



CLFP

Circular

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A MESSAGE FROM THE CLFP PRESIDENT

WE ARE LIVING OUR MISSION AND MAKING MEANINGFUL PROGRESS TOWARD OUR VISION.

As I sit down to compose this, time is flying as usual, and the year is roughly half over already. As they say, time flies when you are having fun.

Things continue to be very exciting for our CLFP Family. You may remember that in the last Circular, I mentioned that we expect to surpass 1,500 CLFPs this year. We did it! During the month of May, we surpassed the 1,500 CLFP mark. It's exciting to know that we have achieved another milestone in the history of the CLFP Foundation and our CLFP Family. It's a testament that we are living our mission and making meaningful progress toward our vision.

The CLFP Foundation's Mission is:

"Building a better commercial equipment leasing and finance industry by helping its individuals achieve exceptional standards of professional conduct and technical expertise."

The CLFP Foundation's Vision is:

"Establish the Certified Lease & Finance Professional (CLFP) designation as the preeminent credential throughout the world for professionals who have demonstrated mastery of the CLFP Body of Knowledge, exceptional competency and commitment to exemplary ethics through their business practices, continuing education and dedication to the industry."

As a Board, we often talk about and refer to something we call the "CLFP Journey". It is with a purpose that we refer to a "journey" and not a "destination." That is, obtaining the CLFP designation doesn't have to be a destination where one proclaims, "I've made it!" and then stops. Instead, as CLFPs, we can all continue to have a meaningful impact on the mission and the vision of the CLFP Foundation.

I am so thankful for the countless number of CLFPs who

volunteer and give of their time and talents to support CLFPs and aspiring CLFPs alike. We have people who teach and prepare others. We have people who inspire and mentor others. We have people who serve on our Board of Directors and serve on committees and task forces. All of these individuals are helping the CLFP Foundation to live its mission and make meaningful process toward achieving the vision. It's truly remarkable.

My ask of each CLFP would be to reflect on what you are continuing to do on your CLFP journey. In what ways are you helping to "Build a better commercial equipment leasing and finance industry" or helping to "Establish the Certified Lease & Finance Professional (CLFP) designation as the preeminent credential"? As CLFPs, we can continue to have a meaningful impact on the lives of others and on the industry we give our time and talents to each day.

I continue to wish all of you a wonderful 2024. I am grateful for the opportunity to share my thoughts with you in this forum, and I do so with great humility. Take care.

- Todd Buzard



Todd Buzard, CPA, CLFP
First American
Equipment Finance



SPOTLIGHT:
FATIMA CHIN, CLFP
DLL

My name is Fatima Chin, and I work for DLL, a global vendor finance company. My professional journey at DLL has been full of growth and development. Starting in the Customer Service department laid the foundation I needed to understand our client's needs and operational intricacies. Transitioning to Sales Support allowed me to directly engage with our vendor partners by booking and funding deals. From there, I moved into a CAMS/KYC role where I reviewed customer profiles, ensuring accuracy in risk assessment. This is where I found my passion for regulatory compliance and risk mitigation, which has led me to my current position as a Senior Financial Economic Crimes Quality Assurance Specialist.

What led you to pursue the CLFP Designation?
The CLFP designation is known by leasing and financing professionals for being a highly regarded certification. I wanted to achieve this designation to show my business acumen and to further advance my career in the leasing and finance industry.

What was the most interesting part you learned while studying for the CLFP Exam?
If I had to choose one section, I would say the history of leasing is pretty fascinating.

What advice would you give to a CLFP Candidate?
Preparing for the CLFP exam is a journey of dedication and hard work. The ALFP book was a key resource, complementing the foundational knowledge from the CLFP book. My advice to future CLFP candidates would be to take the practice tests made available to you. This will help you apply concepts and gauge knowledge. If possible, plan to take the exam the day after the ALFP course!!

What is your current role at your company? Favorite parts of this job?
I have been with DLL for 10 years in various roles throughout the business. I am currently a Financial Economic Crimes Quality Assurance Specialist. What truly excites me about my job is the opportunity to delve into the processes of different roles, understand them, and then enhance them. It's about making the system more robust, efficient, and risk-averse. Every day is a new challenge, a puzzle to solve, and a chance to make a significant impact.

