You Are Invited!

On behalf of the National Association of Equipment Leasing Brokers and the 2009 Annual Conference Committee, I am honored to invite you to the association’s premier event, the 2009 Annual Conference. The event will be held April 30 through May 2 at the Red Rock Casino Resort and Spa in Las Vegas, NV. During your stay at the Red Rock, you will be tempted by excellent restaurants, entertained in exciting nightclubs, pampered by the relaxing spa services and enticed by gaming of every kind. Most importantly, you will be networking and deepening your equipment leasing knowledge in Red Rock’s well designed conference facilities.

The Conference Committee and I have taken great care in planning the 2009 NAELB Annual Conference. Everything is designed to provide each attendee the maximum experience for their investment. We have planned 16 breakout sessions with timely and informative topics for all levels of experience. We have hired professional speakers to address a variety of pertinent subjects, including keynote speakers Doug Hanson and Jeffrey Benjamin. In addition we are featuring industry experts Gerry Egan and Linda Kester. We have planned several networking opportunities where you can meet new contacts and catch up with old friends. Finally, there will be plenty of one-on-one time with exhibitors waiting to do business with you.

Members, this conference is definitely one you will not want to miss. No excuses! During uncertain times it is even more crucial for you to invest in your business. I promise you will learn something new that you can implement on the Monday morning of your return. I promise you will meet a new business contact who will positively impact your business. I can promise you will have a great time at a first class resort if you can promise me that you will invest in yourself in Las Vegas?

See you there!

Mike Coon
2009 NAELB National Conference Chair
Enterprise Funding Group

Testimonials

“The classroom sessions, the networking with other members and the funders exhibits are all outstanding. Any one of them could provide just the bit of information you need to make more money and increase your ability to serve your clients. Together in one place, the combination is incredible! What’s the rate? Extremely affordable. What’s the value? Priceless!”

Gary Greene, LeaseSmart, (Broker Member)

“The open approach to all discussions amongst the attendees was remarkable. There seems to be no secrets around the NAELB. The information about leasing/finance just flowed. All those who come are treated like the professionals they are. We thank you for all that you did for us.”

Neil Roth, Key Credit Corporation, (Funding Source Member)

“The NAELB conferences not only recharge your batteries and give you fresh ideas for new business, they also provide a great environment for meeting with funding sources ‘face-to-face’ and that is the best way to build meaningful relationships for long term success! Oh, and the food is great too!”

James Alvey, Iron Capital, (Broker Member)
Doug Hanson
Doug Hanson Performance Group

After successful careers in the computer and entertainment industries, Doug created his company in 1994 and committed his life to helping people find happiness and helping organizations develop a winning culture. Today, Doug is nationally and internationally recognized as a speaker, consultant, and peak performance coach with customers in the United States, United Kingdom, Spain, Canada, Mexico, and Singapore. Doug addresses over sixty (60) audiences each year from 50 to 5,000 for such notable companies as Verizon, H&R Block, Proctor & Gamble, Texas Instruments, Roche, the Houston Texans (NFL franchise), Southwest Airlines, DHL, Insight, and even the legal counsel of the IRS. For seven years, Doug was also a featured facilitator at Tony Robbins’ Life Mastery University in Hawaii, and in 2004, was sought out by the NFL to address and energize the 6,000 volunteers involved in Super Bowl XXXVII at the pre-game rally held in Houston’s Reliant Stadium.

Jeffrey Benjamin
Breakthrough Training™

Jeffrey Benjamin has authored eight personal development books including the best-selling book series Real Life Habits for Success® and has delivered more than 1,000 presentations. He has spoken globally to audiences from Asia, Europe, Latin America, North America, South America and the Middle East. For 20 years, his focus has been sharing career and personal achievement strategies with individuals, small business entrepreneurs and Fortune 500 companies. Jeffrey has been featured on over 300 television and radio shows. His Breakthrough Training™ produces measurable results with more than 150 groups every year while energizing thousands of people every month.

Gerry Egan
LearnLeasing.com, A Division of TecSource, Inc.

