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EXCELLENCE IN Entrepreneurship



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Profitability 2.0 — A bigger vision than cost-cutting:

Is your company as profitable as it could be? If not, it might be time to abandon conventional wisdom and do things differently.

Profitability pressures are relentless. And at the same time that post-recession economic challenges are prompting most companies to continue lowering operating costs, businesses are also striving to grow.

How do companies reconcile the need to cut costs with the need to grow?

They do it by working through a much more complex, multidimensional set of considerations than in the past. This new approach, what we at PwC call “**Profitability 2.0**,” begins with a comprehensive analysis of a range of considerations such as customer demand and segmentation, labor costs, talent availability, technology. Then every operational expense is looked at in light of these components and across a long-term planning horizon.

Companies that do this are likely to conclude that although cost-containment is important, cost-cutting by itself may in fact undermine profitability at times rather than boost it. Spending more in one area may drive down unnecessary expenditures in other areas. Likewise, reconfiguring a product portfolio or supply chain could improve profitability more than across-the-board cuts would.

In the process, a company’s business model may change, potentially introducing new business risks that should be considered when analyzing profitability.

The ultimate goal? Higher customer value and lower costs, achieved in a way that not only delivers near-term benefits but also is sustainable.

In *Profitability 2.0*, PwC shares what private companies have been thinking and doing where profitability is concerned. **What’s your company doing?**

Want to learn more about profitability 2.0? Please visit www.pwc.com/gyb for additional information.

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5 Ideas to Grow Your Business

Reaching the growth phase in your company's history can be both thrilling and terrifying. While you dream of growth and expansion, you must first put your game face on, and then determine the right growth strategies to take your business to the next level. These possibilities can help point the way.

1. Target other markets. If your current market is serving you well, are there others? Baby boomers, seniors, teens, tweens—let your imagination take you where you need to be, then take your product or service to the markets that need it.

Tip: It's important to understand your current customer demographics and why they buy your products and services. One of the best things you can do to really "know" your customers is to profile them in a database or customer relationship management (CRM) tool. Profiling your customers and analyzing their purchase history will help you uncover what products and services are more profitable and why—and help your efforts as you add other markets.

2. Add e-commerce to your website. If you're not open 24/7/365, with e-commerce you can be. The potential of reaching a new or expanded audience and attracting new revenue depends on many factors.

Tip: Decide if you want to build an entire e-commerce store or just complement your in-store sales with online sales. Depending on your needs or the complexity of your product lines, you can add online ordering or a shopping cart to your current site with third-party or out-of-the-box solutions that require minimal programming — and budget. Tap into your local interactive marketing association and network for options fit for your business.

3. Merge with or acquire another business. Mergers can help you expand your market share, fill a gap and become more competitive.

Tip: First, consider investigating companies that are similar to yours or have offerings complementary to yours. Then, consider the benefits of combining forces. Be sure and think about the "why" if you plan to acquire another company. Once you have an answer, careful planning is key for smooth success.

4. Let your employees do the talking. The best growth strategies can come from those in the trenches and on the front lines. Connect with your employees to understand unique insights they may have.

Tip: Instead of telling them what to do, start asking questions. You may be delighted about what you uncover. Start the conversations by asking:

- ▶ How could we improve things around here?



- ▶ Anything keep you up at night about this business or your job?
- ▶ If you were in my shoes and could make all the decisions, what would you do and why?
- ▶ What are you hearing our customers say about things we're doing well or not doing at all?
- ▶ What one thing can we do better for you?

5. Open another location. Physical expansion may not be the best choice for every business, but it can boost your presence and foot traffic, not to mention build new revenue.

Tip: Make sure you're maintaining a consistent bottom-line profit with your current location. Be sure your administrative systems and management team are extraordinary, because you're going to need them to get a new spot up and running. Choose your location, location,

location (because it's key) based on what's best for your business, not your wallet. Consider brand image, the local labor market, competition and safety. Understanding laws and regulations imposed on businesses in a particular location is essential as you look to grow your business too. Tap into your local SBA office or state resources to uncover any government-funded economic incentives or demographic data.

There are so many possibilities to grow your business. Choosing the right ones depend on the size and type of business you own, your available resources and how much money, time, sweat equity and guts you're willing to invest. Depending on your situation, equipment leasing can be a cost-effective way to acquire vehicles and other equipment, plus take advantage of potential tax benefits you can use right away to improve your cash flow and finances. You may find SBA financing, a flexible term loan or commercial real estate financing a good fit to make opportunities possible.

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Teenagers Learn Business Skills at Concordia University Irvine's Teen Entrepreneur Academy & Kid Entrepreneur Academy

In summer 2015, more than 100 teenagers from six states and four countries (China, France, Singapore and Canada) participated in the Concordia University Irvine School of Business fourth annual Teen Entrepreneur Academy (TEA).

The week-long international business startup program held each July helps high school students who are interested in starting their own businesses and learning the principles of entrepreneurship. The students lived on campus for the week while learning basic business principles and how to start their own businesses. Participants also received hands-on training and real-world experiences, and were coached and mentored by more than 30 entrepreneurs and business leaders.

The capstone of the week-long training was the business plan competition (generously sponsored by Citi), where students were put into teams and worked to create a winning business plan. Twenty-five teams were each given just eight minutes to present a 12-slide investor PowerPoint presentation and persuade a panel of CEOs and entrepreneur judges to award them the \$1,000 first place cash prize.

A team of Irvine teens – Tony Hsu and Natasha Takahashi from Woodbridge High, and Beckman High School student Katherine Wong – were awarded first place and \$1,000.

Karina Gonzalez was also a participant in the 2015 Teen Entrepreneur Academy. Following that experience, she was nominated by Alan Gersten, her teacher at Century High, for the US Hispanic Chamber of Commerce (USHCC) BizFest Youth Entrepreneurship Program. Karina was selected to participate in the program in Houston, where she developed a business plan, and then competed for the best plan. Karina's business plan presentation won first place, and she received a \$5,000 scholarship and the title of National Business Plan Champion.

