



CLFP

Circular

IN THIS ISSUE

- 02 | A Message From The CLFP President
- 03 | Spotlight: Angela LeMaire, CLFP
- 04 | Pursuing the CLFP Designation and Embracing Continued Professional Development: An Interview with Jacie Moul, CLFP
- 06 | New CLFPs And Associates
- 11 | Thank You to Our Supporting Associations!
- 12 | Industry News
- 13 | Thank You's



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A MESSAGE FROM THE CLFP PRESIDENT



Lia Wax, CLFP
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WOW! HOW CAN IT BE JUNE ALREADY? WHERE HAS THIS YEAR GONE?

Before you know it, it will be time for our annual CLFP day. Whether together in-person or virtually, the time to come together and enjoy each other's company, while building community and camaraderie, has always been one of my favorites. Although I must say that getting to spend some time with fellow CLFP's at the PNW mixer recently was quite lovely as well.

As an extension of the above, two of the things I love the most about the designation is the feeling of camaraderie that it creates, and the learning that comes with studying for the exam and the continuing education we go through for recertification each year. I had the opportunity to attend the NEFA conference in San Diego in March, and it immediately felt like a family when introducing myself to other CLFPs. Participating in the CLFP toast and seeing how our numbers have grown was definitely one of the highlights. Then to see the CLFP representation at the AACFB conference a short time later was also wonderful. Having the Foundation participate in a promotion to encourage Brokers to sit for the exam reinforced our commitment to this industry and the Broker community. Our numbers continue to grow exponentially, and the ever-expanding representation within the industry and at industry functions makes me very proud.

But obviously, our ability to continue to grow as a Foundation is dependent on an ever-renewing assemblage of brave souls that are willing to not only commit to participating in an ALFP, but also sit for the Exam. So this quarter, I would like to take the opportunity to talk about the Exam. For those of you that have already faced that dragon and won, I'm sure you still look back on that journey with a sense of pride and accomplishment. As well you should. If you know people that have attended an Academy but have not yet taken the test, perhaps you reach out and

offer support and encouragement. You've been there and you know what they're going through. But you also know that passing is possible, and the relief and satisfaction at the end of that journey is immense. Perhaps they just need a little nudge and a reminder that yes, they can do it!

For those of you reading this that have not yet attempted the exam, you may be nervous or reticent to take that final step. It's not an easy test – it's not meant to be. But it's also not designed to trick you. The Foundation has spent a great deal of time and energy over the last several years making the Exam as clear and fair as possible. We want you to pass and come out the other side a more well-rounded member of our industry that has the opportunity to join this family of certified finance professionals! If you are being sponsored by your company, what a great sign that they believed in you enough to invest in your furthering education both for the benefit of the company, but also the benefit of your own professional growth – pass or fail. That's something to be proud of as well. Just remember that there are resources available to help get you there – not the least of which are your fellow ALFP participants, other CLFPs within your company and the industry, mentors, etc. You can do it!

I wish everyone the best and a wonderful summer. Talk to you next quarter.

- Lia Wax



SPOTLIGHT: ANGELA LEMAIRE, CLFP

Tell me a bit about yourself:

My name is Angela LeMaire. I have been married to my husband for 22 years and we have one son together. I have worked in banking and customer service for many years and initially joined Ascentium Capital in 2014. I've enjoyed working on the Documentation and Funding team with Ascentium and look forward to my future with the company. I spend my weekends on my hobby of collecting, buying, and selling collectible toys, cards, and comics. I have a great love for traveling and exploring new places. The ocean and beach are my happy place!

What led you to pursue the CLFP Designation?

Craig Colling reached out and was looking for individuals that were interested in earning their CLFP Designation and I was very interested. In the beginning, I felt that it was a good way for me to learn more of the ins and outs of Leasing and Financing as I felt it would help me to assist our Sales Reps and customers. I also believe that the CLFP designation is a standard in the industry and it helps me to stand out in a crowd.

I'd love it to be known that I'm very proud to be the first new CLFP of 2023!

What was the most interesting part you learned while studying for the CLFP Exam? We assist Sales Reps daily and I feel that the knowledge that I received regarding pricing and how they operate helps me to more effectively facilitate them. I also enjoy having the Handbook that we received, as I am able to refer to it for specific rules and guidelines.

What advice would you give to a CLFP Candidate?

Read the Handbook prior to class and go over it well after the class is complete. Take some time to study, but not more than a few days as it helps to test while the information is still fresh in your mind. I sat down right after the class and took my test; I would not suggest that anyone do this!

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

I was promoted shortly after signing up for this class. I am now a Documentation and Funding Supervisor. I love being able to advocate for and interact with my employees. I also enjoy it when I can team up with our Sales Reps to assist our customers. It is so important for all our departments to work as a team, and I feel that the CLFP course helps all of us to obtain a general overview of what the other departments do, which in turn helps us to understand how important each of our roles is.

