



# CLFP

## Circular

### IN THIS ISSUE

- 02 | A Message From The CLFP President
- 03 | Spotlight: Magan Jugurnauth, CLFP
- 04 | The Academy for Lease & Finance Professionals as a Continuing Education Tool
- 06 | New CLFPs And Associates
- 08 | Thank You to Our Supporting Associations!
- 09 | Industry News
- 10 | Thank You's



### 2023 CLFP BOARD OF DIRECTORS

**Past President**  
**Jenny Wood, CLFP**  
*Orion First Financial, LLC*

**President**  
**Lia Wax, CLFP**  
*Financial Pacific Leasing*

**Vice President**  
**Todd Buzard, CPA, CLFP**  
*First American Equipment Finance*

**Treasurer**  
**Mike McDonald, CLFP**  
*CoreTech Leasing*

**Secretary**  
**Candace Reinhart, CLFP**  
*CoreTech Leasing*

**Craig Colling, CLFP**  
*Ascentium Capital LLC*

**Nick Gibbens, CLFP**  
*Wintrust Specialty Finance*

**Ben Hall, CLFP**  
*U.S. Bank Equipment Finance*

**Brent Hall, CLFP**  
*Alliance Funding Group*

**Michelle "Mikki" Henkelman, CLFP**  
*Oakmont Capital Services*

**Theresa Kabot, CLFP**  
*Kabot Commercial Leasing*

**Paul Knowlton, CLFP**  
*Huntington National Bank*

**Eric Mandella, CLFP**  
*Navitas Credit Corp.*

**Jill Molitor, CLFP**  
*Stearns Bank*

**Michael "Mic" Mount, CLFP**  
*U.S. Bank Equipment Finance*

**Kathy Nordendahl, CLFP**  
*Dext Capital*

**Deborah "Deb" Reuben, CLFP**  
*TomorrowZone*

**Molly Simon, CLFP**  
*DLL*

**Dave Verkinderen, CLFP**  
*U.S. Bank Equipment Finance*

**STAFF**  
**Reid Raykovich, CLFP**  
*CEO*

**Mel Vinson, CLFP**  
*VP of Marketing and Development*

**Sandy Vigilia**  
*Executive Administrator*



*In memory of*  
**Larry LaChance, CLFP**

# A MESSAGE FROM THE CLFP PRESIDENT

---



Lia Wax, CLFP

*Financial Pacific Leasing*

## I MUST ADMIT THAT AS I BEGIN THIS ARTICLE, THINGS FEEL A BIT SURREAL.

I think back to when I started my CLFP journey in 2004 and find it hard to believe that 19 years later, after almost 24 years in the industry, I am lucky enough to be President of the Board of Directors for an organization and designation that means so much to me.

As I reflect further on that journey, I think about all the amazing people I have had the opportunity to meet, as well as all things that I have watched occur in that time. Especially since joining the board in 2020 - just as we embarked on the craziness that has been COVID. Out of such immense upheaval for the world and our industry, came some of the most intense growth the foundation has ever seen. The launching of virtual academies leading the way for the unprecedented growth in our numbers.

For me personally, that launch allowed me the opportunity to give back in an additional way by teaching more frequently now that geographical location was no longer a hindrance. I thoroughly enjoyed sharing my love of all things Documentation. I had the opportunity, more than ever before, to see the increased interest in the designation and witness our ability to reach more and more people through a number of different learning options. It has been a wonderful experience to watch so many people tackle the challenge of expanding their knowledge base and taking steps to grow in their careers in the industry we love.

***“With such unprecedented growth comes increased opportunities to get involved.”***

Whether that is joining the Welcome Committee to say hello to all our new members, being a mentor to those considering the test, being an Ambassador for your company, being a teacher for an Academy, or getting involved with events going on in your area. I would encourage everyone that is interested to consider getting involved and giving back. And even if you're not in a position or have an interest in doing one of those things, please let us know how we can make your experience a better one. This foundation is for all of you, and we want to make sure that you feel as if you are getting value from the certification and your fellow CLFPs.

Lastly, I would like to personally acknowledge the passing of one of our own, Larry LaChance. Those on the board had the opportunity to spend some time with Larry during the end of January at the annual board retreat in Arizona. Little did we know that it would be our last opportunity. It made that brief couple of days all the more important. Larry was bigger than life and there is a large hole left by his passing. Not only on the board, but in the industry and for those who knew and loved him. My deepest sympathies go out to Larry's family, friends, and colleagues. He will be sorely missed, but I know he will still be with us in spirit. Especially on one task force in particular.

