INDUSTRY BUZZ IN THE BIZ

CLFP Foundation Welcomes 16 New CLFPs

AUGUST 10, 2026 - The Certified Lease & Finance Professional (CLFP) Foundation is pleased to welcome its newest class of CLFPs: 16 industry professionals who have demonstrated mastery of the equipment finance body of knowledge by passing the rigorous CLFP Exam. Representing diverse companies and roles across the industry, these individuals have joined an elite community united by a commitment to professional excellence and ethical practice. They are:

1. Ryan Barten, CLFP – Senior Systems Analyst, Oakmont Capital Holdings, LLC
2. Brandon Bliziotis, CLFP – Senior Financial Analyst, Oakmont Capital Holdings, LLC
3. Austin Borgerding, CLFP – Credit Analyst, Oakmont Capital Holdings, LLC
4. Helen Giotopoulos, CLFP – Business Development Manager, Finance Specialist, Group Financial Services
5. Samantha Hagen, CLFP Associate – Marketing Specialist, AP Equipment Financing
6. Eric Henry, CLFP – Sr. Manager, Capital Markets & Syndications, Altec Capital Services, LLC
7. Adelyn Hildebrandt, CLFP Associate – Marketing Event Specialist, AP Equipment Financing
8. Kelsey Johnson, CLFP – Legal Specialist, Transport Enterprise Leasing LLC
9. Juliana Lowe, CLFP – Regional Manager – Legal, CoreTech
10. Susan Perry, CLFP – Treasury Analyst, Transport Enterprise Leasing LLC
11. Joseph Smith, CLFP – IT Security Analyst, Oakmont Capital Holdings, LLC
12. Kayla Thielen, CLFP – Account Manager, Oakmont Capital Holdings, LLC
13. Jessica Thompson, CLFP Associate – Funding Coordinator, Oakmont Capital Holdings, LLC
14. Nicholas Trapani, CLFP Associate – Staff Accountant, Oakmont Capital Holdings, LLC
15. Katelyn Walls, CLFP – Business Development Officer, Oakmont Capital Holdings, LLC
16. Ashley Watson, CLFP – Quality Control Analyst, First Citizens Bank Equipment Finance

“I pursued the CLFP designation because I sought to develop a complete understanding of the equipment leasing and finance industry,” shares Ashley Watson of First Citizens Bank Equipment Finance. “I am in my fourth year in this industry and wanted to learn every aspect of the leasing process. I also wanted to understand how applications are received through direct origination, vendor relationships, and third-party brokers, and how each source progresses through underwriting, documentation, funding, servicing, and portfolio management. Understanding the entire life cycle has given me greater appreciation for how every department contributes to a successful transaction and an exceptional customer experience.”

“In my current role, this knowledge has been invaluable. My CLFP journey has equipped me with a broader perspective that allows me to identify potential concerns, support sound business practices, and help ensure every transaction meets the highest standards. Earning the CLFP designation has strengthened my industry knowledge, expanded my perspective, and reinforced my commitment to continuous learning. I believe that the more we understand the entire leasing process, the better we can serve our customers, support our teams, and protect the integrity of our organization.”

Earning the CLFP designation signals more than technical expertise. It reflects a commitment to elevating the equipment finance industry through continuous learning, ethical leadership, and shared professional standards. CLFPs and Associates are now found across the United States (including Puerto Rico), Canada, India, Pakistan, Africa, New Zealand, and Australia. To learn more or begin your own path to certification, visit www.CLFPFoundation.org.

PRESS RELEASES

Maxim Commercial Capital Streamlined Credit Operations in H1 2026

AUGUST 11, 2026 - LOS ANGELES, CA - Maxim Commercial Capital ("Maxim") announced significant improvements to its intake, underwriting, and funding processes during the first half of 2026. The company launched a new credit matrix resulting in competitive pricing for B-to-D credits and simplifying communication with borrowers, finance brokers and equipment vendors. Maxim fuels small businesses and entrepreneurship nationwide in underserved market segments by providing loans and leases from $20,000 to $3 million collateralized by construction and agricultural heavy equipment, over-the-road trucks and trailers, and real estate.

"Our team's efforts to identify and implement game-changing enhancements from originations through funding and exceptional customer service are defined by our goal to help partners close deals quickly and easily, while fulfilling customers' dreams and needs," noted Don Cosenza, SVP-Business Development. "We onboarded 50+ new referral partners during the first half of 2026, reflecting the high demand for a reliable, competitive finance source for non-bankable, challenged, and story credits."

Maxim's reputation as a funding source of choice for equipment vendors and finance brokers resulted in Monitor Daily recognizing Michael Kianmahd, Maxim's CEO, as a 2026 NextGen Leader in June. Earlier in the year, NEFA published Cosenza's article, "Common Traits of Successful Brokers," which provides valuable insight for novice and seasoned brokers alike.

The company's website has been refreshed with new underwriting criteria for its heavy equipment, transportation equipment, real estate, working capital, and debt consolidation and refinancing programs, as well as a simplified broker application. Recent fundings across all programs are updated regularly for the benefit of referral partners and customers.

Representative fundings during the period included: a $119K 2025 Schwing SP500 trailer concrete pump for an experienced construction contractor to start his own business; a $48K 2024 Bobcat T66 to support the rapid growth of an experienced contractor's new oilfield supply company; 100% financing of a $20K 2012 Reitnouer Big Bubba 48 x 102 Aluminum Flatbed Trailer for an owner-operator with less than 2 years' time-in-business, 628 FICO, $0 revolving available, and collection accounts who pledged his 2019 Peterbilt 579 with 493k miles as excess collateral; and a $58K 2023 Freightliner Cascadia 126SLP with 577K miles for 30% down for a startup owner-operator with thin credit.