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

I absolutely love to travel! My best vacation was a trip to Seattle, WA with a cruise to Alaska. We spent the first few days exploring Washington and Oregon and then we hopped on the cruise. One of our excursions was a helicopter up to the top of a glacier with a dog sled ride through the snow. We got to see so much wildlife including bears, otters, bald eagles (basically the buzzards of Alaska) and whales. While cruising we got to see several Orca breach the surface. It was one of the most beautiful experiences I have ever had.

Who is your hero?

My dad has always been my hero. He was a lost hippie and was always the kindest and most inclusive person that I have known. He provided for us and gave us all that he had and then did the same for my sister and I's children. Our family meant everything to him, and I feel that I am the person that I am today because of him and my mom. He passed two years ago, but his memory lives on and we think of him all the time.

What is your favorite quote?

Not really a quote, but I always ask people that are in situations to reverse roles and try to view from the other person's shoes. It's important to know that if you wouldn't want something said or done to you, then you shouldn't do it to anyone else.

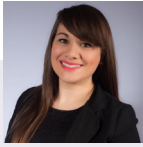
Also, "Life is What you make of it". You can choose to be happy and love and live with grace, kindness and love towards others.



Pursuing the CLFP Designation and Embracing Continued Professional Development:

AN INTERVIEW WITH JACIE MOUL, CLFP

by Mel Vinson, CLFP | June 2023



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.

Professional development is a constant theme across our industry and others, and many within the equipment leasing and finance industry embark on the path to continued development and career elevation by striving to earn their CLFP letters. Our CLFP Family has grown immensely over the last decade, earning a comma in 2021 at hitting 1,000 CLFPs, and continues to frequently add new CLFPs. I was able to connect with new CLFP, Jacie Moul and hear a bit about her CLFP Journey.

TELL ME A BIT ABOUT YOURSELF PERSONALLY AND PROFESSIONALLY.

JM: "My name is Jacie Moul, CLFP. I work for Amur Equipment Finance and I am an AVP of our Relationship Management team. I was raised in a small town near Grand Island, NE where our headquarters are. I truly enjoy working with our broker partners to provide the best service to each customer we get the privilege to serve. During my free time, I enjoy spending quality time with my family and friends (at the lake, riding 4-wheelers, any activity outdoors), working out at the gym or going on walks with our puppies, doing house projects, and relaxing nights at home watching movies."

WHAT MOTIVATED YOU TO PURSUE THE CLFP DESIGNATION?

JM: "My superiors [at Amur] felt that I was in the next stage of my career, so it was time to pursue it! I hoped to earn my CLFP letters not only for myself, but as a leader at Amur. I first heard about the designation when I started at Amur about 4 years ago. I have known that this has been on the horizon for me for quite a while, but after I passed my 3 years of tenure, I was ready to take the next step to demonstrate my commitment to our industry."

I knew it would be challenging, but I wanted to take on this challenge for myself and to also pave the way as a leader for my team. Amur was extremely encouraging of my pursuit of continued knowledge and supported me in every step of the way."



DESCRIBE YOUR CLFP JOURNEY – THE STUDY PROCESS, ALFP, EXAM, ETC.

JM: "When I became eligible to participate, I began to prepare by setting aside time to dedicate to studying and maintained a curiosity and constant pursuit of knowledge along the way."

My strongest advice is to read *The Certified Lease & Finance Professionals' Handbook* before the Exam, but especially before the ALFP (Academy for Lease & Finance Professionals). You will feel so prepared going into the course - and that preparation paired with the ALFP Workbook and the test nuggets (from Mel!) will go a long way leading up to the Exam.

Being able to have a baseline of knowledge to come into the ALFP specifically (and then the test was extremely important). I'm also a big advocate for highlighting key points in both the CLFP Handbook and the ALFP Workbook from the Academy, so I could focus more in-depth on the material. I knew I could come back to those highlighted points later and really study them further. If I observed other classmates asking questions, I made sure to pay attention and note what others were saying in case it came up later.

I also made flashcards to support memorization of terms - I've heard that if you repeat things 7 or more times, you will retain that information! The flashcards really helped me there. When I read something, I really wanted to ensure I understood. If I needed help, I knew that I could reach out to my teammates and I did. The pricing was a tricky area for me, so I would recommend practicing as much as you possibly can to gain confidence. Be sure to prepare a little bit at a time. It is the practice that will help you feel confident."

WHAT ARE YOUR TOP WORDS OF WISDOM FOR THOSE CLFP CANDIDATES PREPARING FOR THEIR OWN ACADEMY AND EXAM? ANYTHING YOU MIGHT HAVE DONE DIFFERENTLY ALONG THE WAY?