What is the best vacation you've ever been on?
I have family all over the world and have been fortunate enough to travel quite a bit. My most recent trip to Denmark, where I reunited with some of my extended family, was incredible.

Do you have any pets? If so, what kind and what are their names?
My dog Benny is a Jack Russell mix. He is full of energy and love! (Picture of him and my daughter included)

If you could only eat one thing for the rest of your life, what would it be?
Shrimp ceviche, I could have this every day!

Your go-to karaoke song is...?
Any COLDPLAY song! Best band ever.

What is your favorite quote?
"You may encounter many defeats, but you must not be defeated. In fact, it may be necessary to encounter the defeats, so you can know who you are, what you can rise from, how you can still come out of it."
- Maya Angelou





SPOTLIGHT: ANTHONY SCHINDELL, CLFP *Trio Capital Solutions*

Anthony Schindell serves as the VP of Underwriting at Trio Capital Solutions. With over nine years in the equipment finance industry, Anthony brings a wealth of experience to his role. He joined Trio in 2022 upon the company's inception.

Before his tenure at Trio, Anthony spent almost two years as the Credit Manager at Apex Commercial Capital (formerly FirstLease). Before that, he dedicated over five years at Marlin Leasing Corp (now PEAC Solutions) as a Senior Underwriter and a Credit Leader in the Working Capital and Direct Leading Group. Anthony's professional background extends beyond leasing, encompassing a decade of prior experience in consumer and small business lending for Wells Fargo and American Heritage FCU. Born and raised in southern New Jersey, right outside of Philadelphia, Anthony still resides in southern New Jersey with his wife and two daughters. He pursued his education at Drexel University in Philadelphia, graduating with a BS in Finance.

What led you to pursue the CLFP Designation?

Having a deeper understanding of all areas of leasing will enable me to be a more effective leader and a more versatile resource for my company, especially since Trio is a newer company in equipment financing, and everyone wears many hats. In my current role, I support both the underwriting and funding departments, so the knowledge gained through this work has been valuable.

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

Delving into the intricacies of the finance and contract sections has been very enlightening for me. Understanding how financial assets and documentation affect lessors post-funding has been a valuable

educational experience, especially since I only had knowledge of transactional capital markets prior to the CLFP Exam.

What advice would you give to a CLFP Candidate?

When studying, consider framing the material within the lifecycle of a lessor. Keep in mind the impacts of marketing, sales, credit, funding, servicing, and collections, as this will enhance the relevance of the material post-exam. I would highly recommend the ALFP training if it's available to you.

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

As VP of Underwriting, I support both the underwriting and funding departments. One of the most exciting aspects of working at Trio, a newer lender, is witnessing the continuous evolution of the business. We are nimble and small enough to swiftly adapt and update procedures to ensure mutually beneficial outcomes.

What is the best vacation that you have been on?

I recently visited the Florida Keys for the second time. We visited Islamorada, Florida, which had beautiful beaches, wonderful shops, restaurants, and welcoming locals.

What is your definition of success?

It's about more than just chasing a paycheck, it's about building something meaningful. Finding purpose, both personally and professionally, is what truly matters.

A life hack every CLFP needs to know is...?

Effective time management on the CLFP Journey involved balancing exam preparation with current responsibilities while also applying these principles to life. I've often found the "rocks and sand" analogy is helpful in this regard. Just as you

prioritize adding rocks to a container before filling in the gaps with sand, and focus on completing big tasks first (the "rocks") before addressing smaller tasks and details (the "sand"). This approach optimizes your capacity to manage both important and lesser tasks efficiently.

Who or what inspires you?

I am inspired by those who show empathy, compassion, and always maintain a positive attitude. When you see or know someone who can listen, smile, and care for others it rubs off on those around them. This makes those around them better people and the world a better place.

Tell us three things on your bucket list.

1. Visit the Mediterranean area of Europe (Italy, Greece, etc.)
2. Have a chance to cook my own recipes in a professional kitchen
3. Be present for my family's major milestones (graduations, weddings, etc.)



