



THE CLP CIRCULAR

News for Leasing Professionals

"How To" Use The CLP Logo

HIGHLIGHTS

- "How To":
Use The CLP Logo
- CLP Stimulus Package
- *Leasing News* –
Person of the Year:
Bob Teichman, CLP
- NAELB and NEFA
Special Opportunities

For supporters of the CLP Program and employers of CLPs, you can display the CLP logo on your website, business cards or stationary. The Foundation has designed these two new CLP logos specifically for this purpose. Simply go to the "Members Only" section of the CLP web site and follow the instructions for downloading. These are the only logos sanctioned by the Foundation for use on the web or print materials.



The new logos are available in several different sizes and formats which should suit all your needs.

CLP Stimulus Plan

The Foundation's CLP Stimulus Plan drops the fee for the CLP Exam and CLP Handbook from \$610 to \$495 and **will expire on June 30th**. Remember that candidates can still study at their own pace; the only requirement is that the CLP Application for certification is received by June 30th along with the exam fee.



**Remember EOGO:
Every One Get One**

Our request is that every CLP reach out to their colleagues and encourage at least one to study for and take the new CLP Exam this year. Many of you will naturally encourage far more than one of your peers to become a part of the industry's only recognized certification program, and that would be great!

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Bob Teichman, CLP
Receiving the Leasing News
Person of The Year award.

Leasing News Person of the Year Bob Teichman, CLP

Congratulations to CLP, Bob Teichman, on being named Leasing News Person of the Year for 2008 for all the service he has provided the equipment leasing industry in the United States as well as abroad.

Bob was 2007-2008 President of the CLP Foundation and is currently Chairman of the Leasing News Advisory Board; one of the original founders of this internet trade publication as well as one of the originals in the formation of the CLP program. Bob has served on the UAEL Board of Directors and numerous committees including serving as Education Committee Chair. Bob's career spans over 45 years with such companies as Belvedere Equipment Finance, Crocker Bank, Dividend Leasing, New England Capital, Sumitomo Bank, as well as his own company Teichman Financial Training, Sausalito, California.

The 2007 recipient of the Leasing News Person of the Year award, Paul Menzel, CLP presented the award to Bob at the NAELB annual business meeting luncheon on Saturday the 2nd of May at the Red Rock Casino in Las Vegas, Nevada. Over 400 attendees listened to a glowing speech about

Bob by Paul and then gave a standing ovation to Bob after his dignified and appreciative acceptance speech that called on the industry to continually strive for improvement, especially through education.

It was reported that in the nomination process by the Leasing News Advisory Board that Bob was continually described as a statesman and as a dedicated and true leasing veteran, who consistently contributes to the improvement and well-being of the leasing community, a good person, an honorable and trustworthy man, an individual with the qualities one would hope for in a dear friend or trusted colleague and CLP - here at the CLP Foundation we couldn't agree more! Way to go Bob!

CLP Spotlight

An Interview with Shannon Green, CLP



How did you get your start in the equipment leasing industry?

I began my career in leasing at Financial Pacific Leasing in 1986. I found myself interested in all aspects of the business and took advantage of opportunities as they arose to work in various areas of the company. I found that I wasn't at all interested in accounting or IT but had a passion for solving problems, setting and achieving goals and was not fearful of taking on the risks and accountability of being a decision maker. In 2003, after a long and successful career at FP, I made the decision to leave my position as VP of Funding for an opportunity to further expand my knowledge and experience. I joined Orion First Financial, LLC as the Credit and Operations Manager and have been like a kid in a candy store ever since!

What is one of things you enjoy about your current position?

I enjoy the complex nature of Orion's business model and strive every day to learn something new that I can pass on to someone else. I truly enjoy participating in others journeys to success and make it a point to make a difference in someone else's life each day whether it is personally or professionally. I pride myself on my integrity and work ethic. I know that hard work, focus and perseverance pay off. My day typically starts around 6:00 a.m. which is my favorite time in the office. I am able to get through most of the day's tedious tasks and focus on the staff and clients when 7:00 a.m. rolls around, which is when all the fun starts!

If you could be a super hero, what would be your super power and why?

If I could be a super hero my powers would be to read minds. If I knew exactly what someone was thinking rather than having to try and read between the lines, I could probably cut my work day in half....how amazing would that be!

How do you enjoy your spare time, Shannon?

Outside of work I am the mother of two children, a 21 year old daughter (who also works at Orion) and a 13 year old son (who is out to save the earth one day) and happily married for 21 years to my husband and best friend Michael. We enjoy movie nights, camping, working in our yard and anything else that enables us to enjoy the sunshine.



Shannon Green, CLP
Orion First Financial

An Interview with Olevia Yates, CLP

How did you get your start in the equipment leasing industry?

I got my start in leasing in December 2000 with a super broker where I learned practically all facets of the equipment leasing sale. For the first 18 months I learned the backside of the operation: assisting with marketing/sales efforts, inputting credit apps, pulling required reports based on transaction, doing docs, reviewing signed docs, submitting funding packages, etc. After learning that side of the business I was permitted to make an attempt at entering the sales side. The first many months were long hours on the phone – many 11-12 hour days getting a steady client base. I stayed in that position for nearly six years and then made the decision to make the entrepreneurial leap and started my own leasing company. I feel that by not entering sales directly but learning the backside of leasing operations too, I was better prepared for starting a leasing company.

