



CLFP

Circular

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A MESSAGE FROM THE CLFP PRESIDENT

WHAT STANDS OUT ISN'T JUST WHAT WE'VE ACCOMPLISHED—IT'S HOW WE'VE DONE IT.

A new year is another starting line—another chance to keep growing, keep elevating each other, and keep making an impact.

When I earned my CLFP designation in May 2016—after 20 years in the industry—it was a deeply personal milestone. Without a formal degree in equipment finance, I saw this certification as my stamp of validation—proof of my knowledge and commitment to the field. What I didn't expect was how transformative the experience would be.

The CLFP Academy ahead of my exam introduced me to some of the most incredible people I have ever met. Those friendships, along with the renewed passion I found in this community, reinvigorated my career and deepened my love for this industry. Today, I can confidently say: it's the people who make CLFP special. The continued growth and commitment to excellence from every single designee has turned this designation into not just a personal achievement, but a collective movement.

And that movement isn't slowing down anytime soon.

Last year, CLFP took some huge strides forward. One of the biggest? The introduction of a college course on equipment finance at the University of North Texas—a game-changer in bringing industry awareness to students considering their future careers.

But what stands out isn't just what we've accomplished—it's how we've done it.

One of the most inspiring things I've witnessed from the CLFP community is the collaboration across our industry. Even among competing companies, there's an unwavering commitment to the CLFP mission. Business models may differ, leadership styles may vary, but when it comes to this designation, we are all working toward the same goal. That kind of unity is rare. It's special. And I don't take it for granted.

So, as I step into the role of CLFP Board President for 2025, I've asked myself: What's my role in all of this? How can I best serve this community? And the answer, for me, is simple: stay out of the way. I know that might sound strange but hear me out.

I've always been someone who thrives in the details—digging into processes, problem-solving, and finding ways to clear a path forward. But in this role, my focus isn't about working in the minutiae; it's about stepping back to let the CLFP Foundation speak for itself and stepping up when needed to amplify the voices within it.

This community is already filled with incredible perspectives, ideas, and talent—I feel, my calling is to help ensure those voices are heard, that great ideas gain traction, and that every CLFP knows their input matters. My biggest focus is deepening engagement. Whether you're brand new or have been re-certifying for over a decade, I hope for you to have the experience that I have had and that you truly feel like this community is a resource for you.

Last year, I read *Call an Audible* by Daron K. Roberts, and one message stuck with me that I believe to be true: passion is what gets us to the starting line. I always picture this motivational stock photo of two sets of feet at the beginning of a race with the words "Passion Led Us Here."

That sentiment rings true in so many ways. Passion is what brings us to the big moments. It's what drives us to take the CLFP exam. It's what pushes us into new challenges. It's what fuels us when we step into leadership roles. Passion brought me to CoreTech in 2019, and passion brought me to this role as CLFP President today.

As we move into 2025—thank you in advance.

To the CLFP board members, committees, and volunteers: I know the hard work that lies ahead, and I know you're bringing passion to every effort. I'm deeply grateful for your commitment.

Thinking About Taking the CLFP Exam? SET A DATE.

If you're considering earning your CLFP, my best advice is simple: pick a date and commit to it.

Don't overthink it. The resources are there, the support is there—and the people who succeed are the ones who give themselves a deadline and build toward it.

Make this year your year!

Current CLFPs—Your Voice Matters.

Whether you're volunteering, mentoring, serving on a committee, or simply carrying the designation with pride, your impact is real. Not everyone has the time or desire to be deeply involved in board work, and that's okay. I hope we can continue finding new ways in 2025 to connect, engage, and add value for all members.

To the entire CLFP community—if you're reading this circular, it means you care deeply about this industry, and that sets you apart. I hope you'll speak up, engage, and get involved in whatever way makes sense for you. If, by the end of 2025, I've heard from all 1,600+ of you in some form or fashion, that will be a success.

Rah! RAH! Go TEAM!

