



CLFP

Circular

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A MESSAGE FROM THE CEO

Dear Colleagues and Friends,

The first quarter of 2026 marked an important period of transition and progress for the CLFP Foundation as we begin this new chapter following our affiliation with the Equipment Leasing & Finance Association (ELFA). Over the past several months, our focus has been on building the governance structure and strategic foundation that will support the continued growth and long-term strength of the CLFP designation.

A key milestone this quarter was the formation of the Transitional Board, which brings together leadership from both organizations to guide the integration process and ensure that the CLFP program continues to operate with the independence and integrity that the industry expects. This group is helping shape the structure and priorities that will carry the program forward in the years ahead.

We also established the CLFP Board of Advisors, creating a dedicated body of experienced industry leaders who will provide strategic guidance, institutional knowledge, and ongoing support for the program. The creation of this board ensures that the voice of the CLFP community remains strong as we move into this next phase.

Another major focus this quarter has been laying the groundwork for possible accreditation. We have begun the early stages of this process, including evaluating the appropriate accreditation pathway and preparing the organizational framework required to support it.

While much of this work has taken place behind the scenes, it represents meaningful progress toward strengthening the long-term future of the CLFP program and the professionals it serves.

None of this progress would be possible without the dedication of our volunteers, board members, and staff who continue to contribute their time, expertise, and leadership to the Foundation. Your commitment ensures that the CLFP designation remains the standard of professionalism in the commercial equipment finance industry.

Thank you for your continued support of the CLFP Foundation and for the role you play in advancing our mission of building a better commercial equipment finance industry, one individual at a time.



Reid Raykovich, CLFP, CAE

WHY I BECAME A CLFP



“I chose to pursue my CLFP designation to deepen my technical expertise and strengthen my credibility within the equipment finance industry. As someone who values professional growth and accuracy in structuring transactions, I wanted a more comprehensive understanding of credit, documentation, tax, and regulatory considerations. Earning the CLFP demonstrates a commitment to excellence and ensures I can better support clients, partners, and internal stakeholders with confidence and precision.”

ARYANA SHAHEEN, CLFP



“I chose to pursue the CLFP designation because equipment finance has become the core of my professional path, and I wanted to build a stronger, more disciplined foundation within the industry. In my current role, I handle pre-funding review, manage UCC and lien filings across the United States and Canada, oversee delinquency and collections strategy, and support financial reporting and operational optimization initiatives. Earlier in my career, I structured secured transactions, managed collateral perfection, and recovered significant receivables exposure through compliance-driven processes.

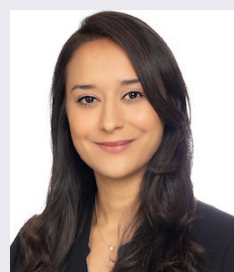
Through these experiences, I realized that technical execution alone is not enough. True impact in this industry requires a comprehensive understanding of credit, documentation, risk allocation, ethics, and long-term portfolio stewardship. Preparing for the CLFP Exam allowed me to systematically refine my knowledge across the full lifecycle of a transaction, from origination to recovery. More importantly, it reflects my commitment to professional integrity and to contributing meaningfully to the equipment finance community.”

WANRU (VERONIA) ZHANG, CLFP ASSOCIATE



“I chose to pursue the CLFP designation to deepen my knowledge in the equipment finance industry. Earning this certification will equip me with a stronger technical foundation and broader industry perspective, allowing me to provide more informed insights and contribute more meaningfully to the organization. By improving my knowledge and capabilities, I aim to increase my overall value and usefulness to the company as we continue to grow and evolve.”

COOPER EVERETT, CLFP



“I decided to pursue the CLFP certification to strengthen my industry expertise and support my professional growth. It’s an opportunity to deepen knowledge, stay aligned with best practices, and enhance the value I bring to my role and organization.”