I wish everyone a happy and healthy rest of your spring.

**- Lia Wax**

# SPOTLIGHT: MAGAN JUGURNAUTH, CLFP

Magan Jugurnauth is an experienced independent equipment financing, leasing, and banking consultant working with international organizations like the World Bank Group, International Finance Corporation, KfW Development Bank, Foreign Commonwealth Development Office, to develop financial systems, markets, and products in Sub-Saharan Africa and opening access to finance to the unserved and the under-served.



He has been very active for the last ten years in countries like Ethiopia, Kenya, Uganda, Tanzania, Rwanda, Lesotho, Seychelles, South Sudan, Djibouti, Ivory Coast, Liberia, DRC, South Africa, carrying out multiple assignments involving market assessments and surveys, country diagnostic studies on tax, accounting, legal and regulatory aspects of financial markets, review the regulatory framework in those markets and make recommendations to address market and regulatory failures, open access to finance to MSMEs and improve financial inclusion, amongst others.

Magan has also carried out extensive capacity-building activities and led many training sessions, as part of technical assistance programs, supporting leasing companies, central banks, commercial banks, SME banks, agriculture banks, development banks, MFIs, SMEs in strategy development, business planning, asset-based and lease financing, risk management, credit underwriting, due diligence, risk-based supervision, policies, procedures, processes and systems review and improvement, and productivity and performance improvement.

Before moving into consulting, Magan has led large international and regional equipment financing, banking and financing groups and diverse conglomerates from Mauritius and the African region, for over 30 years.

Magan Jugurnauth holds an MBA from the University of Surrey, UK, since 1999 and is a qualified stockbroker from Mauritius having passed the "Stockbroker Examination" in 1993. Recently, he gained his "Certified Lease & Finance Professional" (CLFP) designation, issued by the Certified Lease & Finance Professional Foundation, USA, as well as a "Certified Digital Finance Practitioner" (CDFP) issued by the Digital Frontiers Institute in collaboration with Fletcher School, Tufts University, USA. He is a member of the Mississauga Board of Trade (MBOT) and the Canadian Finance and Leasing Association (CFLA).

## What led you to pursue the CLFP Designation?

I have been engaged in the field of equipment leasing and financing in Sub-Saharan Africa for more than 25 years, leading and growing independent regional and international leasing companies in and from Mauritius. I have been a leasing industry advocate through the leasing association for many years and for the

last ten years, a leasing consultant developing leasing markets and products across Sub-Saharan Africa, working with international organizations like the World Bank, International Finance Corporation, and KfW Bank. I always wanted to make sure I am recognized as a true leasing professional and somehow got interested in the CLFP designation, around 2009.

It was a challenge to proctor the CLFP exams those days from Mauritius, and moving to Canada a few years ago, brought me closer to the CLFP designation and my dream of becoming a CLFP. The CLFP designation is really a unique pathway for professional recognition of the skills and knowledge of those individuals involved in the leasing and financing world. I am really proud and honored to be a member of the CLFP family, now.

There are many people like me, outside the US who would want to pursue a CLFP designation and it's time to make the CLFP designation a real global identity.

## What was the most interesting part you learned while studying for the CLFP Exam?

The most interesting thing I learnt was about the different US rules, codes and laws, affecting the leasing transaction, but beyond that, I was able to compare them with what is done in other parts of the world.

## What advice would you give to a CLFP Candidate?

The first thing I would say is take the exam when you are ready, but not too far from the Academy. Attending the Academy is very important, as it prepares you for the exam, but you also need to go through the Workbook and the Handbook and practice the sample exam questions. This is very important.

Eight hours may seem long, but if you plan it in such a manner that you give yourself a comfortable break of 10-15 mins after each part, you'll not feel the pressure. You'll easily finish within 5 hours including breaks.

## What is your current role at your company? Favorite parts of this job?

I am currently the founder and CEO of my leasing consulting business, Infinite Capital, operating out of Canada. The favorite part of my job is when I carry out tax, accounting, regulatory, and legal diagnostics of markets where leasing is either non-existent or nascent or developing

and make recommendations for its growth and development by amending the tax, accounting, regulatory and legal frameworks. I also like working directly with commercial and development banks, leasing companies and micro-finance institutions in developing their policies, procedures and processes and internal capacities in credit, legal documentation, and portfolio management.

## Who is your hero?

My hero is Sudhir Amemba, CLFP, who helped me develop my skills and knowledge in leasing from 2006 onwards. I owe him a lot.