- Candace Reinhart

Candace Reinhart, CLFP
2025 CLFP Board President
COO/CXO, CoreTech Leasing





SPOTLIGHT: MATTHEW KLEBERGER, CLFP

Trans Lease, Inc.

Matthew Kleberger, CLFP is a Credit Analyst II at Trans Lease, Inc., a leading company in the transportation leasing and financing space. Although he has only been in the equipment industry for almost two and a half years, he is always looking for opportunities to grow. Most recently, he became a Certified Leasing & Finance Professional with the drive to learn, obtain new knowledge and increase his responsibilities. At his company, Matthew has found himself a career he enjoys and mentors he looks up to.

Before his tenure at Trans Lease, Inc., Matthew spent just over 4 years in the residential mortgage space, developing knowledge bases in processing, underwriting, compliance, and sales. Matthew resides in the Denver Metropolitan area where he was born and raised. He pursued his education at Metro State University of Denver, graduating with a BS in Business Management. When not at work, (and in no particular order), he enjoys spending time with his twin brother, riding his motorcycle, trying new craft breweries, playing golf, and meeting new people.

What led you to pursue the CLFP Designation?

Pursuing the CLFP Designation provides a person with a deeper understanding of the moving parts within the equipment leasing & finance industry and its history. I wanted to elevate my competency and understanding of how important each department and process is and how they fit together to be successful.

The level of knowledge I gained going through the process of obtaining this reputable designation has been invaluable and will allow me to be a better colleague. Being a part of Trans Lease, Inc.'s pioneering group of 4 to achieve the CLFP Designation is an incredible honor!

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

The most interesting aspect I learned while studying for the CLFP exam is how holistic the industry is. Each part is important in and of itself, let alone as a whole. It gave me a new appreciation for everything that goes into even just a single transaction before, during, and after.

What advice would you give to a CLFP Candidate?

The first piece of advice I would give is to go through the CLFP Handbook thoroughly. Chances are in your everyday business you have developed an understanding of the high-level processes. The Handbook outlines the history of the industry, detailed

ins and outs of how it works, and processes you may not have even been aware of because you haven't participated in them on a consistent basis.

Next, I would say that if your company has multiple candidates studying and preparing for the exam, get together and learn from each other. Challenge one another—it's a great way to apply what you've read and learned. Then, discuss things you may or may not understand, and rely on others that may have experiences to share with you.

The last, but certainly not least, piece of advice I will give is to utilize the available study aids. Go through the ALFP, be present and interact. Use the Handbook's study guide, Body of Knowledge, sample tests provided and your experiences in your leasing and finance career already. In aggregate, these will set you up for success in earning the CLFP designation.

(Continued on next page.)



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

I currently serve as a Credit Analyst II at Trans Lease, Inc. being part of our Credit Department reviewing credit, collateral, capacity, capital and setting conditions for financing and lease terms for our customers. My favorite parts of my job include the amount of interconnectedness our office has with each other. In my department, I get to work closely with different departments, banking partners, and customers. I also have the opportunity to travel, receive career development support, and benefit from the mentorship and expertise that each and every one of us has access to.

Who supported or encouraged you the most during your CLFP journey?

During this journey, the people that encouraged me the most were the 3 other candidates I studied every week and even some weekends with. John Kounalis, CLFP, Jason Mitchell, CLFP, and Avery Cantrell, CLFP Associate, soon to be full CLFP in May.

Tell us three things on your bucket list.

- Getting my Private Pilot's License
- Playing Golf in Scotland at the Old Course (IYKYK)
- Visit all the MLB baseball stadiums in the United States

What is your go-to snack?

My go-to snack is popcorn. It is so versatile. Watching a movie? Popcorn. Late night snack? Popcorn. Enjoying a craft beer at a great brewery? Popcorn. Studying for the CLFP exam? Popcorn.

Your go-to karaoke song is...?

My go to song that I know every word to is All Star by Smash Mouth.

