



NAELB New Member & First Time Attendee Orientation



Agenda

- **Welcome**
- **History of the NAELB**
- **Board of Directors**
- **Committees**
- **Member Benefits**
- **Ethics Overview**
- **How to Get Involved Today**

History of the NAELB

- **Created in 1990 by leasing brokers for leasing brokers**
- **Promotes the interests of equipment leasing brokers, through**
 - Education
 - Advocacy
 - Improved communication with funders
 - Programs designed to upgrade the professionalism and profitability of brokers, funders, and others engaged in the business of equipment lease financing
- **Membership represents leasing brokers across the United States, Canada, and Ireland.**
- **Membership currently exceeds 500 and is growing.**

2015 – 2016 Board of Directors



President

Pete Sawyer, CLFP
Sun South Equipment Leasing, Inc.

President – Elect

Mike Parker
Credential Leasing and Finance

Vice President

Rodney Blecha
Precision Leasing, Inc.

Secretary/Treasurer

Jaime Kaneshina, CLFP, Best Practices Broker™
TCCG, LLC dba The Cambridge Capital Group

Immediate Past President

Joan Modes, Best Practices Broker™
Gem Commercial Credit, Inc.

Directors:

- Sheri Bancroft
Bancroft Leasing
- Henry Grace
I.F.S. Equipment Financing
- Doug Richters
Accord Financial Group, Inc.

Legal Counsel

Joseph Bonanno, Esq. CLFP, NAELB Legal Counsel

How to Join a Committee

- Contact the committee chair or board liaison to become a committee member.
- Access the online sign-up form on the committee page.
- Committee member qualifications:
 - You must be a NAELB member in good standing.

Committees

- **Standing Committees**
 - Distance Learning
 - Ethics
 - Funder Development
 - Funder/Sponsorship
 - Marketing Committee
 - Meetings
 - Member Benefits
 - Membership
- **Sub-Committees & Task Forces**
 - Member Screening Sub-Committee
 - Publications Sub-Committee



Distance Learning Committee

Mission

This Committee works to teach NAELB members about different industry topics via distance learning that uses video and the latest internet and teleconference technology.

Board Liaison

**Joan Modes
Gem Commercial Credit, Inc.
248-477-2170
joanmodes@naelb.org**

Committee Chair

**Linda Kester
Institute for Personal Development
516-724-1922
linda@lindakester.com**

Ethics Committee

Mission

Works to educate and oversee the ethical standards of the NAELB and its membership to protect the association's credibility and professionalism in the marketplace.

NAELB Legal Counsel

Joe Bonanno, Esq., CLFP
781-391-7800
JoeBonanno@NAELB.org

Best Practices Broker

This committee also promotes Best Practices Broker, which is a designation given to those who pass an exam designed to gauge one's knowledge and use of ethical practices in the leasing industry.

Funder Development Committee

Mission

**Recruit funding sources to
NAELB membership.**

Board Liaison

Michael Parker
**Credential Leasing and Finance 239-
278-4464**
MikeParker@NAELB.org

Committee Chair

Bud Callahan
National Equipment Leasing Co
317-823-0447
bcallahan@nationalequipmentleasing.com

Funder/Sponsorship Committee

Mission

- **Develop and promote annual sponsorship program.**
- **Recruit conference exhibitors/sponsors.**
- **Facilitate Meet the Funder conference calls.**
- **Ensures the funders and associate members are well-informed.**

Board Liaison

Pete Sawyer, CLP
Sun South Equipment Leasing, Inc.
863-583-3000
PeteSawyer@NAELB.org

Marketing Committee

Mission

- **Develop strategies to promote the NAELB and its benefits through web, print, and social media.**

Board Liaison

Henry Grace
I. F. S. Equipment Financing
614-777-0000
henry@usfinco.com

Committee Chair

Carrie Radloff
American Financial Partners, Inc.
888-237-3533
Carrie@FinanceWithAFP.com

Committee Co-Chair

Theresa Kabot, CLP
Kabot Commercial Leasing LLC
206-301-9960
TKabot@Lease-It.com

Meetings Committee

Mission

- **Develops the agenda and recommends speakers for NAELB's annual national conference.**
- **Develops the agenda for NAELB's two regional meetings.**