"The Teen Entrepreneur Academy is about helping teenagers succeed in business, education and life," explained TEA Founder and Concordia University Irvine School of Business Dean Stephen Christensen. "We are developing the entrepreneurial mindset in teens, a mindset of seeing problems as opportunities, looking for innovation, creativity, critical thinking, teamwork and problem-solving skills. This entrepreneurial mindset is key for future job creators and employers."



The fifth annual TEA will be held July 24-30, 2016 and registration is now open. Participants can sign up at www.cui.edu/tea.

Building on the success of the teen program, Concordia University Irvine also offered a Kid Entrepreneur Academy (KEA), open to children in grades 5 through 8. KEA is a summer day camp in July for kids interested in business. The 50 participants developed the business skills that will make them smart, savvy and successful in all areas of their lives. This year, the second annual KEA will be held from 8 a.m. to 4:30 p.m. on July 25-29. Information and registration can be found at www.cui.edu/kea.

The Teen Entrepreneur Academy (TEA) invites business experts, successful company presidents, entrepreneurs and distinguished business professors to serve as guest speakers. This interaction supplements the lesson plans and provides an extra dimension of real-world learning. Local business leaders are invited to serve as coaches and mentors.

If you are interested in participating in the 2016 TEA, please visit www.cui.edu/tea or email stephen.christensen@cui.edu.

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California Bank & Trust & Your Big Ideas



We salute this year's entrepreneurial all stars.

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Innovative Business Practices. Big Data Analytics. Student-Centered Learning.

The Executive MBA (EMBA) at The Argyros School of Business and Economics at Chapman University is offered to ambitious mid-career managers and executives. The Argyros School of Business and Economics is ranked in the top 100 business schools in both *Bloomberg Business* and *U.S. News and World Report*. In the EMBA program at The Argyros School, students will gain the skills and intellectual confidence to lead in a competitive marketplace with a structured, practical, dynamic curriculum designed to immediately benefit them and their organization. The EMBA program prepares students to take their professional and personal advancement to new heights with a curriculum that offers opportunities to network with top executives inside and outside the classroom, cultivate lifelong friendships and business partners, learn from renowned faculty, and gain first-hand knowledge and experience in a global market. Our EMBA students are immersed in both experimental and real-world business settings, connect theory to practical applications, and participate in hands-on learning with high-achieving peers, enabling them to build a strong foundation in every key business discipline. The EMBA program allows full time working executives to complete their degree at a full time pace in an intimate, personalized environment. Classes are structured twice a week in the evenings and weekends for 21 consecutive months. Residential experience trips to San Diego, Asia and Washington, D.C. are required as part of the curriculum providing students with opportunities to meet with and learn from various business leaders. Other highlights of the program include tutors, catered pre-class meals, textbook delivery, and one-on-one executive coaching.

EMBA Program highlights include:

- ▶ Three residential courses
- ▶ 21-month program
- ▶ Textbooks and case studies for all classes
- ▶ Private sessions with an executive coach
- ▶ Meals before class
- ▶ Tutors for quantitative courses

One such exceptional graduate of The Argyros School's EMBA program is Matt Gray (MBA '12). For Gray the opportunities expanded after he completed the EMBA program. The EMBA program helped him take his practical experience logged at Disneyland and apply it at a deeper level. Now whether it's planning inventory or evaluating costs and benefits as he prepares a budget, those lessons work their magic. **Matt Gray**



It all comes in handy at a place where the legendary Walt Disney challenged everyone to think big.

Beginning as a skipper on the Jungle Cruise in 1986, Matt Gray's broad Disneyland Resort experience has encompassed a variety of roles. Currently the Director of Park Operations, Environmental Initiatives, and Operations Training, he most recently served as the General Manager of Store Operations for Disneyland Park. In addition, he has held executive positions in Food & Beverage, Attractions, Custodial, Security, Distribution Services, and Costuming. Matt holds master's degrees from Chapman University and the University of Southern California.

"I looked into Chapman's EMBA program based on the reputation of the Argyros School of Business and Economics and the recommendation of colleagues. Also playing into the decision was that the location and class schedule complemented rather than competed with my other personal and professional commitments. The individual attention

received during the application process and throughout the program played into that as well: I had several situations where the professors showed great flexibility in helping me resolve time conflicts. Also worth calling out were the opportunities to learn economics from Esmael Adibi, strategy and organizational effectiveness from Tom Turk, along with an elective course on social marketing taught by Wing Lam of Wahoo's Tacos that took me far away from my comfort zone—in the best possible way. The residential experiences offered within the program gave real-life, practical insight to the course materials, and the site visits, speakers, and other activities during our class's trip to China and Vietnam, led by Noel Murray, were life-altering for me, opening up a much broader perspective and sparking a love for travel and exploration.

Disney has provided me with a wonderful variety of challenging and interesting roles over my near-thirty years here. I came to the realization, however, that a stronger business foundation would give me a deeper context for decision-making.

Chapman's EMBA program has allowed me to take a thoughtful, yet much nimbler approach to changes, initiatives, and opportunities in all aspects of my life, and will serve me well with the evolution and expansion of the Disneyland Resort before us. I must say, however, the biggest influence the program had on me comes at a personal level in the form of the beautiful Wendy Munua Gray, an Argyros School EMBA alumna and my wife."

Connect with the EMBA program at The Argyros School of Business and Economics today! Learn more by visiting chapman.edu/business.



