



CLFP

Circular

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A MESSAGE FROM THE CLFP PRESIDENT

To those who celebrate Cinco de Mayo, it seems that destiny has given us another reason to raise our glasses on this date. On May 5th, 2021, Jay Christiansen of US Bank Equipment Finance made history by becoming the 1,000th CLFP! Congratulations to Jay, to all of you CLFPs out there, and to the numerous volunteers whose tireless efforts have made this milestone possible. I'm pleased to say that the number of CLFPs (currently 1,032) continues to climb domestically and abroad thanks to your collective engagement and support.

The CLFP movement continues to grow stronger every month. This has afforded the CLFP Foundation more volunteers, new committees, and lots of creative ideas that will benefit each of you. In fact, a workshop sponsored by Deb Reuben of TomorrowZone brought a dozen different companies together to envision and design the future state of the CLFP program. Meanwhile, we've made progress on a newly developed Mentor Program, and we're changing the format of our learning academy to maximize learning retention. I won't spoil the surprise on several other exciting developments but stay tuned and be sure to follow us on social media to stay informed.

Lastly, if you've conquered the CLFP exam, and are anxious to share your talents with the rest of the world, let us know! Volunteering on one of our committees allows the industry to benefit from your perspective, and is sure make your career much more fulfilling as our current volunteers will tell you. Thanks for making our industry awesome!



Nate Gibbons, CLFP - President of the CLFP
Foundation Board of Directors

A handwritten signature in blue ink, appearing to read "Nate Gibbons", written on a white background.

SPOTLIGHT

Ben Hall, CLFP

"I mitigate organizational legal and documentation risk by reviewing and negotiating transactional and programmatic documents and by keeping informed of changes to regulations and statutes impacting the commercial and government finance sectors."



At the theater, pre-pandemic



Ben and Madison



Cheers from Cinco de Mayo

At which store would you like to max-out your credit card?

Assuming I don't have to pay it off after maxing it out, Amazon... They have everything and bring it to my door.

What was your favorite TV show when growing up?

CHiPs. My best friend and I would then ride around on our bikes pretending to chase the bad guys.

Choose a movie title for the story of your life.

Better Late than Never.

What was your favorite toy as a kid?

Hot Wheels, or Star Wars action figures.

Can you play any instruments?

Not well enough that it could be considered "playing."

What was your childhood nickname?

Benjy.

Do you have any strange phobias?

Cows - not beef, but the living critters.

What, or who, are you a "closet" fan of?

The banjo.

What are three things still left on your bucket list?

Visit Machu Picchu, go to a Formula 1 race, retire.

What is the worst pet you have ever had?

Is there such a thing as a bad pet?

What was the best concert you ever went to?

Probably my first concert - Pink Floyd.

Where's your favorite place in the world?

London.

What's the last book you read?

Besides the CLFP Handbook? I am currently reading Camino Winds by John Grisham.

What are you passionate about?

Democracy, making the world a better place, finding the perfect bourbon.

What are you currently watching on Netflix?

I don't currently have Netflix, but am anxiously awaiting the final season of Better Call Saul.

If you could visit anywhere in the world you've never been, where would you go?

New Zealand. I would say Australia, but it seems like all the flora and fauna there wants to kill people. New Zealand seems a bit less lethal.

What's your secret talent that no one knows about?

If I told you, it wouldn't be a secret!

Who is your least favorite superhero?

The Flash. Anyone who thinks it is a superpower to get someplace fast has obviously never been in the car when I am driving. And it seems like he would always be covered in smashed bugs.

Want to be featured?
Email Reid and you could be
our next spotlight:
reid@clfpfoundation.org

THE CHICKEN-WING VS. THE HANDSHAKE: GETTING BACK TO “NORMAL”



Jenny Wood, CLFP

Ms. Wood is the Senior Vice President of Client Services for Orion First, LLC along with serving on the CLFP Board as Vice President. With 20+ years of leasing experience she provides the skills, professionalism, and accountability necessary to manage Orion's customer and client accounts at the highest level. Jenny currently resides in Tacoma, WA and enjoys spending time with family, friends, traveling and watching professional football.

As we move into what we hope is the last stage of the COVID pandemic, we find ourselves questioning the new “norm” of social and professional interactions. What is proper etiquette for greeting one another in person? Will we overstep someone's personal space if we reach out for a hug? Is it offensive to decline a handshake?

Who would have guessed that we'd all get used to countless Zoom/Teams meetings with our peers each week that also involved uninvited “guests?” Examples include:

- Children running rampant in the background playing hide and seek.
- An occasional doorbell ring for an Amazon delivery (or twelve).
- A loud bark or meow as we were discussing the budget.
- Or my personal favorite: seeing the true color of someone's hair (although silver and grey are gorgeous on some of you).

With virtual meetings becoming the usual communication method over the last year-plus and the business world now opening up, it begs the question, what are the accepted social etiquettes? Hopefully, we can help ease some of your concerns while providing a little humor and some great tips on handling getting back to the real world.

So, what is the new norm? I am not sure we have it figured out yet, but we know from experience that we are adaptable and quick on our feet with change (flashback to mid-March 2020). In our first quarter CLFP Circular, Rachel Chesley broached the subject of returning to the office in 2021. As we continue passing the COVID threat, more and more companies are now moving towards a return to pre-Covid workplace guidelines or a hybrid of remote and in-office days.