Mother-Daughter Duo Shines in the CLFP Family

By: Mel Vinson, CLFP | Featuring Lexi Tauer, CLFP Associate & Shelly Tauer, CLFP

Earlier this spring, while leading the first Academy of 2024, I had the pleasure of connecting with several CLFP Candidates preparing for the CLFP Exam. In a conversation with one of the Candidates, I learned that her mother was a CLFP! After she passed the CLFP Exam, I knew I had to reach out and learn about each of their respective CLFP Journeys. Their stories are both full of dedication, mutual support, and a shared commitment to excellence in the commercial equipment leasing and finance industry. This mother-daughter duo exemplifies the essence of the CLFP Family, proving that professional achievement and personal bonds can go hand-in-hand.

It is with great joy that I had the privilege of learning a bit more about Shelly Tauer, CLFP, and her daughter Lexi Tauer, CLFP Associate, and how this mother-daughter CLFP duo came to be. I asked Shelly and Lexi to share more about their CLFP Journeys and their experiences of earning their CLFP letters. Shelly shared, "A young, eager, small-town girl couldn't wait to start her first 'big girl' job back in December of 1994 after graduating college. Little would she know that this would be the start of a journey that would allow her experiences beyond her wildest dreams!"

"Over the past 29+ years, I have been blessed to work with so many wonderful people in this industry who challenged and supported me in my desire to continue to learn and grow. I thrive for opportunities & experiences that allow me to expand my knowledge to become a better leader and advocate for our clients and partners."



"I was honored (and a little nervous) to be part of the first U.S. Bank Equipment Finance Cohort back in 2018," said Shelly. "I can still recall the numerous study sessions and the 2-day offsite Academy sharing early morning coffee study sessions and late-night quizzing as we were all helping each other to prepare for the upcoming exam. The sense of camaraderie and yearning we all had for each other to pass the exam was indescribable."

I continue to be excited each year when our new cohorts are announced knowing the experiences and feelings they too will share through their CLFP Journey!"

Lexi shared, "Coming into the industry, I wasn't sure what to expect. Graduating college amidst the pandemic and navigating the job market during uncertain times was challenging."

"After starting my career at Bremer Bank, I transitioned to underwriting at Channel in September 2022. Growing up, I admired my mom's dedication to her career, inspiring me to follow suit. As I entered the equipment finance space, my mom expressed the benefits of being a CLFP in the industry. Though I was apprehensive about taking the challenging test, I took a leap of faith and decided to get certified."



Shelly chimed in and shared, “I was thrilled when my daughter Lexi started her career as she and I share a lot of common interests and characteristics. She is newer to this industry, and I am so incredibly proud of her for taking the initiative, as I can attest to how hard she worked having personally witnessed the amount of time she spent studying and preparing for this Exam! I am thankful for her having this experience so early in her career not only because of the personal accomplishment but because of the deepening of relationships, camaraderie, and expanded industry knowledge!”

Lexi added, “I want to extend my gratitude to the class who took the Exam alongside me; their support and encouragement were instrumental in my journey. Being part of this program was an honor, as it not only unlocked new opportunities but also provided a strong network within the industry. As they say, mothers know best!”

The CLFP designation is widely recognized in our industry as a symbol of advanced industry knowledge and commitment; however, the value of the CLFP designation extends beyond individual achievement. It fosters a sense of community and has built a network of professionals who support and learn from each other continuously. This sense of community is especially evident within the CLFP Family with a strong emphasis on mentorship, collaboration, encouragement, and camaraderie.

Within this vibrant network, personal stories of growth and achievement, like those of Lexi and Shelly, offer inspiration and insight. As Lexi and Shelly shared their experiences with me, their journeys highlighted the profound impact of the CLFP designation and the supportive culture of the CLFP Family. “The CLFP designation has profoundly expanded my industry knowledge and inspired me to embrace new experiences and further my education in equipment finance,” shared Lexi. “Connecting with colleagues and fellow CLFP members has been incredibly rewarding. It’s reassuring to know that no matter where we started, this foundation equips individuals to thrive in their careers.”

Shelly had similar sentiments, saying, “I participated in the program to earn my CLFP designation and enhance my overall knowledge of the equipment finance industry. However, the overall experience was much more impactful. Sharing this journey with other CLFP members allowed for deepened relationships, respect, camaraderie, and confidence, which all have played a critical role in my development as an equipment finance industry leader.”