JM: "For me personally, I really took reading the Handbook seriously. It was a matter of budgeting time to do it around my work schedule, but the time commitment is so important to help prepare. You cannot just rely on the information in the ALFP to earn a passing grade on the test. It takes a combination of the preparation before, during, and after class to gain that confidence. Intentional time is key!"

Taking notes on my own and then adding more in the Academy were both important parts of my own CLFP Journey. There [is] so much information that we have to know, so repetition and writing as much down as possible were very helpful in my process to prepare for the CLFP Exam.

If I were to do it again, perhaps I would spend more time studying the CLFP Handbook before the class.”

NOW THAT YOU'VE EARNED YOUR CLFP LETTERS, WHAT IS THE BIGGEST TAKEAWAY YOU CAN SHARE WITH OTHERS? (BOTH AS CLFPS ALREADY, AND CANDIDATES PURSUING THE DESIGNATION)

JM: “It motivated me to show my brokers and customers my commitment and dedication to the industry. As a young professional, it was especially important to take this step to show that I was able to take this challenge on.”

WHAT ENCOURAGEMENT CAN YOU PROVIDE TO THOSE WHO HAVEN'T TESTED YET AND/OR THOSE WHO DON'T HAVE THE CLFP LETTERS?

JM: “My biggest encouragement is that this designation really sets you apart in your field. Showing that I am here for the long run by demonstrating that I will always be seeking opportunities to better myself and continue to grow are the perfect ways I can summarize the benefits of being a CLFP and earning my letters. Continual improvement is key to providing the best support to my brokers and my team.

It is challenging, it is a big step, but you can truly train your brain to believe that it can be done – and you can do it! Go into the test and/or class with confidence and the outlook that you can and will do it, and that will be a game-changer for you. Own what you are doing, and be confident in doing it.

Personally, I wanted to prove myself as a young, female professional that I am not only committed, but I have knowledge of what I do.”

WHAT ADVICE MIGHT YOU OFFER TO SOMEONE HESITANT TO PURSUE THE CLFP?

JM: “I would say that earning the CLFP designation really changed me for the better.

It is a whole other level of challenging yourself, and you should give it a shot! You don't realize how much you don't know until you try something like this. It really does test your knowledge and application of our day-to-day work. The perseverance and dedication you put in to get to the point of sitting for an Academy and then the Exam is huge! That alone shows that you have set yourself apart.

Because our industry is ever-changing, we need to ensure we have a strong knowledge base, and then we can keep continuing to grow, learn, and level up. Pursuing the CLFP is a way to establish knowledge, lock in key concepts, and build understanding. Once that knowledge base is set, you can build on it in tandem with your career.”

WHAT WAS THE MOST CHALLENGING AND MOST POSITIVE PART OF YOUR CLFP JOURNEY?

JM: “The process will test you, but it will also reward you. There is perseverance, and then there is reward. Just keep going! The biggest challenge is that the Body of Knowledge is big! You need to train your brain to understand many various subjects, and the best way to overcome this is to schedule the time to make it happen. I'm newer to the industry, but I'm also very competitive, and overall, I wanted to make a positive impact with this experience. By earning my CLFP it shows that I can do it, and I will continue to build my knowledge base throughout my career. The experience is something that I would encourage anyone in our industry to do.

It was so rewarding to receive the notification that I passed, and after 4 years in the industry seeing the validation that I really do have knowledge of our industry and can demonstrate that! Earning my CLFP letters says that what I'm doing every day is making an impact, not just for Amur but for my partners, and this was the next step to broaden my knowledge, to get my name out there, and be a part of something bigger. I'm excited to have the opportunity to tell people my story and journey, and I am eager to tell others about my experience earning my CLFP and encouraging others to take the leap, too.”

HOW HAS THE CLFP IMPACTED YOUR PERSONAL AND PROFESSIONAL DEVELOPMENT?

JM: “For me, my role only focuses on a small area of our leasing lifecycle – the CLFP was beneficial for me to learn a more well-rounded, broad view of the industry. And the ALFP plus the designation are only the tip of the iceberg, there is so much more I can continue to learn! The CLFP is a crucial way to apply a little bit of all the knowledge in all we do. It provides such a positive perspective into the various roles that exist out there. It's all a puzzle – having to find the pieces to make the puzzle full describes the CLFP Journey so well for me.

Making it a point to set aside the time in my personal and professional life to take the next steps, study, prepare, and earn the CLFP has not only aided in my own growth, but has benefited those around me – my team, my company, my brokers.

I hope now that those that interact with me (my team, brokers, or other industry professionals), see me having the next level of education and as someone who is very dedicated to what I do. I know that I am seen as someone who takes my career seriously and will only continue to grow from here.

I am so proud to be a CLFP and having this as a part of my story.”



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The Ambassador Program was created last 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.

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