



CLFP

Circular

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A MESSAGE FROM THE CLFP PRESIDENT



Lia Wax, CLFP
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WELCOME TO OCTOBER, EVERYONE.

I hope you had a wonderful holiday and a safe and enjoyable summer. As we enter the fourth quarter of the year and make our way into fall, I would like to focus this month's article on one item of celebration and something that will be here before you know it.

Firstly, I hope everyone enjoyed CLFP Day. What an inspirational occasion! Seeing where we've come from, along with all the progress we've made in the last several years, never fails to inspire me. On a personal level, it was beyond enjoyable for me to help Reid with this year's presentation. My mispronunciation of someone's name notwithstanding – for which I am truly sorry. But I must say that seeing Nate presented with the Cindy Spurdle Award of Excellence was one of the high points of the presentation for me. I had the opportunity to serve on the board with Nate for a time, and he is simply one of the best people in our industry. To see him recognized in such a fashion was a highlight for sure.

I also enjoyed seeing all the LinkedIn posts of the regional get-togethers celebrating all things CLFP. I saw a lot of pride as it relates to the foundation and its designation. Another thing I noticed was the increase in companies specifically posting about all the CLFPs that are part of their organization. I loved seeing so many companies celebrate their CLFPs on their special day. I can't wait to see what next year brings and how many CLFPs we'll have then. The sky's the limit.

The next thing to consider as we move into the final quarter of the year is that it's almost recertification time. Yay! I realize that's not everyone's favorite time of the year – I know it isn't mine. Yeah, just kidding. However, all joking aside, it is a very beneficial process we go through every year. It's an opportunity to not

only remain an active and contributing member of the foundation, but it's also an opportunity to stay up to date on what's impacting our industry the most. Previous years have covered everything from a refresher on true leases to the explosion of electronic signature usage necessitated by the pandemic. This year, you will notice that it has a lot to do with our increasingly more intense regulatory environment, the impact of identity theft and fraud on our industry, as well as taking us back to the basics with the benefits of leasing.

Doing this recertification each year lets you get a leg up on the most relevant topics impacting our industry. Being a CLFP means that you have a well-rounded knowledge base, and doing the yearly recertification ensures that you maintain that as you grow in your career. I encourage you to recertify early and get it out of the way before the craziness of year-end and the holiday season gains too much momentum. As I close out this quarter's article, I wish you a happy fall and an exciting close to the conference season. Stay safe and enjoy.

- Lia Wax



SPOTLIGHT: MORGAN STANFORD

My name is Morgan Stanford and I have worked for First Horizon Bank for my entire 25-year professional career. I originally started as a teller and after graduating from Christian Brothers University in 2005, I moved into commercial lending where I have stayed for the remaining part of my career. I joined the Business Credit/Asset Based Lending department in 2012 where I managed the operations team prior to becoming a Relationship Manager in 2016. I completed the Company's Emerging Leaders Program in 2014. Today I handle a \$650MM book of business in multiple industries including equipment leasing, lender finance, and indirect auto. On a personal note, my husband and I have been married 18 years and we have two sons; Cayson (15) and Grant (13). You can find us at the lake or on the football or lacrosse field in our spare time.

What lead you to pursue the CLFP Designation? I was challenged by a current CLFP member who also happens to be my customer. As a 25-year industry veteran currently lending money in this sector, I decided it would be a great investment in my personal and professional development.

What was the most interesting part you learned while studying for the CLFP Exam? Lease Pricing was the most interesting to me and also what I think will benefit me most in what I do today.

What advice would you give to a CLFP Candidate? For me, the most valuable part of the program was the in person ALFP session and having a co-worker walk thru the journey with me. I also made sure I was prepared. I read the entire book prior to attending the ALFP and I used the online practice tests.

What is your current role at your company? Favorite parts of this job? My current role is a Senior Vice President and Relationship Manager with First Horizon Bank. I focus on providing working capital solutions to customers across multiple industries, including equipment leasing. My favorite part is meeting customers and learning what makes their company so successful.

Do you have any pets? I have a pit bull/dachshund mix named Penny and due to my youngest son's love of animals we also have 12 chickens and two lizards.

If you could only eat one thing for the rest of your life, what would it be? Mexican food but more specifically tacos and cheese dip.

Who or what inspires you? My family. I work hard and try and be the best version of myself for them.





