



1000+ YEARS OF EXPERIENCE

UAEL SPRING CONFERENCE APRIL 21–24, 2005

Doubletree Paradise Valley Resort in Scottsdale, Arizona

Welcome to Scottsdale, located in the beautiful Sonoran Desert where the sun shines over 330 days a year. The surrounding area is home to over 200 golf courses. You can hike in the local



mountains, take a Jeep tour, go river rafting on the Salt River, visit one of the many museums or cultural centers, spend time shopping in the many unique neighborhood shops or indulge in a spa where they use Native American healing techniques. Whatever your interests, there is an activity to satisfy your needs, so come early and enjoy the city and all it's offerings.

UAEL is entering its fourth decade as an association, and because of that, our membership offers a wealth of knowledge and experiences. Our theme, "1000+ years of experience, share it, and learn from it" go hand in hand with our membership.

Experience is defined as: Active participation in events or activities, leading to the accumulation of knowledge or skill. With the varied programs, panels and roundtables being offered, one will broaden their knowledge and leave with more "experience".

Our speaker, Roger Dawson will be helping us sharpen or renew our negotiating skills. We have panels

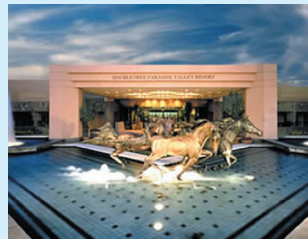


that will cover everyday concerns and issues. We have nine roundtables so that you may interact with your peers and can benefit from their experiences and share your knowledge. On Saturday afternoon we will have our first "Texas Hold'em" event where you can be crowned as the champ (and walk away with \$1,000.00). Saturday evening we will go to the BOB (Bank One Ballpark) and enjoy a game between the Diamond-

backs and the San Diego Padres.

To Quote Abigail Van Buren, "If we could sell our experiences for what they cost us, we'd all be millionaires." Attending the UAEL Spring Conference may not put you at the top of the Forbes list, but the Experiences gained will add value to you and your company.

We look forward to sharing your experiences in Scottsdale.



Steve Reid, CLP
Pacific Capital Bank
Conference Chairman

Thursday

7:00-6:00PM

Registration Desk

8:00

Golf McCormick's Ranch

9:00-4:00

A UAEL Day of Education presented by the CLP Foundation

An in depth review of four of the toughest subjects in Equipment Leasing:

- **Lease Classification & Terminology**
- **Math of Leasing**
- **Leasing Law, Documentation & Collections**
- **Accounting for Leases**

4:00-5:00

Committee Meetings

5:30-6:30

First Timers Orientation

7:00-10:00

Welcome Reception

Friday

7:00-6:00

Registration Desk Open

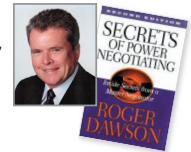
7:00-9:00

Continental Breakfast

8:45-10:30

General Session:

"The Secrets of Power Negotiating" by Roger Dawson.



Coffee Break

Roger Dawson Workshop ★

A more in depth look in the area of negotiating

10:30-10:45

10:30-12:00

10:30-12:00

Panel: Salesman at Work: the saga continues. ★

A follow-up to the panel started last fall in Monterey based on a true story. The issues raised have an impact on the broker, the lessor and the funder:

Andrew Alper-Frandzel, Robins Bloom & Csato

Victor Harris-Law Offices of Victor Harris

Jim Merrilees, CLP-Pacific Capital Bank

Steve Geller, CLP-Leasing Solutions

Bob Rodi, CLP-LeaseNow

Networking Lunch

12:00-1:00

11:00-2:00

Friday Spouse Outing
INTERACTIVE COOKING
CLASS/LUNCH

with the chef at SurLaTable



Friday CONTINUED

1:15-2:30

Panel #1 Brokering vs. Discounting ★

There is a difference, risk versus rewards, advantages vs. disadvantages:

Moderator, Tom Mulally-Szabo, Spencer & Mulally
Paul Menzel, CLP-Pacific Capital Bank
John Donohue, Direct Capital
Bette Kerhoulas, CLP-Pacifica Capital

ROUNDTABLES

#1 When to start a portfolio and why?

Ron Lear-PFF Bank & Trust

Dave Schaefer, CLP-Orion First Financial, LLC

#2 Repeat Business: how to get it and how to keep it coming:

Rick Wilbur-Media Capital

#3 Salesman at Work: a follow-up to the many issues raised in the panel: panelists from above

Coffee Break

2:30-2:45

Introduction to the CLP Program

2:45-3:45

Panel #2 When a Salesperson leaves: ★

Unfair competition and employment issues when a salesperson moves from one company to another.

Irwin Wittlin-Hemar, Rousso & Heald

Steve Sherman-Hoge, Fenton, Jones & Appel

Bob Fisher, CLP-Main Street Bank

ROUNDTABLES

#4 Vendor business vs. End User (or direct):

There are advantages and disadvantages to both sources of business. What are you missing?

Evan Lang, Nationwide Funding, LLC

Tony Sherwin, Pacifica Capital

#5 Issues concerning Broker/Lessor agreements with Funders/Assignees:

Do you know and understand what your obligations may be?

Chris Canavati, CLP-Lease Servicing Center

Roger Marce-Manufacturers' Lease Plans, Inc

Jim Coston, CLP-Coston & Rademacher

#6 What to look for in a funder; low rates, fast service, stability?