"The recent addition of key executives to the Maxim team, including Lyn Elam as COO and Don Cosenza as SVP-Business Development, has been instrumental in elevating our programs, operations, and market presence," said Kianmahd. "I am extremely proud of the recognition our exceptional team has earned from customers and referral sources, as demonstrated by our industry-leading 4.5-star Google rating. We are moving fast and excited about the future."

MAXIM
COMMERCIAL CAPITAL

PRESS RELEASES

14 for 14: Channel Named Inc. 5000 Fastest-Growing Private Company Again

AUGUST 11, 2026 - MINNETONKA, MN **-** Channel is honored to announce that it has earned a spot on the Inc. 5000 list of fastest-growing private companies in America for the 14th year in a row. The annual ranking recognizes independent and entrepreneurial businesses that have demonstrated strong performance while driving innovation and shaping the future of the economy.

“The streak was never the goal. Instead, we just tried to build a place where people are proud to come to work and our Partners know they can count on us,” said Adam Peterson, Chief Executive Officer. “When you stay focused on doing what’s right on both counts, the results tend to follow.”

The milestone arrives as Channel celebrates funding over $4 billion to more than 41,000 small businesses since its founding in 2009. This number further represents the real companies and business owners' success that Channel has been fortunate to support across the country. Through deliberate investment in people, partnerships, and a culture of doing the right thing, the organization remains dedicated to helping small businesses access the capital they need to move their ventures forward.

“Fourteen years is a long time to sustain anything,” said Rob Ceribelli, President. “The fact that our growth has stayed consistent while the market around us has shifted dramatically says more about the people in this organization and the Partners we stay close with than any single milestone ever could.”

The 2026 Inc. 5000 list recognizes a new class of companies redefining what progress looks like. From AI and advanced manufacturing to healthcare and professional services, these businesses are expanding their impact, creating jobs, and proving that entrepreneurial ambition continues to fuel the economy. Among the 5,000 companies, this year’s honorees collectively added more than 627,208 jobs to the economy over the past three years.

“Every company on the Inc. 5000 has a story of perseverance, smart decision making, and a refusal to sit still,” says Mike Hofman, Editor-in-Chief of Inc. “Their growth reflects more than strong financial performance – it reflects creativity, resilience, and the customer focus required to build companies that make a lasting impact. We congratulate all honorees on this significant achievement.”

The Inc. 5000 recognition adds to a year that also included Channel’s fifth consecutive appearance on the Minnesota Star Tribune Top 200 Workplace list – an acknowledgement that the internal culture driving the company’s growth is as strong as the external results it produces.

CHANNEL

PRESS RELEASES

360 Equipment Finance Welcomes Jonas Kim as Salesforce Administrator

AUGUST 18, 2026 - AUSTIN, TX - 360 Equipment Finance announced that Jonas Kim has joined the company as Salesforce Administrator, bringing six years of Salesforce experience and a strong focus on improving business processes and operational efficiency.

In his new role, Jonas will oversee and support the company's Salesforce platform, helping optimize workflows, improve processes, and ensure the system continues to support the needs of 360 Equipment Finance as the company grows.

"I'm excited to join 360 Equipment Finance and have the opportunity to help improve the way we use Salesforce," said Jonas. "I enjoy finding ways to make processes simpler and more efficient, and I'm looking forward to working with the team to make things run more smoothly and help support the company's continued growth."

"Please join us in welcoming Jonas Kim as our new Salesforce Administrator," said Erik Tyvoll, Vice President of Information Technology at 360 Equipment Finance. "Jonas brings six years of Salesforce experience and a genuine drive to make our processes run smoother and smarter. He has a knack for spotting inefficient workflows and immediately thinking through how to fix them, an instinct that will serve us well as we sharpen our operations and set the team up for continued growth."

360 Equipment Finance continues to invest in experienced professionals and technology as it strengthens its operations and expands its presence in the equipment finance industry, supporting brokers, vendors, and businesses nationwide.

Michael Beswick Joins Maxim Commercial Capital as Chief Technology Officer

AUGUST 19, 2026, LOS ANGELES, CA - Maxim Commercial Capital ("Maxim") is pleased to announce Michael "Bez" Beswick has joined the company as Chief Technology Officer. Beswick brings over 15 years of experience as a technical architect and consulting practice lead across many industries to guide Maxim's technology strategy, systems architecture, data, and AI roadmap.

"Technology is pivotal to achieving our mission of redefining access to capital for underserved small and mid-sized businesses nationwide," said Michael Kianmahd, Maxim's CEO. "Bez's proven technology leadership skills combined with his vision for the future and spirited practicality will help propel Maxim forward as a business while improving the customer experience. We could not be more excited to have Bez aboard as our CTO and part of our leadership team."

Prior to joining Maxim, Bez served as Vice President of Services at Faye Digital where he led a specialized CRM practice. Previously, he was Vice President of Delivery at CRM Science, which was acquired by Faye Digital. Bez architected a 2019 Salesforce Partner Innovation Award-winning implementation and is a two-time Dreamforce presenter. He began his career as a programmer analyst and web developer building custom applications and analytics platforms.

