



NAELB Eastern Regional Meeting

November 14-15, 2008

Renaissance Atlanta Airport Concourse Hotel
Atlanta, Georgia

Cash in on the NAELB Experience!



REGISTRATION INFORMATION



INVITATION



On behalf of the entire planning committee, I invite you to attend the 2008 Eastern Regional Meeting in Atlanta, GA. The committee has worked tirelessly to ensure that the workshops will appeal to every attendee; whether they are new to the business or a 20-year veteran. You will find the information provided invaluable to the future

success of your business. I guarantee all attendees will go home energized, educated and armed to take on the current market place. Our goal is not just to help you survive today's market, but to give you the weapons to thrive in it!

In addition to the exceptional educational workshops, the Eastern Regional provides ample networking opportunities. To get you warmed up for the 2009 NAELB Annual Conference in Las Vegas, our opening reception will have a Vegas theme. This is the perfect opportunity to meet new people, see old friends or just put a face to that voice you hear on the other end of the phone. Saturday starts with a continental breakfast and four hours of exhibit time. There is no better way to find a new funding source or get to know your existing lender on a more personal level.

We strive every year to make each regional meeting better than the last and this year's Eastern Regional will be no exception. I would like to thank Angie Sciotto, Heather Von Bargen and Henry Grace for all of their help in putting this year's Eastern Regional Meeting together. You will not be disappointed!

See you in Atlanta,

Corey Bell
2008 Eastern Regional Conference Chair
Lanier Funding, LLC

AGENDA

FRIDAY, NOVEMBER 14

8:30 a.m. – 7:00 p.m.

Registration

9:00 a.m. – 12:00 p.m.

CONCURRENT WORKSHOPS

Introduction to alaQuote & Advantage 2.0

Jim Buckles, Preferred Business Solutions

Jim Buckles will offer an introductory session on Preferred Business Solutions' two lease automation products: alaQuote (on-line lease calculator, quote letter, application submittal and credit release authorization tool) and Advantage 2.0 (an upgrade from System 1 Software), which includes contact management, deal tracking, document processing and paperless file storage. This session is geared towards companies considering upgrading their lease management tools and new users who want an overview of these products.

Ethics Test (additional fee will apply)

NAELB Best Practices Broker™ Exam. By passing the NAELB Ethics examination, you can proudly display "Best Practices Broker™" on your letterhead, business cards and brochures.

You must have signed up to take the exam at the time you registered for the regional meeting. You must also be approved to take the exam. No walk-ins will be accepted. (Brokers only)

1:00 p.m. – 4:00 p.m.

CONCURRENT WORKSHOPS

Advanced alaQuote & Advantage 2.0 Training

Jim Buckles, Preferred Business Solutions

Jim Buckles will demonstrate the latest features of Preferred Business Solutions' lease automation products (alaQuote & Advantage 2.0). This session is geared towards existing customers who would like to get the most out of their technology investments. This will also be an excellent opportunity to share ideas on specific uses of these products with your peers.

Why Should I Become a CLP and What Will it do for Me?

This workshop will not only answer those two important questions, but it will give you valuable insight into the steps necessary to become a Certified Lease Professional. It will explain the materials and special programs available to assist you with your studies and review the subjects covered in the exam. Test your leasing knowledge by taking a short exam covering the subjects in the Body of Knowledge and then review your answers with CLPs.

6:00 p.m. – 8:30 p.m.

Sponsors Opening Reception

A special thanks to all the NAELB sponsors for making this event possible!

Come enjoy an evening of good food, drink and fun while mingling with industry colleagues. Try your luck at achieving the best hand of poker and you could go home with a prize, in addition to invaluable business contacts. Everybody wins when you bet on the NAELB!



SATURDAY, NOVEMBER 15

7:30 a.m. – 4:00 p.m.
Registration

7:30 a.m. – 8:30 a.m.
Continental Breakfast

8:30 a.m. – 12:00 p.m.
Exhibits Open

11:00 a.m. – 12:00 p.m.
CONCURRENT WORKSHOPS

**Everything You Wanted to Know But Were Afraid to Ask
How to Become a Better Broker** (Level: Beginner)

Heather Von Bargaen, *Caladesi Capital, Inc.*
Corey Bell, *Lanier Funding, LLC*

Following the success of this workshop at the annual conference, Heather and Corey return with open, honest and real-world advice for brokers just starting out. Among the many things you will learn include: industries to target and those to avoid, getting more approvals, funding sources, when to walk away from a deal, how to value your time, the tools you need, how to find customers and many more! Bring questions you never thought a seasoned broker would answer. This interactive question and answer session will help you increase your profits!