Board Liaison

Rodney Blecha
Precision Leasing, Inc.
888-382-8272
RodneyBlecha@NAELB.org

2016 Annual Conference Chair

Timothy Daum, Plan B Capital Group LLC

2016 Eastern Regional Meeting Chair

Christopher Lyle, Equipment Finance Group, LLC

2016 Western Regional Meeting Chair

Jonathan Kohanoff, Diamond Business Loans

Member Benefits Committee

Mission

- **Negotiates preferential pricing for a broad range of products and services for NAELB members.**
- **Identifies new NAELB benefits and investigates opportunities.**

Board Liaison

Doug Richters
Accord Financial Group, Inc.
800-347-4977
DougRichters@NAELB.org

Committee Chair

Jim Blumberg
MIJ Associates, LLC
864-228-9400
MIJLeasing@charter.net

Membership Committee

Mission

Works to increase NAELB membership.

Board Liaison

Michael Parker
Credential Leasing and Finance 239-278-4464
MikeParker@NAELB.org

Committee Chair

Rosanne Wilson, CLP, BPB
1st Independent Leasing, Inc.
503-626-3486
Rosanne@1stIndependentLeasing.com

Member Screening Sub-Committee

Mission:

The Member Screening Sub-Committee screens new member applications to determine if the applicant meets the requirements of membership.

Board Liaison

**Michael Parker
Credential Leasing and Finance
239-278-4464
MikeParker@NAELB.org**

Committee Chair

**Meagan O'Brien
Dedicated Commercial Recovery, Inc.
(612) 351-3945
meagan@dedicatedcri.com**

Publications Sub-Committee

Mission

- Ensure our members are aware of benefits and industry events.
- Publish quarterly *LeasingLogic* Newsletter as well as *Saturday Morning Post*.
- Develop and update website content.

Board Liaison

Sheri Bancroft
Bancroft Leasing
800-414-1308
SheriBancroft@NAELB.org

Industry Advocacy

- **The NAELB's collective representation will have an important influence on the future of the leasing industry.**
- **NAELB.org provides unbiased information for the general public to educate them about leasing and its potential advantages.**

Member Benefits

- **Access to Online Resources**

- Documentation Library
- Leasing Forum
- Funding Source Directory
- Associate Member Directory
- Member Directory

- **Legal Assistance**

- **Quarterly *Leasing Logic* and *Saturday Morning Post***

- **Networking Events**

- Annual Meeting
- Regional Meetings

- **Education**

- Leasing School
- Sales Training Discounts
- Distance Learning Tools
- Mentor Program

