

2016 CLFP ACCOMPLISHMENT REPORT

2016 CLFP Board of Directors

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Reid Raykovich, CLFP

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Thank you to our supporting associations



Membership

The CLFP Foundation membership increased with 114 applicants sitting for and passing the exam. With almost 400 CLFPs in good standing, the Foundation has set another record for its highest membership since the inception of the designation in 1985. The following individuals gained the CLFP or CLFP Associate Designation in 2016:

Mark Ainsley, CLFP	Marlin Business Services Corp.	Beth Lanshe, CLFP	BB&T
Jim Alnas-Benson, CLFP	Ivory Consulting Corporation	Daryn Lecy, CLFP	Stearns Bank
Kip Amstutz, CLFP	360 Equipment Finance	Tom Lockhart, CLFP	Marlin Business Bank
Aubri Anderson, CLFP	Allegiant Partners Inc.	Jodi Mackinnon, CLFP	Key Equipment Finance
Mike Berkman, CLFP	First American Equipment Finance	Rob Mater, CLFP	1st Source Bank
Rick Blowers, CLFP	First American Vendor Finance	Claudine Matian, CLFP	Celtic Commercial Finance
Beth Blumenthal, CLFP	Commerce Bank	Siobhan McGee, CLFP	KingsBridge Holdings, LLC
Justin Borkowski, CLFP Assoc.	First American Equip. Finance	Mark McKissick, CLFP	Hanmi Bank
Shawn Brady, CLFP	Provident Equipment Leasing	Beth McLean, CLFP	Northland Capital Financial Services, LLC
Donnie Bunn, CLFP	First South Leasing, LLC	Nanette Mickelsen, CLFP	Bank of the West
Mark Campbell, CLFP	Celtic Commercial Finance	Jill Molitor, CLFP	Stearns Bank
Kevin Canepa, CLFP	Vision Financial Group, Inc.	Chris Morell, CLFP	Umpqua Bank Vendor Finance
Don Cosenza, CLFP	North Mill Equipment Finance LLC	Dominique Mosley, CLFP	BB&T
Skylar Crane, CLFP	Celtic Commercial Finance	Regan Mullikin, CLFP	LeasePlan USA
Matt Crawley, CLFP	Arvest Equipment Finance	Korie Nicholson, CLFP	Provident Equipment Leasing
Tony Culiano, CLFP	First American Equipment Finance	Derek Nutley, CLFP	
Phil Davidson, CLFP	Ivory Consulting Corporation	Drew Olynick, CLFP	Taylor Financial
Lynn Deitrick, CLFP	BB&T	Timothy Ong, CLFP	Celtic Commercial Finance
Steve DeSimone, CLFP	National Funding	Dirk Onink, CLFP	TEQLease, Inc.
John DiMino, CLFP	First American Equipment Finance	Ron Palmer, CLFP	Key Equipment Finance
Kristian Dolan, CLFP	Tamarack Consulting, Inc.	Christopher Park, CLFP	Dakota Financial, LLC
Claire Donohue, CLFP	First American Equipment Finance	David Passafiume, CLFP	First American Equipment Finance
Rebecca Drake, CLFP	First American Equipment Finance	Jim Peach, CLFP	Stearns Bank
Brent Dunbar, CLFP	Celtic Commercial Finance	Derek Perez, CLFP	Bank of the West
Mark El-Hinn, CLFP	Celtic Commercial Finance.	Kayla Perlinger, CLFP	Stearns Bank
John Faris III, CLFP Assoc.	National Truck and Trailer Leasing	Mae Philpott, CLFP	Quality Leasing Co., Inc.
Don Ferguson, CLFP	Provident Equipment Leasing	Ray Poole, CLFP	First American Equipment Finance
Chris Fischer, CLFP	Ivory Consulting Corporation	John Pitre, CLFP	Arvest Equipment Finance
Fred Fischer, CLFP	Ivory Consulting Corporation	Michael Price, CLFP	Tri Counties Bank
Tara Flanagan, CLFP	Canon Financial Services, Inc.	Kate Ralston, CLFP	First American Equipment Finance
Mike Flanigan, CLFP	First American Equipment Finance	Candace Reinhart, CLFP	First National Capital
Cindy Fleck, CLFP	GreatAmerica Financial Services	Deb Reuben, CLFP	Reuben Creative, LLC
Michelle Fuchs, CLFP	Stearns Bank	Kendra Rothschild, CLFP	Quality Leasing Co., Inc.
John Germaske, CLFP	First American Equipment Finance	David Salome, CLFP	Brandywine Capital Associate
Nick Gibbens, CLFP	Bank of the West	Joe Schluender, CLFP	Stearns Bank
Jennifer Giefer, CLFP	First American Equipment Finance	Andrea Schmid, CLFP	BB&T
Marc Gingold, CLFP	Fleet Advantage, LLC	Joe Sclafani, CLFP	DLL Financial Solutions
Ron Gonzales, CLFP	BSB Leasing, Inc.	Guy Selinka, CLFP	Streamline Financial Services
Michael Green, CLFP	Dakota Financial, LLC	Kristi Serrano, CLFP	Umpqua Bank
Michael Gsellmeier, CLFP	First American Equipment Finance	Mike Seyal, CLFP	Diagnostic Institute of Imaging, Inc.
Michael Haines, CLFP	First American Equipment Finance	Chris Shutter, CLFP	Canon Financial Services, Inc.
Andrew Halladay, CLFP	Oakmont Capital Services	Scott Smilie, CLFP	Bank of the West
Katharine Harris, CLFP	GSG Financial	Rocky Soliday, CLFP	Celtic Commercial Finance
Mikki Henkelman, CLFP	Stearns Bank	Justin Sudore, CLFP	First American Equipment Finance
Randy Hollowell, CLFP	Celtic Commercial Finance	Spencer Sundahl, CLFP	BSB Leasing
David Holmgren, CLFP	Ivory Consulting Corporation	Spencer Thomas, CLFP	KLC Financial, Inc.
Andy Horne, CLFP	Provident Equipment Leasing	Brian Thune, CLFP	Celtic Commercial Finance
Thomas Hotard, CLFP	Commerce Bank	Nick Toy, CLFP	Allegiant Partners, Inc.
Matt Ivory, CLFP	Ivory Consulting Corporation	Christine Underwood, CLFP	Dakota Financial, LLC
DJ Jackson, CLFP	Oakmont Capital Services	Kevin Vick, CLFP	Ridgeline Financial, Inc.
Judi Jenks, CLFP	Global Financial & Leasing Services	Don Wampler III, CLFP	FirstLease, Inc.
Marc Keepman, CLFP	KLC Financial, Inc.	Amy Weader, CLFP	First American Equipment Finance
Jakeb Klein, CLFP Assoc.	Beacon Funding Corporation	Jordan Wellman, CLFP Assoc.	Allegiant Partners, Inc.
Martin Klotzman, CLFP	Ivory Consulting Corporation	Jeremy Wolocki, CLFP Assoc.	First American Equip. Finance
Celenia Kurtz, CLFP	Select Funding	Sarah Yarnes, CLFP	First American Equipment Finance
		Evan Zoller, CLFP	Provident Equipment Leasing