ERICA MAY, CLFP



SPOTLIGHT: **GEORGE A. PARKER** *VenSource Capital LLC - Co-CEO*

Location
Stamford, CT

Year Earned CLFP
2026

Biography

George A. Parker is Co-CEO of VenSource Capital LLC and President of the Black Equipment Finance Network (BEFN). He began his career at Continental Illinois National Bank, where an early assignment in a specialty lending group introduced him to equipment finance and set the foundation for a career spanning banking, leasing, and executive leadership.

He later co-founded Leasing Technologies International and served in a long-term leadership role, guiding the firm's growth and strategic direction. George was also a member of the founding team of the National Equipment Finance Association and served as its first Treasurer, helping shape the financial and organizational framework of what would become a leading industry association.

Throughout his career, George has valued the discipline and strategic thinking that define equipment finance. In addition to his executive work, he is passionate about expanding opportunities within the industry. Through BEFN, he focuses on mentoring, leadership development, and encouraging professionals to elevate their careers, leading by example whenever possible.

CLFP Journey

How did you get started in the equipment finance industry?

Like many people in this business, I stumbled into the industry. In my first job out of college at a Midwest bank, I was assigned to a specialty lending group that focused on equipment finance companies. I began lending to equipment finance firms and quickly developed an appreciation for the industry. Several years later, I joined one of our customers (an equipment leasing company) as Vice President of Finance, and the rest is history.

What motivated you to pursue the CLFP designation?

I have always associated the CLFP designation with high professional standards, discipline, and commitment. Preparing for it requires all three. For years, it stood as a professional goal I intended to achieve.

In addition, my leadership role with BEFN played a meaningful part in the decision. I regularly encourage others to challenge themselves and elevate their careers by pursuing the CLFP designation. There is no better way to motivate others than to lead by example. Earning the designation reflects both a personal commitment and a responsibility to model the standards I advocate.

What part of the process stretched or challenged you the most?

Staying focused long enough to prepare thoroughly was the biggest challenge. With competing commitments and the natural ebbs and flows of work and life, carving out consistent study time required discipline. Managing distractions and recommitting when they appeared was the real test.

How has earning your CLFP influenced your career or confidence?

It hasn't dramatically changed my career trajectory or confidence. If anything, it brings a sense of relief and satisfaction. I set a goal for myself several years back and followed through. That matters.

What advice would you share with someone considering the designation?

If you have been in the industry for a while, you already know much of the material through experience and osmosis. If you are early in your career, focusing on the CLFP Handbook and the Body of Knowledge is probably the way to go. Set aside a focused few weeks to prepare and take the exam. I was able to use some of the new AI tools as study aids and they helped tremendously.

Resist procrastinating. The worst that can happen is you do not pass on the first attempt. The best is that you succeed and join the CLFP Community.





Let's Get to Know You

1. What's your "can't start the day without it" drink?

Earl Grey tea. Gives me a great morning lift.

2. What's a personal value that guides how you show up at work?

Every day is an adventure. Lean in, work smart, keep a positive attitude, and enjoy the ride.

3. What's something people might not guess about you?

I am deeply interested in how people learn and how to improve learning efficiency so much so, that I've taken courses on this topic.

4. If you could master one new skill overnight, what would it be?

Remembering names effortlessly.

5. What's a small daily habit that makes a big difference for you?

Visualizing success for the day ahead.

6. When you need to reset after a long day, what do you do?

Meditate or challenge my wife to our favorite card game.

7. What book, podcast, or idea has shaped your thinking recently?

Learning How to Learn by Barbara Oakley. It explores the science of learning and how to make knowledge stick through purposeful friction, repetition, and self-testing.

8. If you had a completely free Saturday, how would you spend it?

On a road trip with my family.

9. What's a goal you're currently working toward (professional or personal)?

Expanding the awareness and pipeline of underrepresented professionals in our industry, particularly through outreach to colleges.

10. What's a quote or mantra you return to often?

"Pigs get fed, hogs get slaughtered." It's a reminder not to overindulge and to stay disciplined.

11. If you could travel anywhere tomorrow, where would you go?

China - for its history, scenery, and a good walk.

