



NAELB 2015 EASTERN REGIONAL MEETING

Expanding Your Horizons... Discover the Possibilities

September 11-12, 2015
Atlanta Marriott Marquis ~ Atlanta, GA

AGENDA

FRIDAY, SEPTEMBER 11

12:00 – 6:00 PM **REGISTRATION**

1:00 – 2:00 PM **THE NAELB VALUE PROPOSITION**

Sheri Bancroft, Mike Parker and Pete Sawyer, NAELB Board Members

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

2:15 – 3:45 PM **BUILDING A STRONGER BROKER COMMUNITY**

Scott Wheeler, Wheeler Business Consulting

The evolution of a broker business, to include one-man origination (sales organization), building a staff: sales, operations and credit and moving from brokering to discounting to small internal portfolio. Thinking long term and building wealth, to include topics such as systems matter; providing value to all stakeholders; building a meaningful balance sheet; having a long-term strategy for all economic times; defining, establishing and solidifying the “Right Partners.”

4:00 – 5:00 PM **REAL WORLD MARKETING TACTICS**

Jacklynn Manning, Fora Financial

Learn relevant marketing techniques that you can put into practice today. Discover how to get the most mileage out of your marketing efforts, with minimal cost.

6:00 – 8:00 PM **OPENING RECEPTION**

SATURDAY, SEPTEMBER 12

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**

1:00 – 2:00 PM **STATE OF THE INDUSTRY**

Panel will include: Matt Evans, Marks & Associates, P.C., Brian Huey, LeaseSource Financial Services, Inc., Joe Leonard, Oakmont Capital Services, Mike Miller, NCMIC Finance Corporation, Matt Mosley, Financial Pacific Leasing, Inc.

We are pleased to present a panel of seasoned experts in the equipment finance industry. The discussion, which includes brokers and funders and is guaranteed to be lively, will focus on:

- Current trends in the industry-what’s hot and what’s not, where the industry is going
- Conquering the competition-tips on how to overcome the competitive interest rate environment, analyzing and communicating effective rates vs quoted rate, comparing contract terms and conditions
- Enhancing your broker skills-how to be a more savvy broker while building better local relationships, closing vs. order taking for more deals

2:15 – 3:15 PM

EXPLORING ALTERNATIVE FINANCING SOLUTIONS

Panel will include: Chuck Brazier, TradeRiver USA (Supply Chain Finance), Beth Malin, Pinnacle Specialty Capital (Factoring and Purchase Order Finance), Jeff Schubert, RapidAdvance (Working Capital Loans) and Chris Mitchell, Hitachi Business Finance (Asset Based Lending)

This session will introduce the equipment professional to a myriad of alternative forms of financing and show how these products can benefit both the equipment finance professional and their clients. Each of the lenders on this panel has a different solution for helping a client's cash flow. They will highlight opportunities for increasing the broker's revenue and enhancing the overall client relationship by positioning the broker as a single source for all of their client's financial needs, while simultaneously providing additional options to help close more equipment deals. Presenters will be given 10 minutes each to discuss the products in a purely informational format and ten minutes for questions will be provided.

3:45 – 5:00 PM

PACKAGING FOR SUCCESS/ANALYZING FINANCIAL STATEMENTS

Chris Knauf, Knauf Consulting & Joe Upson, Heritage Global Capital

This session will provide comprehensive, educational information to assist you in closing more transactions by teaching you to prepare solid packages and submitting them to funders in formats that will better guarantee approvals. Topics will include help in identifying funder specialties, required documents and formats. The second portion of this session will provide detailed information to help you become more knowledgeable in analyzing financial statements.