If you have a peer or connection who wants to pursue the CLFP designation but needs financial assistance, please encourage them to apply!

For more information, please reach out to us at: scholarships@clfpfoundation.org



Dear CLFP Family,

Mark your calendars! CLFP Day 2024 is set for October 10th.

This date is an intentional date set to celebrate and acknowledge CLFPs around the world each year. The Foundation will host a short virtual call where we can all toast to being a CLFP together. In-person events can be established at any time on or around that date. For more details, connect with Mel (mel@clfpfoundation.org) to get your events on the calendar.

We look forward to celebrating with you!

Cheers,
The CLFP Foundation

Celebrating a Historic Milestone: The Journey to Becoming CLFP #1,500

An Interview with Mel Vinson, CLFP from the CLFP Foundation, and Sharon Pietras, CLFP from Huntington National Bank

The CLFP Foundation reached a new milestone of 1,500 members in early May, and it is pleased to announce that Sharon Pietras of Huntington National Bank is the 1,500th CLFP.

Sharon attended an Academy for Lease & Finance Professionals (ALFP) with a cohort of teammates from Huntington National Bank in mid-May. When asked about her experience and preparation for the ALFP and CLFP Exam, she was happy to share her CLFP Journey with the CLFP Family.

MEL VINSON: Congratulations on earning your CLFP letters, and for being our 1,500th CLFP! Tell me a bit about your CLFP Journey and how you prepared.

SHARON PIETRAS: Preparation was key. Thankfully, Huntington does a fantastic job supporting its CLFP candidates! The Huntington CLFP leaders—Andrea Schmid, Paul Knowlton, and Mike Gregan—spearheaded weekly review sessions with guest Huntington CLFP alumni who each gave us their unique perspectives on the subject matter we were studying that week.

Andrea extended herself to many on the team, including me, with one-on-one sessions in pricing. Once the class arrived in Minnesota for the Academy, we spent two days reviewing the material with you, Paul Knowlton, and Ann Erickson who were our ALFP instructors and leaders. Leading up to the ALFP, I used various methods to prepare, like flashcards, notes, and Quizlet. Ultimately, the basics mattered most: reading the entire Handbook, taking the practice tests and attending the Academy, and lastly, taking advantage of the extra problems available for pricing, balance, and income statements.

MV: You certainly made use of all the resources available to support your preparation. What was your favorite or most memorable part of preparing for the CLFP Exam?

SP: The camaraderie and shared experiences with the CLFP Huntington Class of 2024 were incredible. Before the Academy, our Huntington cohort spent weeks together online during our virtual weekly review sessions. The in-person Academy felt like a mini-reunion! Mel, you were made to teach this program, and you made each session enjoyable with your enthusiasm. It was the best part of the whole experience, and we really felt like we were in it together.

MV: Thank you so much for sharing that wonderful feedback, Sharon! It was such a joy to lead this class with you and the Huntington team. Now that you’ve studied, taken the ALFP, and earned your CLFP letters, what is your best encouragement for a CLFP candidate who may be beginning their own CLFP Journey?



SP: The best encouragement I can give a new candidate is the same encouragement I received: “Trust the process and trust yourself!” It is a bit daunting when you start, but that’s okay. There will certainly be some concepts or chapters that may be harder for you, or perhaps all of it feels like completely new territory. Either way, trust the process and yourself because you deserve to be here, and you will succeed. Each nugget of knowledge or learned skill is a step in the right direction, so enjoy the journey and reward yourself for taking the first steps!

MV: This is such a positive encouragement to a CLFP Candidate or anyone beginning something new! Reaching the end goal of earning your CLFP letters must have felt amazing after months of preparation. What did you experience, feel, or think upon learning that you passed the CLFP Exam?

SP: I smiled and nodded. I was in an Uber to the airport when the email came through. When I arrived at the airport, I was all worked up, but I finally saw the first few words: “You passed.” I just smiled and remembered all the encouragement from Andrea, Mike, Paul, Ann, and you, Mel, who all repeated, “You WILL pass! Trust us, you WILL PASS!” You all were right. Each one of us worked for it and passed! I am so proud to be a part of the Huntington crew and now a part of the CLFP Family.

