




NAELB
Member 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



<p>President Pete Sawyer, CLFP Sun South Equipment Leasing, Inc.</p> <p>President – Elect Mike Parker Florida National Equipment Finance</p> <p>Vice President Rodney Blecha Precision Leasing, Inc.</p> <p>Secretary/Treasurer Jaime Kaneshina, CLFP, Best Practices Broker™ TCCG, LLC dba The Cambridge Capital Group</p>	<p>Immediate Past President Joan Modes, Best Practices Broker™ Gem Commercial Credit, Inc.</p> <p>Directors:</p> <ul style="list-style-type: none"> • Sheri Bancroft Bancroft Leasing • Henry Grace I.F.S. Equipment Financing • Doug Richters Accord Financial Group, Inc. <p>Legal Counsel Joseph Bonanno, Esq. CLFP, NAELB Legal Counsel</p>
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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 task force works to teach NAELB members about different industry topics via distance learning that uses the latest internet and teleconference technology.

Committee Chair
 Linda Kester
 Institute for Personal Development
 516-724-1922
 linda@lindavester.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.

Best Practices Broker

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

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



Funder Development Committee

Mission

Recruit funding sources to NAELB membership.

Board Liaison
 Michael Parker
 Florida National Equipment Finance
 239-278-4464
 MikeParker@NAELB.org

Committee Chair
 Bill Mapes
 Monetary Resources, Inc.
 (316) 425-1836
 bmapes3@gmail.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.

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
TBD

2015 Eastern Regional Meeting Chair
Beth Malin, Pinnacle Specialty Capital

2015 Western Regional Meeting Chair
Susana Saja, Coast Equipment Lending




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.

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
Florida National Equipment 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
Joan Modes
GEM Equipment Leasing
866-882-3933
JoanModes@NAELB.org

Committee Chair
Lauren Aleksinas
FirstLease
866-493-4778 Ext. 28
lauren@firstleaseonline.com



Publications Sub-Committee

Mission

- Ensure our members are aware of benefits and industry events.
- Publish quarterly *LeasingLogic* Newsletter.
- 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* Newsletter

•Networking Events

- Annual Meeting
- Regional Meetings

•Education

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

•Industry Advocacy

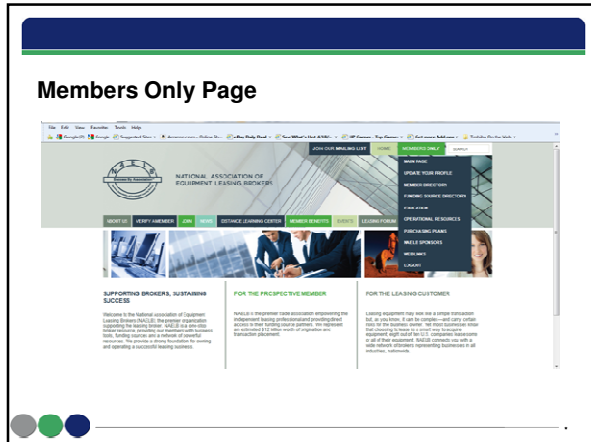
•Marketing

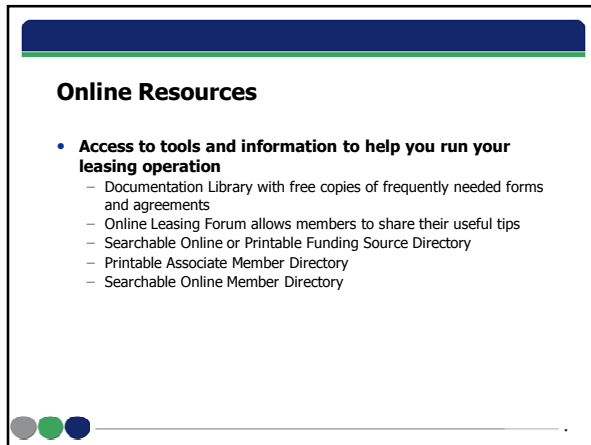
- Licensed Use of NAELB Logo

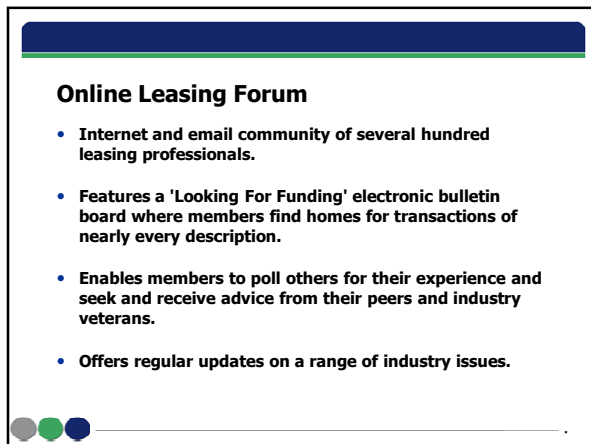
•Purchasing Plans

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









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**
 - Published quarterly
 - Features funding sources, new members, professional development, legal issues, meeting information and other NAELB news
 - Written by members of the NAELB Communications Committee and other member contributors
 - Corresponding blog at www.NAELBLEasingLogic.org



Networking National and Regional Events

- **Regional Educational Meetings**
 - Eastern Regional – September 11-12, 2015 – Atlanta, GA
 - Western Regional – November 13-14, 2015 – Anaheim, CA
- **2016 Annual Conference**
April 28-30, 2015 – Tropicana Las Vegas – Las Vegas, NV
- **Golf Tournament (at Annual Conference)**
 - Hit the links for some quality networking time with industry peers.
- **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.
- **Laura Huestis, Associate Director**
 - 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.





Questions & Answers

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