Curt Lysne, CLP-Balboa Capital

6:00-8:00

Presidents Reception

Evening Open to enjoy Scottsdale and Phoenix

★ = CLP Credit Available

Saturday

7:00-3:00

7:30-8:45

7:00-9:00

9:00-10:30

10:30-10:45

10:45-12:00

1:00

2:00-5:30

6:00 pm

Registration desk open

CLP Breakfast

Continental Breakfast

General Session: What not to do to your funder... how come we won't fund your deals anymore?

You won't believe these stories... a lighter look at real life situations that result in the inactivation of the relationship. The panel will share some of their experiences in working through the unseemly side of the business.

Moderator: Brad Peterson-US Bancorp, Manifest Funding

Panelist: Steve Crane, CLP-Bank of the West

Dwight Galloway, CLP-Netbank Business Finance

Bob Fisher, CLP-Main Street Bank,

Jim Merrilees, CLP-Pacific Capital Bank.

Coffee Break

Panel #3 Direct Marketing for Success ★

Why, how and to whom. Tips for a successful marketing campaign, and how to measure the results.

Jim Robb-InfoUSA

ROUNDTABLES

#7 Warehouse line: Do you need one, should you have it and why?

Ron Lear-PFF Bank & Trust

#8 Legal War Stories: Norvergence, and other topical issues.

Andy Alper-Frandzel, Robins, Bloom & Csato

Barry Ferns-Ferns, Adams & Associates

#9 Growing your company: strategies, opportunities and pitfalls:

Jim Harris-Allco Leasing & Financial Services

Lunch and Networking opportunities:

Join your comrades around the pool for a lunch and drinks. With a 1000+ years of experience, you need to take advantage.

"Texas Hold'em"

It looks easy when you watch it on television, and you know what the other player is holding, but how good are you when it counts? Come join the fun in our tournament and see if you've got what it takes to be the UAEL champion.



Baseball at BOB

Passover: For those wishing to celebrate with a seder, arrangements have been made. Please notify the staff of your interest in attending.

Sunday

7:00-9:30

8:00 - 4:00

Farewell Brunch

CLP Exam

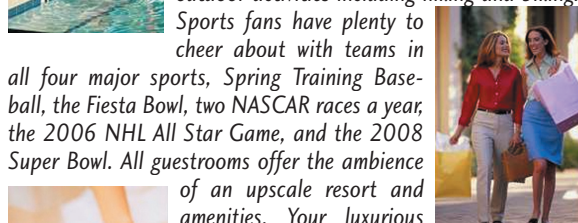
BASEBALL AT BOB
Arizona Diamondbacks vs. San Diego Padres
 Transportation provided



Travel Information

The Doubletree Paradise Valley Resort

The Doubletree Paradise Valley Resort hotel is located just minutes from Old Town Scottsdale and just 12 miles from Phoenix Sky Harbor International Airport. A member of the Hilton Hotels Family of Brands, the resort is located near Scottsdale Fashion Square, the largest shopping center in the Southwest. Scottsdale is a premier golfing destination with nearly 200 courses to play in the metro area. Scottsdale is also home to several other outdoor activities including hiking and biking. Sports fans have plenty to cheer about with teams in all four major sports, Spring Training Baseball, the Fiesta Bowl, two NASCAR races a year, the 2006 NHL All Star Game, and the 2008 Super Bowl. All guestrooms offer the ambience



of an upscale resort and amenities. Your luxurious guestroom will feature views of lush courtyard filled pools and fountains or exquisite desert vistas. Guestroom amenities include high-speed internet access, and large work areas. Premium rooms include Sweet Dream Beds with upgraded linen and pillows. The resort offers two large heated outdoor pools with Jacuzzi, health club facilities, kids play area, concierge, and a full-service restaurant and lounge. And of course, you will always enjoy our signature Doubletree chocolate chip cookies served warm upon check-in.



Hotel Reservations

Special UAEL priced rooms available on limited basis to first registered at hotel.
Call 1-877-455-6677 for reservations.
\$159.00 single/double per night plus tax.

Airline – United Airlines

United Airlines will provide to the conference attendees round trip transportation to Sky Harbor Airport fares of either (1) a 5% discount off any United published fare, including First Class, in effect when tickets are purchased, or (2) a 10% discount off fares when tickets are purchased any date before the convention. An additional 5% discount is applicable when tickets are issued 30 days prior to travel. United Airlines discounted fares are available through the United Airlines Meeting Desk at 800.521.4041 and reference #516GG.

Car Rental – Avis

If you are planning on doing some sightseeing at any time during your stay, it is recommended to rent a car. There is an Avis Rent A Car on property as well as many other companies within a short distance. Even during peak season, cars can be rented for as little as \$40.00 per day. Offering conference attendees special rental rates with unlimited mileage! Call AVIS Meeting and Reservation Desk at 800.331.1600 and reference #J990108.

How To Register (By Mail Or Fax)

Complete registration form (included in mailing and also available on our web site) and send or fax to:

UAEL
78120 Calle Estado Suite 201
La Quinta, CA 92253
Fax: 760-564-2206

How To Register Online

go to www.uael.org.

QUESTIONS

Contact Mike@uael.org or call 760-564-2227 .

Registration Details

The registration fee may be fully deductible in conformity with the "Quality Meeting" rule, section 142(n) of the Tax Reform Act of 1986.