Education

The Foundation continued organizing the “Academy for Lease & Finance Professionals” (ALFP). The ALFP is a three day event that covers all three of the mandatory sections of the exam in-depth, as well as three of the most popular elective subjects during the first two days. On the third day, the exam is offered, but not mandatory. Below are those individuals who graciously donated their time and knowledge for the cause of the Foundation.

Steve Crane, CLFP - Bank of the West

Chris Enbom, CLFP - Allegiant Partners, Inc.

Nick Fong, CLFP - Allegiant Partners, Inc.

Stephanie Hall, CLFP - Bryn Mawr Funding

Brad Harmon, CLFP

Bob Humber, CLFP - RCH Consulting

Gabe Jarnot, CLFP - Northland Capital

Bill Jennings, CLFP - Lease Western

Bette Kerhoulas, CLFP - Pacifica Capital

Paul Knowlton, CLFP - Bank of the West

Joe Leonard, CLFP - Oakmont Capital Services

Chris Lerma, CLFP - Allegiant Partners, Inc.

Brian Link, CLFP - TEQLease

Tamara McCourt, CLFP - Currency Capital

Jarrod Michel, CLFP - Park Western Financial Corporation

Chris Nagle, CLFP - DLL

David Normandin, CLFP - Hanmi Bank

Kevin Prykull, CLFP - PNC Equipment Finance

Shervin Rashti, CLFP - Maxim Commercial Capital

Nicholas Ross, CLFP - Bank of the West

Jonathan Sandgarten, CLFP - ComSource, Inc.

Joe Schmitz, CLFP - F.I.T. Leasing

Brian Schonfeld, CLFP - Pawnee Leasing Corp.

Kim Shea, CLFP - Allegiant Partners

Pam Spanier, CLFP - Northland Capital

Amy Spragg, CLFP - Pacifica Capital

Lisa Whitehead, CLFP - First Foundation Bank

A big thank you also goes to all of the hosts who made each of the ALFPs a success!



Cindy Spurdle Award of Excellence



Reid Raykovich, CLFP presented Todd Buzard, CPA, CLFP the 2016 Cindy Spurdle Award of Excellence.

The 2016 Cindy Spurdle Award of Excellence was presented in Baltimore, MD to Todd Buzard, CLFP of First American Equipment Finance. He was chosen as the CLFP who has contributed the most to the industry and best represent the CLFP ideals.

Alan Sikora, CLFP, CEO of First American Equipment Finance said, “The CLFP is the preeminent credential in the equipment leasing industry. Todd’s commitment to helping his First American colleagues and other industry professionals achieve this designation is admirable. His efforts augment his students’ professional development while furthering the progression of the equipment finance industry.”

Automated Exam

A large undertaking for the Foundation in last year was getting the 8-hour examination accessible online. In November of 2016, Nancy Geary, CPA, CLFP, Michael Green, CLFP, Reid Raykovich, CLFP, Brian Schonfeld, CLFP, and Amy Spragg, CLFP gathered at the offices of Dakota Financial to make the exam more automated. With the large number of applicants sitting for the exam, the tedious task of grading each has become insurmountable. Each of the mandatory sections will include at least one essay, however, the remaining questions will be gradable using the software platform. This new exam format is expected to be released in the first quarter of 2017.

