

2018 CLFP ACCOMPLISHMENT REPORT

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36th Street Capital

Andrew Eller, CLFP - Vice President
First American Equipment Finance

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Pete Sawyer, CLFP
Sun South Equipment Leasing

Jason Seitz, CLFP
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Thank you to our supporting
Associations



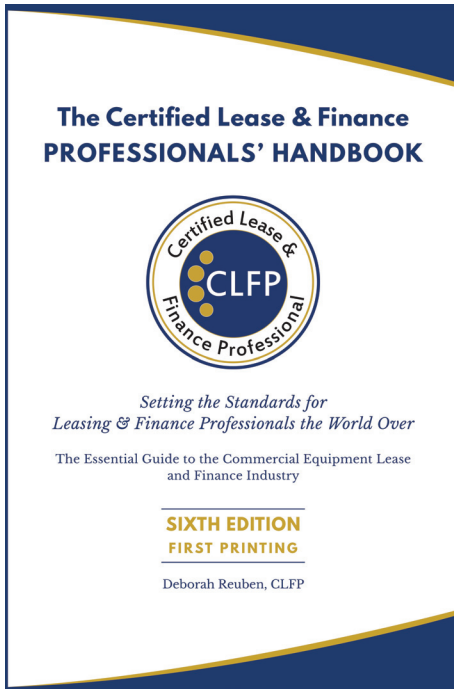
2018 Membership

The CLFP Foundation membership increased by 24% with 180 individuals sitting for the exam in 2018. At year-end, the Foundation has 644 CLFPs and Associates across the United States, Australia, and Canada. The following individuals gained the CLFP or Associate designation in 2018.

Stacy Allen	Amur EF	Paul Coupland	Partners Capital Group
Bryan Anderson	ENGs Comm. Finance	David Cramer	Amur EF
McKayla Anderson	Amur EF	Judith Cummings	Huntington Bank
Derek Anniston	American Leasing & Fin.	Kathryn Dapcic	U.S. Bank EF
Ryan Anthony	First American EF	Melissa Day	BancorpSouth EF
Catherine Archer	Amur EF	Christopher Demtschenko (Assoc.)	First American EF
Assal Asgarinejad	Partners Capital Group	Richard Dierks	Arvest EF
April Beamenderfer	BB&T Comm. Equip. Cap.	Kris Dragoo	Partners Capital Group
Andrew Berkovitz	Taycor Financial	Tina Eickhoff	U.S. Bank EF
Eric Bicknase	Amur EF	Sean Evans	LeaseQ
Emily Blair	NCMIC	Nicholas Flemister (Assoc.)	First American EF
Chad Boivin (Assoc.)	Beacon Funding Corp.	Chris Forsyth	First American EF
Matthew Bona	Blue Bridge Financial	Joe Franco, Jr.	
Tearinea Briscoe	Canon Financial Services	John Freeman	BB&T Equip. Finance Corp.
Aaron Brouker	U.S. Bank EF	Allen Glynn	KLC Financial, Inc.
Kersten Brown	Western EF	Steven Hanneman	U.S. Bank EF
Donald Bryson	Canon Financial Services	Melissa Hanson	Stryker
Daniel Callahan	First American EF	Shauna Heckathorn	Amur EF
Joseph Carr	Canon Financial Services	Christopher Hepler	Element Fleet Management
Tina Cartwright	U.S. Bank EF	Sara Hobbs	JB&B Capital, LLC
Caroline Cely (Assoc.)	SB Business Advisor	Steven Holben	ENGs Comm. Fin.
Kyle Cerone (Assoc.)	First American EF	Robert Hollenbeck	Canon Financial Services
Desiree Chackal (Assoc.)	First American EF	Freddy Jalilvand	Providence Capital
Chang Cho	Huntington Bank	James Jankowski	UniFi EF
Drew Christopher (Assoc.)	First American EF	Jerry P. Jarnagan	Xerox Financial Services
Zach Cicero	First American EF	Julie Kaczor	First American EF
Andre Clifford (Assoc.)	Bryn Mawr EF	Josh Klein	First American EF
Jacob Conlon	Canon Financial Services	Kirsten Kleven	BMO Harris EF
Kari Contrera (Assoc.)	First American EF	Michelle Kostick	M&T Bank Corp.
Michael Coon	North Star Leasing	Svetlana Kralik	U.S. Bank EF
Joshua Cooper (Assoc.)	First American EF	Christy Kusilek	Tamarack Consulting

