



Presents

## Leveraging Technology through Best Practices

April 26 – 27, 2016 • Minneapolis, MN USA

A solutions-driven conference sponsored by



### WHY THE CONFERENCE?

The equipment leasing industry has identified several key tech initiatives for the coming year, including improving integrations, enhancing business intelligence, enhancing technology, and replacing legacy systems. Choosing the initiatives in which to invest, along with the financial and operational aspects of doing so are major hurdles being faced by lessors.

Several factors further complicating this decision are the past experiences of others that have attempted similar initiatives, along with a general inexperience as to the process of making infrequent decisions such as these. Lessors, therefore, are proactively seeking guidance, advice and insights into how to best approach these decisions in the most effective and cost-efficient manner.

### BENEFITS OF ATTENDING

Attendees will benefit from the free-flowing and vendor-agnostic perspective that speakers with vast experience in the technical, operational, and accounting aspects of leasing applications will add. All sessions, particularly the roundtables, will reflect contemporaneous attendee input, so that the most relevant issues are addressed.

Frank discussions as to functionality and approach will be the norm. When combined with A&H's 40 years of providing services to equipment leasing industries throughout the world, attendees will leave this conference with the tools to properly assess their technology decisions.

### WHO SHOULD ATTEND?

CFOs, CIOs, COOs, IT managers, project managers, system analysts, data managers, service providers and operations personnel will all gain valuable information and insights from attending this conference.



## CONFERENCE SESSIONS

### DAY ONE

9:00 – 9:45

**Conference Welcome and Chairman's Address**  
*Shawn Halladay, Managing Director - Amembal & Halladay*

- User issues and challenges in today's environment
- Business model concerns
- Coping with accounting changes

9:45 – 10:30

**Best Practices in Determining an IT Strategy and Roadmap**  
*TBD - Hexaware Technologies, Inc.*

- Identifying the components of a successful IT strategy
- Ensuring that new applications deliver a competitive advantage
- Technology trends influencing these decisions

10:30 – 10:45

Refreshment Break

10:45 – 12:00

**Making the Decision to Upgrade, Engage a New Vendor or Outsource**  
*Mark Belec, Founder - Advanced Portfolio & Application Services*  
*Shawn Halladay, Managing Director - Amembal & Halladay*

- ROI decision-making
- Building the foundation/approach
- Functional aspects
- Technical considerations

12:00 – 1:00

Luncheon

1:00 – 1:45

**Contracts with Third Parties/Vendors**  
*TBD - TCF Equipment Finance*

- Identifying the issues
- Objective view of both sides to the contract/agreement
- Crafting the agreement
- Common mistakes and best practices to protect both parties

1:45 – 2:30

### RFP Considerations

*Shawn Halladay, Managing Director - Amembal & Halladay*

*Mark Belec, Founder - Advanced Portfolio & Application Services*

- Identifying business requirements
- Developing the document
- Managing the process
- Vendor selection

2:30 – 3:15

### The Emerging Role of Salesforce

*Kristian Dolan, Chief Operating Officer and Solution Architect - Tamarack Consulting*

- Integration with the front-end
- Use as a front-end
- Motivation to de-link with the back office

3:15 – 3:30

### Refreshment Break

3:30 – 4:15

### Tax and Accounting Aspects of Selecting an LMS

*Jeff Nelson - PricewaterhouseCoopers*

- R&D credits
- Capitalization of costs
- Like-kind exchange functionality

4:15 – 5:00

### Delivering Value through Contemporaneous Implementation and Process Review

*Shawn Halladay, Managing Director - Amembal & Halladay*

- Gap analysis
- Best practices and process alignment
- Avoiding translating flawed concepts into the application

5:00

### First Day Wrap-up

5:30 – 6:30

### Beer and Wine Mixer

## DAY TWO

9:00 – 9:10

### Summary of Day One

*Shawn Halladay, Managing Director - Amembal & Halladay*

9:10 – 10:00

### The Implementation and Conversion Process

*TBD – Hexaware Technologies, Inc.*

- On time and within budget
- Risk sharing between the parties
- Best practices

10:00 – 10:30

### Portals/Communities

*Daniel Nelson, Founder and President - Tamarack Consulting*

- Demand from vendors, dealers and customers
- Effect on IT and the business
- Best practices