12. What's one thing you're deeply grateful for right now?

My health. I never take it for granted. Good health allows me to continue working, building, and hopefully, making a difference.



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SPOTLIGHT: CASEY RYAN

DLL - Communications Business Partner

Location
Calgary, Alberta Canada

Year Earned CLFP
2026

My CLFP Journey

How did you get started in the equipment finance industry?

In the past, I worked at two Canada-wide insurance brokerages as a communications professional. By chance, I saw the posting for a communications business partner at DLL and thought the role would be a great fit for how I was looking to grow as a professional. I applied right away and have been in the position for four years. I love it.

What motivated you to pursue the CLFP designation?

One of my colleagues, Gordon Walker, recommended that I get the CLFP to help me learn more about the equipment financing profession. When I did more research, I saw what the CLFP covered and thought it would be a great way to help me find better/more creative ways to tell the story about why equipment financing matters. That meant getting a better understanding of the industry - credit, lease pricing, sales and marketing...all of it.

What part of the process stretched or challenged you the most?

I would say the lease pricing component. Math was a huge source of anxiety for me growing up. I struggled with the overall concepts and spent hours in tutoring sessions. Added to that, I had absolutely zero knowledge about lease pricing.

So: Historical/current anxiety + zero experience = literally climbing Mount Everest.

Given what I was up against, I made a conscious effort to get help. A former DLL colleague, Joe Iavarone, recommended I reach out to Darren Whalen, DLL Canada's National Sales Manager for Technology Solutions. He is a math wizard and took the time to teach me what I needed to know, literally from the ground up. Getting help from Darren was the first time that I have EVER looked forward to math sessions. That change in perspective was huge for me. Darren and Joe – Thank you!

How has earning your CLFP influenced your career or confidence?

I find I'm able to ask better questions and overall, understand more of the impact of things within the equipment finance space. That could include inflation or supply chain shortages. With this, I find that I'm able to think more creatively about the kinds of content I produce - this includes media pitches, blogs, speaking proposals, etc.

What advice would you share with someone considering the designation?

My biggest recommendation, especially to people who are getting their CLFP within their organization, is to start a study group. When I signed up for the CLFP, I was intimidated. I didn't want to do it alone. I found out who else in the company was taking the certification and created a virtual study group over Teams. We helped each other with dissecting often complicated concepts, shared study tips, and overall, supporting each other.

The second recommendation I'd give is to ask for help. When I failed the CLFP for a second time, I posted about it on my LinkedIn. I wanted to reflect on an unexpected, positive result - lease pricing was my highest score - and to thank the people who were supporting me. I was shocked at the level of support and encouragement I received! People I didn't even know from DLL, and many CLFPs reached out to offer help and overall encouragement.





The Postpartum Diaries



Let's Get to Know You

What's your "can't start the day without it" drink?

Coffee. I have a two-year-old who frequently likes to "party" at 2 a.m. I never know what level of sleep I'll get. Coffee is essential. Also, my morning coffee acts as a mini "quiet time" away from the world.

What's something people might not guess about you?

I write about my experiences with postpartum mental health via my Instagram, The Postpartum Diaries. After I had my daughter, I suffered from postpartum psychosis and depression. I decided to write about my experience via Instagram for therapeutic reasons and in the hopes that it might help someone else. I've learned so much and connected with people from around the world that have experienced the same.

Similar to asking for help with the CLFP, it's another reminder for me about the strength of vulnerability. You never know what you'll learn about yourself or others.

If you could master one new skill overnight, what would it be?

I would love to be bilingual in Spanish. I love the language and studied it in high school and in university. Right now, my daughter is in a bilingual (English and Spanish) daycare. Who knows if she'll continue with learning Spanish, but I wanted to give her the opportunity and exposure at an early age. Her favourite words are "agua" (water), chaqueta (jacket), and vámonos (let's go!).

What's a quote or mantra you return to often?