Due Dilligence and Quality of Earnings

by Gordon S. MacLean, Partner & Director of Audit Services,
and Sam Lahham, Audit Senior Manager, RJI

If you are thinking of buying or selling a company, you have probably heard the term “due diligence.” What does this term actually mean? Although due diligence can essentially mean validating certain claims that have been made in any context (qualitative or quantitative), this article is going to explain the term as it pertains to a business transaction (most commonly, a merger or acquisition).

Using an asset purchase or business acquisition as an example, a due diligence team working on behalf of the buyer would test and review items relating to the assets being purchased (cash, accounts receivable, inventory, fixed assets, etc.) and ensure the completeness of the obligations or liabilities being assumed. A likely place to start would be the audited or reviewed financial statements of the company being acquired. The company’s tax returns provide valuable information as well. The due diligence team would also review insurance policies, leases, employment agreements and other pertinent contracts. Any pending or threatened litigation, claims or assessments against the company would also be addressed.

Sellers should also perform due diligence on potential buyers. This is something that is often overlooked during a merger or acquisition. Reasons for this include ensuring the buyer’s ability to meet the financial commitments or to assess whether or not the company would be compatible. Sellers should perform due diligence relating to potential “claw back” provisions or other terms of the transaction which could potentially result in a reduction of the purchase price.

Another term commonly used when buying or selling a company is the “quality of earnings”. While a due diligence engagement will tend to focus on an investigation of the important aspects of a company, a quality of earnings study specifically focuses on a company’s ability to generate income and cash flow. This type of engagement is more subjective and can be approached in a variety of ways. Seller adjustments are typically made for items that are distinct and specific to the seller. For example, excessive or discretionary wages and bonuses and are often added back to arrive at a more “normalized” net income figure. Personal expenses in the business would also be backed out. Additionally, these types of engagements will focus on the company’s receivables and payables and capital expenditures to ensure cash flows.

It is important to note that due diligence and quality of earnings study engagements are not financial statement audits. While the engagements may have similar procedures performed, the main goal of an audit, which is conducted by an independent and licensed CPA, is to express an opinion as to whether the company’s financial statements are free of material misstatements and in conformity with an accounting methodology (e.g., U.S. GAAP).

If you are considering buying or selling your business, you should consider working with an accounting firm to best neutralize any situation discussed above.

Gordon S. MacLean, CPA

Gordon is a Partner and the Director of Audit Services at RJI. He has 30 years of experience, including 20 years at a Big 4 firm. He specializes in audits of publicly traded and privately held businesses in the manufacturing, technology, medical device, real estate, hospitality, distribution and professional services industries. Gordon can be reached at 949.852.1600 or at gmaclean@rjicpas.com.



Sam Lahham, CPA, MBA, CFE

Sam is an Audit Senior Manager at RJI. He has over nine years of experience in both public and private accounting. Sam’s experience covers several industries, including hospitality, manufacturing, professional services, real estate, healthcare, not-for-profit and technology. Sam also specializes in SEC filings, forensic accounting and litigation support. Sam can be reached at 949.852.1600 or at slahham@rjicpas.com.



About RJI

Established in 1980, RJI specializes in audit, accounting, corporate and international tax issues for publicly traded and privately held companies. RJI is PCAOB registered and the Southern California member firm of DFK International, a top 10 international association of independent accounting firms and business advisers.

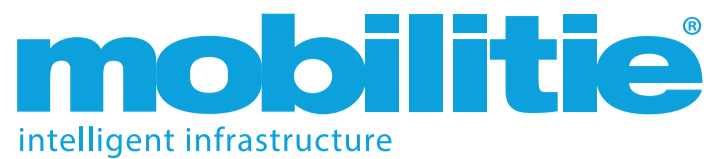
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Assisting Clients in Achieving Their Goals



Making the Most of Every Connection: Smarter Solutions For Today's Connected Venues

Society is on the move today, and the demand for reliable, continuous wireless connectivity is moving with it. From major sporting events to transportation hubs, universities, retail centers and high-rise office buildings, people gather and connect—and expect to do so seamlessly and easily.

Mobilitie partners with telecommunications carriers to design and build high-capacity wireless networks in congested environments to provide comprehensive, robust and secure mobile coverage.



As the largest privately-held wireless infrastructure provider in the United States, Mobilitie funds, installs, and operates indoor and outdoor neutral host DAS, Small Cell and Wi-Fi networks, communication tower sites, as well as other infrastructure used by wireless carriers to enable high speed mobile communications. Mobilitie engineers wireless solutions at the largest and most complex venues across all major industries, including sports and entertainment, real estate, hospitality, education, healthcare, as well as government and transportation.

Mobilitie Enhances The Wireless Experience

Mobilitie's wireless coverage solutions keep fans and customers connected. People want to share their experiences with family and friends, run mobile applications, and post photos and videos on their social media channels in real-time. Whether in an indoor or outdoor environment, Mobilitie uses Distributed Antenna Systems (DAS), Small Cells, and Wi-Fi networks to increase connectivity in densely-populated venues. The high-density wireless infrastructure is designed to facilitate the richest and most interactive mobile experiences, including real-time video streaming, location based services, and other mobile applications.

Mobilitie has enhanced the fan experience across a wide spectrum of professional sports leagues including the NFL, NHL, NBA, MLB, and MLS. In Orange County, California, Mobilitie is the official DAS provider at the Honda Center. The high speed DAS was designed to enhance wireless connectivity for fans attending Anaheim Ducks games and the wide array of concerts and events hosted at the venue each year. In addition to ensuring voice calls are successfully connected, the DAS allows smartphones, tablets and other devices to access the Internet and run interactive applications, including the Anaheim Ducks Mobile App and the Honda Center mobile website. The Ducks Mobile App includes features such as live game updates and exclusive video content. With the Honda Center mobile website, fans can locate concessions or purchase tickets for an upcoming event. The neutral host DAS network is utilized by all wireless carriers to provide increased wireless connectivity during highly-attended events so people can stay connected and successfully run high-bandwidth applications.