When I started in leasing in 1999, leasing was not taught the way it is today and Leasing training materials and handbooks were scarce in the developing world. To enhance my leasing knowledge, I followed Sudhir Amemba in his several leasing conferences and training sessions. In 2009, I invited him to Mauritius to lead a leasing conference and since then we started working together to further develop leasing in Africa.

## Tell us three things on your bucket list.

My wife, daughter and I have listed the following to do activities and are waiting for the right time to do them: (i) Bungee jumping (ii) skydiving and (iii) paragliding.

## What is the best vacation you've ever been on?

In July 2018 we decided to do our first long drive from Toronto to New York City. When you come from a country where traveling from North to South or from East to West is a mere ninety minute's drive, this one looked more exciting as it was meant to be a long eight-hours drive, which we have never done before. I can tell you, we will never regret it.

It took us eleven hours to reach New York City, three more hours than the scheduled time, a totally new experience crossing the US border by car through Buffalo, driving in the unknown and following our GPS and missing the exits a few times, but above all, always enjoying the green scenery for most of the part. When we reached Times Square around midnight, it was all lit, vibrant with activity and 7th Avenue full of life. During our short stay, we visited Madison Square Garden, the Empire State Building, Madame Tussauds, Central Park, Hop-on Hop-off Bus City Tour by night, China Town and the Statue of Liberty. We still cherish those moments spent together.



# The Academy for Lease & Finance Professionals as a Continuing Education Tool

---



---

## AUTHOR

### Mel Vinson, CLFP

VP of Marketing and Development  
Melissa “Mel” Vinson, CLFP, is the Vice President of Marketing and Development at the Certified Lease & Finance Professional Foundation.

Mel is a native of Portland, Oregon and a graduate of Oregon State University. She began her career in banking with U.S. Bank back in 2012 and found that this was a great path for her – there was so much to learn and so many avenues for growth in the industry. Mel started in consumer banking where her passion to help her customers better understand the ins and outs of finance yielded great success and built many positive relationships. This quickly blossomed into eagerness to help business customers succeed financially. Mel moved into the Equipment Finance division of U.S. Bank a few years later and found that Leasing and Finance was truly where she belonged.

After becoming CLFP certified, Mel was ready to give back and support future CLFPs obtain their certifications and immediately began volunteering to teach ALFP courses. Mel’s joy to help others and enthusiasm for education helped launch her into a new role with the CLFP Foundation.

In her spare time, Mel loves hiking, exploring the Pacific Northwest, photography, and running races including the world’s largest relay, Hood to Coast.

Since its initial launch in 2015, the Academy for Lease & Finance Professionals (ALFP) has been an immensely successful opportunity for CLFP Candidates preparing to take the Exam. As most of our CLFP Family know, the ALFP is the course offered by the CLFP Foundation that supports an individual prior to taking CLFP exam. It reviews the CLFP Body of Knowledge section by section and gives a comprehensive overview of the CLFP Handbook.

Candidates may attend an ALFP in a 2- or 3-day format, participating in-person, via virtual classroom, and now have the opportunity to participate in an online-self-paced class within a 6-month timeframe. Prior to the pandemic, courses we held in-person throughout the country and yielded many new CLFPs. In 2020, as the whole world shut down, we adapted quickly to change our classroom to a digital version along with many other teachers and students across the world. While this change was unusual and unprecedented at the time, it has in fact allowed many more opportunities for students who desired to participate in the journey to earn the designation.

## ADAPTING FOR THE BETTER

Through that first year of navigating the change from in-person to virtual, the concept and experience inside the digital Academy became much a more accepted, accessible, and desirable means to continue education. Many, like myself, took the opportunity to set a goal of obtaining the CLFP designation during pandemic times, with everything shut down, and less distractions in place that of our previous world. In 2021, the CLFP Foundation held 14 Academies, all of them digital, and in 2022, we increased our Academy total by 42% by holding a record 20 ALFPs.

Moving the classroom from an in-person structure to virtual has brought immense accomplishment and opportunity for future CLFPs. By now offering a virtual class structure, we have been able to accommodate students across (and outside of!) the United States and in multiple time zones. The digital classroom brought a higher need for many more ALFP Instructors, as the course now typically has an instructor assigned for each individual subject. The great news is – our CLFP Family loves to give back! In 2022 specifically, the ALFP Instructor bench nearly tripled in size with many of our own coming together to support the ever-frequent classes we offer. An immense win with the digital classroom (in addition to the amount of CLFPs willing to give back) is that our digital Academies are



instructor diverse, with many company types, job titles and responsibilities, and people being represented across the curriculum. It has been an exceptional way to build our CLFP Family and create many positive connections.