Gerry Egan has been arranging equipment leases for over 25 years, beginning as a vendor in the 1970s. In 1991, Gerry started TecSource, Inc. Over a period of many years, he has done consulting, writing, marketing, sales training and in-house workshops for lessors and funders around the country and for some local banks. He has conducted many sales seminars for equipment vendors about using equipment leasing as an effective sales tool; and a number of them have incorporated videotape sessions into their regular sales training programs. Gerry is a past president of the board of directors of the National Association of Equipment Leasing Brokers.

Linda Kester
Institute for Personal Development

Linda Kester is nationally recognized as an outstanding sales trainer and professional speaker. She has twenty-one years of experience in leasing sales and marketing management and has authored the book “366 Marketing Tips for Equipment Leasing”. She has had a tremendous positive impact on sales for all types of companies – from start-up firms to corporate giants. Linda’s work has been published in The Philadelphia Inquirer, The Monitor, Leasing News and Selling Power Magazine. She has also produced several training CD’s.
Agenda

Thursday, April 30

6:45 a.m.

2009 NAELB Golf Tournament at Arroyo Golf Club at Red Rock (Optional: Additional cost for participation)

The Arroyo Course, Red Rock Country Club’s Arnold Palmer Signature course will be home to the 2009 NAELB Golf Tournament. Golfers can network and play a round of golf while they take in the scenic beauty of Nevada’s spectacular landscapes of Red Rock Canyon, one of Las Vegas’ most revered natural landmarks.

This Las Vegas golf course is considered a masterpiece that offers challenges to both beginners and advanced players. The well-kept course makes a stark, yet beautiful, contrast to the rugged terrain that surrounds it. Plus, the Las Vegas weather makes the Red Rock golf club the perfect destination for golfers.

Golf participants will meet in the main lobby of the Red Rock Casino, Resort and Spa beginning at 6:30 a.m. There will be a rotating shuttle to the nearby course. Shuttles will leave for the course at 6:45 a.m., 7:15 a.m. and 7:45 a.m. Tee-off is at 8:15 a.m. so you will want to get there early to hit a few practice balls. Breakfast will be on your own but lunch will be served at the course.

Lunch and transportation to and from the course will be provided. In addition to enjoying hours of networking, participants will have the opportunity to play for thousands of dollars in prizes plus the chance to win the Hole-in-One Contest. Prizes will be awarded for:

1st Place Closest To Pin Men
2nd Place Closest To Pin Women
3rd Place Long Putt
Long Drive Men Straightest Drive
Long Drive Women

All skill levels are encouraged to participate in this event. Only the first 100 registered players will be ensured a spot. Don’t miss your chance to be a part of this exciting tournament. Register to play TODAY to secure your spot! Golf sponsorships are still available. Visit www.naelb.org to register as a sponsor or a player.

Workshop Level Descriptions

Levels
In order for the conference attendees to gain the most out of the workshop sessions, two levels have been established to help the attendees choose the best sessions for their level of experience. All information that is presented is carefully designed to target the intended audience and each speaker has been briefed in detail of the expectations of each session.

Level 1:
Level 1 workshops are recommended for brokers in the start up phase to three years in business. Also, brokers that may have been in the business for some time but have recently gone out on their own will find Level 1 sessions to be very informative and helpful while they establish their new firms. Special care has been taken in each Level 1 workshop to develop topics that brokers can use and implement when they return to work on Monday. Each speaker has been specially chosen for their expertise on the topic they will present.

Level 2:
Level 2 workshops are recommended for brokers with a minimum of three years of experience. It is assumed that attendees will have an operating brokerage, have a customer base, and a solid understanding of the elements of the leasing business. While designing the Level 2 sessions, we have ensured that the information is fresh, challenging and informative. Each speaker has been specially chosen for their expertise on the topic they will present.

