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## History & Overview of Equipment Finance and Leasing

- Ancient History
- Middle Ages
- Industrial Revolution
- Early 1900s
- History of Modern Equipment Finance
  - 1990s
  - 2000–2010
  - 2010–Present

### Participants in the Industry

- Industry Sector by Transaction Size
- Competition to Equipment Financing

### Equipment Finance Products – Through Which Lens

- Benefits of Equipment Financing and Leasing

## Leasing Law

- Basis for U.S. Leasing Law
- The Uniform Commercial Code
- Contrasting True Lease and Lease Intended as Security
- Legal Entities
- Qualification to Do Business

## Financial & Tax Accounting

- Financial Accounting
- Other Accounting and Tax Considerations

## Sales & Marketing

- Role and Purpose of Sales and Marketing
  - Common Equipment Finance Origination Channels
    - Marketing
    - Sales
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- Typical Sales and Marketing Tools
  - The Direct Origination Channel
  - The Vendor Origination Channel
  - The Third-Party Origination Channel (TPO)

## Credit

- Role and Purpose of Credit
- Credit Process
- Credit Request / Credit Application
- Data Gathering and Due Diligence
- Credit Analysis
- Deal Structuring
- Credit Decision
- Credit Scoring and Analysis

## Lease Pricing

- Lease Pricing Fundamentals

## Equipment Lease & Financing Documentation

- Documentation Process
- Standard Documentation
- Municipal Leasing Documentation
- Agricultural Leasing Documentation

## Equipment Finance Operations & Funding

- Sources of Capital
  - Lease Syndication
  - Buy & Sell
  - Portfolio Acquisition
  - Regulatory Compliance
  - Funding
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- Customer Service
  - Technology

## Portfolio Management

- Tracking Portfolio Performance
  - Current Expected Credit Loss Model (CECL)
  - Ongoing Credit Review
  - Collections
  - Asset Management
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