MV: I congratulate you again on this exciting achievement – you are a CLFP and CLFP #1,500! What’s next for you as one of the newest CLFPs in the CLFP Family?

SP: Giving back and then giving some more. One consistent theme that I saw in action was the spirit of giving. From my fellow classmates, Huntington leadership, and CLFP leaders, it was evident that CLFP is all about giving of ourselves to help our colleagues, our industry, and the next generation of candidates. I will be happy to support future CLFPs and, of course, keep learning and gaining experience in the industry. We’re all better tomorrow when each one of us is better today.

A Credential of Opportunity: The Foundations of Commercial Equipment Finance

By: Reid Raykovich, CLFP, CAE | CLFP

We're excited to announce the launch of the "Foundations of Commercial Equipment Finance" micro-credential by the CLFP Foundation. This initiative, which started at both Cheyney and Lincoln University, aims to bring more diversity to the industry.

We didn't just come up with this idea out of nowhere. We talked to industry hiring managers and asked them what they look for in an entry-level candidate. Based on their feedback, we created a six-hour journey through the practical aspects of commercial equipment finance. Along the way, there are quizzes to help reinforce real-world applications. This way, when students finish the program, they're ready to hit the ground running.

The program takes students through a scenario that mirrors the lease lifecycle. They learn about everything from origination to default, giving them a window into the industry's operational nuances. Once they complete the program, they'll receive a digital certificate showing they're ready to enter the field. Plus, we're working with Cisco's Talent Bridge to help students find internships or full-time positions in the industry. We also introduce them to the Equipment Leasing & Finance Foundation's scholarship program.

We extend our heartfelt gratitude to the Cisco Social Justice Initiative and DLL for their invaluable support of the program.



Reid Raykovich, CLFP, CAE, and Bev Brinkley introduced the program during campus visits, and we were honored to host a panel discussion featuring esteemed Black/African American industry leaders like Nate Gibbons, CLFP, Jené Hill, David Miles, Cassandra Gordon, Richard Griffin III, CLFP, and Falencia Prime, who all shared their wisdom and inspiration with our participants.

The kick-off ended on a high note when two Cheyney students, Maison Burton, and Jude Butumbi, joined the April CLFP Board of Directors call to share their feedback on the program. As you can see in the picture, everyone had a smile on their face!



WHY I BECAME A CLFP

"I chose to pursue the CLFP designation as I wanted to learn more about the leasing industry. It was interesting to learn about history, finance, pricing, and management side of the industry, which is beneficial for our day-to-day work."



**NIMISHA VARGHESE, CLFP ASSOCIATE
ECS FINANCIAL SERVICES, INC.**

"I chose to pursue the CLFP designation further to develop my knowledge of the leasing and financing profession and to make connections with colleagues outside of my department. Preparing for the exam exposed me to areas I'm not as familiar with and gave me a more holistic view of the business."



**MADISON WALLEY, CLFP
DLL**

"I pursued the CLFP certification after my extensive 14-year career in leasing to add to my professional credibility, demonstrate my expertise and commitment to the industry, expand my knowledge and skills, and potentially open up new career advancement opportunities at Navitas Credit Corp."



**RYAN BASS, CLFP
NAVITAS CREDIT CORP.**

"I chose to pursue the CLFP designation to build a strong foundation for my career in the Equipment finance industry. I entered this industry in May 2023 and felt the CLFP would provide the tools I needed to succeed. I am thrilled to be a part of the CLFP Family!"



**CHELSEA KNUTSON, CLFP ASSOCIATE
CHANNEL**

"The CLFP designation is the preeminent industry-specific acknowledgment of the necessary skills, character, and knowledge that one can attain."



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Sandra Anderson, CLFP
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Ryan Bass, CLFP
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**Benjamin
(Leighton) Bost, CLFP**
Navitas Credit Corp.



Parker Bullard, CLFP
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Colleen Bullock, CLFP
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Lisa Burks, CLFP
Equify Financial LLC



Adam Carl, CLFP
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Jenna Cassidy, CLFP
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Fatima Chin, CLFP
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Paula Cole, CLFP
The Huntington
National Bank



Jean Conran, CLFP
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Lynne Cooney, CLFP
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Jacob Crouch, CLFP
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James Currier, CLFP
Finloc 2000 Inc.