The Annual Conference Planning Committee has decided to offer a special service for newer brokers who may be struggling with getting deals approved. You will be able to bring a deal that has previously been declined and discuss what went wrong with the application with a veteran broker. This is a once in a lifetime opportunity to sit down with a select group of hand picked veterans and discuss one-on-one what you could have done differently. This information will be invaluable to your future approval ratio and future success. This is an opportunity you don’t want to miss!
1:00 p.m. - 5:00 p.m.
Broker 101: The Foundation
Level 1

Sonia v. M. Stoddard, Stoddard & Associates

Foun-da-tion: noun - The basis, on which a thing stands, is founded, or is supported. The word is simple enough to understand but do we have a clear concept of just how important a good foundation is to building things that will survive over time? With a solid foundation, you can build a business that will survive the test of time and concentrate on adding the next success to your portfolio. This class will be for those interested in becoming brokers, new brokers, those new to the industry and all those interested in discussing such topics as:

• The Leasing Basics: types of leases, credit structures, terminology
• The Brokers Role: What we bring to the market
• Working with funding sources: The do's and don'ts
• Finding business that your underwriters will want to fund
• Ethical standards for brokers: fiduciary responsibility, it's not just a word
• Protecting your partners: funders, clients, vendors
• Tools of the trade: contact management, pricing, negotiations, structuring
• Finding business and keeping it
• Leases vs finance agreements, which are better?
• ABC's of a cold call
• What is the rate?

These are just a sampling of what will be discussed as we work to lay the cornerstone of your foundation so that you may be successful as an equipment leasing broker.

(Please pre-register for this class on the conference registration form. There is no extra charge for the class.)

8:30 a.m. - 8:00 p.m.
Registration Desk

9:00 a.m. - 12:00 p.m.
Introduction to Advantage 2.0 & alaQuote Training

Jim Buckles, Preferred Business Solutions

Jim Buckles will be training on the alaQuote software that includes the online lease calculator, quote letter and application submittal tool. Training will also include Advantage 2.0 Software, which is upgraded from System 1 (2.5) and includes contact management, deal tracking, document processing and electronic file storage. Get the most from your automation investment and give your company a competitive edge by learning how to better utilize these powerful tools.

(Please RSVP by calling (866) 352-8665 or by e-mailing jim@pbs4u.com)

9:00 a.m. - 5:00 p.m.
CLP Master Review Class

This comprehensive eight-hour program will be taught by Certified Lease Professionals. The review will include an NAELB Day of Education presented by the CLP Foundation and an in-depth review of four of the toughest subjects in equipment leasing: lease classification and terminology, leasing law, documentation and collection, math of leasing and accounting for leases. (Please pre-register for this class on the conference registration form. There is no extra charge for the class.)

1:00 p.m. - 4:00 p.m.
Advanced Advantage 2.0 & alaQuote Training

Jim Buckles, Preferred Business Solutions

Jim Buckles will demonstrate the latest features of their 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. Please pre-register for this class on the conference registration form. There is no extra charge for the class. (Please RSVP by calling (866) 352-8665 or by e-mailing jim@pbs4u.com)

6:00 p.m. - 7:00 p.m.
First-Timers Reception

This reception is for first-time attendees only. This will be a great time to meet the NAELB Board of Directors, sponsors and committee chairs as well as being eligible for a drawing that is only available for first-timers.

7:00 p.m. - 10:00 p.m.
Sponsors’ Opening Reception

Eden awaits at our poolside opening reception. We will have our own private piece of off of the Red Rock’s three acre backyard pool. The perfect setting for an evening of making new acquaintances and renewing old friendships. Throw in some cocktails and delicious food and we have ourselves a kick start to a fabulous annual conference!
Agenda

**Friday, May 1**

7:30 a.m. - 5:00 p.m.
Registration Desk

8:00 a.m. - 9:00 a.m.
Hot Breakfast Buffet and Presentation
**Tips on How to Get the Most Out of Your Conference Experience**
Linda Kester, *Institute for Personal Development*

9:00 a.m. - 12:00 p.m.
Exhibits Open/Internet Lounge
Back by popular demand! The NAELB will again feature the Internet Lounge inside the exhibit hall sponsored by Enterprise Funding Group. This is a great time for you to check your e-mails, print boarding passes, surf the net or close that last minute transaction you are working on. When you have a moment, stroll over to the NAELB Relaxation Station sponsored by Evans National Leasing to take advantage of complimentary chair massages and re-energize your body and mind.

9:30 a.m. - 10:15 a.m.
**NAELB First-Timers/New Member Orientation**
Is this your first NAELB conference? Are you new to the NAELB? Would you like to meet other new members? Attend this brief informative session to learn how to make the most of this conference AND your membership!