In Las Vegas, Mobilitie designed, built and currently operates the world's largest broadcast Wi-Fi network at MGM Resorts International. The Wi-Fi network was designed to allow guests to access the Internet at all times throughout the 11 different properties, while maintaining a single set of authentications; this means that guests don't have to sign into a new network at different properties. Location-based services were also included in the design, providing visitors with the tools needed to easily find their way to venue locations, such as meeting rooms, restaurants or other retail locations. Mobilitie has also worked with MGM Resorts International to deliver unique monetization opportunities. The network was designed to generate additional revenue through advertising and customized branded portals that sponsors could leverage to reach their audiences.

Successful Track Record

Mobilitie's successful track record of building robust wireless networks in some of the most challenging environments further validates the company's expertise and commitment to exceed clients' expectations every time.

The highest mobile data traffic ever recorded during an event was carried on a Mobilitie DAS network. Mobilitie's DAS helped support record data traffic eclipsing an estimated 10 terabytes at Churchill Downs in Louisville, Kentucky, accommodating the wireless demands of their 290,000 guests over the 2015 Kentucky Derby weekend. Additionally, Mobilitie deployed the first venue mobile application with indoor location based services and mapping, as well as a proprietary video broadcast technology for venues to broadcast videos directly to fans' mobile devices.



The Future

Mobilitie is growing rapidly and deploying more venue infrastructure and outdoor macro networks than any other providers or carriers combined.

Mobilitie's focus on client service, fast decision-making, and zeal to remain disruptive in the marketplace with its innovative solutions and business models, are the company's core differentiating factors. To promote innovation, Mobilitie is working on complex RF simulations, mobile application development, and new technology testing to add more capacity and features to its solutions.

About Mobilitie

Mobilitie is headquartered in Newport Beach, California with regional offices across the United States. To learn more about our wireless coverage solutions, visit us at www.mobilitie.com.



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WHERE PEOPLE GATHER,
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THAT KEEP FANS CONNECTED



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Tenants rule. That's our #1 rule.



The Tenant's Advantage

Choosing the right real estate advisor for your business can make a huge difference to the future of your company. As the world's largest tenant advisory firm, we have helped thousands of companies find the right space for their business and their people.

There's nothing more satisfying than hearing that our strategies and advisory work have helped shape the success of a client's business. See for yourself why Cresa is The Tenant's Advantage.

Sustaining Growth through New Workspace

Cresa Identifies Innovative Office for Irvine Chamber of Commerce

The Irvine Chamber of Commerce was in search of a new location to call home and retained the help of Cresa to find a new workplace that would not only accommodate its current and future needs, but also support recruitment and retention of members. As a result of its partnership with Cresa, the Chamber will be moving to a new Irvine Company-owned office space at 36 Executive Park in May 2016.

Tallia Hart, president and CEO of the Irvine Chamber of Commerce, and Randy Parker, a principal at Cresa, discussed the relocation process and how Cresa positioned the Chamber for continued growth and success.

ORANGE COUNTY BUSINESS JOURNAL (OCBJ): Can you tell us a little bit about the Irvine Chamber of Commerce?

TALLIA HART (TH): We are the largest and most active chamber in Orange County. We represent all types of businesses, ranging from entrepreneurial start-ups to established Fortune 500 companies. Currently, we represent more than 800 members that employ hundreds of thousands of employees. As an organization, our goal is to promote an economic climate that strengthens the competitiveness of local businesses by providing our members with a variety of benefits, services, programs and information.

OCBJ: Why did you choose Cresa as a partner in your relocation efforts?

TH: First and foremost, we wanted to choose a partner that is a member of the Chamber. It is important that our partners support the local business community. We wanted a partner that could manage the entire relocation process from beginning to end and complete the transaction in the timeframe promised. In addition, our partner needed to be knowledgeable about the market while also caring about their clients and their clients' businesses.

We were very attracted to the fact that Cresa only represents tenants throughout the entire leasing process. This was extremely important to the Chamber's executive team because, as the tenant, we knew that we could count on Cresa to act in our best interest at all times and complete the leasing assignment without any conflicts of interest.

RANDY PARKER (RP): From Cresa's point of view, our tenant-centric position is critical. When working on a transaction, we are agnostic about where clients choose to lease, as long as the end result supports their goals and objectives.

TH: Randy and his team at Cresa met every one of our criteria. Randy has a long history of success in the marketplace. He and his team were able to strategically evaluate each of our workplace options, and provide creative recommendations on how we could reposition and re-think how to better serve our membership.

RP: When Cresa can profoundly impact an organization by re-examining its real estate, those are the most fun and rewarding opportunities. Our work with the Irvine Chamber of Commerce is a great example of that type of assignment, and we are excited to be a part of its transformation.

OCBJ: What was the catalyst for the Chamber to begin the search for a new work environment?

TH: As an organization, the Chamber is a huge contributor to the business community, and we require a space that enables us to serve that role. With our lease coming to an end, the time was right to explore the marketplace to find a location that would reflect our innovative and technology-driven approach to business. In our search, we had to ensure that any location we considered would have ample parking and nearby freeway access – making it as convenient as possible for members and visitors.

Additionally, the Chamber hosts a variety of meetings and events on a daily basis. From hosting business executives and dignitaries to conducting seminars for local businesses, to providing a location for our members to host their own events, we constantly have people cycling in and out of our office. We were looking for a space that could accommodate multiple events at once.

RP: The Chamber had been in its current location for many years, and it enlisted us to help find a space that would better position the organization for its future success. We were able to find a space and a landlord that not only meet the Chamber's current needs, but provide the flexibility necessary for sustaining growth.

OCBJ: Tell us about the new space that the Chamber will occupy.

