

Tony Kruglinski's

Rail Equipment Finance



Agenda
2024

03

MARCH 2024

Rail Equipment Finance

1:30 PM

Registration

Flores Foyer

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



**Infinity
Transportation**
Powered by Global Atlantic

03

MARCH 2024

04

MARCH 2024

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

04

MARCH 2024

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

11:00 AM

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 ALVORD PLLC

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



05

MARCH 2024

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



FIFTH THIRD

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

05

MARCH 2024

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.

11:00 AM

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

BANK OF AMERICA 

Reception is sponsored by:
Bank of America, Modern Rail Capital, LLC & Oliver Wyman



 OliverWyman

06

MARCH 2024

Power-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

06

MARCH 2024

9:00 AM

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

11:00 AM

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

