

6:30 a.m. – 2:00 p.m.

NAELB Annual Golf Tournament

Organized by: Rodney Blecha, Precision Leasing, Inc.

Pre-registered golf participants will meet at the North Entrance in the Paradise Tower at 6:30 a.m. The bus will depart promptly at 6:40 a.m. for Angel Park. Breakfast will be on your own but lunch will be served at the course. Tee-off is scheduled for 8:00 a.m.

Special Thanks to our Golf Tournament Sponsors:



9:00 a.m. – 7:00 p.m.

Trinidad Foyer

Registration Open

10:00 a.m. – 12:00 p.m.

Trinidad 6

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.

1:00 p.m. – 4:00 p.m.

Trinidad 6

Broker 101

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

Foun-da-tion (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.

5:00 p.m. – 5:30 p.m.
Trinidad 6

Gold Sponsor Presentation – Channel Partners Capital Better Connect With Your Customers and Prospects

The small business loan marketplace has doubled in size each year since 2013 and is estimated to reach \$40 Billion in originations by 2020. Your customers need working capital to fuel their growth and there's a significant opportunity for you to grab your share of this growing industry.



Join Channel Partners Capital to learn how we can help you Better Connect with Your Customers and Prospects.

- Evolve With Your Customer: 19% of small businesses applying for financing are buying equipment, 56% are applying for working capital
- Keep Your Customer, Your Customer: Don't open the door for your competitors
- Multiple Revenue Opportunities: Drive additional income into your business with fee income, renewals & participation
- Grow Your Business: Channel Partners Capital can help you expand your product offerings with our flexible Partner Programs

6:00 p.m. – 7:00 p.m.
Beach Club Veranda

First-Time Attendee 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.
Havana Room

Opening Reception & 25th Anniversary Celebration

Meet brokers and funders in your industry while trying your luck at some casino favorites! This is your chance to network with business contacts and new friends from all over the country and win some awesome prizes. Mix, mingle and help us celebrate the 25th Anniversary of the NAELB!

Agenda – Friday, April 29

7:30 a.m. – 4:00 p.m.
Trinidad Foyer

Registration Open

8:00 a.m. – 9:00 a.m.
Trinidad Pavilion

Breakfast

9:00 a.m. – 1:00 p.m.
Trinidad Pavilion

Exhibit Hall Open

9:15 a.m. – 10:00 a.m.
Trinidad 6

First-Timers/New Member Orientation

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

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.
Trinidad 6

Professional Development

Presented by Gary Greene, Lease \$mart, Jaime A. Kaneshina, CLFP, BPB, The Cambridge Capital Group and David Normandin, CLFP, Banc of California, N.A.

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.
Trinidad Pavilion

Business Meeting & 25th Anniversary Recognition 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. We will also take this opportunity to further celebrate our 25th Anniversary by recognizing our Founders and Past Leadership of the NAELB!

2:45 p.m. – 3:45 p.m.
Trinidad 4

Concurrent Sessions

Back to the Future Comes Full Circle

Moderated by Dwight Galloway, Navitas Lease Corp.

Panel includes: Donna Cole, Business Capital Leasing, Gerry Egan, TecSource, Gary Greene, Lease \$mart, Barry Marks, Marks & Associates, Gerry Oestreich, ABC Leasing and John Winchester, ComCo-One World Equipment Finance

Listen as some of our longtime NAELB members discuss how they survived and thrived amid changes in our industry that are again challenging brokers and funders alike. What they learned yesterday may be important to your success today and tomorrow! Join us to get a look at your business through other's eyes and gain the true value of our association.

Trinidad 6

Tools to Detect Fraud

Presented by Andrew Alper & Hal Goldflam, Frandzel Robins Bloom & Csato, L.C.

This seminar will discuss fraud, how to spot it before a transaction is entered into to avoid a loss, who is liable for the fraudulent transaction, and what to do when a lessor or lender is the victim of fraud.

Trinidad 5

Selling has Nothing to do With Selling: Going Against Traditional Training, Wisdom and Convention to Produce Sales Results

Presented by Philip T. Kash, Kash Development Corp.

We will address the #1 issue today: Most sales organizations are very unique just like everyone else. They are selling the exact same differences and attributes; quality, service, reliability, expertise, performance and value. No wonder they have a hard time differentiating themselves from the competition and minimizing commoditization. What they work so hard to prevent (commoditization), they are actually creating. Your remaining differentiator is not what you sell, but how you position it.

In this session, you will be trained, challenged & pushed the entire time & will return home well equipped to deal with the challenges of this Economy and methods for

separating yourself from competition.

What you'll take away:

- Real world tactics that work including new ideas to re-invigorate your selling
- How to generate "Decision Alignment" to overcome the traditional "Winner" and "Loser" in most sales "opportunities"
- Tactics to Eliminate Unprofitable Activities
- How to be a Change Agent vs. a sales person and help clients "discover" compelling reasons to change & commit
- State of the Art closing tactics that work ...especially in this Economy!

