

Certified Lease Professional Foundation 2013 Accomplishment Report

Membership

The CLP Foundation accepted and approved 51 applications for 2013, an increase of 283% from the previous year! 27 of those individuals passed the exam, and the remainder of the applicants are either studying to take the exam or planning to re-sit for it.

The following gained their CLP designation in 2013:

Jeff Bartholomew, CLP – Credit Officer at Financial Pacific Leasing
Leslie Brown, CLP – Analyst at Bravo Capital LLC
Eric Bunnell, CLP – Equipment Finance Specialist at Arvest Equipment Finance
Dan Burgos, CLP – AVP of Credit at Ascentium Capital, LLC
Neil Clark, CLP – Vice President of Sales at Innovative Lease Services
Lori Dennis, CLP – Senior Vice President at First American Equipment Finance
Britanee Dixon, CLP – AVP-Controller at Orion First Financial
Peter Dwyer, CLP – Program Manager at First American Equipment Finance
Laura Eichenseer, CLP – Senior Vice President at First American Equipment Finance
Jaimie Haver, CLP – Lease Funding Manager at Banc of California
Steve Huffman, CLP – Client Reporting at Orion First Financial
Bree Johnson, CLP – Senior Processor at Argent Bank
Michael Kianmahd, CLP – Vice President at Maxim Commercial Capital
Robert Knudson, CLP – Senior Account Executive at Go Capital
Chris Lerma, CLP – Vice President, Syndications at Allegiant Partners, Inc.
Chris Maudlin, CLP – AVP-Lease Credit Manager at Banc of California
Javier Mendoza, CLP – Transaction Coordinator at Maxim Commercial Capital
Andrew Nere, CLP – CEO at Innovative Lease Services
Jake Nguyen, CLP – Credit Analyst at Argent Bank
Kristan Parker, CLP – Account Manager at Innovative Lease Services
Sam Shallenberger, CLP – Chief Financial Officer at RJ Young Company, Inc.
Kim Shea, CLP – Funding Manager at First Star Capital
Teena Smith, CLP – Sales Support Specialist at Arvest Equipment Finance
John Snyder, CLP – VP Commercial Finance Group at Alliance Funding Group
Lisa Whitehead, CLP – Operations Manager at Pacifica Capital
Mike Willerer, CLP – Funding Team Leader at Direct Capital Corporation
Chet Zeken, CLP – Director of Sales at Go Capital

Technology

The Foundation is excited about the implementation of “Wild Apricot”, a new web platform which by combining many of the functions that were previously managed by different databases will allow for increased efficiency and capabilities. Among some of the new functionality is a blog in which CLPs in Good Standing may post discussions and the ability to set up recurring payments for annual dues.

Education

There were three Master Review Classes held in 2013: 1) National Equipment Finance Association (NEFA) Spring Finance Summit in Albuquerque, NM; 2) National Association of Equipment Leasing Brokers (NAELB) Annual Conference in Las Vegas, NV; 3) NEFA Fall Funding Symposium in Nashville, TN. The Foundation also announced that the educational materials for the class are now available for purchase to the public, which was previously available only to class attendees. To learn more, click [here](#).

In addition to the Master Review Classes, the Foundation also worked with the National Equipment Finance Association (NEFA) to present the Institute for Leasing Professionals with one being held in the offices of Orion First Financial in Gig Harbor, WA and the other at Banc of California (previously PacTrust Bank) in Irvine, CA. They proved to be a huge success with 18 individuals gaining their designation after the classes, including all sixteen attendees at the Irvine class.

Cindy Spurdle Award of Excellence

The 2013 Cindy Spurdle Award of Excellence was presented to Nancy Geary, CPA, CLP at the NEFA Fall Funding Symposium in Nashville, TN. She was chosen as the CLP who has contributed the most to the industry and best represents the CLP ideals. Upon receiving the award, she stated, “I am honored to be the recipient of this wonderful award. I am a huge supporter of the CLP Foundation and its contribution to the industry, and am happy to be serving on the CLP Board of Directors during this time of growth and expansion. I would encourage every company in the industry to include the CLP Handbook in its employee training toolbox, and add obtaining the CLP designation to each employee’s goals for the coming year. The knowledge gained in preparing for the exam will be valuable to any level of industry member, and the designation serves as an indicator of the individual’s commitment to education and ethics.”

Board of Directors

Enthusiasm for the Foundation was once again evidenced by the fact that there were 12 nominations received for the 2014 Board of Directors for 3 open positions. The three elected directors for 2014 are:

- Bob Fisher, CLP – Ascentium Capital (1st term)
- David Normandin, CLP – Banc of California (3rd term)
- Brian Schonfeld, CLP – Pawnee Leasing (2nd term)

The Foundation would especially like to salute those whose terms have come to an end and have graciously volunteered their time over the years:

Bob Teichman, CLP – Teichman Financial Training (Chairman of the Board)
Rosanne Wilson, CLP – 1st Independent Leasing (President of the Board)
Paul Nibarger, CLP – Nibarger Associates (Secretary of the Board)
Mary Armstrong, CLP – Financial Pacific Leasing (Director)
Kyle Gilliam, CLP – Arvest Equipment Finance (Director)
Carl Villella, CLP – Acceptance Leasing and Finance (Director)

Companies with 3+ CLPs

Financial Pacific Leasing (18)
First American Equipment Finance (14)
Orion First Financial (9)
Arvest Equipment Finance (7)
Argent Bank (5)
Ascentium Capital (5)
Great American Insurance (5)
Bank of the West (4)
ECS Financial Services (4)
First Star Capital (4)
Innovative Lease Services (4)
Maxim Commercial Capital (4)
Banc of California (3)
FSG Leasing (3)
LeaseTeam (3)
Pacifica Capital (3)

The CLP designation identifies you as a knowledgeable professional to employers, clients, customers, and peers in the leasing industry. There are currently 199 Certified Lease Professionals throughout the world. For more information please call Reid Raykovich, CLP, Executive Director at (206) 535-6281 or visit www.clpfoundation.org