

Agenda - Thursday, April 30

7:00 a.m. - 2:00 p.m.
Pro Shop

NAELB Annual Golf Tournament **Organized by: Rodney Blecha, Precision Leasing, Inc.**

Pre-registered golf participants will meet at the Pro Shop at 7:00 a.m. Breakfast will be on your own but lunch will be served at the course. Tee-off is scheduled for 7:30 a.m.

Special Thanks to our Golf Tournament Sponsors:



9:00 a.m. - 7:00 p.m.
South Mountain Registration

Registration Open

10:00 a.m. - 12:00 p.m.
Sonoran Sky Salon 2

Intro to Advantage 2.0 & 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 & 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 works great as stand-alone programs or combined as a great overall marketing and transaction tracking package.

12:30 p.m. - 2:30 p.m.
Sonoran Sky Salon 1

Brokers and Community Banks - An Untapped Opportunity Session 1 **Presented by: Scott Wheeler, Wheeler Business Consulting** **Partnering with the "RIGHT" Bank**

How do you find the right bank - doing your research.

- Who do you solicit within the bank?
- What is your value proposition?
- Why should a bank choose you as a partner?
- Setting realistic expectations for you and the bank.
- Becoming a bank partner.

1:00 p.m. - 4:00 p.m.
Sonoran Sky Salon 2

Broker 101 **Presented by: Charles (Bud) Callahan, Jr., CLP, BPB, National Equipment | Leasing, Inc.**

Founda-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 a NAELB Past President.

3:00 p.m. - 5:00 p.m.
Sonoran Sky Salon 1

Brokers and Community Banks - An Untapped Opportunity Session 2
Presented by: Scott Wheeler, Wheeler Business Consulting
Soliciting, Winning and Packaging Bank Qualified Transactions

- What is a bankable transaction?
- Moving beyond application only.
- Proper bank packaging.
- Discounting paper - what are the implications?

5:00 p.m. - 5:30 p.m.
Sonoran Sky Salon 2

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 non-traditional customers
- Understand Maxim's submission requirements and underwriting process
- Master the art of customizing your close for higher-risk deals
- Have fun while you grow your funder referral base!

5:30 p.m. - 6:00 p.m.
Sonoran Sky Salon 2

Gold Sponsor Presentation - Channel Partners, LLC
Protect Your House

In addition to equipment financing, your customers need working capital to fuel their growth and are looking for alternatives right now. If you aren't providing them options to get working capital, someone else is, and it may be your competitor. Join Channel Partners to learn how we can help you Protect Your House.



- Why Working Capital Loans: Your customers need it to grow
- Why Protect Your House: Don't open the door for competitors
- How Channel Partners Helps you Protect Your House: Flexible programs to help Keep your Customer Your Customer

6:00 p.m. - 7:00 p.m.
Paseo West

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. Get involved and make great connections!

7:00 p.m. - 10:00 p.m.
Oasis Waterpark

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 Phoenix atmosphere!

Agenda - Friday, May 1

6:30 a.m. - 7:30 a.m.
Athletic Club

Group Fitness - Pilates

A non-weight bearing system of physical conditioning that promotes muscle harmony by strengthening and lengthening movements. This workout will assist in flushing toxins from the body through breathing techniques

7:30 a.m. - 4:00 p.m.
South Mountain Registration

Registration Open

8:00 a.m. - 9:00 a.m.
Park Pavilion

Breakfast

9:00 a.m. - 12:00 p.m.
Park Pavilion

Exhibit Hall Open

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

9:15 a.m. - 10:00 a.m.
Palm 3A

First-Timers/New Member Orientation

Presented by Sonia v.M. Stoddard, BPB, NAELB Past President, Stoddard & Associate

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 make the most of this conference and your membership!

10:30 a.m. - 11:15 a.m.
Palm 3B

Professional Development

Presented by Brian Huey, Lease\$ource and Jaime A. Kaneshina, CLFP, BPB, The Cambridge Capital Group

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.

12:00 p.m. - 1:30 p.m.
South Mountain Ballroom

Lunch & Keynote Speaker: The Universal Language of Profit

Presented by Davy Tyburski, Profit InnerCircle

This program provides Entrepreneurs, Business Owners & Executives with effective and easy-to-implement strategies and techniques that will Increase Revenue, Improve Cash Flow, and Boost Your Bottom Line!

Attendees will learn how to:

- 1) Increase new revenue by simply removing the bottlenecks that are limiting your revenue growth
- 2) Grow repeat sales in ways you probably never even considered to keep your customers buying over and over again
- 3) Improve cash flow by making a few minor adjustments to your existing policies and procedures
- 4) Immediately raise client/customer delight and loyalty levels without spending a dime
- 5) Drive down the cost of doing business so you can make more, in less time, with less rework

Special Thanks to our Luncheon Sponsor:



Agenda - Friday, May 1

1:30 p.m. - 3:00 p.m.
Park Pavilion

Exhibit Hall Open

3:00 p.m. - 4:00 p.m.
Palm 3A

Concurrent Sessions

Measuring Up in Foreign Markets - 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

Palm 3C

Expanding your Business Opportunity through Vendor Relations

Presented by Gerry Egan, TecSource, Inc. & Lesley Farmer, KLC Financial, Inc.