As the world began to return to normalcy, we started to see the desire to meet in person, and 6 Academies were held in person once again last year. In 2023, we have 15 Academies (and counting!) on the calendar, with nearly half being in person. Throughout each classroom experience, it is incredible to witness the dedication the attending students have as they prepare to earn this unique designation.

## BEGINNING THE JOURNEY

As CLFPs, you know that the CLFP journey starts with reading and studying *The Certified Lease & Finance Professionals' Handbook*. From there, students may elect to be paired with a mentor to be further encouraged before the exam. The CLFP Mentor Program has been immensely successful with a bench of 25 CLFPs who graciously share their time, knowledge, and encouragement with our CLFP Candidates. CLFP Candidates also have the option of attending one of our Academies for Lease and Finance professionals (ALFP) as a next step to further their understanding of the CLFP Body of Knowledge before taking the Exam. In an effort to further support success with the CLFP Exam, a robust sample test was created in 2022 as a study tool for anyone who registered for an Academy and Exam. It was also last year that we digitized our Glossary and published it online as another positive study resource for prospective CLFPs. The Sample Exam, combined with our Academy Toolbox (containing practice problems and Exam information), the Glossary, Mentor Program are all exceptional resources that have proven time and time again to be successful materials that support our students. It is our ultimate hope that CLFP Candidates feel supported at any stage in their CLFP Journey.

## AN EXCITING UPDATE

In early 2023, a new version of the Academy was born: in partnership with Odessa, the CLFP Foundation is thrilled to have launched an online, self-paced Academy as another way to embark on the CLFP Journey. This exciting new version of our Academy allows the opportunity for a participant to learn at their own pace, and is similar to taking a college class, or other similar learning module. The course, once purchased, is accessible for up to 6 months. After the completion of the course, a student still has the option to participate in the CLFP Exam, or may simply participate in the course to gain industry knowledge, just as they may do with our 2- or 3- day ALFP. I was incredibly supportive of this new access point for our Academy, as it will support new learners, and allows students to participate at their leisure. I often compare this digital Academy to the Couch to 5K app, which is an immensely popular app that helps you go from not running at all to running a 5K in 9 weeks; the self-paced Academy is essentially the Couch to CLFP approach! As a Couch to 5K graduate myself, and a CLFP who started with only moderate industry knowledge prior to my own ALFP and CLFP Exam, I can confidently say that this new method to continue education will be a positive benefit to many.

## LOOKING AHEAD

With so many tools, resources, and members of the CLFP Family willing to support our CLFP Candidates coupled with so many setting the goal to earn the designation, it is no wonder our CLFP Family continues to grow. As we approach the 1,500 mark, it is incredible to think that 10 short years ago, we were under 200 members in total. To give perspective, in 2022 we added over 200 new CLFPs to our Family, with many more to come this year. As we enter into what I'm calling "Academy Season" (3 ALFPs a month for the next 4 months!), I am looking forward to meeting, supporting, teaching, and welcoming our many new CLFPs to come.

# NEW CLFPS AND ASSOCIATES



**Noah Barnard, CLFP**  
*First American  
Equipment Finance,  
a City National Bank  
Company*



**Richard Blair, CLFP**  
*First Citizens Bank  
Equipment Finance*



**Alexis Chacchia, CLFP**  
*Premier Financial  
Services, LLC*



**Joseph Dahm, CLFP**  
*Cadence Bank*



**Joseph Enevoldsen, CLFP**  
*JDR Solutions, Inc.*



**Nicole Floge, CLFP**  
*Taycor Financial*



**Mary Griser, CLFP**  
*Taycor Financial*



**Carrie Guire, CLFP**  
*Arvest Equipment  
Finance*



**Thomas Harter, CLFP**  
*First American  
Equipment Finance,  
a City National Bank  
Company*



**James Howard III, CLFP**  
*APPROVE*



**Janet Jonas, CLFP**  
*Alliance Funding Group*



**Angela LeMaire, CLFP**  
*Ascentium Capital LLC*



**Alicia Lester, CLFP  
Associate**  
*Ascentium Capital LLC*



**Kathy Massey, CLFP**  
*Ascentium Capital LLC*



**Kelley McArdle, CLFP**  
*First Citizens Bank  
Equipment Finance*

Proud supporter  
of the **CLFP**  
Foundation.