Tom Landmark	U.S. Bank EF	Kyle Rafferty	Huntington Bank
Matthew Langdon	Stanton Leasing	Matthew Rankin (Assoc.)	First American EF
Samantha Lardi (Assoc.)	Odessa	Charles Reed-Dustin	CRD Financial, LLC
Shawn Lowe	BancorpSouth EF	Kevin Reese	U.S. Bank EF
Réne Macfarlane	BMO Harris EF	Garrett Reetz	First Foundation Bank
Daniel Maddock	First American EF	Michael Renfro	Great American Insurance
Jacklynn Manning	Amur EF	Tina Ross	First American EF
Jennifer Marison (Assoc.)	BB&T CEC	Kathleen Russell	U.S. Bank EF
Daniel Marquette	Amur EF	Kirsten Schoenborn (Assoc.)	First American EF
Aaron Massie (Assoc.)	Beacon Funding	Zachary Scribani (Assoc.)	First American EF
Michael Matar	BMO Harris EF	Tom Shin	Hanmi Bank
Jeffrey Matysek	First American EF	Brian Shinkle	Canon Financial Services
Catherine McDonald	GSG Financial	Kamal Shivrani	Odessa
Kathleen McGrath	Great American Ins.	Joshua Smith	Arvest EF
Michael McKeever	First American EF	Robin Smith	BancorpSouth EF
Traci McKenrick (Assoc.)	First American EF	Marietta Smith (Assoc.)	First American EF
Robert Measer	First American EF	Delroy Stauffer (Assoc.)	Odessa
Lisa Mediare	Huntington Bank	Ian Steidel	Great American Insurance
Heather Miller	Huntington Bank	Greg Stitt	First American EF
Michael Miller	NCMIC	Shelly Tauer	U.S. Bank EF
Casey Mitchell	Amur EF	Natalie Tawil	BB&T CEC
Mark Molenkamp	Stryker	Alison Taylor (Assoc.)	First American EF
Christine Moses	First American EF	Jeffrey Teucke	UniFi EF
Mic Mount	U.S. Bank EF	Max Tirey	LeaseQ
Heidi Mukomela	U.S. Bank EF	Blake Tollefsen	Great American Insurance
Robert Murrer	First American EF	David Trost	Mintaka Financial
Eric Myhre	U.S. Bank EF	James Truran	Amur EF
Danielle Naylor (Assoc.)	First American EF	David Verkinderen	U.S. Bank EF
Samantha Nunn (Assoc.)	First American EF	Kyle Vogel	First American EF
Patrick O'Connor	TimePayment	Dean Ward	U.S. Bank EF
Jeffrey Ostholthoff	Huntington Bank	Katelyn Weichman	First American EF
Richard Padgett	U.S. Bank EF	Christine Williams	Genpact, LLC
Melissa Pagliai	DLL	Tony Williams Jr.	Huntington Bank
Danielle Patti	UniFi EF	Clint Williamson	Summit Funding Group, Inc.
Adrian Pelkey	First American EF	Jennifer Wilson	Amur EF
Nate Pfeifer	Amur EF	Laura Witow	Madison Capital, LLC
David Rabinovitz	Ocean Street Capital	Megan Yeaple (Assoc.)	First American EF
Mark Rader	Canon Financial Services	Seth Yount	Amur EF

The Certified Lease & Finance Professionals' Handbook - Sixth Edition



In late 2017, the Foundation commission Deb Reuben, CLFP to rewrite *The Certified Lease & Finance Professionals' Handbook*. This was no small task and took several months that included a couple of AI platforms, interviews with over forty Subject Matter Experts, and professional copyediting by Mike Dickinson. The result is a brand new, top-notch Handbook that flows smoothly and has one voice throughout. It also includes improved narrative that incorporates perspectives reflective of the larger bank, captive and independent equipment finance companies that use the Handbook and the designation as a tool for professional development.

The Foundation is also pleased to announce that a digital copy is now available as well and may be purchased [here](#).

2018 CLFP Celebration Day

In August and September, CLFPs and Associates celebrated their designation in ten different cities across the United States from Seattle, WA to Rochester, NY. The celebration included a charity event in Fort Smith, AR; a round of mini-golf in Chicago, IL; dinner and drinks in Irvine, CA, Portland, OR and San Francisco, CA; a baseball game in Seattle, WA; drinks in Miami, FL; coffee in Milwaukee, WI and lunch in St. Cloud, MN and Rochester, NY.



St. Cloud, MN



Seattle, WA



Miami, FL



Irvine, CA



San Francisco, CA



Chicago, IL



Rochester, NY



Fort Smith, AR



Portland, OR



Milwaukee, WI

Exam Preparation

The CLFP Foundation continued facilitating the Academy for Lease & Finance Professionals (ALFP) in 2018 and held six public Academies and three private Academies. Below are those CLFPs who graciously volunteered to proctor the exam or lead a subject (or sometimes ten!).