10:30 – 10:45	Refreshment Break
10:45 – 12:00	<p data-bbox="380 134 748 172"><b>Mitigating Conversion Risks</b></p> <p data-bbox="380 172 1214 243"><i>Mark Belec, Founder - Advanced Portfolio &amp; Application Services</i> <i>TBD - Hexaware Technologies, Inc.</i></p> <ul data-bbox="380 264 1161 483" style="list-style-type: none"> <li>• Requirements decisions</li> <li>• Project management</li> <li>• Vendors</li> <li>• Contracts</li> <li>• C-level communications</li> <li>• Managing the gap between IT and business understanding</li> </ul>
12:00 – 1:00	Luncheon
1:00 – 1:45	<p data-bbox="380 604 1344 676"><b>Roundtable Discussions around the Following Issues will be Facilitated by Experienced Leasing Professionals and/or Service Providers</b></p> <ul data-bbox="380 697 617 798" style="list-style-type: none"> <li>• Functionality</li> <li>• Budgetary</li> <li>• Organizational</li> </ul>
1:45 – 2:30	<p data-bbox="380 840 1101 877"><b>Using Available Tools and Applications to Manage Risk</b></p> <p data-bbox="380 877 1214 915"><i>Mark Belec, Founder - Advanced Portfolio &amp; Application Services</i></p> <ul data-bbox="380 936 1516 1071" style="list-style-type: none"> <li>• Using a data and process driven approach to improve front-office ROE</li> <li>• Aligning pricing with collateral and residual risk</li> <li>• Organizing asset categories, trees and attributes to improve operational efficiency and 'better data'</li> </ul>
2:30 – 2:45	Refreshment Break
2:45 – 3:15	<p data-bbox="380 1192 893 1230"><b>Maximizing the Integration Experience</b></p> <p data-bbox="380 1230 1477 1268"><i>Kristian Dolan, Chief Operating Officer and Solution Architect - Tamarack Consulting</i></p> <ul data-bbox="380 1289 854 1423" style="list-style-type: none"> <li>• Front and back office applications</li> <li>• Third-party ancillary applications</li> <li>• Work flow integration</li> <li>• Security and updates</li> </ul>
3:15 – 4:15	<p data-bbox="380 1465 1159 1503"><b>The Role of Leasing Applications in Leveraging Information</b></p> <p data-bbox="380 1503 831 1541"><i>TBD - Hexaware Technologies, Inc.</i></p> <ul data-bbox="380 1562 997 1701" style="list-style-type: none"> <li>• Big Data</li> <li>• Predictive analytics – beyond credit decisions</li> <li>• The Internet of Things</li> <li>• Data management and retrieval</li> </ul>
4:15 – 4:30	Conference Conclusion and Wrap-up

## ABOUT AMEMBAL & HALLADAY

Amembal & Halladay and its predecessor, Amembal & Associates, have been creating opportunities for lessors since 1978. Today, we are the foremost and most highly respected equipment lease training and consultancy firm in the world and continue applying our knowledge and experience to assist our clients drive sustainable and profitable growth.

A&H has trained over 75,000 leasing professionals in 80 plus countries across the globe. The leasing economies in these countries represent mature markets, such as Australia, Germany and the USA; evolving markets such as India, South Africa and Turkey; and, emerging markets such as China, Jordan, Mexico and Kenya. A hallmark of our services is the needs analysis we perform and the executive level attention every engagement receives, supplemented by our broad range of training delivery methods. These methods include public and in-house seminars, webinars, and online learning alternatives. We also help lessors address specific issues and products through targeted executive forums and conferences such as the annual Operating Lease Conference, the only global event dedicated solely to driving success through the operating lease.

A&H provides a wide range of consultancy services and has conducted engagements on behalf of some of the best-known leasing companies in the world. Our services help customers better manage their opportunities and challenges and include assisting in the formation of global captives, portfolio management, risk assessment, geographical expansion, and facilitating the strategic movement of emerging market lease companies to the next level.

We also have aided over 20 governments in their efforts to facilitate the growth of their domestic leasing industries by reviewing the state of their leasing industry, providing assistance in drafting leasing legislation, and devising strategic recommendations.

The firm has co-authored, authored and published 16 books including industry best-sellers, *The Handbook of Equipment Leasing and Winning With Leasing!*. Other publications include *Operating Leases - The Complete Guide*, *International Leasing – The Complete Guide*, *A Guide to Accounting for Leases*, *Guide to Captive Finance Company Equipment Leasing*, and *Lease Securitization*.

A&H is proud to state that not only are we serving a myriad of leasing industry needs, but we also have been, and will continue to be, influential in shaping its growth. We have seen many of our ideas and thoughts implemented in companies around the globe, with some even developing into industry practices. Serving the global leasing industry has been more than a commitment - it has been a passion!

## OUR CONFERENCE SPONSOR



### About Hexaware

Hexaware is a leading global provider of IT solutions, business process services and consulting services. Our 11000+ experts are driven by the business philosophy “Your Success is Our Focus” - to deliver value to our clients and help them succeed. Since its inception in 1990, our company has been providing cutting-edge solutions to small, large & Fortune 500 companies across the globe spanning industries such as banking, financial services, capital markets, leasing, healthcare, insurance, travel & transportation, logistics and manufacturing and retail.