Funny enough, it came from an episode of Criminal Minds, which is a show I used to binge. I clearly remember one episode where the main character, David Rossi, said, "Scars remind us where we've been. They don't have to dictate where we're going."

We all have a story to tell. No one gets through life unscathed. However, the choice comes down to what you do with those experiences. Making positive, constructive choices from scarring experiences isn't easy. For me, this quote has come to mind time and time again. Working through math trauma and healing from postpartum mental health issues are just a few. I also keep that in mind for the "scrapes" life throws my way - that could range from a major coffee spill to a challenging day at work.

It comes down to perspective, and perhaps more important, vulnerability. In my experience, not letting a "scar" dictate where you're going means asking for help. I'm living proof of that and want to pay it forward. Whether it's volunteering as a CLFP mentor (which I'm currently doing and love) or helping a friend, I want to do my part in making people feel seen and heard.

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The CLFP Journey at Dext Capital: Building Talent for the Future

By Mel Vinson, CLFP and Conrad Nilsen, CLFP, CPA, SVP of finance

In an industry built on relationships, expertise, and trust, investing in people remains one of the most powerful ways an organization can prepare for the future.

At Dext Capital, that investment has taken the form of a deliberate commitment to staff development through the CLFP designation.

Over the past three years, Dext Capital has grown its CLFP presence from only a handful of certified professionals to being on target to have 30 certified members this year. What began as an effort to encourage professional development has evolved into a broader commitment to learning and long-term talent development.

For Conrad Nilsen, CLFP, SVP of Finance at Dext Capital and the company's CLFP Ambassador, the journey represents something larger than individual achievement.

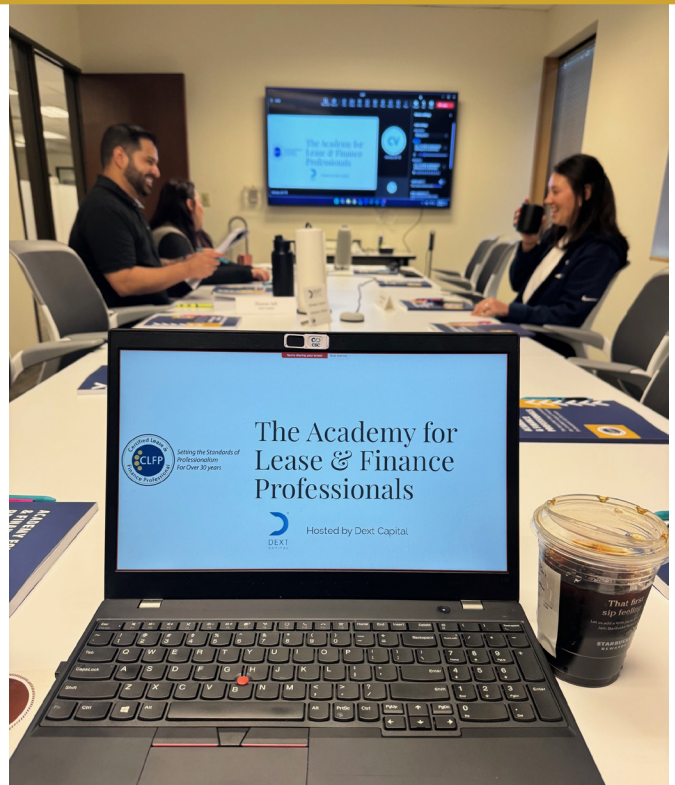
"It really started with a teammate who believed strongly in the value of the designation," Nilsen explained. "When the CLFP was first introduced internally, we had very limited exposure to it. But once the benefits of industry knowledge, cross-department learning, and connection to the broader community were communicated, it became clear that there was something meaningful there."

A Pilot Cohort That Sparked a Cultural Shift

Dext's leadership team decided to test the concept by sending a group of influential leaders from across the organization through the Academy for Lease & Finance Professionals (ALFP). The company made a deliberate investment in taking those leaders offline for two full days to focus entirely on the program.