[bmoharris.com/equipmentfinance](https://bmoharris.com/equipmentfinance)

Building a better  
equipment finance  
industry.





PROUD SUPPORTER  
**CLFP FOUNDATION**  
[faef.com](https://faef.com)





**Jesbaan (Jay) Morales, CLFP**  
Taycor Financial



**Sarah Moreau, CLFP Associate**  
First American  
Equipment Finance,  
a City National Bank  
Company



**Mackenzie Mynter, CLFP**  
First American  
Equipment Finance,  
a City National Bank  
Company



**Vi Nguyen, CLFP**  
ECS Financial Services,  
Inc.



**Trupti Patel, CLFP**  
DLL



**Michael Schober, CLFP Associate**  
Ascentium Capital LLC



**Paul Smith, CLFP**  
Smith & Nephew Inc



**Sydney Stone, CLFP Associate**  
North Mill Equipment  
Finance



**Cristina Triassi, CLFP**  
First American  
Equipment Finance,  
a City National Bank  
Company



**Brent Ver Ploeg, CLFP**  
DLL



**Griffin Walpert, CLFP Associate**  
First American  
Equipment Finance,  
a City National Bank  
Company



**Brandon Wilson, CLFP**  
The Huntington  
National Bank

**At Financial Pacific Leasing, we DO take it personally. Our customer service, that is.**

Your financing partner for equipment leasing, nationwide



**Financial Pacific Leasing**

Pleased to be a platinum sponsor for the CLFP Foundation

800.447.7107 | [www.finpac.com](http://www.finpac.com)

Financial Pacific Leasing, Inc. including its divisions, is a subsidiary of Umpqua Bank. Products offered by Financial Pacific Leasing, Inc. are not FDIC insured.

**Work with  
Certified Lease & Finance Professionals  
who share your passion for the  
lease and finance industry.**

[GAIG.com/SpecialtyEquipment](http://GAIG.com/SpecialtyEquipment)  
866.676.5677  
[SpecialtyEquipment@GAIG.com](mailto:SpecialtyEquipment@GAIG.com)



**GREAT AMERICAN INSURANCE GROUP**  
Specialty Equipment

© 2023 Great American Insurance Company, 301 E. Fourth St., Cincinnati, OH 45202

# THANK YOU TO OUR SUPPORTING ASSOCIATIONS

---



Drive digital transformation with automation

**↑amarack™**  
Guiding financial innovation

[Tamarack.ai](http://Tamarack.ai) 888 952 8268  
[Discover@Tamarack.ai](mailto:Discover@Tamarack.ai)

The advertisement for Tamarack features a background image of pine needles and cones. The text is white and green, with the Tamarack logo in white. The background is a dark green gradient.

LET'S MAKE  
*Awesome*  
HAPPEN

**TOMORROWZONE®**

[TomorrowZone.io/CLFP](http://TomorrowZone.io/CLFP)

A photograph of a woman with long brown hair, wearing glasses and a black blazer over a white top, smiling. The background of the advertisement is white with a grey city skyline graphic.

**nôrthteq**  
**DOC'D, E-SIGNED,  
DELIVERED –  
THE DEAL'S YOURS.**

- loan origination system
- partner portal
- turnkey salesforce apps

SCHEDULE DEMO

powered

The advertisement for nôrthteq features a white background with blue and green text. It includes a list of services, a QR code, and the Salesforce logo. The background is a light blue gradient.



# INDUSTRY NEWS

## JOIN YOUR PEERS AT EMERGENCE2023

Now in its 5th year and brought to you by the Emerging Talent Advisory Council, Emergence2023 is a leadership program designed specifically for emerging talent in the equipment finance industry. If you have the ability and desire to lead, grow and make a positive impact on others, this event is for you! Make plans to join us on July 13-14 in Baltimore, MD. Learn more at [www.elfaonline.org/events](http://www.elfaonline.org/events).



## SAVE THE DATE: 2023 EQUITY FORUM

Get ready to celebrate and advance diversity, equity and inclusion in the equipment finance industry at the second annual Equity Forum, Sept. 13-14 in New Orleans. Industry professionals representing all DEI categories, as well as allies and those interested in creating inclusivity in their organizations, are encouraged to attend. Learn more at [www.elfaonline.org/events](http://www.elfaonline.org/events).