TH: One of my favorite attributes about the new space is that it is conducive to making the member feel comfortable. The design will incorporate an open-air kitchen that can serve as alternate workspace for members. This will be an area where they can access WiFi and touch down between meetings, creating effective and flexible workspace.

We are very excited to have access to the amazing indoor-outdoor workspace that the Irvine Company has created at 36 Executive Park.

We will have plush outdoor seating and BBQs right outside of our office, enabling us to extend our workspace to the outdoors.

Our workspace will give the Chamber new energy and visibility in the community, positioning us to increase our membership.

RP: The front of the new space will feature a conferencing center anchored by a flexible meeting room. Through the use of a movable wall, the meeting room will accommodate 80 people in a classroom-style layout when fully opened, or can be separated into two smaller gathering spaces. This layout creates more space for the types of events that make the Chamber successful.

OCBJ: Will Cresa be working with the Chamber in any other portions of the transaction cycle?

TH: Another benefit of working with Cresa is that its work did not end once we signed our lease. Our Cresa team will be instrumental in working with us to ensure that all of our tenant improvements and construction processes go smoothly. We will be working closely with its project management department throughout the construction and move-in process.

RP: It is rewarding to be able to see a client through the entire transaction cycle. After signing the lease, our team jumped into the next phase of partnership with the construction team and will continue that relationship through project completion.

OCBJ: What would you tell other businesses about working with Cresa?

TH: Working with Cresa is like working with a five-star hotel where you know what to expect, the customer service is top-notch, and you feel like you are the only client. From day one, Cresa and Randy treated us like a partner in the process – not a client. We had access to the Cresa team at all times and at all points throughout the process. And, they kept us informed through each step. Overall, Cresa made what could have been a very stressful process easy and enjoyable.

RP: At Cresa, we have a time-tested process we utilize on every project that enables us to determine a client's business plans and goals. We then take the tenant to market and have landlords compete for the opportunity to capture the tenant. When we start with the fundamentals, we are able to better understand our clients' needs and present them with the best opportunities in the marketplace. By deploying our process, the tenant wins every time.

As a client, the Chamber's team looked to us to take the lead on the project, and was extremely responsive and forthcoming throughout the transaction.

Because we were able to develop a true partnership, I know that the project's outcome will be a fantastic success for both parties. Ultimately, this real estate transaction will support the Chamber's business for years to come.



The Tenant's Advantage



Vanguard believes learning goes beyond the classroom and happens in the context of relationships with faculty and other students.

Vanguard University Alums Lead in Entertainment, Medicine and More

At Vanguard University in Costa Mesa, we've got the perfect mix – unbeatable academic training, world-class arts and entertainment programs, a beautiful campus and a strong spiritual foundation. Our alums are executives at Disney, Nike and Buck Knives (including CEO Chuck Buck), to name just a few.

"Vanguard was an important part of helping us start Wahoo's Fish Taco," says Vanguard alum Ed Lee '87, co-founder and CEO of Wahoo's Fish Taco. "The theories and work ethic I learned in the financing and marketing courses helped us, and the professors were instrumental. Unlike at a bigger school, Vanguard gives you a one-on-one experience."

Small class sizes and professors who care make the difference at Vanguard. We believe learning goes beyond the classroom and happens in the context of relationships with faculty and other students. Our professors serve as mentors inside and outside the classroom, giving students the knowledge they need and the wisdom to apply it in the real world.

Vanguard's faculty is simply outstanding. Our professors advise U.S. presidents, win national theater awards, pioneer scientific research in China, perform at Carnegie Hall and the Hollywood Bowl, and much more. Seventy percent of our professors hold doctorates in their field from some of the most prestigious universities in the world. Those same professors teach every course and mentor students at Vanguard. No one gets lost in the back of a lecture hall, and at Vanguard, graduate students never teach our classes.

For 90 years, this personalized approach has yielded a distinguished list of alums – leading scientists, best-selling authors, network television producers, high-level military leaders and world-changing business leaders.

"I fell in love with Vanguard," says Kristina Kuzmic-Crocco '01, host of *Kristina's Fearless Kitchen* on the Oprah Winfrey Network. "My time there helped me become more confident being in front of people, and I made lifelong friends."

Larry Mantle, founder and host of AirTalk on NPR affiliate KPCC, and winner of



VANGUARD
UNIVERSITY

multiple Golden Mic awards, says his experience at Vanguard shaped his life and career.

"I love Vanguard," says Mantle. "I have such positive feelings about the university. It's a very important part of my life. The professors had a profound impact on me. I wouldn't be the person I am without my years at Vanguard."

With more than 30 majors and concentrations to choose from, Vanguard University has a path for everyone. Best-selling author and brain scan pioneer Dr. Daniel Amen '78 says his undergraduate education at Vanguard put him on course to become a leader in the medical profession.

"I really love Vanguard. My whole experience there was wonderful," says Amen. "I had incredibly good teachers and got a terrific education."

Two thousand miles away in Washington, D.C., Nathan Gonzales says Vanguard helped launch him into his career as a nationally-known political analyst. Gonzales is the political editor of the *Rothenberg Political Report*, which gives in-depth analysis of congressional, senatorial and gubernatorial races across the country. He is frequently quoted in the *Wall Street Journal*, *New York Times*, *Washington Post*, *Los Angeles Times* and *USA Today*, and has appeared on Fox News Channel, CNN and more.

"At Vanguard, I discovered that there is more to learning than sitting in a classroom," says Gonzales, who discovered his passion for politics when he spent a semester as an intern at the White House press office in the West Wing.

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Vanguard University is located at 55 Fair Drive, Costa Mesa, 92626. Call 714.556.3610 for more information.

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Maximizing the Sale of Your Business with the Right Tax Strategy

by Mark Cook, Tax Partner, SingerLewak LLP

Over the last several years in the face of many obstacles you have managed to create and grow your business and now you are considering a sale as an option. But you have questions. If I sell, how much do I keep? What are the tax consequences? What is the best way to sell to maximize the net proceeds?

