Tony Kruglinski's

Rail Equipment Finance



Agenda 2024



Rail Equipment

Finance

1:30 PM

Registration

Flores Foyer

Railroad™

Margarita Bar

Flores Foyer

Margarita Bar is sponsored by:

Ascensor Consulting LLC

Ascensor Consulting

6:30 PM

Welcome Reception

Waterfall

Opening Reception is sponsored by:

Cathcart Rail & Infinity Transportation







North American Railcar Review Day One

7:15 AM

Registration & Continental Breakfast

Flores Foyer



Breakfast is sponsored by:

ITE Management and RVI Group



7:30 AM

Opening Remarks

Flores Ballroom

Speakers:

Andrew Falcone - Vice President - Railroad Financial Corporation

William Geiger - Senior Vice President - Railroad Financial Corporation

David Nahass - President - Railroad Financial Corporation

7:45 AM

Monday Morning Kickoff Keynote

The US Economy, the Labor Challenge and the Second Chance Opportunity

Moderator:

Lafayette Ford - Managing Director - Fifth Third Securities

Speaker:

Jeffrey Korzenik - Managing Director/Chief Economist - Fifth Third Commercial Bank

8:45 AM

North American Railcar Review

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

David Humphrey - Senior Data Scientist - Railinc

9:30 AM

Manufacturing Review

Moderator:

William Vantuono - Editor-in-Chief - Railway Age

Speaker:

Robert Pickel - Senior Vice President - Marketing & Sales - National Steel Car Limited

9:45 AM

Coffee Break and Jeffrey Korzenik Book Signing

Flores Foyer

Coffee Break is sponsored by:

American Industrial Transport, Inc.



10:15 AM

FTR Keynote

Flores Ballroom

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Eric Starks - Chairman - FTR

PLG Keynote

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Graham Brisben - CEO - PLG Consulting

11:45 AM

Ratings and Economic Review

Moderator:

David Nahass - President - Railroad Financial Corporation

Speakers:

Jarrett Bilous - Managing Director - S&P Global

Geoffrey Wilson - Director - Lead Analyst Transportation - S&P Global

12:15 PM

Luncheon

Fiesta Ballroom



Lunch is sponsored by:

FreightCar America, Inc. & GATX Corporation



12:15 PM

Lunch Speaker

Fiesta Ballroom

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Jason Kuehn - Vice President - Oliver Wyman

1:30 PM

Intermodal Environment

Flores Ballroom

Moderator:

William Vantuono - Editor-in-Chief - Railway Age

Speaker:

Ronald Sucik - President - RSE Consulting

2:00 PM

Coal Market Update

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

John Ward - Executive Director - National Coal Transportation Association

2:30 PM

Class I Update

Moderator:

William Vantuono - Editor-in-Chief - Railway Age

Speaker:

Clint Pella - General Director Resource Planning - Union Pacific Railroad

3:00 PM

Tank Car Marketplace

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Daniel Anderson - Vice President - Corporate Strategy - TrinityRail

3:30 PM

Coffee Break

Flores Foyer

Coffee Break is sponsored by:

American Industrial Transport, Inc.



3:45 PM

Steel Products and Scrap

Flores Ballroom

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

TBD

4:15 PM

Railcar Valuation, Leasing and Lease Rates

Moderator:

David Nahass - President - Railroad Financial Corporation

Speakers:

Edward Biggs - President - Biggs Appraisal

Johanna Biggs - Accredited Senior Appraiser - Inspector of Rail Equipment -

Biggs Appraisal

Patrick Mazzanti - President - Railroad Appraisal Associates

Greg Schmid - Managing Director Rail Marketing - RESIDCO

Bryan Vaughan - Vice President - Sales, Marketing and Business Development -

Modern Rail Capital, LLC

5:15 PM

Adjourn

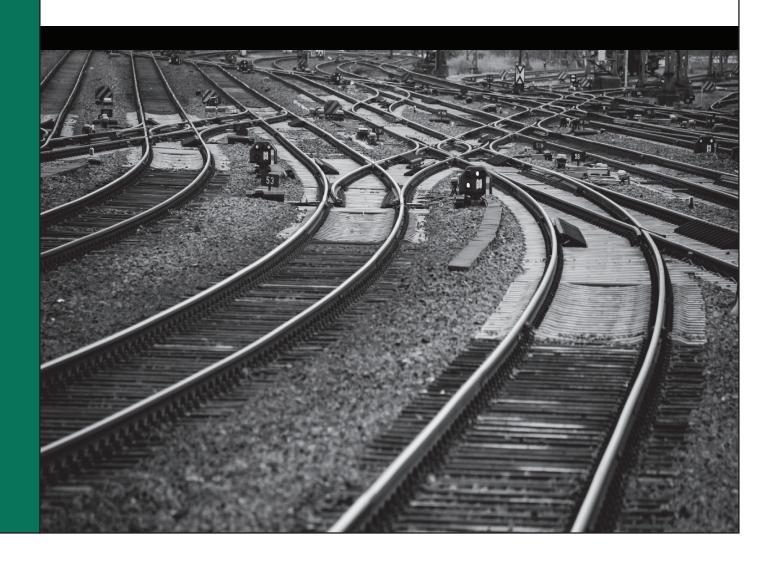
6:30PM

Reception Waterfall

ALVORD AND \widehat{A} LVORD PLLC

The Reception is sponsored by:
Alvord and Alvord PLLC & Union Tank Car Company







North American Railcar Review Day Two

6:00 AM

REF FUN RUN/WALK (Prompt)

Resort Lobby

REF FUN RUN/WALK is sponsored by:

ING Bank



7:30 AM

Registration & Continental Breakfast

Flores Foyer



Breakfast is sponsored by:

ATEL Capital Group & Fifth Third Bank



8:00 AM

Operating Lessor Keynote Flores Ballroom

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Paul Titterton - EVP & President, Rail North America - GATX Corporation

8:30 AM

ABH Consulting Keynote

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Anthony Hatch - Analyst/Consultant - ABH Consulting

9:15 AM

Coffee Break

Flores Foyer

Coffee Break is sponsored by:

American Industrial Transport, Inc.



9:45 AM

Boxcar Briefing

Flores Ballroom

Moderator:

David Sellers - Consultant - Special Projects - The Greenbrier Companies

Speakers:

Doug Driscoll - Vice President Fleet Management - Genesee and Wyoming Railroad Services, Inc.

David Horwitz - Vice President & Group Executive, Portfolio Management & Procurement - GATX Corporation

Anthony Petrillo - Transportation Manager - Packaging Corporation of America

10:30 AM

Covered Hopper Focus

Moderator:

William Vantuono - Editor-in-Chief - Railway Age

Speaker:

Patrick Kurtz - Vice President Portfolio Management - American Industrial Transport, Inc.

Adjourn

12:30 PM

Women In Rail Luncheon

Morgan's Patio

ALVORD AND ALVORD PLLC

Women In Rail Luncheon is sponsored by:

Alvord and Alvord PLLC

12:30 PM

Annual Golf Outing

La Quinta Resort - Dunes and Mountain Courses *Lunch will be provided

*Golfers Required to be in Carts

Annual Golf Outing is sponsored by:

CIT Rail & TrinityRail

Golf Drinks & Snack Cart is sponsored by:

Williams Hayward Protective Coatings, Inc.







6:30 PM

Reception

Waterfall



Reception is sponsored by:

Bank of America, Modern Rail Capital, LLC & Oliver Wyman







Power-Power Day Three

7:45 AM

Registration & Continental Breakfast

Flores Foyer

Breakfast is sponsored by:

HGmotive Inc.



8:20 AM

Opening Remarks

Flores Ballroom

Speakers:

Andrew Falcone - Vice President - Railroad Financial Corporation

William Geiger - Senior Vice President - Railroad Financial Corporation

David Nahass - President - Railroad Financial Corporation

8:30 AM

North American Locomotive Review

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

David Humphrey - Senior Data Scientist - Railinc

Wednesday Morning Kickoff Q&A

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Donald Graab - General Manager - Triangle Brothers and Associates, LLC

9:45 AM

Coffee Break

Flores Foyer

Coffee Break is sponsored by:

American Industrial Transport, Inc.