## FOUNDATION OFFERING \$5,000 SCHOLARSHIPS

Tell a student you know that the Equipment Leasing & Finance Foundation is accepting applications for its scholarship program. Up to five scholarships of \$5,000 each will be awarded to full-time undergrad and grad students focusing on business, economics, finance or a related discipline. Apply by May 19. Learn more at [www.LeaseFoundation.org](http://www.LeaseFoundation.org).

## JOIN THE COMMUNITY ON LINKEDIN

Looking to expand your network and advance DEI in equipment finance? Join one—or all three—of ELFA's "People Power" LinkedIn groups:

- ELFA Equity: [www.linkedin.com/groups/12317521/](http://www.linkedin.com/groups/12317521/)
- Generation Next: [www.linkedin.com/groups/8371318/](http://www.linkedin.com/groups/8371318/)
- Women4Inclusion: [www.linkedin.com/groups/12189073/](http://www.linkedin.com/groups/12189073/)

**BUILDING RELATIONSHIPS. SUPPORTING YOUR GROWTH.**

CONSTRUCTION AND INDUSTRIAL

In the equipment finance industry, every goal starts with a plan. As your business grows, Wintrust Specialty Finance is here to support your initiatives through innovative financing programs designed with your specific needs in mind. Our team of experts is here to develop solutions that complement your expertise and provide support where you need it most.

**SERVICES**

- Portfolio purchases or individual transactions
- Warehouse and guidance lines of credit
- Private label servicing or originator retained servicing
- Ultimate net loss programs and recourse

**WINTRUST**  
SPECIALTY FINANCE  
[wintrust.com/wsf](http://wintrust.com/wsf)

Wintrust Specialty Finance is a division of Beverly Bank & Trust Company, N.A., a Wintrust Community Bank. Banking products provided by Wintrust Financial Corp. banks.

**A.P. EQUIPMENT FINANCING**

Partners in Equipment Financing & Leasing for over 20 years!

Just entered into my 8 or 9th contract with AP! In short, great team, from Sales, to Finance, to customer service!

★★★★★ - Google Reviews

CALL US AT  
**1-800-604-4817**

[www.apfinancing.com](http://www.apfinancing.com)

We are proud supporters of the CLFP Foundation

**IVORY SUPERTRUMP**

Make Modeling & Pricing Sophisticated Leases and Loans Intuitive

Let's chat (925) 926-1100  
[www.iverycc.com](http://www.iverycc.com)

Proud Supporters of the CLFP Foundation

# THANK YOU AMBASSADORS!

The Ambassador Program was created this year to help facilitate communication with companies with multiple CLFPs. As an Ambassador, these individuals are responsible for not only being the main point of contact between their company and the Foundation, but also for leading the Recertification effort and assisting with CLFP Day.

If your company has five or more CLFPs and doesn't have an Ambassador, please reach out the Foundation: [info@clfpfoundation.org](mailto:info@clfpfoundation.org).

Karen King, CLFP - 1st Source  
Brent Hall, CLFP - AFG  
Laurie Stratman, CLFP - Amur  
Cori Miller, CLFP - AP Equipment Financing  
John Bradford, CLFP - Arvest  
Craig Colling, CLFP - Ascentium Capital  
Aaron Maise, CLFP - Beacon Funding  
Jason Seitz, CLFP - BMO Harris  
Lori Dean, CLFP - Cadence Bank  
Joe Carr, CLFP - Canon  
Olga Seijo, CLFP - CEFI (Commercial Equipment Finance Inc)  
Marley Clark, CLFP - Channel  
Ben Wendt, CLFP - CIT/First Citizens  
Heather Broadwell, CLFP - CoreTech  
Suzann Fakhoury, CLFP - Crossroads EF  
Krishna Agrawal, CLFP - DLL  
Tobey Wilson, CLFP - ECS  
Kristi Serrano, CLFP - Financial Pacific Leasing  
Todd Buzard, CLFP - First American Equipment Finance  
Marc Gingold, CLFP - FleetAdvantage  
Mike Renfro, CLFP - GAIG (Great American Insurance Group)  
Tawnya Stone, CLFP - GreatAmerica  
Andrea Schmid, CLFP - Huntington  
Martin Klotzman, CLFP - Ivory  
Robin Van Lant, CLFP - Key Bank  
Lesley Farmer, CLFP - KLC  
Violet Misajlovich, CLFP - LCA  
Van Wrenn, CLFP - LTI Technology Solutions  
Sean Cokeley, CLFP - Navitas  
Kristin Coster, CLFP - North Mill EF  
Greg Pabich, CLFP - Northland Capital  
Tracey Elfering, CLFP - Oakmont  
Delroy Stauffer, CLFP - Odessa  
Terry Wood, CLFP - Orion First Financial  
Stephanie Hall, CLFP - Quality Leasing Co  
Steve Caulder, CLFP - Solifi  
Michelle Fuchs, CLFP - Stearns Bank  
Melissa McCuaig, CLFP - Stryker  
Melissa Fisher, CLFP - Taycor Financial  
Marilyn Tacka, CLFP - Truist  
Rhonda Rester, CLFP - Univest  
Lana Kralik, CLFP - US Bank Equipment Finance  
Mark McKissick, CLFP - Wintrust