10:15 a.m. – 10:30 a.m.
Gold Sponsors’ Networking Break

12:00 p.m. - 1:30 p.m.
Lunch and Keynote Presentation
*Sponsored by Presidential Sponsors*
**Doug Hanson, Doug Hanson Performance Group**
Doug has spent most of his adult life studying the path that leads to personal happiness and team excellence, and has found that just a few key distinctions separate those who achieve their full potential and those who fall short. In this seminar, Doug will share a few of the most powerful principles he’s learned from researching some of the world’s most successful people. You will leave with a new awareness of how to connect with virtually anyone, and how to influence your attitude, your energy level, and your results. Doug’s message and personal stories are not only hilarious, they will touch your heart, make you think, and have an immediate impact on your relationships at home and at work. You won’t want to miss this life-changing session!

1:30 p.m. - 2:00 p.m.
Gold Sponsors’ Networking Break
Using Metrics to Run Your Business  
Level 2  
Chris Fielder, TEAM Funding Solutions  
Have you ever felt like you are extremely busy but get very little accomplished? Do some customers and vendors use a lot of your time but do very little business with you? Ever wonder where the day went? Chris Fielder, a favorite presenter with the NAELB, is back to share his open, interactive and always enjoyable presentation on how to improve efficiency and effectiveness in your business by implementing and understanding key performance metrics. In Chris’ workshop, you will learn why it is important to “keep score”, how not to waste time in your day and how to measure your results so you can focus on those things over which you have control. This is a very interactive class with a lot of exercises and homework.

Internet Marketing - CLP-CPE Credit  
Levels 1 & 2  
Back by popular demand, this internet marketing workshop is a must-attend class for today’s technological world. Topics covered include email blasts, CRM, web sites, on-line applications, on-line calculators, and much more. You will learn what it takes to truly make use of today’s internet tools. You will take home an outstanding booklet which contains internet marketing ideas, resources, and best practices. There is something for everyone in this workshop!

Exit Strategies - CLP-CPE Credit  
Level 2  
It’s never too early to think about how you’d like to get the most bang for your buck when it comes to unwinding your business. Everyone knows that business goes in cycles, and we know that now is not a great time to try selling your leasing company. That’s the good news about this workshop! Now is the perfect time to learn about what you should be thinking about and planning for so you’ll be prepared to sell when the time is right! An industry expert and a leasing veteran who has sold and bought leasing companies will share his insights about what you should be doing now!

3:00 p.m. - 3:15 p.m.  
Gold Sponsors’ Networking Break

3:15 p.m. - 4:15 p.m.  
CONCURRENT WORKSHOPS  
Packaging Application-only Deals for Success  
Level 1  
This session is geared entirely towards new brokers that are beginning to generate application flow or already have application flow, but feel like they’re not as efficient and successful at processing those applications as they could be. What information does your funder need to review your deal? How much information is too much and what is not enough? Do you preview with funders or just send it in? Which funding sources will have an appetite for your deal? Industry veterans will give you step by step instructions and advice on how to package your applications for success.
Agenda

Commitment Fees: Best Practices - CLP-CPE Credit
Levels 1 & 2

Experienced Broker Panel and NAELB Legal Counsel
If there’s one topic that causes more complaints under our Ethics Policy than any other, it is the misuse of commitment fees. And yet many of our most successful brokers regularly use commitment fees without any problems whatsoever. What are the best practices that these successful brokers use? Attend this class to learn when and how to use commitment fees. You’ll take away not only valuable ideas to put into practice in your business right away, but also copies of documentation that these successful brokers use with commitment fees.

How to Get Approvals in a Tough Market - CLP-CPE Credit
Levels 1 & 2

Steve Geller, CLP, Leasing Solutions, LLC
Bob Teichman, CLP, Teichman Financial Training

In this tough financial market, it is almost impossible to figure out what funding sources will approve. Policies and programs keep changing and credit has clearly tightened. What is the broker to do? How do you maintain funding for key customer & vendor relationships? Learn strategies on how to present your transactions to funding sources to maximize approvals—even when money is tight.