10:00 AM

Motive Power Fuel Storage In A Low/No Carbon World

Flores Ballroom

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Pedro Santos - Chief Technology Officer - HGmotive Inc.

10:30 AM

Class I Update

Moderator:

William Vantuono - Editor-in-Chief - Railway Age

Speaker:

Matthew Findlay - Director Mechanical Systems - Hydrogen COE - CPKC

Locomotive Manufacturer Report - Part I

Moderator:

William Vantuono - Editor-in-Chief - Railway Age

Speaker:

Glen Rees - Director - Rail Business Development - Cummins Inc.

11:30 AM

Locomotive Manufacturer Report - Part II

Moderator:

William Vantuono - Editor-in-Chief - Railway Age

Speaker:

Robert Bremmer - Vice President Product Management - Wabtec

12:00 PM

Lunch Break

Flores Foyer

Sandwiches and Refreshments are sponsored by:

Biggs Appraisal



12:15 PM

Locomotive Manufacturer Report - Part III

Flores Ballroom

Moderator:

William Vantuono - Editor-in-Chief - Railway Age

Speaker:

Andrew Anderson - Director, Product Management - Progress Rail

12:45 PM

Analyzing The Locomotive Marketplace

Moderator:

William Vantuono - Editor-in-Chief - Railway Age

Speaker:

Jason Kuehn - Vice President - Oliver Wyman

1:15 PM

Waste to Zero Emission Locomotive Power

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Michael Hart - CEO - Sierra Railroad Company

1:45 PM

Locomotive Backlog Update

Moderator:

David Nahass - President - Railroad Financial Corporation

Speaker:

Stuart Biggs - Appraiser - Biggs Appraisal

2:00 PM

Locomotive Valuation and Leasing

Moderator:

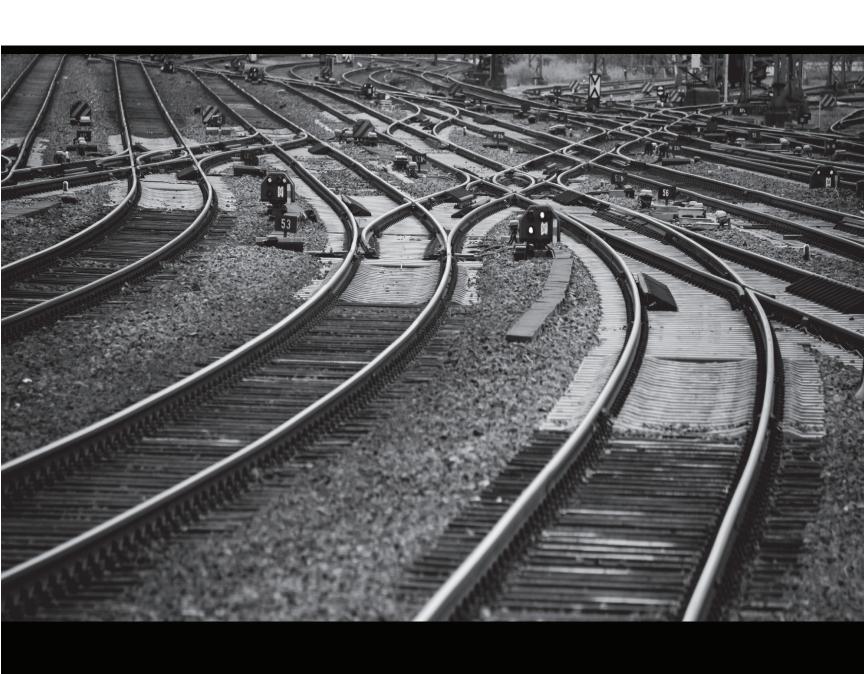
David Nahass - President - Railroad Financial Corporation

Speakers:

Patrick Mazzanti - President - Railroad Appraisal Associates
Rick Ortyl - Vice President & Family Owner - Metro East Industries
Greg Schmid - Managing Director Rail Marketing - RESIDCO

2:45 PM

Adjourn



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39TH REF CONFERENCE SAVE THE DATE March 2 - 5 2025