What are your biggest challenges?

My biggest challenges include keeping current with the more frequent credit changes and finding enough customers who are making capital acquiring decisions at this time. I think it is critically important to maintain good relationships with your funding sources and your clients. Do what you say you are going to do. Better to under promise and over deliver. Provide excellent customer service. Technology has made this easy and we need to take advantage of new technology and stay two steps ahead, not one. If you're only one step ahead others are going to jump past you. You need to read as much as possible. Stay current on marketing ideas, your funding sources' info and also changes affecting your client base.

Become a CLP!! With increases in financial fraud and tough times when some are more likely to do desperate things what better way to set you apart. I have found the CLP designation a great help/asset in getting signed on with many of our industry funding sources.

What does your perfect day start with?

It would start with a walk on the beach at sunrise and luckily I live close enough that this could happen everyday but it doesn't happen as often as I'd like.

Your favorite song or music? Jazz

Would you like to share an interesting hobby or accomplishment?

The one most people would probably be most surprised by is my Green Belt in Taekwondo.

In the movie about your life, who would you cast to play you?

Rachel McAdams: She does well in both serious and comedic roles. I think my life has some of both so it's important to be able to do both.

Would the movie be a drama, comedy, romantic comedy, action film or science fiction?

Drama with a little comedy

What thought or message would you put in a fortune cookie?

Funny you ask. I have had a fortune cookie message held on my refrigerator with a magnet for more than five years that reads "The important thing is to never stop questioning". I really believe this and loved finding it in my fortune cookie so much I had to save and display it!

If you could transport yourself anywhere instantly, where would you go and why?

There are too many places to name one. I have a lot of traveling yet to do.



Olevia Yates, CLP
Navigant Leasing

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Institute for Leasing Professionals

NEFA has joined the Foundation with a Stimulus Plan of their own, valid through June 30, 2009.

NEFA has reduced the cost of the two-day Institute for Leasing Professionals to \$395.00. The next ILP will be offered August 17th and 18th at Premier Lease and Loan in Bellevue, WA, USA.

NAELB Members:

Did you know that the \$50 NAELB Membership Voucher can be used toward CLP Certification, Recertification or Annual Dues?



Advertising Opportunities

	If received prior to July 1st \$75 total, \$25 per issue First come first serve, space is limited	After July 1st \$75
CLP Circular - business card size ad 3 Issues		
Inside Cover of CLP Handbook 2009 Edition	\$1150	\$1350
Back Cover of CLP Handbook 2009 Edition	\$1150	\$1350
Inside Pages of CLP Handbook 2009 Edition	\$850	\$1000

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Your CLP 2009 Board of Directors at the NAELB Conference at the Red Rock Casino in Las Vegas, Nevada.



Shown left to right

Back row: Chris Walker, CLP; Cindy Spurdle; Rosanne Wilson, CLP; Paul Nibarger, CLP; Joe Bonanno, Esq, CLP
Front row: Vicki Shimkus, CLP; Theresa Kabot, CLP; Bob Teichman, CLP
Not Pictured: Nancy Pistorio, CLP; Rob Crivello, CLP; Kevin Clune, CLP; Larry LaChance, CLP; John Rosenlund, CLP

CLP Standards of Professional Conduct

- ✓ A Certified Lease Professional will always strive to conduct all business dealings in an honest, ethical, and professional manner.
- ✓ A Certified Lease Professional will respect ownership of funds delivered as advanced fees or security deposits and will treat in a fiduciary capacity all funds received in that capacity.
- ✓ A Certified Lease Professional will strive to constantly gain additional education to improve his/her professional competency and will work to promote education and integrity within the leasing industry.
- ✓ A Certified Lease Professional will never make false or misleading statements to his/her employer, customers, vendors or funding sources.
- ✓ A Certified Lease Professional will never be involved in fraudulent activities in business dealings within the equipment leasing industry.
- ✓ A Certified Lease Professional will always treat with confidentiality, as defined by law, all information regarding customers, vendors, funding sources and credit reporting agencies.
- ✓ A Certified Lease Professional will act in a leadership role in the industry and always be held to the highest standards of conduct applicable to the industry.

Committees

Education/Training

Updates the CLP Handbook, is the keeper of the Body of Knowledge, implements the Mentor Program and determines what workshops presented at association meetings qualify for CPE's

- Bob Teichman, CLP (Chair)
- D. Paul Nibarger, CLP
- John Rosenlund, CLP

Marketing

Develops ways to market the CLP Certification Program, the CLP Handbook and the Recertification Program.

- Rosanne Wilson, CLP (Chair)
- Joe Bonanno, CLP
- Kevin Clune, CLP
- Nancy Pistorio, CLP
- Vicki Shimkus, CLP
- Chris Walker, CLP

Exam Re-Write, Review & Update

Oversees the updates of the new CLP Exam based on feedback from exam takers and exam graders and beta testers. Maintains as database of questions and answers for future exams.

- Larry LaChance, CLP (Chair)
- Theresa Kabot, CLP

Nominating

Responsible for selecting nominees from CLPs in Good Standing to stand for election to the CLP Board of Directors for the years 2010 & 2011.

- Bob Teichman, CLP (Chair)