FRIDAY OPEN EVENING
There are no scheduled events on this evening so attendees can enjoy fabulous Las Vegas.

Saturday, May 2

7:30 a.m. - 5:00 p.m.
Registration Desk

8:00 a.m. - 9:00 a.m.
Hot Breakfast Buffet

9:00 a.m. – 11:45 a.m.
Exhibits/Internet Lounge

11:45 a.m. – 12:00 p.m.
Gold Sponsors’ Networking Break

12:00 p.m. – 1:30 p.m.
Lunch/Business Meeting
Sponsored by Presidential Sponsors

Join us for lunch and updates on NAELB affairs. Witness the passing of the gavel from NAELB President, Jack Harvey, CLP to incoming president Spencer Richman, CLP.

1:30 p.m. – 2:00 p.m.
Gold Sponsors’ Networking Break
2:00 p.m. – 3:00 p.m.
Keynote Presentation
Real Life Habits For Success®
Jeffrey Benjamin
Yes! Breakthrough Training™ believes in engaging audiences through a dynamic and interactive approach that encourages full participation for maximum benefits. Our core philosophy is to provide an energetic environment that challenges people to take the necessary action to create successful results in their personal and professional lives. Take the challenge! Breakthrough Training™ is guaranteed to create results, or we don’t deserve to be paid for our services. Discover what thousands of people already know—Breakthrough Training™ works!

3:00 p.m. – 3:15 p.m.
Gold Sponsors’ Networking Break

3:15 p.m. – 4:15 p.m.
CONCURRENT WORKSHOPS

Gerry Egan’s LearnLeasing
Level 2
Gerry Egan, LearnLeasing.com, A Division of TecSource, Inc.
Industry veteran, past NAELB president and renowned trainer Gerry Egan addresses brokers with 3+ years of experience with topics such as “3 myths of vendor marketing” “working for your own business” and “eliminating turn downs”.

Open Legal Q & A Session
Levels 1 & 2
Joe Bonanno, CLP, NAELB Legal Counsel
Burke Fosse, Burke Fosse III, P.C.
Barry Marks, CLP, Marks & Weinberg, P.C.
Where do legal opinions batter up against business decisions? At the ever popular open legal Q & A session! This is your opportunity to ask about that weird situation you ran into in the last year, or maybe about the new idea you’re thinking of trying this year. No topic is off limits! This session will be led by a moderator to protect our esteemed legal panelists from the attendees whose feelings often run high …oh, and also to keep the conversation on target and moving from topic to topic. You won’t want to miss this one!

4:15 p.m. – 4:30 p.m.
Gold Sponsors’ Networking Break

4:30 p.m. – 5:30 p.m.
CONCURRENT WORKSHOPS

Marketing to Your Lessee Database
Level 2
Linda Kester, Institute for Personal Development
In this workshop we will continue last year’s discussion of marketing to your lessee database, but take it one step farther. This will be an advanced discussion designed for brokers who already have a database of lessees and prospects. We will assume that you already have all the pertinent contact information captured including email addresses and birth dates. You may already send birthday cards and quarterly newsletters, but in this class you will learn advanced strategies and ideas to get the maximum return on your most valuable asset – your existing lessees (and prospect) database!

Best Practices Brokerages - CLP-CPE Credit
Levels 1 & 2
Jaime Kaneshina, CLP, The Cambridge Capital Group
David Normandin, Envision Capital Group, LLC
Have you ever wondered what the secret is to the highly successful lease brokerages? Why do some firms prosper while others struggle? The industry’s most successful brokerages have one thing in common - they have developed and consistently implement Best Practices. In this workshop you will learn from industry professionals who have identified Best Practices, which make their companies best in class. Don’t miss your chance to learn their valuable secrets!
Know Your Funder

Levels 1 & 2

Dwight Galloway, CLP, LEAF Financial Corporation

There is more to know about your funding sources than rates, credit window and commission caps. What is the source of their funds? Do they evergreen leases or charge interim rent? How do they treat your customers during the term of the lease? Does the funding source have a direct sales force that may call on your customers and vendors? For brokers focusing on high customer retention, this session is a must. Executives from funding sources and experienced brokers enlighten you on the questions you need to ask before you do business with a new funder.