Who or what inspires you?

My parents are my biggest supporters and inspire me to be successful in whatever I put my mind to. I also have a group of friends that challenges me and pushes me to continue to grow in my career, faith, and personal goals. The support system I have surrounded myself with inspires me to be better today than I was yesterday. For that I am grateful.



Getting to Know the First CLFP in 2025 | An Interview with Cathy Clair, CLFP

By: Mel Vinson, CLFP

Earning the CLFP designation is a journey of dedication, resilience, and growth. As the first CLFP of 2025, Cathy Clair shares her experience—from the challenges of studying to the triumph of passing the exam. In this interview, she offers insights, advice, and encouragement for those on their own path to becoming a CLFP.

Mel Vinson, CLFP: Let's start with a little bit about you—tell me some things about you both personally and professionally!

Cathy Clair, CLFP: I was born and continue to live in Burlington County, New Jersey, about 20 minutes outside of Philadelphia. My home is full of love with my 25-year-old and 23-year-old sons, Shawn and Trevor, and my husband Michael of 27 years. My second home has been and always will be Clearwater, Florida. My dad moved there when I was little, and I now visit about three times a year.

I earned my degree in Business Administration from Goldey Beacom College in Wilmington, Delaware. From an early age, I knew what I wanted to do, and between semesters, I worked various corporate jobs via a temp agency to prepare for a post-graduate career. As luck would have it, I discovered an ad for a Leasing Administrator for Canon Financial Services in the local paper. I started on my 22nd birthday and have been in the business since. I've taken on many tasks and learned new skills with the three companies I've had the pleasure to work for. Currently, I hold a position at Financial Pacific Leasing as a Vendor Experience Representative.

I'm also a Zumba Instructor and have been teaching for 13 years, leading two classes a week. I'm an avid walker and try to get outside five days a week.

Quick facts about me:

- I'm the youngest of six kids—four sisters and one brother.
- I love the band Rascal Flatts! I've seen them 24 times and will soon reach show #26.
- I have a small part-time job at a liquor store.
- Friends call me "CC."
- I wear a holiday t-shirt every Friday from the day after Thanksgiving until New Year's Day.
- I love the beach.
- I attend as many high school musicals as possible during the spring musical season.
- We have a kitty named Sissy.



- I watch golf every chance I get and have attended many tournaments, including the upcoming Truist Golf Championship in May.
- I keep my winter decorations up until March when I'm ready for spring.
- I watch almost every show on HGTV and love "Diners, Drive-Ins, and Dives." We've even visited a few featured restaurants.
- I'm known to indulge in Hallmark movies.

MV: What motivated you to pursue the CLFP designation?

CC: I first expressed interest in pursuing my CLFP designation about ten years ago. Even though I had been in the business for a while, I knew my knowledge was only the tip of the iceberg. About 95% of my experience has been on the originations side, with a limited background in accounting, pricing, and sales support. I knew there was a lot more to learn!

MV: Tell me about your CLFP journey—how did the study process, ALFP, and Exam go?

CC: Once I decided to pursue the CLFP designation, I joined an online class with several colleagues at Financial Pacific. I started my journey in 2023. When the book arrived in January, I was super excited and planned to read it all before class started two months later. That didn't happen—I'm not much of a reader, and it was overwhelming.

After the class, I didn't feel ready. It took me six months to take my first test, and when I received my results, I was devastated. I prepared for two months and took the test again, only to face the same devastation. But I was determined. 378 days later, on my third attempt, I got it! I was skeptical at first because I didn't find out until the next day—I thought I'd have to retake it. But no—I PASSED!

MV: What were some of the highs and lows of your CLFP Journey?

CC: Throughout this process, I've felt a mix of emotions—doubt, excitement, eagerness, and anxiousness. My husband can certainly attest to that! The second time I didn't pass

the test, I had studied intensely but only for a few weeks after that. I lost my momentum and was already a year out from taking the class, so I had doubts. I added passing the CLFP exam to my 2024 goals but still studied sporadically. Toward the end of the year, I finally buckled down. I'm so thankful I did!