SPOTLIGHT: MATTHEW CULLITY

My name is Matthew Cullity, and I am a Senior Analyst Team Lead in Quality Control at First Citizens Bank Equipment Finance.

What lead you to pursue the CLFP Designation? My organization recently started offering the course back in the fall of last year and selected a group of individuals to participate. My manager was fortunate enough to be one of those selected, and I was able to passively see his progress and growth through the process. Once he finished and passed the exam, I knew I wanted to experience the same growth. I was on the list later that week for the next course.

What was the most interesting part you learned while studying for the CLFP Exam? The broad nature of what leasing entails really astonished me. My role currently only briefly touches on a portion of the whole picture. When I read the book and experienced the course, I finally got the full scope of how long leasing has been around and how it has evolved.

What advice would you give to a CLFP Candidate? Do not let the amount of information overwhelm you! It is a lot; far more than I expected from the outset. You are given every tool you will need, and you have all the support required. The CFLP Foundation wants you to succeed and will help assist you along your way. You can do it!

What is your current role at your company? Favorite parts of this job? I am currently the Senior Quality Control Analyst Team Lead. I am extremely fortunate to work with such a group of talented members on my team. My role provides the opportunity to provide value to my organization on many fronts, including financial risk, data accuracy, and third-party auditing. I am also lucky to be able to help train others and lift them up to find the potential that I know they all have.

If you could only eat one thing for the rest of your life, what would it be? It's hard to overlook a great cheeseburger. I am sure my waistline may disagree, but I could eat a cheeseburger every day.

What is your favorite quote? "Always take the risk and shoot for the moon. Even if you miss, you'll land among the stars."

Who or what inspires you? My three children are my inspiration for everything I do. My goal in life is to make their lives a bit better, easier, or more enjoyable every day. I want them to see that despite the hardships, roadblocks, and difficult moments that we all experience, we can all find success by having perseverance.

Your go-to karaoke song is...? Your Love by The Outfield. It's such a good song that I can hide my poor singing skills in it.



The Quest for Continued Growth while Navigating New Opportunities and their Paths

INTERVIEW WITH TODD BUZARD, CPA, CLFP

by Mel Vinson, CLFP | October 2023



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 Todd Buzard, CLFP, and hear a bit more about his CLFP Journey.

In the ever-evolving landscape of personal and professional development, inspiration for future goals and dreams can often come from unexpected places. For Todd Buzard, Senior Vice President in Finance at First American Equipment Finance (FAEF), holding credentials as both a CPA (Certified Public Accountant) and CLFP (Certified Lease & Finance Professional), the journey toward personal and professional growth began with higher education. In our interview, Todd shares his insights, experiences, and words of encouragement for those seeking to embark on a similar journey of self-improvement.

Discovering the CLFP Designation

Todd's initial exposure to the CLFP designation came through conversations with colleagues, including senior leadership at FAEF. While Todd initially pursued a financial career path that started with college education and led to earning his CPA license, the CLFP designation opened new horizons, particularly within the equipment finance industry. When he became aware of this unique designation, he was captivated by the opportunity to expand his knowledge and build a deeper understanding of the field."

"I was unaware of anything else besides the CPA in our industry. Immediately, I was interested! I began my career at a smaller equipment finance company, and as I grew in my career, I became aware that there are larger players in the game. It intrigued me to continue learning more and wanting to build my understanding of this industry," Todd explains.

The heart of Todd's journey lies in an innate desire to keep learning and to continue growing. He has a relentless thirst for knowledge and continued development in both his personal and professional

lives. This passion for continuous learning is what first led him to pursue the CLFP designation.

"I have an innate sense to be learning something new, to find out more about something I didn't know before – work-related or not," Todd shares.

Embarking on the CLFP Journey

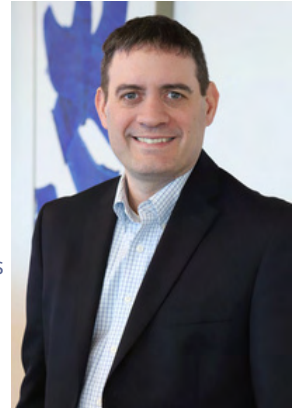
To prepare for his CLFP Exam, Todd began his CLFP journey by engaging in group study sessions with fellow candidates, fostering a sense of camaraderie and mutual support along the way. Even before earning his CLFP designation, Todd was instructing others in Accounting, demonstrating his early passion for helping others grow. Looking ahead to today, Todd continues to serve as a regular instructor in many of the CLFP Exam preparation courses, both at FAEF and with the CLFP Foundation.