If you are considering selling a business, there are generally two options. They are to sell the assets of the business, or sell the shares of the company that owns and operates the business. Some might argue, and they would be correct, that there are variations of these two options such as a qualifying IRC section 338 transaction whereby a sale of shares is treated as a sale of assets purely for income tax purposes. But for now, we'll leave those more complex options alone and focus on the two basic options.

Sale of Assets

A sale of assets occurs when you sell the machinery and equipment along with other tangible property such as furniture and fixtures and leasehold improvements. In addition, you will sell the inventory, accounts receivable and intellectual property such as patents. Oftentimes, a sale of assets results in the buyer assuming some or all of the company's liabilities in addition to paying cash. For tax purposes, assuming liabilities is treated as if the buyer paid the seller additional cash. So that the full sales price is a combination of cash paid and liabilities assumed. The buyer then allocates this full sales price to each of the assets in accordance with the provisions of so called residual method to arrive at the depreciable or amortizable basis for each asset.

Here is an example of a sale of assets related to a manufacturing business:

- ▶ Machinery and Equipment – \$500,000
- ▶ Furniture and Fixtures – \$150,000
- ▶ Leasehold Improvements – \$300,000
- ▶ Inventory – \$1,500,000

The fair market value of these specific assets are therefore, \$2,450,000. However, the actual price paid by the buyer was \$3,000,000. The difference between the fair market value of the assets and price paid by the buyer is known as going concern value or 'goodwill'. In this example, goodwill is \$550,000.

The tax rules would allow the seller to offset the \$3,000,000 sales price with the cost of each of the assets less the depreciation previously claimed by the seller during the time in which the business was in operation.

The buyer, on the other hand, will now have a \$3,000,000 tax basis or cost in the newly acquired business and as mentioned, will allocate this amount to each of the assets acquired including the goodwill. This is one of the advantages of an asset purchase, since the buyer can depreciate or amortize the cost of each asset. As a result, the buyer often pursues an asset deal over a share sale.

As a seller of assets, the character of the gain will be either ordinary or capital gain. In most cases, there is some of each. To the extent, of any gain on tangible property such as machinery and equipment, the gain is first allocated to so-called depreciation recapture income and is taxed as ordinary income. To the extent such gain is higher than the previously taken deductions for depreciation; the gain is taxed as a capital gain. The highest federal capital gain tax rate is 20% and the highest federal ordinary rate is 39.6%.

Sale of Shares

The second option is the sale of shares of the corporation or LLC that owns the business. The obvious advantage to the seller is the gain is likely taxed at the more favorable capital gain tax rates.

In addition, if you are selling "Qualified Small Business Stock" the gain on such sale may be excluded if you held the stock for more than five years and are a C corporation. And thanks to the Protecting Americans from Tax Hikes Act of 2015 sometimes known as the PATH Act, this exclusion is eliminated as a preference item for the AMT and is not subject to the 3.8% Net Investment Income Tax.

If your business doesn't qualify as Qualified Small Business Stock, you may still be more interested in selling shares as opposed to assets. A gain resulting from selling shares will generally qualify for the more favorable long term capital gains tax rate if you have met the one year holding period requirement.

The Right Team of Advisors

Regardless of which type of sale you decide on, it is important that you are counseled by a tax professional with the right expertise. You should also consult an attorney skilled in selling businesses. Negotiating the deal may take on a more complicated tone if you wish to make a share sale and the buyer desires an asset deal.

Oftentimes, this situation exists due to the tax benefits to the buyer and seller. As a result, you may wish to run the numbers and split the tax benefits such that the buyer pays for a portion of the benefits of asset deal compensating the seller for the lost benefits of a share sale.

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Mark Cook

Mark has more than 27 years of tax experience including more than 16 years with PricewaterhouseCoopers as a tax partner, preceded by four years with Ernst & Young. His clients have ranged in size from emerging small and mid-cap companies to Fortune 500 businesses. Mark's expertise includes corporate planning, acquisition due diligence and structuring, tax compliance, tax provision calculations, and structuring alternatives for private equity and venture capital participants. For more information, contact Mark at 949.261.8600 x 2143, mcook@singerlewak.com.

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How to Start a Fraud Risk Management Program in Your Business

by Gregory N. Lewis, Shareholder, ELLS CPAs

Do you consider your company immune to fraud? Have you ever thought to yourself, “my employees/customers/vendors are loyal and honest; they’d never cheat my company?” Perhaps you are more realistic about the chances of fraud being perpetrated in your company, but you just don’t know how to start looking for and mitigating that risk. If your company hasn’t confronted the serious risks that you may encounter due to fraud, it may be time to analyze these threats and come up with a campaign for fraud risk management.

The battle should begin by reviewing areas within the company where fraud occurred and the impact it had on the company. Then a brainstorming team should be formed, in which the team creates an extensive list of ways that fraud could be committed. Every level of management and non-managerial employee throughout the organization should be encouraged to think outside the box and share ideas of how each of them might steal from the company or provide other ways misappropriation of company assets might occur. The goal is to formulate a plan for how these modes of theft can be deterred.

This plan is then used as a starting point for training on deterrence, prevention, early detection and efficient handling of fraud risk. Fraud risk training should include everyone in the company, from the CEO to the newest employees, and should cover things like what constitutes fraud, the company code of conduct and how to report suspected fraud. Effective internal controls that are established in order to prevent and detect fraud, along with the ongoing behavioral training of employees are the best ways to manage your company’s fraud risks.