MV: What was the most challenging and most positive part of your CLFP Journey?

CC: The most challenging part was studying. I'm a long way removed from my college studying days, and I had to adapt to processing such detailed information. The most positive part was all the support I received throughout my journey—both before and after passing. The congratulatory messages have meant so much to me.

MV: What are your top words of wisdom for CLFP candidates preparing for their Academy and exam?

CC: Be open to learning. Don't rely solely on your existing skill set. Even though I've spent my career in originations, I still needed to study those subjects just as much as the others. Don't take your current knowledge for granted—something on the test will challenge you!

MV: If you could have done anything differently along the way, what would it be?

CC: I would have read the book as soon as it was delivered and taken the test immediately after completing the ALFP class. That way, the discussions and topics would have been fresh in my mind.

MV: Now that you're officially a CLFP, what's your biggest takeaway for others—both current CLFPs and those working toward it?

CC:

- Read the book.
- Take the class.
- Schedule and take the test quickly! You don't want all that knowledge to fade or be lost while you wait.
- In class, you listen, engage, and bounce ideas off each other. That interaction prepares you well for the exam.

MV: For those still working toward the designation, any words of encouragement?

CC: As I say in my Zumba class—just keep moving! Stay focused on the outcome. **YOU WILL BE A CLFP!** This designation is the gold standard of the Equipment Finance & Leasing industry.**MV:** What advice would you offer to someone hesitant to pursue the CLFP?

CC: Be confident in yourself! I waited years before taking the class. Set your goal and GO FOR IT! You'll be so proud once you achieve it.

MV: How has the CLFP impacted your personal and professional development, and what does holding the CLFP letters mean to you?

CC: Personally, my family is incredibly proud of me. They've seen me excel in an industry I love. Professionally, I smile every time I send an email with my signature—CC. Overall, it validates me as a leasing professional. This designation deepens my knowledge and experience in an industry I'm passionate about.

MV: 2025 marks the 40th year of the CLFP designation—how does it feel to be part of such a milestone?

CC: It's incredible! I'm proud to be a part of this milestone. The CLFP Foundation keeps pace with our ever-changing industry, and I love being part of this community.

MV: Anything else you'd like to share?

CC: Thank you for letting me share my CLFP journey. I truly appreciate it!



WHY I BECAME A CLFP

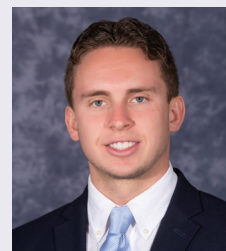
"I chose to pursue the CLFP designation to demonstrate my commitment to professional excellence, up-holding industry standards, and on-going education. Earning the CLFP will not only enhance my credibility but help foster a deeper understanding of the industry nuances and complexities to better support my clients' needs."

JAKE WENZEL, CLFP ASSOCIATE | FIRST AMERICAN EQUIPMENT FINANCE



"This was a designation that many people in my office recommended I pursue, and I could not be happier that I did. The experience and knowledge I gained is truly rewarding and I learned so much along the way. Happy to be a part of the CLFP Family!"

LUCAS TRUJILLO, CLFP | KEY EQUIPMENT FINANCE



"I chose to pursue the CLFP to demonstrate my commitment to the equipment finance industry and to align with my company's overall commitment of being the best in class with regards to possessing the highest standards in equipment finance. Wintrust Specialty Finance is committed to the CLFP and I consider it a privilege to receive this designation."

KEN ELLIOTT, CLFP | WINTRUST SPECIALTY FINANCE





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INDUSTRY NEWS

CLFP Foundation and ELFF Partner with the University of North Texas to Launch Commercial Equipment Finance Course

The Department of Finance, Insurance, Real Estate and Law (FIREL) of the G. Brint Ryan College of Business at the University of North Texas (UNT) has announced partnership with the Certified Lease & Finance Professional Foundation and the Equipment Leasing & Finance Foundation to launch a new course on commercial equipment finance. The course, FINA 4700-Survey of Commercial Equipment Leasing & Finance, began in early 2025.

