirmation E-mail**

After your registration form has been processed, NAELB Headquarters will send you a confirmation email.

## **Cancellation Policy**

Written notice of cancellation must be received at NAELB Headquarters no later than **Thursday**, **April 11, 2014** in order to receive a refund, less a \$75 processing fee. There will be no refunds for cancellations received after this date. All refunds will be processed after the conference.

## **General Conference Information**

## **Conference Attire**

The conference attire is business casual.

# **Distribution of Publications and Promotional Materials**

Distribution of brochures, fact sheets, advertising, industry publications and promotional materials is not allowed during the conference except for companies participating in the official conference sponsorship program and annual conference exhibitors. Distribution of these materials by sponsors is allowed only within the guidelines of the sponsorship program.

#### **Scheduling of Non-NAELB Functions**

Events that conflict with officially sponsored NAELB events or educational programming are not allowed during the conference. This includes hospitality suites, special breakfasts, focus groups or similar events.

For any additional questions, please contact NAELB Headquarters at 1-800-99-NAELB.

# Special Thanks to our 2014 Exhibitors (as of March 4, 2014)

360 Equipment Finance Allegiant Partners, Inc. Amerimerchant Amerisource Funding **Axis Capital** Banc of California, N.A. Bankers Capital Channel Partners LLC Financial Pacific Leasing, Inc. First Federal Leasing instaCover Leasepath Maxim Commercial Capital LLC NFS Leasing On Deck Orange Commercial Credit Paradigm Equipment Finance Pawnee Leasing Corporation **RLC Funding TEAM Funding Solutions** 

## Gold







Doing great things together









## Silver

Allegiant Partners
AmeriMerchant
Amerisource Funding
Banc of California
Bankers Capital
InstaCover

LeasePath
OnDeck
Orange Commercial Credit
Paradigm Commercial
Capital Group
RLC Funding

## **Bronze**

Leasing Solutions, LLC

## **Broker**

American Financial Network
Enterprise Financial Solutions, Inc.
Gem Commercial Credit
Kabot Commercial Leasing, LLC

Lease\$mart

National Equipment Leasing, Inc

Sun South Equipment Leasing, Inc.

The Cambridge Capital Group

## **Presentation Sponsors**

Channel Partners, LLC Maxim Commercial Capital, LLC

# Hotel Key Card and Name Badge Sponsor

Banc of California



# **Interested in 2014 Sponsorships?**

Contact NAELB Headquarters at 1-800-99-NAELB

## **REGISTER AT WWW.NAELB.ORG TODAY!**



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