



NAELB 2014 EASTERN REGIONAL MEETING

Business is Coming Back... Time to Up Your Game

September 5-6, 2014
Lord Baltimore • Baltimore, MD

TENTATIVE AGENDA

FRIDAY, SEPTEMBER 5

12:00 – 7:00 PM

REGISTRATION

1:00 – 2:30 PM

THE NAELB VALUE PROPOSITION

Gerry Oestreich, ABC Leasing and Financing

Why be a member of the NAELB? How to get the maximum value from your membership.

2:30 – 3:30 PM

LEASING 201: FINANCIAL STATEMENTS – WHEN DO WE NEED THEM AND WHY?

Larry LaChance, Banker's Capital

Have you ever had an App-Only deal that needed something more to get approved? How do you determine when to ask for financial information from a customer? What information do you need to get and what impact can it have on an approval? Hear from knowledgeable industry professionals on how to address this topic.

2:30 – 4:30 PM

INTRO TO ADVANTAGE 2.0 AND ALAQUOTE TRAINING

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.

3:30 – 4:30 PM

CLP FOUNDATION PRESENTATION + MEET UP

Carl Villella, CLP, Acceptance Leasing and Financing Service

Learn more about the Industry's Gold Standard. What is the CLP designation? How do you earn it and what does it mean?

5:00 – 7:30 PM

SPONSORS' OPENING RECEPTION

SATURDAY, SEPTEMBER 6

8:00 AM – 12:00 PM

REGISTRATION

8:00 – 9:00 AM

BREAKFAST

9:00 AM – 12:00 PM

MEET WITH EXHIBITORS

12:00 – 1:00 PM

LUNCH

1:15 – 2:00 PM

THE STATE OF THE INDUSTRY

Confirmed Panelists: Joe Bonanno, NAELB Legal Counsel, Paul Witte, First Federal Leasing, Vernon Tirey, LeaseQ, Inc.

The leasing industry is coming back. What is its current state and what is the vision for the next 12 months? Come hear a panel of industry leaders discuss what they see as the current state of the industry and what to expect in the next 12 months.

2:15 – 3:15 PM

1) ALTERNATIVE REVENUE SOURCES

Panelists: Andrew Allaire, Amerisource Funding, Abbie DeYonge, Channel Partners LLC, Kathy Heinecke, IOU Central & Andrew Mallinger, Fora Financial

Learn how to be more valuable to your customer base and make more money doing so.

2) HOW TO BE YOUR FUNDING SOURCE'S MVP

Panelists: Dwight Galloway, RLC Funding, Matt Mosley, Financial Pacific Leasing LLC & Mae Philpott, Maxim Commercial Capital LLC

Topics include how a Funder views Brokers, success ratios and statistics. Include A Funders thru C Funders

3:30 – 4:30 PM

1) COMMUNITY BANKS

Scott Wheeler, Wheeler Business Consulting

This session will explore the growing opportunity for brokers to partner with their local community banks as a source for new business referrals, a potential funding source, and a long term financial stakeholder.

2) INTERNET + TECHNOLOGY

Gary Greene, CLP, BPB, Lease \$mart

How to utilize technology to make your business paperless and portable all while improving your process flow.