This course will use The Certified Lease & Finance Professionals' Handbook for the textbook, and will cover foundational concepts, origination topics, and operations and servicing areas. Upon successful completion, students will be awarded the Certified Lease & Finance Professional (CLFP) Associate Certification.

The Equipment Leasing & Finance Foundation is providing financial support and resources, including academic scholarships, internship opportunities, and networking events. This partnership is a natural alignment with the Foundation's Campus to Career academic outreach program created to raise awareness for student talent development and provide learning and connection opportunities through resources for both students and employers.

The program was developed by Michael P. Gallo, B.Fin., M.Fin., J.D., Lecturer Professor at FIREL and 35-year veteran of the industry having held positions in sales, management and legal, and is currently associated with Padfield & Stout, LLP. "This collaboration supports a comprehensive academic program in commercial equipment leasing and finance that bridges the gap between academia and industry, preparing the next generation of professionals," Gallo said. "It creates a platform for students to gain real-world insights and hands-on experience, positioning them for successful careers."

The program also provides direct access to top talent, enabling equipment finance companies to:

- Engage with the program and students
- Identify future professionals with industry knowledge and CLFP Associates
- Benefit from students skilled in foundational concepts, origination, and operations.
- Ensure a steady pipeline of qualified graduates ready to contribute to the industry's success.

Future plans for the program include expanding to other colleges and universities across the country to facilitate wider access.

The G. Brint Ryan College of Business offers a special thanks to Kirk Phillips, President & CEO of Wintrust Commercial Finance, for his critical role in providing industry leadership and spearheading efforts to foster support for this groundbreaking program.

Companies can support the program by posting their open internship opportunities at the Equipment Leasing & Finance Foundation's Internship Resources page: <https://www.leasefoundation.org/campus-to-career/internship-resources-page/>

National Equipment Finance Association (NEFA) Updates & 2025 Event Lineup:

CONFERENCES

March 11-13 | Spring Conference (Omni La Costa Resort – Carlsbad, CA)

October 14-16 | Fall Conference (Marriott Renaissance Hotel, The Depot – Minneapolis, MN)

EVENTS AND PROGRAMS

- Regional Events (6 planned w/ 4 offering educational programs)
- Virtual Programs and Webinars
- Monthly Knowledge Exchange Roundtables
- Meet the Member – Virtual Connections
- Plus much more – be sure to visit for all events and offerings: <https://www.nefassociation.org/>



INDUSTRY NEWS

CLFP Scholarship Program

The CLFP Foundation is proud to announce the launch of its scholarship program, designed to support individuals who aspire to earn the Certified Lease & Finance Professional (CLFP) designation, but may be facing financial hardship. In keeping with its mission to build a better industry, the CLFP Foundation is offering scholarships that cover the cost of essential resources like the CLFP Handbook, the Audiobook, the Academy for Lease & Finance Professionals (ALFP), the CLFP Exam, or a combination of these.

In 2025, the CLFP Foundation celebrates the 40-year milestone of the designation and is committed to making the CLFP designation more accessible than ever before. The scholarship program ensures that financial limitations won't stand in the way of professionals looking to elevate their careers in the equipment leasing and finance industry. Whether applicants are just beginning their CLFP Journey or are already on their way, this support will empower them to access the tools and knowledge they need for success.

This initiative reflects the Foundation's dedication to advancing industry standards while investing in the professional growth of individuals. The CLFP Foundation remains steadfast in its belief that by nurturing talent, it is building a brighter future for the entire industry—one individual at a time.

For more information on how to apply for the scholarship, please visit <https://clfpfoundation.org/scholarship/> or contact scholarships@clfpfoundation.org for questions and inquiries.



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