6:30 p.m. - 9:00 p.m.
Closing Reception

Join your colleagues one last time for drinks and hors d’oeuvres before heading home to apply the knowledge you acquired throughout the week. Don’t miss the laptop giveaway sponsored by Enterprise Funding Group. Four lucky winners will walk away with brand new laptop computers but you must be present to win!

Sunday, May 3

8:00 a.m. - 5:00 p.m.
CLP Test

The CLP test will be administered to those who are pre-qualified. Contact Cindy Spurdle at 610/687-0213 for more information.

Conference Information

Conference Fee

The conference registration fee includes the cost of attendance at all general sessions, concurrent educational workshops, social functions and planned meals. A golf trip to Red Rock Golf-Arroyo Course will be offered at an additional cost. Please refer to the enclosed form for the appropriate fee structure. If you have any questions regarding the registration process, please call NAELB headquarters at 800/996-2352.

Spouse/Guest Fees

For a fee, spouses and guests may participate in the social functions and planned meals during the conference. Reservations must be made in advance for each function, and the appropriate charges should be included in the remittance that accompanies your registration form. Spouse/guest fees cover attendance at meals and social functions only and are offered as an accommodation for spouses and guests accompanying fully registered conference participants. If a spouse or guest wishes to attend the general sessions or educational seminars, they must purchase a full conference registration at the appropriate member or non-member rate.

Advance Registration

No registration will be processed without proper payment accompanying the form. In order to qualify for the EARLY BIRD rate, registration forms must be postmarked no later than March 24, 2009. Registrations postmarked after that date will be processed at the LATE registrant rate.

Cancellation Policy

Cancellations submitted in writing to NAELB by April 17, 2009 will be refunded, less a $75 processing fee. There will be no refunds for cancellations received after this date. All refunds will be processed after the conference.

Dress Code

The dress code for the national conference is business casual.

Las Vegas Weather

In May, the average high temperature is 88 degrees and the average low is 60 degrees.

Distribution of Publications and Promotional Materials

Distribution of brochures, fact sheets, advertising, industry publications and promotional materials is not allowed during the conference except for companies participating in the official conference sponsorship program. Distribution of these materials by sponsors is allowed only within the guidelines of the sponsor program.

Scheduling Non-NAELB Functions

Events that conflict with officially sponsored NAELB events or educational programming are not allowed during the conference. This includes hospitality suites, special breakfasts, focus groups or similar events.

Hotel Reservations

Make your hotel reservations early. Call the Red Rock Casino, Resort and Spa, 11011 West Charleston Blvd., Las Vegas, NV 89135 at 866-767-7773 and identify yourself as a member of the NAELB. You may also make reservations online by visiting www.naelb.org and clicking on the hotel link. The special room rate is $179 weekdays (Sunday - Thursday) and $199 weekends (Friday and Saturday). The deadline for reserving sleeping rooms is Tuesday, March 24, 2009; after this date the hotel will honor reservations on a space and availability basis.

Airline Information

Las Vegas’ McCarran International Airport is approximately 18 miles from the Red Rock Casino, Resort and Spa. To obtain more information on the McCarran International Airport, please visit www.mccarran.com. All carriers and transportation information are included in this Website.

Ground Transportation

A variety of shuttle/limousine services are available at McCarran, and are located on the west side of baggage claim, outside door exits 7-13. Please note that there are both group shuttle and “for-hire” stretch limousine services. The Red Rock has a complimentary shuttle that runs from 7:00 a.m. to 7:00 p.m., Sunday - Thursday and 8:00 a.m. - 8:00 p.m., Friday and Saturday.
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2009 NAELB Annual Conference Exhibitors
(as of December 17, 2008)
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Allegiant Partners Incorporated
Amerisource Funding
Bankers Capital
BSB Leasing
CFC Investment Company
Constellation Financing Systems
Court Square Leasing Corporation
Dakota Financial, LLC
Diversified Lenders Inc.
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Equipment Data Associates
Equipment Finance Partners
Equipment Lessors Protection Association, Inc.
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TEAM Funding Solutions
TimePayment Corp.
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