"I'm very excited to join Maxim at such an interesting time for the industry," said Beswick. "Technology is reshaping specialty finance and commercial lending, creating opportunities for Maxim to be a leader in that evolution. As part of the leadership team, I am able to build and implement a sustainable, holistic technology strategy to strengthen Maxim's internal performance and position the company at the forefront of the industry's rapidly changing technological landscape."

PRESS RELEASES

SLIM Capital Launches SLIM to WIN, a First-of-Its-Kind Interactive Pricing Tool for Equipment Finance Originators

AUGUST 19, 2026, BEVERLY HILLS, CA - SLIM Capital, LLC, a boutique equipment fintech firm, today announced the launch of SLIM to WIN, a proprietary interactive pricing tool designed to help brokers and originators structure transactions more effectively and move approvals across the finish line.

The live calculator card is embedded directly within eligible SLIM approvals, giving originators immediate visibility into deal pricing and the ability to manipulate payment options without leaving the approval experience. Originators can adjust their points in 0.25-point increments and see how the customer's payment changes in real time. Approval email notifications will clearly identify when a transaction qualifies for SLIM to WIN.

When an originator elects to reduce points, SLIM matches that move with a pricing concession of its own. This shared approach brings the customer's payment closer to the number needed to close the deal, while still giving originators room to manage their own economics and commission.

"We were losing good deals over small pricing gaps. SLIM to WIN closes that gap in real time, and because we're sharing the concession with our originators, it's a win for both sides of the table, which is exactly how we align ourselves with our partners and clients," said Shervin Rashti, CEO of SLIM Capital.

How SLIM to WIN Works

- **Embedded in the approval.** Eligible transactions display a SLIM to WIN calculator widget directly within the approval.
- **Real-time scenario review**. Originators can move points up or down in 0.25-point increments within the available range and immediately review revised payment options.
- **Matched pricing support.** When an originator concedes points, SLIM also adjusts its pricing to help create a more competitive customer payment.
- **Immediate documentation.** Once a term is selected, the revised payment is reflected in the approval workflow and term sheet, with the selection recorded internally for visibility.

Availability

SLIM to WIN will be available on most, but not all, transactions. Email notifications and approval details will clearly indicate when the program is offered. Available point ranges and payment options are transaction-specific, and a selected option becomes final within the approval experience.

Built for Better Partner Outcomes

SLIM to WIN extends SLIM Capital's commitment to combining technology, direct decision-making and relationship-driven service. By making pricing more transparent and actionable for originators, SLIM aims to reduce back-and-forth, accelerate decision-making and give its partners another effective tool for closing equipment finance transactions. This is one in a series of enhancements and deployments we're rolling out to make SLIM Suite the preeminent choice for our partners.

PRESS RELEASES

Channel Announces Cindy Fleck Stepping Away After Distinguished Career in Equipment Finance

AUGUST 19, 2026 - MINNETONKA, MN **-** Cindy Fleck, a respected equipment finance industry leader with more than 36 years of experience with the last six-and-a-half years at Channel, today announced her decision to step away from the business to spend more time with her mom, following the loss of her dad in late June.

Fleck's leadership has been defined by a customer-first mindset, a passion for partnership, and a commitment to helping others succeed. During her tenure at Channel, she played a key role in launching and offering equipment finance, strengthening strategic partnerships, driving revenue growth, supporting organizational development, and helping position the company for future success.

"It has been an incredible privilege to serve this industry for more than three decades and to work alongside so many talented colleagues, customers, and partners," said Fleck. "I am immensely proud of what we have accomplished together and grateful for the relationships that have made this journey so rewarding. The trust, collaboration, and friendships built throughout my career will always be among my most cherished accomplishments."

Cindy has played active roles in all industry associations including NEFA (UAEL/EAEL), AACFB (NAELB), and ELFA – serving as conference chair, committee member and participant on many panels over the years. In addition, Fleck will continue to serve as a Trustee on the Equipment Leasing & Finance Foundation Board, being involved and passionate about the Campus to Career mission which has drawn many new graduates to our industry.

“I’m very fortunate to have worked alongside Cindy for many of her 36 years in the industry,” praised Brad Peterson, Co-Founder and Executive Board Member at Channel. “First at Schwan’s/US Bank/Manifest and the last several years here at Channel. I have often described her as ‘Keeper of the Flame’ relating to her steadfast focus on our culture, our mission and most importantly our relationship and commitments to our partners. Her contributions to Channel have been significant and enduring. She will be missed.”

“Since joining Channel, Cindy has been an essential member of the leadership team, helping shape the organization into what it is today,” added Adam Peterson, Chief Executive Officer at Channel. “Her leadership established a strong foundation for our partnerships, internal culture, strategy, and organizational development, one we will continue building on for years to come. We wish Cindy and her family all the best as they transition into retirement.”

As she looks ahead, Fleck plans to focus on family, personal priorities, and to continue supporting the industry through involvement as Trustee for ELFF and those professional relationships that have been central to her career.

PRESS RELEASES

Jennifer Fanz to Lead the Next Chapter of Operations at PEAC Solutions

AUGUST 20, 2026, MOUNT LAUREL, NJ **-** PEAC Solutions, a leading global equipment financing platform, today announced the promotion of Jennifer Fanz to Senior Vice President of Operations, effective September 1, 2026. In her new role, Fanz will report directly to Eileen Schoonmaker, President of the Americas.