- **Industry Advocacy**

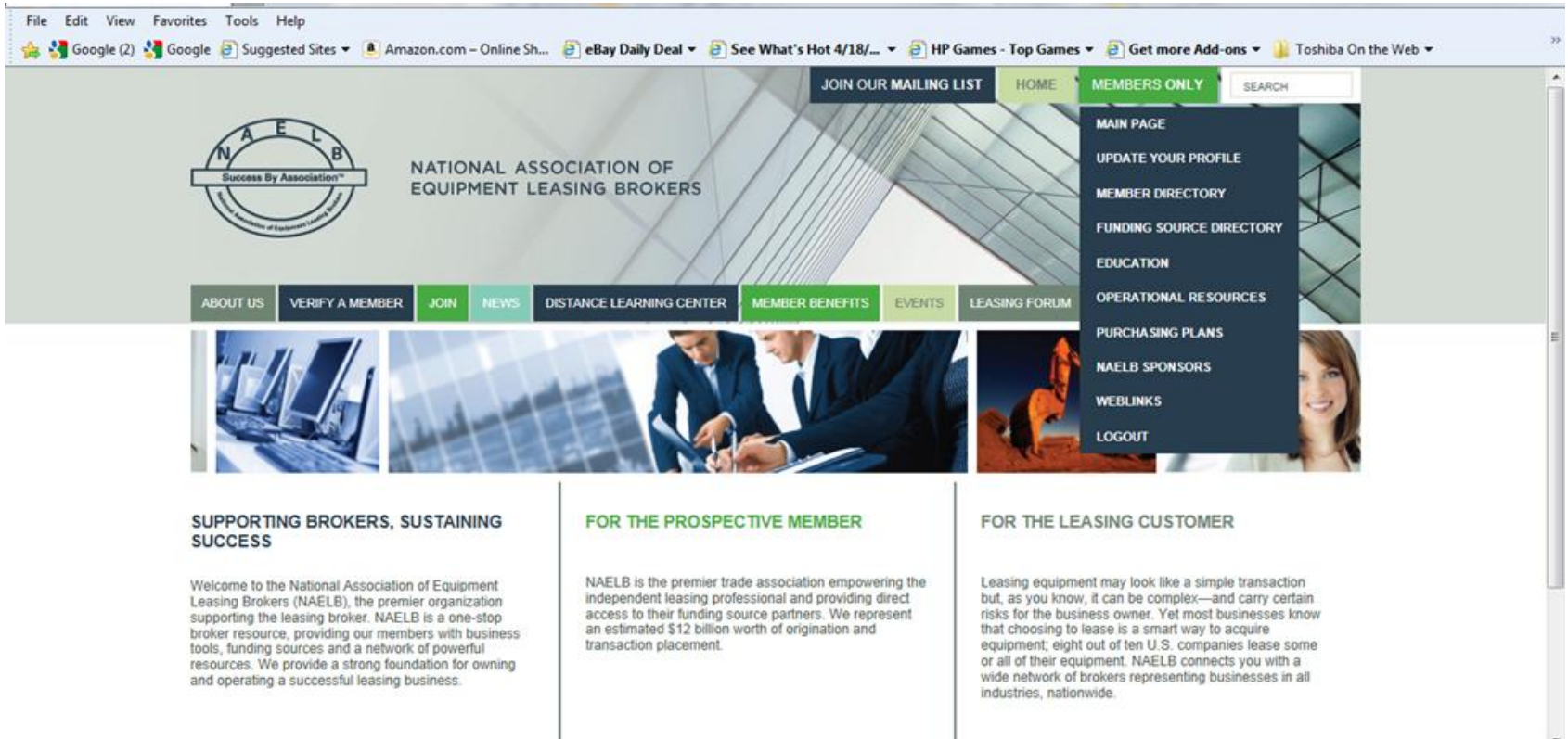
- **Marketing**

- Licensed Use of NAELB Logo

- **Purchasing Plans**

- UPS Pre-Paid Labels
- CoreLogic Discount Credit Reports
- Constant Contact Discount
- LexisNexis/Accurint Program
- alaQuote & Advantage Software
- TimeValue Software
- Office Supply Discounts
- Long Distance Telephone or Teleconferencing Discounts
- Insurance Quotes

Members Only Page



The screenshot shows a web browser window displaying the NAELB website. The browser's address bar shows the URL "http://www.naelb.org". The website's header includes a navigation menu with links: "JOIN OUR MAILING LIST", "HOME", "MEMBERS ONLY", and a "SEARCH" button. The "MEMBERS ONLY" menu is expanded, showing a list of links: "MAIN PAGE", "UPDATE YOUR PROFILE", "MEMBER DIRECTORY", "FUNDING SOURCE DIRECTORY", "EDUCATION", "OPERATIONAL RESOURCES", "PURCHASING PLANS", "NAELB SPONSORS", "WEBLINKS", and "LOGOUT". The main content area features a large banner image of two business men in suits reviewing documents. Below the banner, there are three columns of text. The first column is titled "SUPPORTING BROKERS, SUSTAINING SUCCESS" and describes the NAELB as a premier organization supporting the leasing broker. The second column is titled "FOR THE PROSPECTIVE MEMBER" and describes the NAELB as a premier trade association empowering the independent leasing professional. The third column is titled "FOR THE LEASING CUSTOMER" and describes the benefits of leasing equipment. The website's footer includes a copyright notice for 2008.

