



NAELB 2015 WESTERN REGIONAL MEETING

Expanding Your Horizons... Discover the Possibilities

November 13-14, 2015
Doubletree by Hilton Hotel Anaheim-Orange County
Orange, CA

AGENDA

FRIDAY, NOVEMBER 13

12:00 – 6:00 PM

REGISTRATION

1:00 – 2:00 PM

THE NAELB VALUE PROPOSITION

Sheri Bancroft, Mike Parker and Pete Sawyer, NAELB Board Members

Why be a member of the NAELB? How to get the maximum value from your membership.

2:15 – 3:45 PM

RECENT DEVELOPMENTS IN THE CALIFORNIA FINANCE LENDERS LAW

Joseph Bonanno, Esq., NAELB Legal Counsel, Steve Crane, CLFP, BSB Leasing & Ken Greene, Law Offices of Kenneth Charles Greene

As a result of the Passage of Assembly Bill No. 1091, persons that make only occasional commercial loans in California may be able to take advantage of an expanded licensing exemption under the California Finance Lenders Law. This session will discuss the scope of that exemption, and examine why CFLL licensing may still be a good idea.

4:00 – 5:00 PM

PRACTICAL MARKETING TIPS FOR SMALL COMPANIES SHORT ON TIME & TIGHT ON BUDGET

Barbara Griffith, Southern California Leasing Inc. & Mae Philpott, Maxim Commercial Capital, LLC

Learn relevant marketing techniques that you can put into practice today. Discover how to get the most mileage out of your marketing efforts, with minimal cost.

6:00 – 8:00 PM

OPENING RECEPTION

SATURDAY, NOVEMBER 14

8:00 AM – 12:00 PM

REGISTRATION

8:00 – 9:00 AM

BREAKFAST

9:00 AM – 12:00 PM

MEET WITH EXHIBITORS

12:00 – 1:00 PM

LUNCH

1:00 – 2:00 PM

STATE OF THE INDUSTRY

Mark McClanahan, Equipment Data Associates (EDA)

This session will include current trends: what's hot, what's not and where is the industry growing? EDA will describe equipment financing activity based on their UCC filings database and you will learn Equipment financing volumes for agriculture, construction, lift trucks, logging, machine tools, printing, transportation and woodworking. Plus, number of end-users that are financing equipment, including a breakdown by new versus used equipment.

2:15 – 3:15 PM

EXPLORING ALTERNATIVE FINANCING SOLUTIONS

Panel will include: Kristof Anderson-Tsang, LoanMe, Greg Dyson, Amerisource, Michael Rabil, Funding Circle & Jeff Schubert, RapidAdvance

This session will introduce the equipment professional to a myriad of alternative forms of financing and show how these products can benefit both the equipment finance professional and their clients. Each of the lenders on this panel has a different solution for helping a client's cash flow. They will highlight opportunities for increasing the broker's revenue and enhancing the overall client relationship by positioning the broker as a single source for all of their client's financial needs, while simultaneously providing additional options to help close more equipment deals. Presenters will be given 10 minutes each to discuss the products in a purely informational format and ten minutes for questions will be provided.

3:45 – 5:00 PM

PACKAGING FOR SUCCESS/ANALYZING FINANCIAL STATEMENTS

Jaime Kaneshina, CLFP, BPB, The Cambridge Capital Group & Phil Wellington, Banc of California, N.A.

This session will provide comprehensive, educational information to assist you in closing more transactions by teaching you to prepare solid packages and submitting them to funders in formats that will better guarantee approvals. Topics will include help in identifying funder specialties, required documents and formats. The second portion of this session will provide detailed information to help you become more knowledgeable in analyzing financial statements.