Fanz currently serves as PEAC's Vice President of Sales – Healthcare, a role she has held since joining the company in November 2022. She brings nearly 30 years of experience in the equipment finance industry, with a career spanning sales, program management, sales management, and market development. During her tenure at PEAC, she has helped strengthen the company's healthcare financing business and deepen strategic partner relationships while supporting cross-functional initiatives that have enhanced customer and partner experiences.

Fanz's industry leadership has also been recognized by Monitor, which named her a Top Woman in Equipment Finance. She also served as past Chair of the ELFA Women's Committee, where she supported the advancement and development of women across the equipment finance industry.

As Senior Vice President of Operations, Fanz will focus on strengthening collaboration across teams and functions and driving operational excellence as PEAC continues to grow.

"Jen brings to this role an expert level of understanding of our business, our customers and partners, and what it takes to get things done," said Eileen Schoonmaker, President of the Americas at PEAC Solutions. "One of Jen's greatest strengths is her ability to bring people together across teams and functions to solve problems, create alignment and move initiatives forward. As we continue to grow, working as one connected organization becomes even more important, and I am confident Jen is the right leader to help strengthen those connections while continuing to drive operational excellence across PEAC."

Fanz said she is excited to take on the new role and build on the experience she has gained at PEAC.

"To say I am excited would be an understatement," said Jennifer Fanz, Senior Vice President, Operations at PEAC Solutions. "The last four years with this organization have been a defining chapter in my career, filled with incredible opportunities, meaningful relationships and tremendous growth. I am energized to take on this next role and bring my commercial perspective to the team." Fanz added, "I know that by collaborating with our talented operational leaders and dedicated teams, we will continue to elevate the support and processes that make a difference for our partners and embody our PEAC values. When we put people first, whether they are our colleagues, customers or partners, success naturally follows, and our performance will reflect that commitment."

Fanz's promotion marks the next chapter for PEAC's Operations organization, with a focus on strengthening cross-team collaboration and supporting the company's continued growth.



PRESS RELEASES

NewLane Announces Promotions to Credit, Sales, Support Teams

AUGUST 25, 2026 - PHILADELPHIA, PA **-** NewLane Finance, a subsidiary of WSFS Bank, has announced a number of promotions within its Credit, Sales, and Support teams:

Rebecca Masserini-Cooper has been named Vice President of Credit. This senior leadership role is responsible for overseeing the organization's Credit Policy and Credit Procedures & Guidelines, risk management, and lending strategy. She will also provide strategic direction and hands-on oversight of underwriting, portfolio management, and credit policy. Masserini-Cooper has more than 20 years' experience in the equipment finance industry.

Kimberly Cannon has been named Direct & Vendor Retail Sales Manager. In this role, she leads efforts to accelerate annual sales growth through the Direct Sales and Vendor Retail Sales channels, drive operational excellence in sales and customer service, and collaborate closely with organizational leaders to support strategic business objectives. She has more than 30 years' experience in the equipment finance industry.

Anetta Ventresca has been named Credit Operations Manager. In this position, she is responsible for auditing contracts to ensure compliance with credit guidelines before funding, maintaining vendor payment records, and contract modifications. She has more than 12 years' experience in the equipment finance industry.

"These promotions recognize the ongoing commitment of three team members who have been instrumental in helping NewLane reach our goals for growth and for service," said Robert Ferraro, Senior Vice President and Chief Sales Officer. "We're proud to have Rebecca, Kim, and Anetta leading their respective teams to keep us growing."

360 Equipment Finance Welcomes Valeria Barrera Pasillas as Titling Manager

AUGUST 25, 2026 - AUSTIN, TX - 360 Equipment Finance announced that Valeria Barrera Pasillas has joined the company as Titling Manager, bringing a decade of experience in equipment titling and a deep understanding of the processes required to efficiently manage titles and related documentation.

In her new role, Valeria will oversee the company's titling operations, helping ensure titles are processed accurately and efficiently while supporting brokers, vendors, customers, and internal teams throughout the funding process.

"I'm excited to join 360 Equipment Finance and bring my experience to a company that is continuing to grow," said Valeria. "I'm looking forward to working with the team, helping keep the titling process running smoothly, and using my experience to support our customers and partners."

"We're excited to have Valeria join us," said Ryan Chen, Director of Operations at 360 Equipment Finance. "She brings close to a decade in equipment finance titling, including leading title teams. Titling is one of the more demanding parts of what we do, and having someone with her experience run it helps us continue to service our broker partners at the level they expect."

360 Equipment Finance continues to invest in experienced professionals and operational excellence as it expands its presence in the equipment finance industry, supporting brokers, vendors, and businesses nationwide.

PRESS RELEASES

Channel Elevates Krogen to Head of Sales

AUGUST 27, 2026 - MINNETONKA, MN **-** Channel, a national leader in equipment finance and working capital solutions, today announced the promotion of Cory Krogen, CLFP, to Head of Sales. In this newly elevated role, Krogen will lead the company's full sales organization with responsibility for new business development, partner and customer retention, and sales execution across both working capital and equipment finance.

Krogen's appointment is a natural progression for someone who has been part of the Channel story from the very beginning. Joining Channel in 2010 as the company's fourth hire, he has grown alongside the organization through every major milestone from early working capital roots to its evolution as an on-balance sheet independent lender and the launch of its equipment finance product offering. He was named Director of Sales in 2020 and most recently served as Senior Vice President of Sales before stepping into this expanded leadership role.

"Cory and I go back even further than Channel does, and I've watched him navigate every evolution of the business," said Adam Peterson, Chief Executive Officer. "What has never changed throughout is how he shows up for his team, his partners, and their customers. He earns trust the old-fashioned way, one conversation and one relationship at a time. Putting him in this role is a recognition of what he has already proven, time and again. I could not be more confident in what he is going to do with it."