Before taking the Exam, Todd was dedicated to learning as much as possible along the way. While navigating through the study materials himself, Todd emphasized the importance of active learning: "I was a big proponent of reading the chapter first, then making notecards, notes, and highlighting important parts, all the while generating questions for myself to lock in terms, concepts, and details."

Todd's journey of personal development and his constant pursuit of continued education serve as an inspiring example of embracing challenges. His advice to others is simple but powerful: "Take the time to break things down – you will be so surprised at what you can accomplish. Break down big, scary things into smaller, more manageable pieces! This is true in life, and for the CLFP Exam."

When asked about his vision for the future and whether there is more for him to learn, Todd highlighted his perpetual quest for knowledge, believing there is always something new to learn, especially in a diverse field like equipment finance. Todd also emphasized the value of encouraging leaders to set an example for others by actively participating in ongoing developmental and educational pursuits while emphasizing the importance of continued learning throughout one's career.

"There is always going to be new knowledge out there in any area one can focus on. For the CLFP designation, the Body of Knowledge (BOK) is vast; you can always explore and find something new. Even when studying subjects we have the most



exposure to, we can be challenged to think about these subjects in ways that we might not normally approach them,” Todd says.”

Todd’s Why Behind Pursuing the CLFP Designation

Todd shared that his pursuit of the CLFP designation was primarily rooted in a desire for relevance within the industry. It was also a means to deepen his understanding of equipment finance, broaden his knowledge beyond company-specific practices, and expand his skillset.

“We live in an ocean of knowledge, and the amount we all have is like a small island. What makes life interesting is that, no matter how old or experienced we are, there is still a vast ocean of things we don’t know. That’s what makes life interesting. Realize that we are that small island in a vast ocean! Get off that island and learn more about the ocean around you. It’s so interesting, and it allows us to continue growing,” Todd explained.

For Todd, the CLFP designation is a unique opportunity that offers individuals the chance to test their capabilities, reminding them that they can achieve more than they might initially believe.

The Power of Giving Back to Others and the Industry

As a CLFP, a Board Member, and a regular ALFP (Academy for Lease & Finance Professionals) instructor, Todd finds immense joy and fulfillment in giving back to the industry and supporting the development of others. He believes that experienced professionals should set an example and guide those who are new to the field. Todd’s journey illustrates how the act of giving back can be one of the most meaningful ways to demonstrate the value of continued education and a wonderful way to support our industry.

He explains, “If we value something, we should lead by example. I am hopeful that others see that and find it important as well. Ultimately, we shouldn’t be afraid because we are tenured. If we have achieved things along the way and leveled up, we should set an example for those who come after us. Continuing education is one of the best ways to show value.”

For Todd, the joy of his roles with the CLFP Foundation lies in the potential to make a meaningful impact on others’ lives. He approaches each day with a service-oriented mindset, striving to support and elevate those around him.

“My driving force is to serve others. I feel like I am one of those people who was put on earth to serve others. That is what makes me tick, what makes me feel fulfilled. To be able to help others is the most beautiful thing, to help someone achieve – these are indescribably beautiful things,” Todd shares.”

Encouragement for Industry Professionals

In closing, Todd offered words of encouragement to those considering ways to get involved and give back: “Challenge yourself. You will come out of an opportunity—even if it is unfamiliar or uncomfortable—with something good. The fear of being uncomfortable or doing something new is so small compared to the benefits of helping others.”

Todd’s journey serves as a testament to the transformative power of continued education and the profound impact of giving back to one’s community. His story is a true inspiration to embrace opportunities for growth, pursue new avenues, and always seek the next step on our path to personal and professional development.

TODD’S BIO

TODD BUZARD IS A SENIOR VICE PRESIDENT OF FINANCE FOR FIRST AMERICAN EQUIPMENT FINANCE (FAEF), AN RBC/CITY NATIONAL BANK COMPANY. TODD JOINED FAEF IN 2002 AND HAS OVER 18 YEARS OF EXPERIENCE IN THE LEASING AND FINANCE INDUSTRY.