# THANK YOU!

---

## THANK YOU TO OUR 2023 CORPORATE PARTNERS

---

### PLATINUM PARTNER \$2500

Ascentium Capital  
AP Equipment Financing  
ECS Financial Services  
Financial Pacific Leasing  
First American Equipment Finance  
Great American Insurance Group  
LTi Technology Solutions  
North Mill Equipment Finance  
Northteq  
Odessa  
Orion First Financial  
Tamarack Technology, Inc.  
Wintrust Specialty Finance

### GOLD PARTNER \$1750

Oakmont Capital Holdings

### SILVER PARTNER \$1150

Amur Equipment Finance  
BMO Harris Equipment Finance

### BRONZE PARTNER \$500

AACFB  
Arvest Equipment Finance  
Ivory Consulting Corporation  
Pawnee Leasing Corporation  
TomorrowZone

---

## THANK YOU TO OUR 2022 PERSONAL PARTNERS

### BENEFACTOR \$250+

Robert L. Boyer, CLFP  
Donnie L. G. Bunn, CLFP  
Michael Cohen, CLFP  
Craig Colling, CLFP  
Christopher Enbom, CLFP  
Brian Eschmann, CLFP  
Paul Fogle, CLFP  
Lisa Genereux, CLFP  
Nathan Gibbons, CLFP  
Benjamin J. Hall, CLFP  
Stephanie Hall, CLFP  
Jaimie Haver, CLFP  
Adrian Hebig, CLFP  
Theresa Kabot, CLFP  
Jaime Kaneshina, CLFP  
Vincent W. Knowlton, CLFP

Joseph Leonard, CLFP  
Shari Lipski, CLFP  
Toby McDonough, CLFP  
Michael A. Mount, CLFP  
Daniel D. Nelson, CLFP  
Katherine Nordendahl, CLFP  
David Normandin, CLFP  
John Q. Pfister, CLFP  
Reid Raykovich, CLFP  
Candace J. Reinhart, CLFP  
Robert J. Rinaldi, CLFP  
David Schaefer, CLFP  
Amy Spragg, CLFP  
David J. Verkinderen, CLFP  
Donald Wampler, III, CLFP  
Bruce Winter, CLFP  
Kevin Prykull, CLFP

### SPONSOR \$100 – \$249

Blake Anderson, CLFP  
Patricia Boehl, CLFP  
John Bradford, CLFP  
Eric Bunnell, CLFP  
Todd Chase, CLFP  
Donna Christensen, CLFP  
Quentin Cote, CLFP  
Tracey Elfering, CLFP  
Sean Evans, CLFP  
Cindy Fleck, CLFP  
Nick Fong, CLFP  
John Freeman, CLFP  
Joe Franco, CLFP  
Steven Geller, CLFP  
Nicholas Gibbens, CLFP

Keith Hachey, CLFP  
Brent Hall, CLFP  
Steven Hanneman, CLFP  
Robert Harris, CLFP  
Michael Helder, CLFP  
Michelle Henkelman, CLFP  
Paul Knowlton, CLFP  
Raphael Lavin, CLFP  
Daryn Lecy, CLFP  
Michael Lefkowitz, CLFP  
Chris Lerma, CLFP  
Andrew Mallinger, CLFP  
David Maslyk, CLFP  
Mark McKissick, CLFP  
Connor Means, CLFP  
Katie O'Mara, CLFP  
Adam Ohme, CLFP  
Gregory Pabich, CLFP