CLFP Day

On August 25, 2016, CLFPs across the country celebrated their designation with parties held in Seattle, Portland, Los Angeles, Houston and Minneapolis. This was the first year where multiple events were planned for the same day and with the success of it, will remain a tradition for years to come. After attending the LA-area celebration, Amy Spragg, CLFP, Vice President of the CLFP Board of Directors stated, "The CLFP Celebration Day in Southern California was a fantastic evening filled with fabulous food and fantastic networking. It is always such a pleasure catching up with fellow CLFP's to discuss current changes within the industry and opportunities for growth and advancement."



Minneapolis-Area Event



Portland-Area Event



Seattle-Area Event



Los Angeles-Area Event

Board of Directors

The Foundation's Board of Directors is comprised of seven elected Directors serving two-year terms, and three Directors appointed by the Equipment Leasing & Finance Association (ELFA), National Association of Equipment Leasing Brokers (NAELB) and the National Equipment Finance Association (NEFA) for one-year terms. Below are the 2017 Board of Directors for the CLFP Foundation:



Rob Boyer
BB&T
ELFA-Appointed



Leslie Brown
FactOne Capital
Elected



Eric Bunnell
Arvest Equipment Finance
NEFA-Appointed



Andrew Eller
First American Equip. Fin.
Elected



Chris Enbom
Allegiant Partners, Inc.
Elected



Bob Fisher
Ascentium Capital
Elected



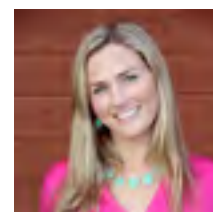
Kevin Prykull
PNC Equipment Finance
Elected



Joe Schmitz
F.I.T. Leasing
NAELB-Appointed



Marci Slagle
VFI Corporate Finance
Elected



Amy Spragg
Pacifica Capital
Elected



The Foundation would especially like to salute Brian Schonfeld, CLFP whose term has come to an end and has graciously volunteered for five years on the CLFP Board.

Companies with 3 or more CLFPs

First American Equipment Finance (62)
Financial Pacific Leasing, Inc./Umpqua Bank (20)
Allegiant Partners, Inc. (15)
Ascentium Capital (14)
Bank of the West (10)
Arvest Bank/Equipment Finance (9)
Celtic Commercial Finance (9)
Orion First Financial LLC (9)
ECS Financial Services, Inc. (7)
GreatAmerica Financial Services (7)
Ivory Consulting Corporation (7)
Stearns Bank (7)
Hanmi Bank (6)
Great American Insurance (5)
Provident Equipment Leasing (5)

Susquehanna Commercial Finance
Inc., A Subsidiary of (BB&T) (5)
BSB Leasing (4)
Commerce Bank (4)
Key Equipment Finance (4)
Maxim Commercial Capital, LLC (4)
Northland Capital Financial Services (4)
Canon Financial Services (3)
Diversified Capital Credit (3)
First Foundation Bank (3)
FSG Leasing, Inc. (3)
Innovative Lease Services, Inc. (3)
LeaseTeam Inc. (3)
Oakmont Capital Services LLC (3)
TEQLease, Inc. (3)

Thank you to our Partners
Platinum Partners

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Let's talk today!

Bob Fisher, CLFP
281.348.2017
BobFisher@AscentiumCapital.com



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Financial Pacific Leasing, Inc. is a subsidiary of Umpqua Bank. Products offered by Financial Pacific Leasing are not FDIC insured.

Gold Partner



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a Chesswood Group Limited company

Bronze Partners

- Arvest Equipment Finance
- Bryn Mawr Funding
- First American Equipment Finance
- Great American Insurance Group
- Maxim Commercial Capital
- National Association of Equipment Leasing Brokers
- Padco Financial Services
- Portfolio Financial Servicing Company
- VFI Corporate Finance

Silver Partner



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ALLEGIANT PARTNERS

Individual Partners

<p>Benefactor (\$250+)</p> <ul style="list-style-type: none"> Bob Fisher, CLFP Rick Galtelli, CLFP Reid Raykovich, CLFP Theresa Kabot, CLFP Jaime Kaneshina, CLFP Pete Sawyer, CLFP 	<p>Sponsor ct'd</p> <ul style="list-style-type: none"> Jack Harvey, CLFP Robert Knutson, CLFP Shari Lipski, CLFP Colin Rosenmeyer, CLFP
<p>Sponsor (\$100-\$249)</p> <ul style="list-style-type: none"> Paul Fogle, CLFP Dwight Galloway, CLFP Steve Geller, CLFP Brent Hall, CLFP 	<p>Supporter (\$50-\$99)</p> <ul style="list-style-type: none"> Ann Holder, CLFP David Lempko, CLFP Brian Link, CLFP Carl Villella, CLFP
	<p>Contributor(\$25-\$49)</p> <ul style="list-style-type: none"> Jake Cutler, CLFP Raphael Levin, CLFP