Before joining FAEF, Todd worked in public accounting for Arthur Andersen, LLP. Todd also taught accounting, finance, and business courses at the college level for over 10 years in his spare time. Since becoming a CLFP in 2014, Todd has been active in the CLFP Foundation. Todd is an active instructor in FAEF’s internal CLFP program. Additionally, Todd has traveled to many Academy for Lease & Finance Professional sessions to help prepare aspiring CLFPs for the CLFP exam.

Todd earned a B.S. in Accounting from Utica College and an M.B.A. in Finance from St. Bonaventure University.

Todd, his wife Kimberly, and their two children reside in Henrietta, NY.



NEW CLFPS AND ASSOCIATES



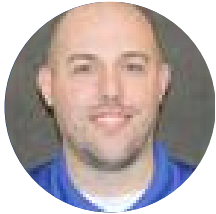
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Darrell Johnson, CLFP
Quality Equipment
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Adam Denny, CLFP
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Brooks Anderson, CLFP
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Dominic Bonacci, CLFP
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Alexa Lemieux, CLFP
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Amanda Kasbohm, CLFP
First Citizens Bank
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Courtney Kramer, CLFP
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Garrick Lin, CLFP
Transport Enterprise
Leasing LLC



Gregory Cox, CLFP
Cadence
Bank



Josephine Henn, CLFP
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Kyla Reis, CLFP
Stearns Bank NA-
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Justin Skoog, CLFP
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Kyle Yockel, CLFP Associate
Delta Financial Group



Heather Miller, CLFP
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Kai Fuller, CLFP
AP Equipment Financing



Lacey Borden, CLFP
AP Equipment Financing



Heidi Muellner, CLFP
Stearns Bank NA- Equipment Finance Division



Kathleen Baxter, CLFP
Nexseer Capital



Lene Palmer, CLFP Associate
AP Equipment Financing



Hiroki Yagishita, CLFP
Tokyo Century (USA) Inc.



Kathryn LeConey, CLFP
North Mill Equipment Finance



Lisa Purser, CLFP
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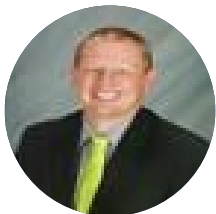
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INDUSTRY NEWS



Dear CLFPs,

CLFP Day is an opportunity to celebrate the CLFP community in the equipment finance industry. As fellow CLFPs, and as the current Chair, Vice Chair, and Immediate Past Chair of the Board of Trustees of the **Equipment Leasing & Finance Foundation**, we are reaching out to each of you with an invitation.

For nearly 35 years, the Equipment Leasing & Finance Foundation has been dedicated to inspiring thoughtful innovation and contributing to the betterment of the equipment finance industry. Our amazing volunteers, many of whom are CLFPs, are at the heart of our programs. As part of commemorating CLFP Day, we invite you to join your fellow CLFPs and volunteer with the Foundation. Here's how:

Academic Outreach – The Foundation's outreach program is over ten years strong!

- Visit your alma mater, or a college near you, to connect with students, raise awareness of the industry and attract new and diverse equipment finance professionals. A comprehensive **toolkit of resources** is online. Many CLFPs have presented

our program to students over the years so there is likely someone in your area to partner with for a group visit.

- List your company's **internship opportunities** on the Foundation's website which is shared with eager students during college visits. And, if your company wants to expand its recruitment program, check out our resources for **experiential learning and executive shadowing**.

- Support the Foundation Scholarship Program by making a **monetary donation** to help fund more collegiate scholarships.

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Many CLFPs augment their deep industry knowledge by exploring, downloading and sharing the FREE reports and resources from our website www.leasefoundation.org. Popular publications include:

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•**Foundation Podcast** – featuring subject matter experts on a variety of industry topics

•**Industry Horizon Report (Market Sizing Study)** – data analysis on the \$1 trillion industry. As a growing community of leaders in the industry, CLFPs have a unique opportunity to impact the future of equipment finance.

Your tax-deductible donation will help fund new research and support the scholarship program to propel the industry forward. Plus, a donation is a terrific way to leave your legacy for future generations of CLFPs.

To volunteer and learn more contact our Executive Director, Kelli Nienaber, knienaber@leasefoundation.org

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