



Loan Officer Event Guide

About This Guide

Ready to host, or be a part of, an upcoming event? Consider this your roadmap to event success. Whether you're attending a national industry conference or hosting your own regional event, preparation is key to maximizing every opportunity. This guide was created to help you arrive confident, organized, and ready to build meaningful relationships that drive business growth.

Inside, you'll find practical resources designed to simplify event planning and execution, for both variously scaled **conferences** and **regional events**.

Before each event, review the sections relevant to your event type and use the included checklists during your preparation. The goal isn't simply to attend an event; it's to create valuable connections, uncover opportunities, strengthen partnerships, and represent Asset Based Lending with professionalism and confidence.

Large Booth Conference



ITEMS CHECKLIST:

- 10 X 10' Booth
- 10' Backdrop (Additional for 10x20 Booth)
- Steamer
- TV Screen (Optional)
- Flyer Stands (2)
- Flyers - 3 Minimum
 - All Programs Flyer (1)
 - Conference Specific Flyers (2)
- Swag
 - Pens
 - Tote Bags
 - Tape Measures / Bottle Openers / Divot Fixers (Select 1)
- Collection Basket
- Business Cards

Small Booth Conference



ITEMS CHECKLIST:

- 6.5' Height Booth
- Steamer
- Flyer Stands (2)
- Flyers – 3 Minimum
 - All Programs Flyer (1)
 - Conference Specific Flyers (2)
- Swag
 - Pens
 - Tote Bags
 - Tape Measurers / Bottle Openers / Divot Fixers (Select 1)
- Collection Basket
- Business Cards

Table Conference



ITEMS CHECKLIST:

- Booth in a Bag (Includes Tablecloth)
- Steamer
- Flyer Stands (2)
- Flyers – 3 Minimum
 - All Programs Flyer (1)
 - Conference Specific Flyers (2)
- Swag
 - Pens
 - Tote Bags
 - Tape Measures / Bottle Openers / Divot Fixers (Select 1)
- Collection Basket
- Business Cards

Lunch and Learn

ITEMS CHECKLIST:

LO Event Kit

- Table Cloth
- Flyer Holders
- Swag
- Name Badge
- Table Tents with QR Code



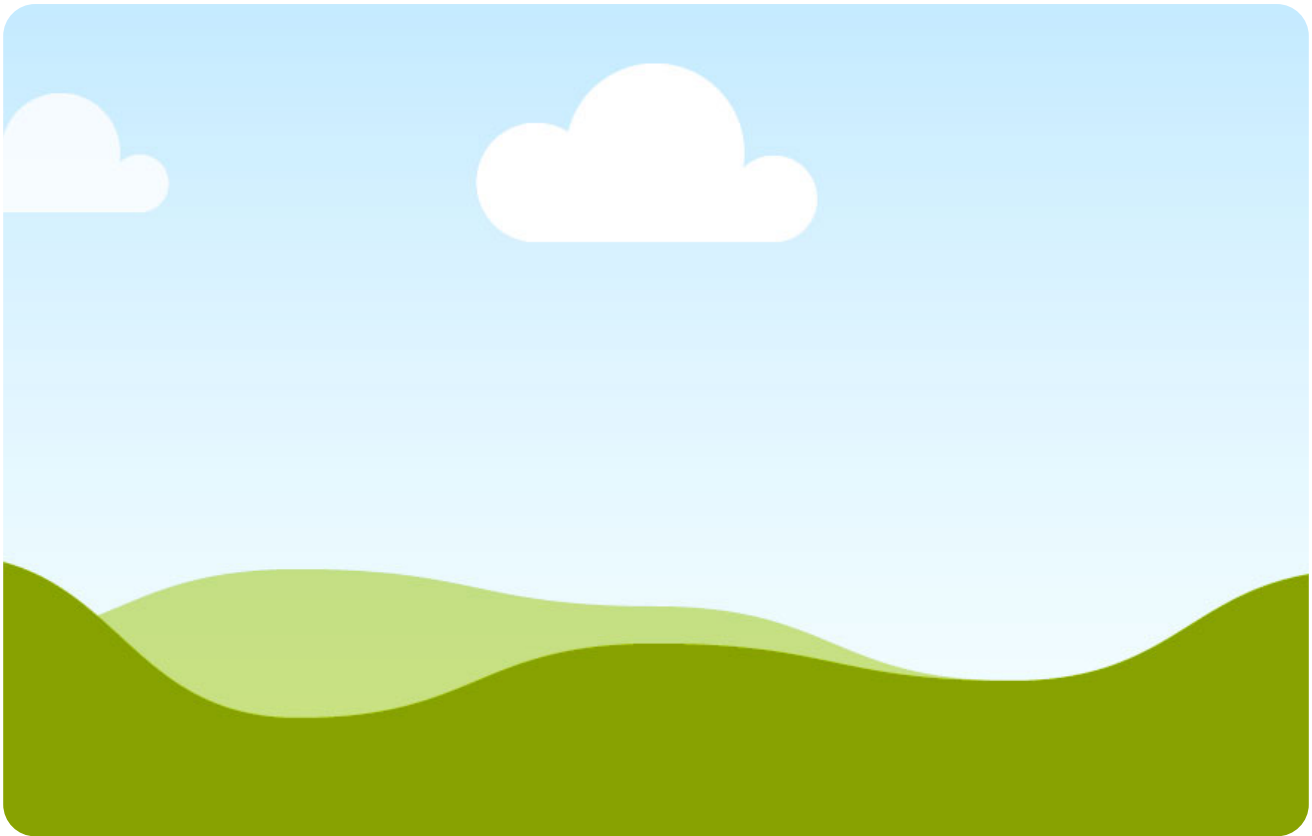
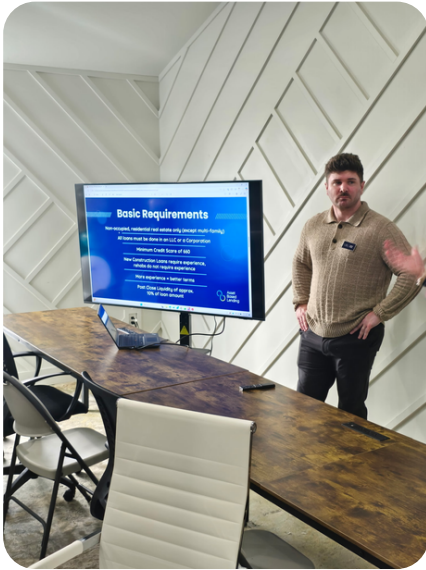
Additional Items