Currently, there are four public Academies scheduled for 2019 - one in January in Scottsdale, AZ hosted by Ascentium Capital, another in February in Seattle, WA hosted by Financial Pacific Leasing, one in Minneapolis, MN in April, hosted by Northland Capital and Oakmont Financial Services, and the fourth in Chicago, IL in May hosted by ECS Financial Services. To learn more, or to register, click [here](#).

Kim Adair, CLFP - Amur Equipment Finance
 Joe Bonanno, Esq., CLFP - Bonanno Law Office
 Tearinea Briscoe, CLFP - Canon Financial Services
 John Bradford, CLFP - Arvest Equipment Finance
 Donnie Bunn, CLFP - KIMDON Financial Services
 Eric Bunnell, CLFP - Arvest Equipment Finance
 Todd Buzard, CPA, CLFP - First American EF
 Anne Dalgaard, CPA, CLFP - ECS Financial Svcs.
 Andrew Eller, CLFP - First American EF
 Jed Evans, IV, CLFP - Wells Fargo EF
 Joe Finelli, CLFP - Neumann Finance Company
 Tara Flanagan, CLFP - Canon Financial Services
 Sheena Grant, CLFP - Canon Financial Services
 Michael Green, CLFP - Dakota Financial
 Shawn Halladay, CLFP - The Alta Group

Bette Kerhoulas, CLFP - Pacifica Capital
 Tamara McCourt, CCE, CLFP - LendSpark
 Mark McKissick, CLFP - Hanmi Bank.
 David Normandin, CLFP - Wintrust Specialty Fin.
 Matt Padden, CLFP - Padco Financial Services
 Kevin Prykull, CLFP - PNC Equipment Finance
 Shervin Rashti, CLFP - Slim Capital
 Reid Raykovich, CLFP - CLFP foundation
 Candace Reinhart, CLFP - First National Capital
 Deb Reuben, CLFP - Reuben Creative
 Brian Schonfeld, CLFP - Pawnee Leasing Corp.
 Amy Spragg, CLFP - Pacifica Capital
 Don Wampler, III, CLFP - FirstLease
 Lisa Whitehead, CLFP - First Foundation Bank

We would also like to thank all of the hosts who made each ALFP a success!



Cindy Spurdle Award of Excellence



Deb Reuben, CLFP receives the Cindy Spurdle Award

The 2018 Cindy Spurdle Award of Excellence was presented to Deb Reuben, CLFP by several CLFP Board members at the ELFA Annual Convention in Scottsdale, AZ. She was nominated by her peers and the Board of Directors then selected her as the CLFP who has contributed most to the industry and best represents the CLFP ideals for the year.

Upon receiving the award, Ms. Reuben stated, "It is an honor to receive this recognition. This project was an adventure. A handbook such as this is not the work of a lone author, but a collaborative labor of love influenced by many. I

am grateful to all of the talented and dedicated authors and contributors to past CLFP Handbook editions, your work made it possible for me to earn my CLFP designation and formed the solid foundation for creating this new edition. It was a privilege to work with diverse and brilliant team of subject matter experts and reviewers who generously shared their wisdom, depth of experience, and expertise to make this possible. Thank you to the CLFP Foundation for the project opportunity and to Reid Raykovich, whose vision, leadership, and red pen were essential to the completion of this project."

Shawn Halladay - Honorary CLFP

Shawn Halladay became the second Honorary CLFP in October 2018. Executive Director, Reid Raykovich, CLFP stated, "He has graciously donated so many hours of his time and shared his knowledge with ease, humor and professionalism. He consistently receives top marks from students and the Foundation sees this as a very small token of our appreciation for all that he has done for the designation as well as the industry."

Mr. Halladay stated, "It truly is an unexpected surprise to receive this honor. I am just grateful for the opportunity to work with fellow industry members who are committed to advancing their careers and strengthening the professionalism of our great industry"



Shawn Halladay, CLFP is presented the Honorary CLFP Designation

2019 CLFP Board of Directors

The Foundation's Board of Directors has been expanded for 2019 and is now comprised of eleven elected directors that serve a two-year term, and three who are appointed by our three supporting Associations (AACFB, ELFA, and NEFA) that serve a one-year term.