**Catherine
Cuthbertson, CLFP**
North Mill Equipment
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Alex Ducharme, CLFP
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Monica Hawk, CLFP
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Emilie Herter, CLFP
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ECS Financial Services,
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Mitchell Jurius, CLFP
Full Skope LLC



Matthew Kilarski, CLFP
First Citizens Bank
Equipment Finance



Chelsea Knutson, CLFP Associate
Channel



Jeremy Koenen, CLFP
Tamarack Technology,
Inc.



Joshua LeClere, CLFP
U.S. Bank Equipment
Finance



Dante Lockhart, CLFP
North Mill Equipment
Finance



Anthony Maddesi, CLFP
DLL



Todd Madson, CLFP
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Michelle McKie, CLFP
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Philip McNamara, CLFP
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Nathan Meyer, CLFP
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Laura Morin, CLFP
U.S. Bank Equipment Finance



Brett Morris, CLFP
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Jill Murphy, CLFP
The Huntington National Bank



Timothy Murphy, CLFP
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Sarah Nyseth, CLFP
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Daniel O'Connell, CLFP
DLL



Julie Paige, CLFP
Navitas Credit Corp.



Neelima Piedy, CLFP
DLL



Kandice Piel, CLFP
DLL



Sharon Pietras, CLFP
The Huntington National Bank



Dylan Porter CLFP
Chanel



Daniel Presciutti, CLFP
First American Equipment Finance, a City National Bank Company



Krystle Riggi, CLFP
North Mill Equipment Finance



Katie Riggs, CLFP Associate
Dext Capital

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Stephen Rodriguez, CLFP
ROK Financial



Jasmine Rognrud, CLFP Associate
Channel



William (Drew) Schilling, CLFP
DLL



Anthony Schindell, CLFP
Trio Capital Solutions



Jahnise Schneider, CLFP
The Huntington National Bank



Eric Scott, CLFP
Navitas Credit Corp.



Jessica See, CLFP
DLL



Danielle Shields, CLFP Associate
Dext Capital



Nicholas Shotwell, CLFP
First American Equipment Finance, a City National Bank Company



Adam Shuman, CLFP
First Citizens Bank Equipment Finance



Annette Simmons, CLFP
Equify Financial LLC



Katherine Sumner, CLFP
The Huntington National Bank



Alexis Tauer, CLFP Associate
Channel



Paul Tew, CLFP
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Jacob Thomas, CLFP
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Kim Tieu, CLFP
Dext Capital



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INDUSTRY NEWS

ELFA Launches New Online Training Courses

The Equipment Leasing and Finance Association recently launched the Onboarding Series, a collection of online training courses specifically targeted toward the knowledge and skills new industry professionals need. Five new courses—free for ELFA members—are available at <https://www.elfaonline.org/online-courses>, including:

- Introduction to the Equipment Finance Industry
- Types of Equipment Finance Companies
- Benefits of Equipment Finance
- Lease versus Loan
- Market Segments

Cultivate DE&I at the 2024 Equity Forum

Equipment finance professionals representing all industry sectors and experience levels are encouraged to attend the ELFA Equity Forum on **July 9-10 in Philadelphia**. The forum is dedicated to celebrating and advancing diversity, equity and intergenerational collaboration in the equipment finance industry. “The Equity Forum is more than a conference—it’s a journey of inclusion and

empowerment,” says DelRoy Stauffer, CLFP, Chair of the ELFA Equity Committee. “Join us for eye-opening insights and practical tips on how to bring more equity and inclusion to your workplace and your community.” Learn more at www.elfaonline.org/calendar.

Elevate Your Career at Emergence2024

Registration is now open for Emergence2024 on **July 11-12 in Philadelphia**. Don’t miss this leadership development event focused on the theme Dream Big, Start Small, Level Up. “Emergence2024 is the premier event for emerging leaders in the equipment finance industry,” says Matt Vazzana, CLFP, Chair of the Emerging Talent Advisory Council. “This event will deliver key insights, practical strategies and unique networking opportunities to accelerate professional growth. We are excited to help the next generation of talent elevate their careers and can’t wait to see everyone there!” Learn more at www.elfaonline.org/calendar.

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