3:45 p.m. – 4:00 p.m.
Trinidad Foyer

Networking Break

4:00 p.m. – 5:00 p.m.
Trinidad 6

Concurrent Sessions

The Impact of Economic Fluctuations on Lending in the Equipment Finance Industry ***Moderated by Abbie DeYonge, Channel Partners Capital***

Panelists: Paul Menzel, Financial Pacific Leasing, Inc., Brad Peterson, Channel Partners Capital and Gary Souverein, Pawnee Leasing Corporation

Learn from the "seasoned" funding source leaders about how economy fluctuations over the past years have shaped the current lending environment in equipment finance industry. The panel will also reflect on the past and current market trends to predict where the equipment finance lending environment will look like in the next 5 – 10 yrs.

Trinidad 3

Speed Dating/Networking – Session #1

Looking for a new funding source/service provider, but short on time? Attend the 2016 NAELB speed dating session to quickly and efficiently date many funding sources/service providers and find your best match! The following companies will be participating:

- | | |
|-------------------------------------------|-------------------------------------|
| - 360 Equipment Finance | - instaCOVER |
| - Amerisource Funding | - LoanMe |
| - Axis Capital | - Maxim Commercial Capital |
| - Bankers Capital | - NCMIC Finance Corporation |
| - Channel Partners Capital | - NFS Leasing |
| - Commercial Funding Partners | - North Mill Equipment Finance, LLC |
| - Eagle Business Credit LLC | - Orange Commercial Credit |
| - Equipment Data Associates (EDA) | - Quality Leasing Co., Inc |
| - Equipment Leasing Group of America, LLC | - RapidAdvance, LLC |
| - Funding Circle | - Tetra Financial Group |

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- Tactics to Eliminate Unprofitable Activities
- How to be a Change Agent vs. a sales person and help clients "discover" compelling reasons to change & commit
- State of the Art closing tactics that work... especially in this Economy!

Agenda – Saturday, April 30

8:30 a.m. – 3:00 p.m.
Trinidad Foyer

Registration Open

9:00 a.m. – 1:00 p.m.
Trinidad Pavilion

Brunch and Exhibits

1:00 p.m. – 2:30 p.m.
Trinidad Pavilion

Lunch and Keynote Speaker – The Gold Medal Process®

To finish out our 25th Anniversary Celebration, NAELB is pleased to welcome Olympic Champion, network television and radio sports broadcaster, author and corporate speaker John Naber as our keynote speaker.

With his three books, over 1,000 corporate speeches, his Going for Gold Sales Improvement Program (c), Awaken the Olympian Within (c) Team Building Workshop and Award Winning Presentation Skills (c) program, Naber teaches how to set world class goals and achieve world class results.

When Naber recounts Olympic stories of discipline, sacrifice and teamwork, he also shares the behind-the-scenes stories of exactly how the athletes achieved their accomplishments. Using Olympic anecdotes and humor, Naber teaches the Olympian secrets of visualization, goal-setting, strategic thinking, hard work, overcoming obstacles and performing under pressure. You will leave this session with a step-by-step game plan and a renewed commitment to your personal and business goals.

You will not want to miss this luncheon!

3:00 p.m. – 4:00 p.m.
Trinidad 3

Concurrent Sessions

Speed Dating/Networking – Session #2

Looking for a new funding source/service provider, but short on time? Attend the 2016 NAELB speed dating session to quickly and efficiently date many funding sources/service providers and find your best match! The following companies will be participating:

- | | |
|-----------------------------------|-------------------------------------|
| - 360 Equipment Finance | - NCMIC Finance Corporation |
| - Blue Bridge Financial LLC | - North Mill Equipment Finance, LLC |
| - Channel Partners Capital | - Pinnacle Specialty Capital |
| - Equipment Data Associates (EDA) | - Quality Leasing Co., Inc |
| - Funding Circle | - RapidAdvance, LLC |
| - Navitas Lease Corp. | |

Trinidad 6

The Power of Having the Right People

Presented by Julie Bartl, Johnson, Kendall & Johnson Benefits, Inc.

Regardless if you are a one person shop, or have contracted or permanent employee's, it is important to hire and manage the people who are engaged in your business. In this session, we will discuss the following:

1. When is the time to hire talent?
2. How do you attract, and qualify the right talent for your business.
3. How do you move your staff from satisfied employees to engaged employees that proactively work towards business goals and the success of the organization?

Trinidad 5

Understanding The Latest Website Technology and Online Marketing Tools To Grow Your Business

Presented by Will Paccione, Dot Xero

Online Marketing is a combination of all online tools and resources that allow you to grow your business. Gaining clients through your online footprint is putting together the correct plan for your business and the prospects you're trying to target. In this session, learn to improve your profitability with the use of leading edge Internet technologies:

1. Social Media
2. Online Advertising Tools
3. Email Marketing
4. Search Engine Optimization