In this new capacity, Krogen will lead Channel's sales strategy and execution across both product verticals, overseeing the development and performance of its national sales team. He will be responsible for deepening partner relationships of all types and scale through product, program, and pricing negotiations. Krogen will also work closely with credit, portfolio management, and executive leadership to ensure the sales organization operates in full alignment with Channel's broader financial and compliance objectives.

"Cory is the definition of what it means to grow with an organization and make it better at every stage," said Ryan Schlenner, Managing Director. "He has lived every chapter of this company's progression and brings a perspective that simply cannot be replicated. Our sales team is talented, motivated, and ready, and with Cory leading the charge, I am certain we will raise the bar on how we serve our partners and build on the momentum we have already established."

"I am incredibly proud to step into this role and grateful for the trust placed in me," said Krogen. "Channel has always put the relationships with its people and partners at the epicenter of what we do. That does not change and this is another opportunity to deepen them. I am excited about what this team is capable of and looking forward to the work ahead."

Krogen holds a Bachelor of Business Administration degree from Hamline University's School of Business and earned his CLFP designation in 2021.

PRESS RELEASES

PEAC Solutions Elevates Alycia Kenney Montero to Senior Vice President, General Counsel & Chief Compliance Officer

SEPTEMBER 1, 2026 - MOUNT LAUREL, NJ **-** PEAC Solutions ("PEAC"), a leading global equipment finance platform, today announced the promotion of Alycia Kenney Montero to Senior Vice President, General Counsel & Chief Compliance Officer, effective September 1.

In her expanded role, Kenney Montero will lead PEAC's legal, compliance, and risk litigation management functions, helping ensure the organization continues to exceed regulatory requirements while supporting its broader business objectives. She will also lead multidisciplinary teams and serve as a key liaison to regulatory agencies and banking partners.

Since joining PEAC in July 2023 as Deputy General Counsel, Kenney Montero has played a critical role in strengthening the company's legal and compliance functions and supporting the organization's continued growth. She has worked in the fintech industry since 2010 and is admitted to the Massachusetts Bar.

"Great legal leadership isn't just about knowing the law; it's about understanding the business and helping it move forward responsibly," said Eileen Schoonmaker, President of the Americas at PEAC Solutions. "Alycia brings that balance every day: strong judgment, a deep commitment to PEAC and an equally strong commitment to helping our customers succeed. Her promotion is also a great example of succession planning working the way it should."

As Chief Compliance Officer, Kenney Montero will continue to focus on strengthening PEAC's regulatory framework, managing legal and compliance risk, and partnering across the organization to support responsible growth and operational excellence.

"In-house in the fintech space is always an adventure; with changing markets, sales innovations, and swinging regulatory pendulums, the challenges are endless, and the opportunity for impact is real. I am excited to keep growing and changing here at PEAC. The people make PEAC a very special place. It is an honor to work with such dedicated, smart, and kind people," said Kenney Montero.



PRESS RELEASES

Navitas Credit Names Karen Shields General Counsel and Kristen Wendle Director of Human Resources

SEPTEMBER 2, 2026 - PONTE VEDRA , FL - Navitas Credit LLC (“Navitas”), a leading equipment finance company, today announced the appointments of Karen Shields as General Counsel and Kristen Wendle as Director of Human Resources, strengthening its leadership infrastructure as the company enters its next phase of growth as an independent equipment finance company.

Shields joins Navitas with extensive experience in legal, regulatory, compliance, and risk management leadership across the equipment finance industry. Most recently, she served as General Counsel and Chief Compliance Officer at PEAC Solutions. In her new role, Shields will lead Navitas’ legal function and support the company’s regulatory, compliance, and risk management initiatives. She will be based in Navitas’ Mount Laurel, New Jersey office.

“I am thrilled to join Navitas as General Counsel at such a pivotal moment in the company’s evolution. I look forward to working alongside such a talented team in supporting the next phase of growth while strengthening the company’s legal framework and ensuring compliance with the industry's evolving regulatory landscape. I believe our combined expertise will help us scale the business thoughtfully and sustainably.” said Karen Shields.

Wendle joins Navitas as Director of Human Resources, bringing broad human resources leadership and business partner experience across financial services and other diverse industries. Most recently, she served as AVP, HR Business Partner at VyStar Credit Union. At Navitas, Wendle will lead the company’s human resources function and serve as a strategic partner to employees and leadership, with a focus on employee engagement, development, and growth. She will also play an important role in strengthening Navitas’ culture and supporting the organization as it continues to grow. Wendle will be based at Navitas’ headquarters in Ponte Vedra, Florida.

"I am grateful for the opportunity to step into this role during such a transformative period and support the organization in Human Resources, where people remain the foundation of our success,” said Kristen Wendle. “I look forward to connecting with employees across the organization, serving as a trusted partner, and contributing to an exciting journey of growth and success together."

“Karen and Kristen are tremendous additions to the Navitas team,” said Mike Bruman, Chief Executive Officer of Navitas. “As we continue to build for the future, their experience and leadership will be invaluable. Karen brings deep industry expertise across legal, regulatory, and compliance matters, while Kristen brings a strong track record of supporting employees and partnering with leaders to build high-performing organizations. We are thrilled to welcome them to Navitas.”