With more relaxed restrictions and over 50 percent of the U.S. population fully vaccinated, how do we greet our fellow peers moving forward? Do we wave across the conference table while wearing a mask? What about offering a handshake? Do we mimic the “cool kids” who are doing the chicken-wing dab with their elbows? Or do we just awkwardly stare at one another until someone makes the first move?

Let's face it, we are all in this together and have been quarantined so long that we may need some in-person communication refreshers, so here are some quick tips that might break the ice as you return to in-person interactions:

- Use inviting body language: When greeting someone post-Covid for the first time, turn on your 10,000-watt smile and be a Croissant, not a Bagel. For those who are not familiar with this amazing networking tool, check out Robbie Samuels's book Croissants vs. Bagels. Samuels was also a guest speaker at the ELFA's first Woman's Conference a few years back.
- Take the lead: Throw up a quick fist or chicken-wing bump! Studies show that "a fist bump is the most hygienic contact hand greeting of all, transferring only about 10% of the germs you'd get from a standard handshake."
- Do not be afraid to say "No:" If you are not comfortable with a handshake or other form of personal contact, be upfront. Don't ignore the gesture; simply state you are being cautious with the current situation.
- Simply Ask: When seeing a co-worker for the first time in over a year, it is acceptable to ask how they feel about contact. This way, you can ensure you are both on the same page.
- Carry Hand Sanitizer: There is just something soothing about someone carrying hand sanitizer. Sharing is caring and if you are making contact, offer to share some of your coveted magic potion to make those around you feel at ease.

As you can see, there aren't yet any hard and fast rules regarding physical greetings as we return to the office. Much like we did in March of 2020, we will find the new norm by simply engaging with one another and trusting the process. If we practice excellent hygiene, respect boundaries, and throw in a little bit of humor, it won't be long until we see each other at the next conference IN PERSON, albeit with a lot fewer grey hairs!

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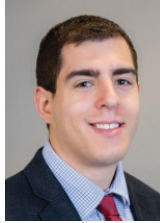
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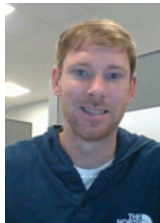
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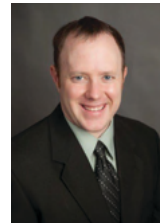
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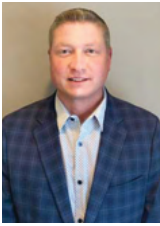
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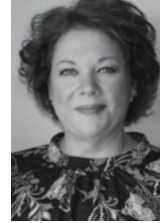
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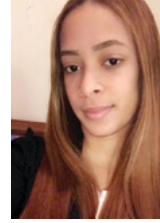
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WHY I BECAME A CLFP



I chose to pursue the designation so that my audience knows the company and ethics I represent on a daily basis is trustworthy and credible. Furthermore, it has and will always be my intent to understand the larger picture of the industry we live and work in everyday so that I may be of better service to my partners and customers.

- Stephen Engel, Regional Sales Manager, Channel Partners Capital



I always love to be able to continue to learn and develop my career and to be recognized as an ethical & well-rounded professional. CLFP certification not only provides the general knowledge of all aspects of the equipment leasing industry, but also have a set of "Standards of Professional Conduct" that each CLFP needs to adhere to. So, this was a perfect opportunity for me to pursue.

- Maggie Holly, First Vice President, Credit Manager, Hanmi Bank



I always believed in the mission of CLFP. When I was on the board of the ELFA we took on the initiative of sponsoring the CLFP which really helped in the mission. So, over the years, I was seeing this incredible growth and wanted to "put my money where my mouth is" so to speak. The body of knowledge encompassed by the CLFP is truly impressive. I am proud to be on the team!

- Robert Rinaldi, President, Rinaldi Advisory Services



ADDITIONAL RESOURCES



Calling All Emerging Talent: Look to the Future at Emergence2021 LIVE

If have the desire to lead, grow and make a positive impact on others, the ELFA Emerging Talent Advisory Council invites you to join us at Emergence2021 LIVE on July 14. This virtual leadership program for equipment finance professionals will include:

- Emerging leadership speaker Pierre Quinn will share strategies and tools you need to activate your inner leader and close the gap between where you are and where you're called to be.
- Futurist Terry Grim will empower attendees to see what's happening before the competition does, identify opportunities and move from "knowing" to "doing."
- Ask a Leader Panel Discussion and Diversity, Equity and Inclusion Panel
- Opportunities to network and connect with fellow attendees.
- Each attendee will receive a complimentary DiSC assessment, designed to help improve teamwork, communication and productivity in the workplace.

Learn more: www.elfaonline.org/events/2021/Emergence21

Are You Managing Up?

Are you looking to develop and maintain a working relationship with your boss that mutually benefits you, your boss and your organization? Discover tips in a new series on ELFA's Emerging Talent webpage:

- Part 1: How Young Professionals Obtain Better Outcomes by Managing Their Boss
- Part 2: Is Your Boss an Introvert or Extrovert?
- Part 3: 6 Common Types of Bosses

Learn more: www.elfaonline.org/emerging-talent-careers

New from ELFA

Set yourself up for success by expanding your professional network and knowledge! ELFA is pleased to present an updated calendar of interactive events in the coming months—from free networking events and webinars to multi-day conferences. In addition to Emergence2021, special events for those newer to the industry include:

- July 14 - Virtual Emerging Talent Networking Event
- Sept. 13 - Virtual Emerging Talent Networking Event
- Sept. 21-23 - Virtual Principles of Equipment Leasing and Finance Workshop

See the full list of upcoming ELFA events at www.elfaonline.org/events.

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