Kayla Perlinger, CLFP  
 Shervin Rashti, CLFP  
 Rhonda Rester, CLFP  
 Deborah Reuben, CLFP  
 Lee Ritter, CLFP  
 Brenton Russell, CLFP  
 Pete Sawyer, CLFP  
 Andrea Schmid, CLFP  
 Tony Sedlacek, CLFP  
 Guy Selinka, CLFP  
 Alexander Shields, CLFP  
 Alan Sikora, CLFP  
 Brian Smith, CLFP  
 Robert Smith, CLFP  
 Anthony Stein, CLFP  
 Stephen Stuesser, CLFP  
 Natalie Tawil, CLFP  
 Jeffrey Teucke, CLFP  
 Spencer Thomas, CLFP  
 Ryan van de Boogaard, CLFP  
 Victor Villegas, CLFP  
 Melissa Vinson, CLFP  
 Annette Watkins Harris, CLFP  
 Scott Wheeler, CLFP  
 Lisa Whitehead, CLFP

Christine Williams, CLFP  
 Justin Wilmes, CLFP  
 Terrence Wood, CLFP

### **SUPPORTER \$50 – \$99**

Randy Anderson, CLFP  
 Abigail Betz, CLFP  
 Kevin Canepa, CLFP  
 Dean Ceglia, CLFP  
 Mark Conrad, CLFP  
 Paul Crnkovic, CLFP  
 Jacob Cutler, CLFP  
 Lynn Deitrick, CLFP  
 Tina Eickhoff, CLFP  
 Amy Hall, CLFP  
 Cheryl Hanson, CLFP  
 John Harders, CLFP  
 Katharine Harris, CLFP  
 Lara Hernandez, CLFP  
 James Jankowski, CLFP  
 Jessica Kort, CLFP  
 Stephanie Langford, CLFP  
 Thomas Lockhart, CLFP  
 Michael McElroy, CLFP

Andrew Mellon, CLFP  
 Randy Montrose, CLFP  
 Evan Moreau, CLFP  
 Chris Nagle, CLFP  
 Carrie Radloff, CLFP  
 Rebecca Ricci, CLFP  
 Colin Rosenmeyer, CLFP  
 Cody Sanguinetti, CLFP  
 Joseph Sclafani, CLFP  
 Kristi Serrano, CLFP  
 Amy Sumerfelt, CLFP  
 Lauren Timlin, CLFP  
 Joshua Utke, CLFP  
 Carl Villella, CLFP

### **CONTRIBUTOR \$25 – \$49**

Assal Asgarinejad, CLFP  
 John Bender, CLFP  
 Daniel Callahan, CLFP  
 Jose Cortez, CLFP  
 David Cramer, CLFP  
 Michele DeBoer, CLFP  
 Lorenzo DeStefanis, CLFP  
 Michele Doherty, CLFP

Kirstin Elmer, CLFP  
 Ryan Flores, CLFP  
 Gary Hanson, CLFP  
 Lisa Hartley, CLFP  
 Scott Jankowski, CLFP  
 Joel Johnson, CLFP  
 Tim Miller, CLFP  
 Amy Moffitt, CLFP  
 Bradley Nicholson, CLFP  
 Tatum Noreen, CLFP  
 Randall Petersen, CLFP  
 Janet Phillips, CLFP  
 Emiley Purvis, CLFP  
 Wade Rignell, CLFP  
 Steven Schroeder, CLFP  
 Hailey Seltzer, CLFP  
 Brad Thresher, CLFP  
 Roberta Warner, CLFP  
 Morka Wolde, CLFP

## **JOB SEARCHING CLFP? DON'T FORGET TO CHECK ORION FIRST!**

At its core, Orion is a manager of risk - so if you're looking to make a low-risk, high-reward career decision visit [orionfirst.com/careers](http://orionfirst.com/careers) for current job openings.

**SERVING THOSE WHO  
FUND SMALL BUSINESS**

**ORION  
FIRST**

**LTI**  
Technology Solutions

**PERFORMANCE  
DRIVEN BY  
OPTIMIZATION**

**THE TRUSTED CHOICE  
OF TOP  
MONITOR-RANKED  
FINANCIAL INSTITUTIONS**

[LTISolutions.com](http://LTISolutions.com) | +1 (402) 493-3445

**THE FUNDING SOURCE OF CHOICE FOR BROKERS SINCE 1982**



**PAWNEE**  
LEASING CORPORATION

*a Chesswood Group Limited company*



800 864 4266 | Fax 970 482 2666



[Info@PawneeLeasing.com](mailto:Info@PawneeLeasing.com)



[www.PawneeLeasing.com](http://www.PawneeLeasing.com)

## **Less work, more flow**

Automate your asset finance business processes end to end - you control how you work on the Odessa Platform.

[Learn more](#)

**odessa**