- Printed Flyers
- Capital Connection Cards (Optional)
- Business Cards
- Food & Drink

IMPORTANT NOTES:

- Be sure to practice your slide deck for optimum confidence.
- Wear Asset Based Lending branded attire (shirt, polo, vest, etc.)
- Show up with purpose – Think Like An Owner.
- Confirm with venue that there will be a table you can utilize.
- If ABL is providing the food, you will want to set up your table appropriately:
 - On one side of the table, Include flyer holders in the back with your swag neatly displayed towards the front. Business cards to be placed in the center of the table
 - On the other side of the table, please display your food neatly. Delivery bags, additional boxes and food covers should be hidden beneath when not in use. Napkins, plates, and utensils should be placed towards front corner of this side of table.

Lunch and Learn



Have a photo you'd like to submit? Please send to taylor.leonardo@ablifunding.com.

Happy Hour/Networking/VIP

ITEMS CHECKLIST:

LO Event Kit

- Table Cloth
- Flyer Holders
- Swag
- Name Badge
- Table Tents with QR Code



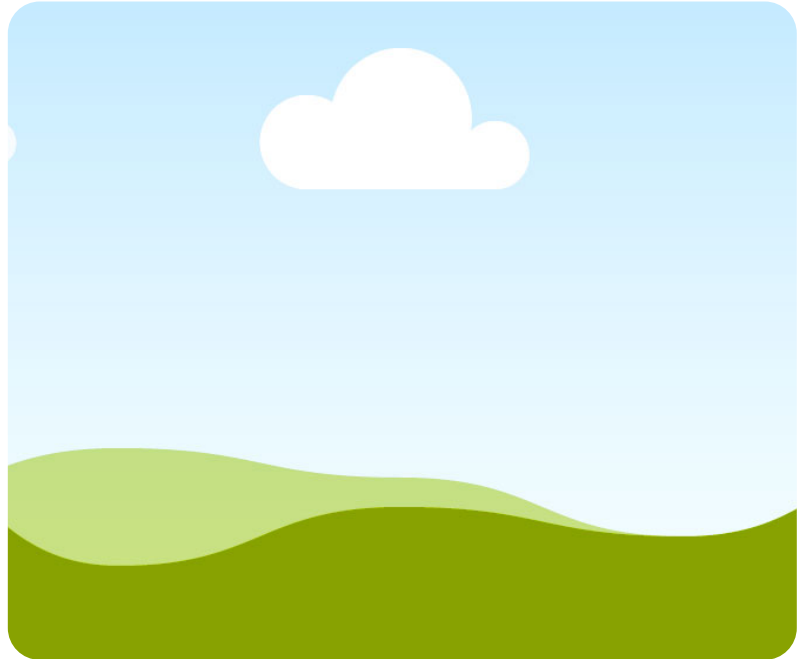
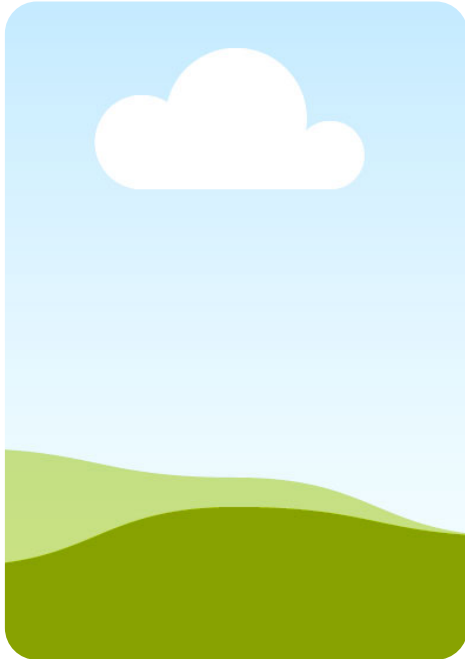
Additional Items

- Pop-Up Banners
- Food & Bev
- Cocktail Napkins (Optional)
- Printed Flyers
- Business Cards
- Additional Table Cloth (If Needed)

IMPORTANT NOTES:

- Table, table cloth, and pop-up banners should be neatly displayed.
- LO Event Kit box and any additional bags should be hidden under your table.
- Table tents and personal QR code napkins should be spread at tables and bar(s).
- Ensure you print flyers that make most sense for your type of event and audience
 - It is your responsibility to print flyers and hand them out during your event. Flyers can be printed at FedEx, Staples, or similar store. Be sure to offer flyers that show an array of products we offer.
 - If you need additional flyer holders, reach out to your Account Manager or buy them with your flyer order.
 - Don't forget to add event QR code to your flyers.

Happy Hour/Networking/VIP



Have a photo you'd like to submit? Please send to taylor.leonardo@ablfunding.com.



Thank you!