File Edit View Favorites Tools Help

Google (2) Google Suggested Sites Amazon.com - Online Sh... eBay Daily Deal See What's Hot 4/18/... HP Games - Top Games Get more Add-ons Toshiba On the Web

JOIN OUR MAILING LIST HOME MEMBERS ONLY SEARCH

NAELB
Success By Association™
National Association of Equipment Leasing Brokers

NATIONAL ASSOCIATION OF
EQUIPMENT LEASING BROKERS

ABOUT US VERIFY A MEMBER JOIN NEWS DISTANCE LEARNING CENTER MEMBER BENEFITS EVENTS LEASING FORUM

MAIN PAGE
UPDATE YOUR PROFILE
MEMBER DIRECTORY
FUNDING SOURCE DIRECTORY
EDUCATION
OPERATIONAL RESOURCES
PURCHASING PLANS
NAELB SPONSORS
WEBLINKS
LOGOUT

SUPPORTING BROKERS, SUSTAINING SUCCESS

Welcome to the National Association of Equipment Leasing Brokers (NAELB), the premier organization supporting the leasing broker. NAELB is a one-stop broker resource, providing our members with business tools, funding sources and a network of powerful resources. We provide a strong foundation for owning and operating a successful leasing business.

FOR THE PROSPECTIVE MEMBER

NAELB is the premier trade association empowering the independent leasing professional and providing direct access to their funding source partners. We represent an estimated \$12 billion worth of origination and transaction placement.

FOR THE LEASING CUSTOMER

Leasing equipment may look like a simple transaction but, as you know, it can be complex—and carry certain risks for the business owner. Yet most businesses know that choosing to lease is a smart way to acquire equipment; eight out of ten U.S. companies lease some or all of their equipment. NAELB connects you with a wide network of brokers representing businesses in all industries, nationwide.

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Online Resources

- **Access to tools and information to help you run your leasing operation:**
 - Documentation Library with free copies of frequently needed forms and agreements
 - Online Leasing Forum allows members to share their useful tips
 - Searchable Online or Printable Funding Source Directory
 - Printable Associate Member Directory
 - Searchable Online Member Directory

Online Leasing Forum

- **Internet and email community of several hundred leasing professionals.**
- **Features a 'Looking For Funding' electronic bulletin board where members find homes for transactions of nearly every description.**
- **Enables members to poll others for their experience and seek and receive advice from their peers and industry veterans.**
- **Offers regular updates on a range of industry issues.**

Online Directories

- **The association makes it easy for members to locate reputable and reliable sources using our searchable online directories of NAELB Funder members, Associate Members, and other Broker Members.**
- **Simply answer questions about the deal you are working on using the Funding Source Directory's online form and the system will provide you with a list of potential appropriate funders.**

Legal Assistance

- Free telephone advice is available from the Association's Legal Counsel including tips on taking the Best Practices Broker Exam.
- NAELB's Legal Counsel writes a legal column in each NAELB quarterly *LeasingLogic* newsletter.
- Regular updates about legal issues are posted on the online Leasing Forum.

NAELB Legal Counsel

Joe Bonanno, Esq., CLFP

781-391-7800

JoeBonanno@NAELB.org

Purchasing Plans

- **Credit Bureau Program**

- Corelogic Credco provides members cost-effective access to all three major credit reporting agencies from one online source.



- **UPS Prepaid Shipping Labels**

- UPS Next Day labels for \$16.00/each.
- UPS Second Day labels for \$11.00/each.



- **Variable Discounts on Office Supplies from Office Depot**

- Access the NAELB price list and get your office supplies at a discount.



- **Discounted Long Distance, Toll-free, Conference Calling Services, and Constant Contact broadcast e-mails**

- Dodson Group Program Through Qwest Communications. **Constant Contact**® 

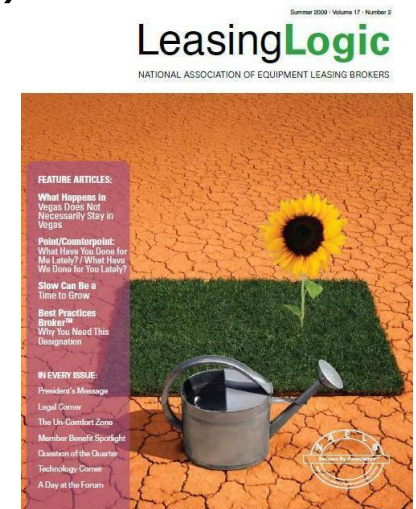
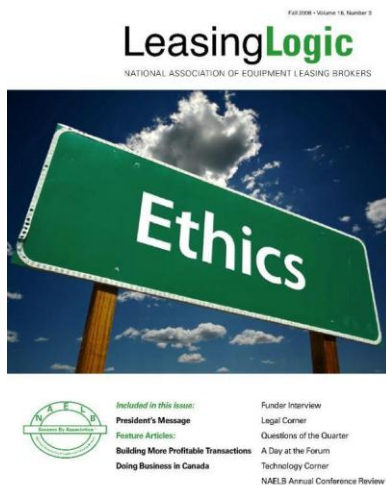
- **Discounts on LexisNexis, TimeValue, and alaQuote Software**

- Visit the Members Only section of www.naelb.org for more information on these programs.