There are a few common mistakes that can derail the program and should be avoided. Among them are:

- ▶ Implementing a fraud policy, but not providing training
- ▶ Management’s negligence in following through on developing promised steps of the program
- ▶ Half-hearted support of the program by management
- ▶ Believing that the process is a one-time thing that will prevent all future fraud

Fraud risk management may sound like a daunting task, but the potential costs to your company when fraud does occur will be a much harder burden to bear. Anti-fraud internal controls should be put into place, employees and management should be provided continual training on what is and is not acceptable behavior, and a plan should be formulated dealing with fraud and the perpetrator once it is discovered.

For more information, contact Gregory N. Lewis, Shareholder at 714.569.1000 or glewis@ellscpas.com.

Gregory N. Lewis

Gregory N. Lewis has been part of the ELLS team since 1978 and a shareholder since October 1984. With more than 30 years of experience in public accounting, Greg’s areas of expertise include audits, reviews and compilations, personal and corporate financial planning and wealth preservation, investment strategies, business advising, strategic growth strategies, profitability analysis, internal control analysis and fraud prevention.



CONGRATULATIONS

RYAN MARSHALL





Congratulations to entrepreneur Ryan Marshall on being nominated for the Excellence in Entrepreneurship Awards. Ryan Marshall’s skylight manufacturing company, SKYCO Skylights, manufactures multiple major Skylight and Photovoltaic system projects for world renowned companies like Google and Apple. SKYCO Skylights engineers and manufactures Commercial/Industrial Skylights, Custom Structural Skylights, UL Listed Smoke Vents, Photovoltaic Skylights and Canopies and more. SKYCO’s innovative approach to skylight design adds trusted performance and longevity to each product.

“Entrepreneur is someone who has a vision for something and a want to create.”

– David Karp, founder and CEO Tumblr



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BUSINESS PLANNING FOR UNCERTAINTY: PLAYBOOK FOR SUCCESS IN A RISKY WORLD

By Tom Wagner, EVP/Head of Corporate Finance and Chris Lieber, VP/Corporate Finance, Pacific Mercantile Bank

YES, THE FUTURE IS UNCERTAIN

But that does not mean a plan is useless. We spend a lot of time working on forecasts with clients, and typically they are quite useful. Quarter-to-quarter results may be different than expected, but the annual assumptions generally tend to hold. Most companies should be planning three to five years out, giving them time to line up capital and build the resources and talent necessary to execute their strategy. However, we are often asked: "How can we plan in such an uncertain environment?"

The truth is that the future is always uncertain. If you are planning to grow at a pace faster than the market, your competition may respond in a way you have not yet anticipated. Simply participating in a market changes its dynamics. That does not mean you cannot establish a game plan.

If you watch football you will notice the head coaches studying a laminated card that represents the game plan for the day. Do you ever wonder why they are still looking at it when losing by 20 points? It is useful because it holds more than the day's game plan. It also includes a variety of alternatives they have practiced.

If your game plan is not effective, you will have to adjust. Your ability to react quickly, however, will be limited by what you have practiced (or thought through). Strategic planning should include options that could be executed if the tactics are not working as expected.

If you plan the next three to five years based on everything you do know and can control, you will be surprised at how much can be anticipated. When things do not go as expected, you will manage the situation much better if you have thought through a number of different scenarios and the options you have available should any of them develop.

PLAN WHAT YOU CAN

Start with a financial forecast including balance sheet, income statement and cash flow. Build a set of assumptions that will drive the line items of your financial statements in as much detail as you can. For instance, sales growth of 10% is not as useful as knowing number of new orders and average selling price that comprise that growth. There can be many controllable variables inside a simple growth percentage.

Run through the variables and determine a most likely ("base" case) scenario. Then test the variables against those assumptions. What does the financial performance look like with faster or slower sales growth? Higher or lower costs? Do you have the resources to make the base case or upside case a reality? Do you have the resources to survive the downside assumptions?

EXPECT THE UNEXPECTED

No one is in a better position to predict the next few years for your company than you. However, that does not mean you cannot, or should not, consider how your company will perform if hit with an unexpected shock.

Once you have set up a model that can demonstrate the financial consequences of changing assumptions, start by entering the system shocks that keep you up at night. For example, a sudden loss of a large customer, a supplier going under, manufacturing or shipping delays. Once the model has been "shocked" with an unexpected event, you can see the financial impact, determine how much time you have to correct it and consider the other variables that need to change to restore the performance.

The chart above represents a performance forecast with the most likely scenario running

smoothly up and to the right. That performance is bracketed with upside and downside cases. Many companies do not forecast the upside case and that is a mistake. Faster growth than expected can strain a company's liquidity and stability as easily as a drop off in demand. Make sure you are prepared for both scenarios. The chart also plots the performance of two different companies when hit by an unexpected event, the contraction of 2008. One company had planned for an exogenous shock and the other had not.

ABC Company implemented a plan that conserved cash flow. They reduced the work force, exited marginal markets, and deferred spending. The Great Recession was not specifically predicted, but management had a contingency plan on its play card. They had already determined what spending they could defer if they had to, had ranked their customer base on marginal cash flow contribution, and knew which markets were weak contributors in a downside scenario. They did not predict what or when the impact would hit, but they were prepared to replace their existing strategy with one focused exclusively on cash conservation.

XYZ Company had no such plans and was slow to respond, waiting for better clarity to emerge. They started planning for the emergency while in the middle of it. There was insufficient information on where or what to cut. As a result, a liquidity crisis developed and bankers and other investors started to exercise control over the plan and process. This slowed everything down, exactly when agility and speed were most needed. XYZ Company did not have a play ready to call. Performance languished longer and deeper, and today full recovery is still on the horizon.

Neither company anticipated the shock. ABC Company, however, had an emergency plan and metrics that defined what constituted an emergency. In other words, they had practiced a play in case the most likely game plan was no longer relevant. Today ABC Company has recovered their market share and gained a reputation for reliability in the face of uncertainty.