PRESS RELEASES

Wafra Completes Acquisition of Navitas Credit LLC

SEPTEMBER 1, 2026 - PONTE VEDRA , FL - Navitas Credit LLC (“Navitas”), a leading equipment finance company, today announced the completion of its acquisition by investment funds advised by Wafra Inc. (“Wafra”), the $30 billion New York City-based global alternative asset manager, from United Community Banks, Inc. (NYSE: UCB) (“United”) for approximately $2 billion in cash after closing adjustments.

Wafra has previously announced it had entered into a definitive agreement to acquire Navitas on June 12, 2026. The transaction marks the beginning of a new chapter for Navitas as an independent equipment finance company. With the support and partnership of Wafra, Navitas will continue to build on its strong market position, expand its capabilities, and pursue opportunities for continued growth while remaining focused on delivering equipment financing solutions to businesses nationwide.

“Today marks an important milestone for Navitas” said Mike Bruman, Chief Executive Officer of Navitas. “We are proud of what we have built and grateful to United for its partnership and support throughout our journey. As we enter this new era with Wafra, we are energized by the opportunities ahead and remain committed to continuing to build Navitas into the premier independent equipment finance company in the United States.”

“Navitas is a standout equipment finance company with proven leadership, deep industry relationships, and a track record of success,” said Edward Tsai, Head of Real Assets & Infrastructure at Wafra. “We are pleased to close our acquisition and to be launching our partnership with Mike and the entire Navitas team as they expand the strong capabilities of the business and further enhance its value proposition to its partners and customers.”

Navitas will operate under the Navitas Credit LLC name and will remain headquartered in Ponte Vedra, Florida. Bank of America and Wells Fargo provided acquisition financing, as well as $1.0 billion of additional financing capacity to support Navitas’ continued growth.

BofA Securities acted as exclusive financial advisors to United, and Squire Patton Boggs (US) LLP served as United’s legal advisor. Sidley Austin LLP, Chapman and Cutler LLP, and Clifford Chance LLP served as Wafra’s legal advisors.

360 Equipment Finance Welcomes Monica Coito as Contract Manager

SEPTEMBER 9, 2026 - AUSTIN, TX - 360 Equipment Finance announced that Monica Coito has joined the company as Contract Manager, further strengthening the company’s growing operations and documentation team.

In her new role, Monica will support the company’s contract management and documentation processes, helping ensure transactions are processed accurately and efficiently while providing a smooth experience for brokers, vendors, and customers throughout the funding process.

“I’m excited to join 360 Equipment Finance and become part of a team that is focused on growth and providing great service to its partners and customers,” said Monica. “I’m looking forward to getting to know the team, contributing my experience, and helping make the contract and funding process as smooth as possible.”

“We’re excited to welcome Monica to the team,” said Ryan Chen, Director of Operations at 360 Equipment Finance. “She brings nearly eight years of equipment finance documentation and funding experience, and she knows the third-party originator side inside and out. That depth is exactly what we need to continue to service our broker partners as our volume grows.”

PRESS RELEASES

360 Equipment Finance Welcomes Jan Schmitzer as Collections & Litigation Specialist

SEPTEMBER 16, 2026 - PONTE VEDRA , FL - 360 Equipment Finance announced that Jan Schmitzer has joined the company as Collections & Litigation Specialist, further strengthening the company's growing collections team.

In her new role, Jan will execute early-stage intervention strategies on delinquent commercial accounts, identify the root causes of default, and negotiate cure plans and restructuring options. She will also evaluate late-stage accounts for post-charge-off collections efforts, prepare files for legal placement, manage legal files with counsel, and execute post-judgment enforcement strategies.

"My favorite quote is, 'Everything happens for a reason.' I believe this applies to my joining the 360 team because I believe 360 will appreciate what I have to offer and help me continue to grow," Jan said. "I'm looking forward to becoming an asset to the company."

"We're excited and fortunate to have Jan join the team," said Jesse Jaskolka, Collections Manager at 360 Equipment Finance. "She brings a wide range of experience within our industry, having worn many different hats at her previous employer. She has a lot of enthusiasm for her work and a great attitude. I believe she will fit in well and hit the ground running."

360 Equipment Finance continues to invest in experienced professionals and service excellence as it expands its presence in the equipment finance industry, supporting customers nationwide.

PRESS RELEASES

CLFP Foundation Welcomes 16 New CLFPs

SEPTEMBER 28, 2026 - The Certified Lease & Finance Professional (CLFP) Foundation is pleased to welcome its newest class of CLFPs: 16 industry professionals who have demonstrated mastery of the equipment finance body of knowledge by passing the rigorous CLFP Exam. Representing diverse companies and roles across the industry, these individuals have joined an elite community united by a commitment to professional excellence and ethical practice. They are:

1. Nicholas Bruns, CLFP – Capital Markets Relationship Manager, Equipment Finance, Fifth Third Bank
2. Nathan Chilton, CLFP – Director - Mechanical and Engineering, Midwest Railcar
3. John Coad, CLFP – Business Development Manager, New Trucks, Crossroads Equipment Lease & Finance LLC
4. Jack Dison, CLFP – Director – Work Truck Group, Crossroads Equipment Lease & Finance LLC
5. Erin Fugh, CLFP – Application Consultant, Solifi
6. Evelyn Izydorski, CLFP – Large Ticket Credit Underwriter, Crossroads Equipment Lease & Finance LLC
7. Alexandrea Jones, CLFP – Senior Application Consultant, Solifi
8. Rodney Landis, CLFP – Segment Credit Executive, Webster Bank
9. Nathan Obringer, CLFP – Officer - Equipment Finance Representative, Fifth Third Bank
10. Nicola Okolo, CLFP – Project Manager, Solifi
11. Jacquelyn Paulsen, CLFP – Chief Operating Officer, Synergy Financial Resources, LLC
12. Joseph Reed, CLFP – Senior Lease Commencement Administrator, Stryker
13. Kaye Rini, CLFP – Senior Application Consultant, Solifi
14. James Rusch, CLFP – Regional Credit Manager, Crossroads Equipment Lease & Finance LLC
15. Brigid Ryan, CLFP – Equipment Finance Capital Markets Associate Relationship Manager, Fifth Third Bank
16. Carolyn Walsh, CLFP – Lead Business Analyst, Solifi

“I had been considering pursuing the CLFP designation for several years, so I was incredibly grateful to receive a scholarship through AACFB (American Association of Commercial Finance Brokers) to attend an Academy and take the Exam in honor of Roderick Knoll, CLFP,” shares Jacquelyn Paulsen. “Throughout my career, I’ve been fortunate to have incredible mentors within the equipment finance industry. While I did not have the opportunity to know Roderick personally, I know the impact he had as a mentor to so many, which made receiving the scholarship especially meaningful.”

“I’ve also always had a strong desire to keep learning, and in an industry that is constantly evolving, there is always more to learn,” adds Paulsen. “Pursuing the CLFP was an opportunity to expand my knowledge while demonstrating my commitment to my profession and to the vendors, customers, and colleagues I work with every day. I’m proud to have earned the designation, and am especially excited to add another CLFP to our small but mighty team at Synergy Financial Resources.”

Earning the CLFP designation signals more than technical expertise. It reflects a commitment to elevating the equipment finance industry through continuous learning, ethical leadership, and shared professional standards. CLFPs and Associates are now found across the United States (including Puerto Rico), Canada, India, Pakistan, Africa, New Zealand, and Australia. To learn more or begin your own path to certification, visit www.CLFPFoundation.org.

PRESS RELEASES

A Triple Recognition for Channel's Influential Leadership by Monitor

OCTOBER 15, 2026 - MINNETONKA, MN – Channel is proud to announce three members of its leadership team have been named to Monitor's 2026 Most Influential People in Equipment Finance. The list is built entirely from peer and colleague nominations, so these leaders were put forward by the people who work alongside them.

Kristi Schon, Chief Marketing Officer, Brand Builders Category

Robert Moskovitz, Chief Financial Officer, Market Movers Category

Hannah Anderson, Director of Human Resources, Culture Creators Category

All three share a habit of reaching past their job descriptions. Instead of chasing trends, they focus on awareness for what's next, gathering facts to make informed calls, and leveraging wide networks they've built to test ideas with. That extra effort means Channel's teams go into each new challenge with sound strategy and the resources to back it up. "One of the things I appreciate most about Kristi, Robert, and Hannah is that they're always focused on something bigger than themselves," said Adam Peterson, Chief Executive Officer. "They have a way of getting out ahead of what's coming and bringing back what our teams need to stay a step ahead. Each of them has built strong teams and invested in people throughout their careers, and it shows."

Now in its second year, the Monitor list draws from an online survey of peer and colleague nominations across 17 categories. Monitor's goal is to capture the people making a lasting impact on the industry, and it gives behind-the-scenes contributors the same weight as the most visible.

Schon has spent nearly 6 years shaping how the organization and its brands show up in the marketplace. She believes businesses are built on relationships. Whether sharing ideas with industry peers, supporting association initiatives, or helping team members find their voice, she has made a lasting impression by putting people first and creating meaningful connections along the way.

Moskovitz brings a deep understanding of the funding landscape and a vast network that he uses to change how Channel navigates shifts in the market while sustaining focus on long-term stability. This approach helped him bring together a more diverse mix of funding sources, further strengthening Channel's foundation with readiness to continue serving its partners when conditions change.

For Anderson, culture starts with the people. From leadership programs to employee-driven initiatives, she has helped build an environment where team members feel supported, valued, and encouraged to contribute in meaningful ways. She believes a strong culture starts with investing in development at every career stage and creating opportunities for growth.

"We're proud to have three of our leaders on this year's list, and it's incredibly powerful when you consider it's entirely determined by their peer set," said Rob Ceribelli, President. "The influence each of them has and the impact they've had on our organization has and continues to exceed expectations. They embody what truly sets Channel apart."

At Channel, success is never the work of one person. These honors speak to the whole team, serving as a reminder of the company's differentiated focus to "win together" - both with internal teammates and external partners alike. Channel's presence on this year's list reinforces the company's commitment to thought leadership and the collective effort behind its influence on the equipment finance industry.

PRESS RELEASES

CLFP Foundation Celebrates 41 Years of the CLFP Designation and Honors Andrea Schmid, CLFP, Dave Schaefer, CLFP and Terey Jennings, CLFP

OCTOBER 19, 2026 - The Certified Lease & Finance Professional (CLFP) Foundation proudly celebrated CLFP Day 2026 on October 8th, marking 41 years of the CLFP designation. Under this year's theme, Decades of Dedication, CLFPs and industry colleagues came together for a virtual celebration and in-person gatherings across the country, honoring the professionals, relationships, and shared commitment to excellence that continue to strengthen the equipment leasing and finance industry. This year's celebration also honored three outstanding members of the CLFP community: Andrea Schmid, CLFP, recipient of the Cindy Spurdle Award of Excellence, and Dave Schaefer, CLFP, and Terey Jennings, CLFP, recipients of the Larry LaChance Lifetime CLFP Award.