Sudhir Amembal, CLFP
Amembal & Halladay
Elected



Todd Buzard, CPA, CLFP
First American Equip. Finance
Elected



Andrew Eller, CLFP
First American Equip. Finance
Elected



Chris Enbom, CLFP
AP Financing
Elected



Nate Gibbons, CLFP
Innovation Finance
Elected



Joe Leonard, CLFP
Oakmont Capital Services
NEFA-Appointed



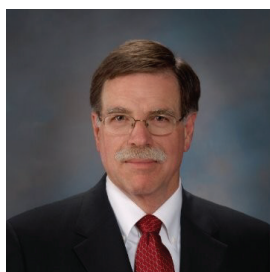
Tamara McCourt, CCE, CLFP
LendSpark
Elected



Dan Nelson, CLFP
Tamarack Consulting
ELFA-Appointed



Kevin Prykull, CLFP
PNC Equipment Finance
Elected



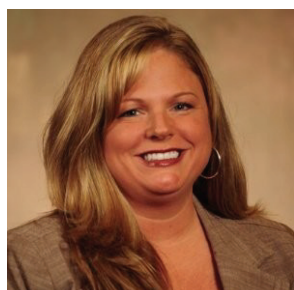
Nick Ross, CLFP
Western Equipment Finance
Elected



Pete Sawyer, CLFP
Sun South Equipment Leasing
AACFB-Appointed



Jason Seitz, CLFP
BMO Harris Equipment Finance
Elected



Jenny Wood, CLFP
Orion First Financial
Elected

The Foundation would especially like to thank those who served on the Board of Directors in 2018 and will not be returning: **Rob Boyer, CLFP** (served for two years); **Eric Bunnell, CLFP** (served for three years); and **Amy Spragg, CLFP** (served for six years and was President in 2017)

Companies With 3 or More CLFPs

2017 Rank	2018 Rank	Company	2018 Count	2017 Count	Change
1	1	First American Equipment Finance	109	73	33%
2	2	Financial Pacific Leasing	24	25	-4%
3	3	AP Equipment Financing	19	19	0%
4	4	Ascentium Capital	18	18	0%
5	4	BB&T	18	16	11%
n/a	5	U.S. Bank Equipment Finance*	17	0	100%
14	6	Amur Equipment Finance	16	3	81%
6	7	ECS Financial Services, Inc.	12	12	0%
6	7	Ivory Consulting Corporation	12	12	0%
7	8	Arvest Equipment Finance	10	10	0%
14	8	Canon Financial Services, Inc	10	3	70%
12	8	Great American Insurance	10	5	50%
6	8	Orion First Financial LLC	10	12	-20%
11	9	BancorpSouth Equipment Finance	9	6	33%
10	9	BMO Harris Equipment Finance	9	7	22%
9	9	KLC Financial, Inc.	9	8	11%
10	10	Beacon Funding Corporation	8	7	13%
9	10	Celtic Commercial Finance	8	8	0%
8	10	Northland Capital Financial Services	8	9	-13%
n/a	10	The Huntington National Bank*	8	1	88%
14	10	Oakmont Capital Services LLC	8	3	63%
11	11	GreatAmerica Financial Services	6	6	0%
9	11	Marlin Business Services	6	8	-33%
10	12	Bank of the West	4	7	-75%
13	12	Commerce Bank	4	4	0%
13	12	DLL	4	4	0%
11	12	Hanmi Bank	4	6	-50%
n/a	12	NCMIC Finance Corporation*	4	2	50%
n/a	12	Partners Capital Group*	4	0	100%
14	12	Tamarack Consulting, Inc	4	3	25%
n/a	13	Alliance Funding Group*	3	2	33%
14	14	Blue Street Capital, LLC	3	3	0%
13	14	BSB Leasing, Inc.	3	4	-33%
14	14	Clune & Company LC	3	3	0%
14	14	Diversified Capital Credit Corporation	3	3	0%
n/a	14	First Foundation Bank*	3	2	33%
14	14	First National Capital	3	3	0%
14	14	Innovative Lease Services, Inc.	3	3	0%
14	14	International Decision Systems	3	3	0%
13	14	Key Equipment Finance	3	4	-33%
14	14	LTi Technology Solutions	3	3	0%
n/a	14	Odessa*	3	0	100%
14	14	Quality Leasing Co. Inc.	3	3	0%
n/a	14	Providence Capital Funding*	3	1	67%
12	14	Provident Equipment Leasing	3	5	-67%
14	14	TEQLease, Inc.	3	3	0%
n/a	14	UniFi Equipment Finance*	3	0	100%
n/a	14	Western Equipment Finance*	3	1	67%
n/a	14	Wintrust Specialty Finance	3	0	100%

*Denotes first year with three or more CLFPs



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Hanmi Bank
LeaseTeam, Inc.

Gold

AP Equipment Financing

Silver

Quality Leasing Company

Bronze

Arvest Equipment Finance
BlackRiver Business Capital
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Pawnee Leasing Corporation
Portfolio Financial Servicing Company
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Paul Fogle, CLFP
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