"I don't think we expected the depth and breadth of the material," Nilsen said. "By the end of the first day, many of us were saying, 'You have to know so much about this business.' It really expanded our perspective."

Participants came from departments including credit, finance, documentation, and sales, creating a dynamic learning environment. As topics surfaced in the curriculum, employees with experience in those areas added practical context and insight.



"What we saw in those sessions was a real sense of pride," Nilsen said. "When reviewing a section connected to someone's department, they wanted to explain how it worked at Dext. It made the learning incredibly tangible."

The most significant shift came after the cohort returned from the ALFP and passed the Exam. As new CLFPs began applying what they had learned and sharing the experience internally, interest quickly spread across the organization.

"It quickly moved from 'Should we try this?' to 'How do we integrate this into building a career at Dext?'" Nilsen shared. "People come away from the process with a stronger understanding of the industry as a whole. It gives our team a common language and shared knowledge that benefits everyone."

The Academy provides a structured pathway for professionals to deepen their understanding of equipment finance, from legal frameworks to operational structures and industry best practices. For organizations like Dext, the program has become an important leadership development tool.

Rather than treating the designation as a single milestone, Dext integrated the CLFP Body of Knowledge into its broader approach to employee development.

"It's not just about earning the letters," Nilsen said. "It's about the learning that happens along the way and how people grow in their roles."

Continued on following page.

Learning Beyond Job Titles

One of the most valuable outcomes of the CLFP program at Dext has been its ability to broaden employees' understanding of the industry beyond their individual roles. While many professionals naturally develop deep expertise within a single function, the CLFP Body of Knowledge encourages participants to understand how those functions connect.

"It really expands your worldview," Nilsen explained. "You realize how much more there is beyond the scope of your role or department. That perspective changes how you collaborate with others."

For Dext, that broader awareness has strengthened teamwork and decision-making across the organization.

Nilsen recalled overhearing an early-career employee explaining a concept to a colleague by referencing something they had learned during the ALFP.

"Hearing someone say, 'When we covered this in the CLFP program...' and then applying it directly to their work was a meaningful moment," he said. "It reinforced that the investment was making a real impact."

A Structured Path for Growth

As the equipment finance industry evolves, organizations are increasingly focused on how to attract new professionals, train them effectively, and retain experienced talent. The Equipment Leasing and Finance Association (ELFA) has emphasized this priority through its mission to attract, train, and retain the next generation of industry leaders. The recent affiliation with the CLFP Foundation will help expand pathways for that vision to continue.

Through its structured curriculum and collaborative learning environment, the ALFP helps professionals develop a deeper understanding of the industry while building confidence in their roles.

"When multiple people in an organization go through the process together, it creates alignment," Nilsen noted. "Everyone develops a deeper understanding of the 'why' behind what we do, and that strengthens collaboration across departments."



Supporting the Next Generation of Industry Leaders

Dext's workforce includes many professionals who are early in their careers and often new to the equipment finance industry. For those employees, the CLFP program provides a valuable foundation.

"It's common for new employees to feel intimidated," Nilsen said. "They're speaking with people who have been in the industry for decades and worry they don't even know enough to ask the right questions. The CLFP designation helps bridge that gap by giving participants the vocabulary, context, and confidence to engage more fully in the business."

"It provides a lexicon for the industry," Nilsen added. "Instead of learning those concepts slowly over many years, the program accelerates that understanding."

This accelerated learning helps prepare the next generation of leaders as employees gain confidence and exposure to different aspects of the business.

Continued on following page.

Strengthening Teams Through Shared Learning

The impact of the CLFP designation is often most visible in the collaborative learning environment that develops around the process. Study groups, peer discussions, and mentorship relationships create opportunities for employees to engage with each other in new ways.

Mel Vinson, CLFP, VP of Academies & Development at the CLFP Foundation, has seen this dynamic across many organizations.

“The Academy creates a shared experience,” Vinson said. “People are learning together, challenging each other, and supporting each other through the process. That kind of collaboration strengthens both the individual and the organization.”