The CLFP Foundation proudly recognized Andrea Schmid, CLFP, with the Cindy Spurdle Award of Excellence for her leadership, service, and continued commitment to advancing the CLFP designation and supporting fellow equipment finance professionals. The Cindy Spurdle Award of Excellence recognizes a CLFP in Good Standing who has demonstrated exceptional leadership and made significant contributions to the equipment finance industry and the CLFP Foundation. Schmid's dedication to helping others succeed reflects the spirit of this award and the collaborative culture at the heart of the CLFP community.

Throughout her career, Schmid has been a dedicated advocate for professional development, helping colleagues expand their knowledge and achieve their CLFP designations. Reflecting on her decade as a CLFP, Schmid looked back at the impact of her efforts and counted nearly 100 professionals she has helped earn the designation, with that number continuing to grow. "The CLFP community embodies everything that makes our industry exceptional: a commitment to learning, collaboration, and helping others succeed," said Schmid. "I am honored to receive this recognition and remain passionate about advancing the CLFP designation and supporting future leaders. My hope is that we continue to inspire the next generation of equipment finance professionals and foster the same sense of community and opportunity that has meant so much to me."

The CLFP Foundation also recognized Dave Schaefer, CLFP, and Terey Jennings, CLFP, with the Larry LaChance Lifetime CLFP Award, honoring their longstanding contributions to the Foundation and their continued connection to the designation.

Schaefer earned his CLFP designation early in his career and credits the knowledge it provided as an important part of his professional journey. "The CLFP designation is more than a title representing your standing in the industry. It shows your pride and commitment to professionalism in our valuable industry, supporting small and large businesses," said Schaefer. "I was fortunate to earn my CLFP early in my career. It prepared me for my nearly 50-year career. And maybe the best part is all of the wonderful and enjoyable folks associated with it!"

Jennings, a longtime leader at Financial Pacific Leasing, saw firsthand how the CLFP designation strengthened both individual professionals and the organizations they served. "I'm honored to be selected as one of this year's recipients of the Larry LaChance Lifetime CLFP Award. It's extra special to be recognized along with Dave Schaefer, who I've known and worked closely with for 40 years," said Jennings. "For many years Financial Pacific had more CLFPs than any company, and I would routinely be asked why FinPac valued the CLFP designation so much. My answer was easy in that we were a better company because of our CLFPs. The breadth of equipment finance knowledge needed to become a CLFP created great value to each of our CLFPs and our company."

In addition to the virtual celebration, CLFPs and industry colleagues gathered at in-person events across the country to mark the occasion. These local celebrations provided opportunities to reconnect with colleagues, welcome fellow professionals, and recognize the shared dedication that unites the CLFP Community.

PRESS RELEASES

BSB Leasing Names Dylan Myerson President; Don Myerson Becomes CEO

Equipment finance company that Don Myerson founded in 1982 reports credit approvals up 47% this year

OCTOBER 15, 2026 - LITTLETON, CO - BSB Leasing today announced that Dylan Myerson has been named President, effective September 25, 2026. Dylan leads BSB's day-to-day operations and its direction going forward.

Don Myerson, who founded BSB in 1982 and led it as President until September, is now CEO and remains active in the business. He works with Dylan on the company's direction, leads BSB's funding-source relationships, and continues to welcome new broker partners.

"I'm not going anywhere," said Don Myerson. "I'm looking forward to watching Dylan grow this company."

Dylan joined BSB nearly a decade ago with no background in equipment finance. He started by rebuilding the company's website and Salesforce system, then learned the business and led BSB's growth into a broader partner for brokers. Under his leadership, BSB approved 47% more deals through September 2026 than in the same period of 2025.

360 Equipment Finance Welcomes Andrea Hwang as Funding Coordinator

NOVEMBER 2, 2026 - AUSTIN, TX - 360 Equipment Finance is pleased to announce the addition of Andrea Hwang to its operations team as Funding Coordinator. Hwang joins the company with extensive experience in lending and loan operations, further strengthening the team responsible for supporting funding transactions and delivering a high level of service to the company's broker partners.

Hwang brings more than six years of experience across various areas of lending and loan operations, including funding, loan documentation, credit coordination, and appraisal. She holds a Master of Business Administration (MBA) and brings a strong attention to detail, thorough document review skills, and a commitment to keeping transactions moving efficiently.

In her role as Funding Coordinator, Hwang will oversee funding transactions from documentation through closing, working closely with the credit, titling, and sales teams to ensure deals are processed accurately and funded in a timely manner.

"We're excited to welcome Andrea to the team," said Ryan Chen, Senior Vice President of Operations at 360 Equipment Finance. "She brings valuable lending and documentation experience, along with a strong understanding of what it takes to get deals across the finish line. Her attention to detail and commitment to keeping transactions on track will be a great addition to our operations team and the service we provide to our broker partners."

Hwang expressed enthusiasm about joining the company and contributing to the continued success of the team.

"I'm excited to join 360 Equipment Finance as a Funding Coordinator," said Hwang. "Funding is where speed and accuracy really matter, and I take pride in getting deals across the finish line. I'm looking forward to growing with a team that clearly cares about doing right by its partners."

360 Equipment Finance welcomes Andrea to the team and looks forward to her contributions as the company continues to strengthen its operations and relationships with its partners.