Quarterly Newsletter

- **LeasingLogic**
 - Features funding sources, new members, professional development, legal issues, meeting information, and other NAELB news
 - Written by NAELB members and other contributors
- **Saturday Morning Post**
 - The fun side of the only association for brokers *by* brokers!



Networking National and Regional Events

- **2017 Annual Conference**
April 27-29, 2017 – Memphis Convention Center – Memphis, TN
- **Golf Tournament (at Annual Conference)**
 - Hit the links for some quality networking time with industry peers.
- **Regional Educational Meetings**
 - Eastern Regional – September 16-17, 2016 – Cincinnati, OH
 - Western Regional – November 11-12, 2016 – Anaheim, CA
- **At these events**
 - Meet face to face with lenders.
 - Attend educational seminars and workshops.
- **To attend these events visit www.NAELB.org**

Education & Mentoring Programs

- **The NAELB is committed to providing members with opportunities to upgrade their comprehension of a broad range of leasing issues.**
- **Educational Seminars and Workshops**
 - Offered at each Annual Conference and the Regional Meetings.
- **Distance Learning**
 - New distance learning programs are being developed for NAELB members.
 - Visit NAELB's homepage to access the Distance Learning sessions.
- **Mentor Program**
 - Industry experts have volunteered to be mentors for new members or members seeking guidance.
 - Find a mentor that can help you at www.NAELB.org.

Ethics Overview

- **Code of Ethics Program**

- Voted on by our broker members.
- Designed to benefit members, vendors, lessees, and others.
- Assures that our members adhere to the highest ethical standards.
- Strongly discourages unsavory business practices and promotes self-policing (rather than government regulation).
- View and download at **www.NAELB.org**.

- **Best Practices Broker™ Exam**

- Recognizes a member's ability to apply the Code of Ethics to everyday business practices.
- Available for brokers who have been NAELB members for at least two years and approved by the Board of Directors to take the exam.

Ethics Overview

- **Provisional Membership**

- Each new member is a provisional member of NAELB for 120 days after activation of membership.
- A member can file within this timeframe a challenge form if they feel as if the provisional member is not suitable for NAELB membership. If a challenge is made, the Board of Directors will review the challenge and expel, if necessary, based on evidence.

- **Ethics Enforcement Program**

- Designed to benefit members, vendors, lessees, and others.
- A complaint may be lodged by following the Complaint procedures in effect in accordance with the NAELB Code of Ethics.

- **Dispute Resolution Process**

- Helps to prevent and resolve conflict issues between members.

How to Get Involved Today

- **Join a committee**
- **Visit the Online Leasing Forum regularly**
- **Participate in a seminar or distance learning workshop**
- **Register to attend the Annual Conference, Eastern Regional, or Western Regional meetings**
- **Participate in our mentoring program**
- **Present at an upcoming NAELB event**
- **Contribute to the quarterly newsletter**
- **Suggest additional member benefits you would like**
- **Spread the word... Recruit new members!**

The NAELB Staff is Here to Help You

Joe Casey, CAE, Executive Director

Oversees operations in accordance with the Bylaws and Board direction.

Facilitates Board policy in accordance with proven association management best practices.

André Brousseau, Administrative Coordinator

Contact for membership, the UPS label program, sponsorship, advertising, and general questions and assistance.

Astrid Schrier, CMP, Meeting Manager

Contact for Annual and Regional Conferences.



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& FERNLEY
Advancing the Mission of Our Clients

Questions & Answers

NAELB

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Philadelphia, PA 19103**

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fax: 215-564-2175

www.NAELB.org

Info@NAELB.org