As more team members earn the designation, the experience often builds momentum within organizations and encourages others to begin the journey.

Investing in the Future of Equipment Finance

The equipment finance industry relies on knowledgeable professionals who understand both the technical and relational aspects of the business. The CLFP Body of Knowledge provides a framework for that development while connecting professionals to a broader community across the industry.

At Dext, what began as a pilot initiative has grown into a shared experience that connects employees across departments, strengthens industry knowledge, and reinforces the company’s culture of development.

“CLFP represents a commitment to excellence,” Nilsen said. “It shows that people care about their craft and about serving clients at the highest level. By investing in pathways to continuous development and empowering employees, companies are not only supporting individual growth, but they are also strengthening the entire equipment finance community.”



About the Authors

Mel Vinson

Mel Vinson, CLFP is the VP of Academies & Development at the CLFP Foundation. A native of Portland, Oregon, and a graduate of Oregon State University, she began her career with U.S. Bank in 2012 before moving into equipment finance. After earning her CLFP designation, Mel began volunteering to teach ALFP courses to support future CLFP Candidates. Her passion for education, industry engagement, and helping others grow professionally led her to join the CLFP Foundation staff. In her current role, she oversees the Academies, communications, and supports industry engagement. Outside of work, Mel enjoys hiking, running, photography, and volunteering in her community.



Conrad Nilsen

Conrad Nilsen, CLFP, CPA is the SVP of Finance at Dext Capital. He oversees corporate finance and capital markets functions. He manages the company’s liquidity strategy and determines the optimal use of multiple credit facilities, including asset-backed warehouses. Conrad also leads Dext Capital’s go-to-market strategy for its recurring securitization transactions.

He most enjoys building relationships with Dext’s investors and finding scalable ways to address the needs of a successful, high-growth financial services company. With a background in corporate finance, capital markets, and data systems, Conrad led highly effective and dynamic finance teams at multiple companies in the direct-to-consumer space before joining Dext. Conrad is a graduate of Gonzaga University, where he majored in Finance. In his free time, he enjoys bouldering and traveling with his wife, Morgan.

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Borrower Information	
COMPANY NAME	Truck City, Inc.
EPN	34-768555
<input type="button" value="Pending"/> <input type="button" value="Confirm"/>	

Fraud Summary

<input checked="" type="checkbox"/> Borrower	VERIFIED
<input checked="" type="checkbox"/> Personal Guarantors	VERIFIED
<input checked="" type="checkbox"/> Vendor	VERIFIED
<input checked="" type="checkbox"/> Documents	VERIFIED

Transaction eligible for syndication.
Syndicate deal?

IN MEMORIAM

In Loving Memory of Roderick Knoll, CLFP

It is with deep sadness that we share the passing of Roderick Knoll, CLFP, on February 14, 2026, following a courageous battle with cancer.

Roderick was more than a respected professional; he was a valued member of the CLFP Community. He embodied the spirit of lifelong learning, integrity, and service that defines the Certified Lease & Finance Professional designation. His commitment to education and to elevating professionalism within our industry left a lasting impression on those who had the privilege of knowing and working alongside him.

Throughout his career, Roderick was a dedicated leader and advocate for commercial finance, particularly within



the American Association of Commercial Finance Brokers (AACFB). His steady presence, thoughtful insight, and generous mentorship impacted countless professionals. He believed deeply in the power of community and connection, and he lived that belief through his service and friendships.

We extend our heartfelt condolences to Roderick's family, friends, colleagues, and all who were touched by his life. His legacy of leadership, integrity, and generosity will continue to inspire the CLFP Community for years to come.

INDUSTRY NEWS



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Allison Harris, CLFP
Stryker



**Nicholas Heins,
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John Hilst, CLFP
Unknown



**Catherine Indiveri,
CLFP**
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Bank



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a City National Bank
Company



Erica May, CLFP
JDR Solutions, Inc.



**George Parker,
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