Banking and Financial Services (BFS) is the largest and most strategic business line for Hexaware, housing industry experts, skilled and experienced consultants, domain specialists and program managers. BFS offers end-to-end IT solutions, business process services and infrastructure solutions tailored and specialized to service financial services organizations comprising banks, asset managers, asset financing institutions and payment processors.

Our decade long experience in leasing allows us to bring value to both lessors and their customers in a variety of ways. We enable lessors to “future proof” their IT arising from their changing business needs by leveraging our domain expertise and innovative solutions to transition to a digital leasing enterprise.

Our services coverage for leasing spans application development and maintenance, business intelligence & analytics, digital assurance with focus on automation, infrastructure management and cloud based and mobility services. We also provide business process services for operational optimization. Our tailor made strategic consulting services provide asset financing institutions ways to transform their overall IT and business landscape and refine their processes to leverage the latest technology trends in the market.

A global workforce presence enables us to leverage our flexible delivery models to the best cost advantage of our lessors and ensuring service excellence.

# REGISTRATION DETAILS

## A. Registration Fees

### Early Bird Fees (registration & payment received up to and including March 31)

Single Registration	\$875
Groups of 3+ (from same company, per registrant)	\$745

### Regular Fees (registration & payment received after March 31)

Single Registration	\$995
Groups of 3+ (from same company, per registrant)	\$865

## B. Payment

1. Payment must be made in full and in advance of the conference by one of the following options:
  - i. Visa or MasterCard
  - ii. Check made payable to *Amembal & Associates* and mailed to:  
220 N. Zapata Hwy Ste 11  
PMB 216C  
Laredo, TX 78043 U.S.A.
  - iii. Wire Transfer or Direct Deposit  
Key Bank NA  
Sunset Key Center  
805 NW Murray Road  
Portland, OR 97229 U.S.A.  
SWIFT NO: KEYBUS33POR  
ROUTING/ABA NO: 123 002 011  
CREDIT TO ACCOUNT NAME: Amembal & Associates  
ACCOUNT NO: 3701 010 13412
2. Please indicate your selected payment option on the registration form.
3. Payments are due net to us; in other words, if there are any withholding taxes, such if deducted, should result in our receiving the amounts indicated above.

## C. Cancellation Policy

1. A substitute delegate will be accepted if the original delegate is unable to attend.
2. A full refund will be made to those who cancel in writing on or before March 31, 2016.
3. Cancellations received after March 31, 2016 through April 15, 2016 will receive an 80% refund. No refunds will be given for cancellations received after April 15, 2016.

## D. Venue & Accommodations

1. The event will be held at the Hyatt Regency Minneapolis, located at 1300 Nicollet Mall, Minneapolis, MN 55403.
2. With your confirmation of registration, you will receive a specially prepared Hyatt Regency reservation form. Please book your rooms directly with the hotel by contacting Ms. Jillian Ollry, Associate Director of Events by email at [jillian.ollry@hyatt.com](mailto:jillian.ollry@hyatt.com); or, by telephone at +1 612 596 4531. Kindly assure that you indicate AMEMBAL on your reservation form to assure you receive the negotiated rate of \$140/night plus taxes. We encourage you to book your accommodations early, as the hotel vacancy may change quickly.

## E. General

1. One registration form is to be submitted by email to [kelly@amembalandhalladay.com](mailto:kelly@amembalandhalladay.com), per delegate.
2. A confirmation packet will be sent upon receipt of payment.
3. Please note that the above fees do not include hotel accommodations.
4. Visa procurement assistance, for international delegates, will be provided upon request.
5. For questions and/or concerns, contact Kelly Farnham at [kelly@amembalandhalladay.com](mailto:kelly@amembalandhalladay.com).

**REGISTRATION FORM**  
Leveraging Technology through Best Practices  
April 26 – 27, 2016

**DELEGATE DETAILS**

Name (please print)		Position
Company Name		
Address		City
State/Province	Zip/Postal Code	Country
Email		Phone (please include country code)

**TOTAL AMOUNT OF FEE (Please check one)**

Early Bird Fees (registration & payment, up to & including March 31)

- Single Registration  \$875  
Groups of Three or More (from same company, per registrant)  \$745

Early Bird Fees (registration & payment, after March 31)

- Single Registration  \$995  
Groups of Three or More (from same company, per registrant)  \$865

*The above amount is due net to us; in other words, if there are any withholding taxes, such if deducted, should result in our receiving the above amount.*

**PAYMENT METHOD (Please check one)**

- Visa/MasterCard
- Check
- Wire Transfer
- Direct Deposit

**IF PAYING BY VISA/MASTERCARD**

Card Number	Expiry Date (MM/YYYY)	Security Code
Name (as it appears on card)		
Company (if company issued card)		
Billing Address (as it appears on your statement)		
City	State/Province	Country and Zip/Postal Code
Signature		