Learn how to build your contacts with vendors into relationships. Then expand them into long lasting business opportunities.

Palm 3B

Entrepreneur Operations Blueprint™: How-to Master Your Time, Talents & Systems to Create More PROFIT & More FREEDOM Right NOW

Presented by Davy Tyburski, Profit InnerCircle

- 1) The key strategies & shortcuts to instantly become more productive, more efficient and less-stressed! (Benefits YOUR health account & bank account)
- 2) How to implement Davy's "Smokey the Bear" mindset to reduce the risk of potential business fires so you can keep more money in your bank account
- 3) How to FIRE yourself, get out of YOUR way so YOU can work less & gain more freedom
- 4) How to reduce or eliminate the REWORK that is draining money from YOUR bank account
- 5.) Davy's Forced-Ranking System that shows YOU how to determine what's most important.

4:00 p.m. - 4:15 p.m.
Palm 3 Foyer

Networking Break

4:30 p.m. - 6:00 p.m.
Athletic Club

Group Hike

Come and explore the Sonora Desert and all it has to offer. Experienced guides will educate you on the wild life as well as the plant life found only in the desert south west. Enjoy majestic mountain views along with stunning city skylines all in the country's largest municipal state park. Pre-registered participants should meet at the Athletic Club at 4:30 p.m. Bring water, sunscreen, a hat and good sole shoes.

Agenda – Saturday, May 2

6:30 a.m. – 7:30 a.m.

Athletic Club

Group Fitness – Yoga

Focuses on balancing the body, mind and emotions as well as relaxing tensions caused by over-stressed lifestyles. An enjoyable class for everyone producing good health and positive feelings.

7:30 a.m. – 3:00 p.m.

South Mountain Registration

Registration Open

8:00 a.m. – 9:00 a.m.

South Mountain Ballroom

Breakfast

9:00 a.m. – 10:15 a.m.

Concurrent Sessions

Palm 3A

Leveraging Your System to Collect Data

Presented by Abbie DeYonge, Channel Partners LLC

Learn from the system experts how you can further leverage your system to collect & analyze business and customer data to better define, measure and track your business and marketing strategies.

Palm 3B

YOU CAN MAKE MONEY ON TAXES! The Ins and Outs of Tax Lease

Presented by Barry Marks, Marks & Weinburg, Spencer Richman, American Financial Network, & John Haenselman, Belvedere Equipment Finance

An interactive panel on the tax benefits of leasing for your customer. What has/is going to change? What will/has stayed the same? Be knowledgeable in order to educate your customer and close the sale.

Palm 3C

Broker to Discounter: How to Make a Successful Transition

Presented by Dustin Christianson, Brickhouse Capital, LLC, Tyson Garrett, Pawnee Leasing, & Ron Mitchell, BancLease Acceptance

This session covers the differences between brokering deals and discounting them. What is involved and what are the benefits and risks associated with discounting transactions? How do you make more money using discounting and when does it not make sense? In addition, the class will address what it takes to become a discounter. How much time in business do you need, what kind of volume is required at a bank before you can progress your relationship with them?

10:15 a.m. – 10:30 a.m.

Palm 3 Foyer

Networking Break

10:30 a.m. – 12:00 p.m.

Concurrent Sessions

Palm 3C

Tales from the Trenches: Repo Stories & Risk Mitigation

Moderated by Doug Houlahan, CLFP, Maxim Commercial Capital, LLC

Panelists: Rob Childers, 360 Equipment Finance, Kirstin Patterson, CLFP, Pacific Western Equipment Finance, & Brad Peterson, Channel Partners, LLC

Hear real tales of transaction terrors from industry veterans as they share how they learned (the hard way) to mitigate risk. Gain an understanding of how your funding sources assess risk in a deal and the various strategies they use to mitigate that risk while continuing to fund.

Palm 3B

Protecting the Industry: Help the Industry Stay Healthy

Presented by Laura Carini, Financial Pacific Leasing, Inc., David Goodman, Tempus Financial Group, Inc., Rob Misheloff, Smarter Finance USA & Dan Munman, Vista Capital Corp.

Hear about what is happening in the industry today. What is/is not in the news? What are best practices? Does your network have the same high ideals you do?

Palm 3A

Municipal Lending

Presented by Linda Tiers, KS StateBank, Baystone Government Finance

What is the big business opportunity in the municipal community and the significant impact on your bottom line? Learn how to target this market. Learn who is finding success and why. In this class you will learn that there is plenty of business to go around.

12:00 p.m. – 1:00 p.m.

South Mountain Ballroom

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.

Park Pavilion

Exhibit Hall Open

3:00 p.m. – 5:00 p.m.

Park Pavilion

Happy Hour

Cement those funder relationships, courtesy of an open bar and complimentary hors d'oeuvres from your association. Happy Hour just got happier... we have some amazing "grand" prizes that will given away during the Happy Hour. Must be present to win!