Legal Discussion (Level: Advanced)
(CLP-CPE Credit)

Joe Bonanno, Esq., CLP, *NAELB Legal Counsel*, Panel Moderator

Have you had an increase in the number of collection calls you need to make? Do you wonder what you should or should not do when trying to help your funding source collect? Have you had a lease go bad and wondered what to do to protect yourself? Have you had a funding source revoke an approval with or without cause and wondered what liability you have? If you answered yes to any of these questions you don't want to miss this discussion lead by NAELB Legal Counsel Joe Bonanno, CLP. The panel will give you in-depth information based on their own experiences that will help you protect your business, your vendors and your customers.

12:15 p.m. – 1:15 p.m.
Lunch

Sponsored by Presidential Sponsors

1:30 p.m. – 2:30 p.m.
CONCURRENT WORKSHOPS

Packaging a Deal for Credit Review (Level: Beginner)

Henry Grace, *Industrial Financial Services, Inc.*, Moderator
Eric Bishop, *Altec Capital*
Mike Coon, *Enterprise Funding Group*
Tammy Negelein, *Puget Sound Leasing*
Mae Philpot, *Dakota Financial, LLC*

Application-only deals really don't exist anymore. How do you package a deal correctly to present to your various lenders? This panel will answer a lot of the questions for the underwriter before he even looks at the deal, from collecting a complete application to vendor verification. Learn from experienced decision makers how a good write-up can greatly increase your chances of getting approvals.

How Successful Brokers Adapt and Thrive in Today's Environment
(CLP-CPE Credit)
(Level: Advanced)

Angie Sciotto, *Regal Finance, Inc.*, Moderator
Bob Friedman, *Bryn Mawr Funding*
Larry Greer, *GPS Capital, Inc.*
Pete Sawyer, CLP, *Sun South Equipment Leasing, Inc.*
Chris Walker, CLP, *GreatAmerica Leasing*

Whether you are a veteran or new to the industry, this current economic climate is a challenge! If tightened credit standards, weaker credit applicants, decreased volume and increased competition is not scaring you, the rapidly-changing credit appetite of your lenders is probably causing you headaches. What's a broker to do? Rather than commiserate about the bad news, come to this session! A panel of brokers and funders are opening their playbooks! Brokers will set you straight on what they've done to respond to the current economic conditions and make their businesses prosper! Funders will give you helpful tips on what you can do to obtain more approvals, keep up with changing criteria and boost profit!

2:30 p.m. – 3:00 p.m.
Networking Break
Sponsored by Gold Sponsors

3:00 p.m. – 4:00 p.m.
CONCURRENT WORKSHOPS

Sales and Marketing Tips for the Newer Broker (Level: Beginner)

Jim Blumberg, *MIJ Associates, LLC*
Barry Reitman, *Keystone Equipment Leasing, Inc.*
Angie Sciotto, *Regal Finance, Inc.*

If an industry veteran is having difficulty selling in this economic market, imagine being a newer broker! A panel of seasoned brokers will share their ideas and experiences. Learn the importance of picking up the phone. See how you can market to your vendors and end-users without breaking the bank and hear new ideas on how to sell your services to vendors, even those who "already have a leasing company." You are sure to hear at least one great tip to take back to your office first thing Monday morning!

Roundtable Discussion (Level: Advanced)

Roundtables have always been a success at the regional meetings and this year's has an intriguing twist. These two roundtable topics are designed for experienced brokers to have the chance to learn from each other. The first thirty minutes are devoted to expanding on the issues started in the Legal Panel. Share your experiences, learn from others and spend more time delving into this important subject in a format more personal than a panel. In the second half hour, we switch gears to discuss sales and marketing techniques that are a proven success from other brokers who've been there and done that! After listening to experienced brokers share their secrets, you're bound to learn something to benefit your business!

Hotel Information

HOTEL RESERVATIONS

Hotel reservations are not included with the registration fee. Hotel reservations for the Renaissance Atlanta Airport Concourse Hotel, located at One Hartsfield Centre Parkway, Atlanta, GA 30354, may be made by phoning the hotel at 888/391-8724 or 404/ 209-9999. Please identify yourself as an NAELB Eastern Regional Meeting attendee. You may also make hotel reservations online at www.naelb.org by clicking on the hotel photo. Our special meeting rate is \$94 standard single/double occupancy. The cut-off date for the hotel reservations at the meeting rate is Monday, October 20, 2008. After that date, the hotel will honor reservations on a space

TRANSPORTATION/PARKING INFORMATION

The Renaissance Atlanta Airport Concourse Hotel provides complimentary shuttle service to and from the Atlanta/Hartsfield Jackson International Airport (ATL).

NAELB attendees will receive discounted parking at the hotel. The rates are \$4.00 per day for self-parking and \$8.00 per day for valet parking.

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