STOP WORRYING AND START PLANNING

We were asked recently how to balance "analysis paralysis" against action. Delay caused by more detailed planning is not the problem. The real risk is paralysis in the face of unexpected market changes.

Plan for the most likely scenario. Test the upside and downside linear performance, but have a play or two to address the unexpected. You do not have to anticipate everything that could cause a crisis because the details really do not matter. Regardless of what takes you outside your expected performance zone, the response should almost always be the same: maximize cash flow.

At Pacific Mercantile Bank, we provide planning assistance to our clients as part of our service, at no additional charge. We believe we succeed by making sure our clients thrive. In financial analysis, risk is defined as uncertainty. We cannot eliminate unpredicted market shifts, but we can help clients prepare to respond. As mentioned earlier, your game plan is not the limiting factor on the game card. You are limited by what you have failed to prepare for or practice.

Most entrepreneurs lie awake at night worrying about what might happen. That is wasted anxiety. Better to write down your concerns, test their financial impact, and determine what you could do about it while you still have the luxury of time. If you can dream it, or worry about it, we can model it.



Tom Wagner is EVP and Head of Corporate Finance at Pacific Mercantile Bank. He developed Horizon Analytics at Pacific Mercantile to help companies plan and manage growth and maximize corporate value. Tom has nearly 30 years of experience in Corporate Banking and Investment Management. He has successfully financed or underwritten over \$2 billion in merger and acquisition activity. He specializes in researching the application of modern portfolio theory to small and medium sized enterprises. Tom has advised senior executives from startups to large publicly held corporations. To explore how Horizon Analytics could help your company grow and prosper, email Tom.Wagner@pmbank.com.



BUSINESS BANKING BEYOND THE OBVIOUS

Is Your Business Investor Ready?

by Patrick Ross, Partner, Haskell & White LLP

When most businesses are created and evolve in their life cycle, tax minimization is a significant motivating factor in running the business for most privately owned businesses. This reduces the emphasis on profitability and makes the maintenance of an existing lifestyle the priority. However, if the entrepreneur's goal is a liquidity event, such a structure does not make a business look attractive to strategic buyers who would pay a premium for a business. When a near-term sale event is needed, the true value of the business is often not realized by the seller. Is your business ready to handle such a transition that would allow you to pocket what you believe your business is worth? The strategies below will demonstrate how to make your business the most attractive to potential investors or acquirers.

Preparing to maximize the value of your business may take several years; now is an ideal time to begin the process. Growing your business may be your first priority to maximizing value, but we believe there is a tremendous opportunity to increase profits through eliminating waste in your business. Simply pumping more incremental top line revenue through a production process that is not maximized for profit may not yield the requisite cash flow sought by potential buyers.

We suggest a three-phased approach to preparing your business for an inevitable transition and maximizing the value of the business.

► Phase 1: Optimize performance through profit improvement. This step is extremely important, as it frees up cash to invest back into the process of getting your business ready for a transition, namely funding phases two and three. These savings will be realized every year forward, so even if a transition does not happen, the benefit far outweighs the cost.

► Phase 2: Polish the business and solidify growth. A potential investor wants to make sure the future growth of your business is achievable without you at the helm. A solid management team will need to be put into place with sufficient time before investors begin making inquiries. Locking in your revenue by creating long-term contracts with your customers will help ensure your revenue projections are believable. Cleaning up the balance sheet by reducing your debt will create a solid platform for growth. A good review of your brand and what it means to the marketplace will help justify a premium business value.

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► Phase 3: Control aspects of the sale to your advantage. This includes negotiating strategies, finding the right buyer and overcoming seller objections and value-reducing tactics. We also suggest incorporating an overall risk management strategy into the process to reduce the risk that the transaction will not be as successful as expected.

This entire process typically takes two to four years, and each completed phase will have a notable positive impact on the overall value of your business. Speak to your business adviser and begin evaluating short-term opportunities for improving your profit and cash flow.

We are experiencing an active period for mergers and acquisitions. By preparing now, you will be better positioned to receive the maximum value for your business and realize the ultimate reward for the many risks, sacrifices and successes you have experienced as a business owner.



BUILT INTO THE FABRIC OF OUR INTERACTIONS IS A CULTURE THAT CAUSES US TO GO BEYOND THE NORMAL DEFINITION OF COMMUNITY, REACHING OUT AND CONNECTING WITH EACH OTHER. WE ARE DRIVEN TO SERVE ONE ANOTHER, OUR CITY, AND OUR WORLD IN PRACTICAL WAYS THROUGH MISSIONS PROJECTS BOTH HERE IN ORANGE COUNTY AND AROUND THE WORLD.



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JEFF MOTSKÉ
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FOUNDER, LAGUNA MERCANTILE



Patrick Ross

Patrick Ross, CPA is a partner within Haskell & White LLP's Audit and Business Advisory Services Department. He provides services to the firm's diverse client base, including both public and private companies. He works with companies to improve their overall performance and achieve their objectives. He can be reached at 949.450.6200 or pross@hwcpa.com.



VANGUARD UNIVERSITY

18/8 Men's Hair and Grooming, Laguna Niguel

Scott Griffiths, CEO

Scott Griffiths helped to create 18/8 Men's Hair and Grooming, a fine men's salon, so that men would no longer have to go to women's salons. With 400 stores operating and in development, 18/8 Men's Hair and Grooming is continually innovating its product service offerings, providing a full spectrum of grooming and hair care solutions so that clientele can look better, feel better — and as a result, perform better. Every year, 34 million men go to women's salons. Griffiths and his team were the first to create this category and solution as a meaningful substitute. Griffiths has been building companies and directing successful brands for 20 years, including for companies such as Paul Mitchell ("Mitch for Men"), House of Blues, Crystal Cruises, Nokia and Vertu, to name a few. As a serial entrepreneur, he has also led or has been on the leadership team of 20 startups and early stage companies.

**Advanced ICU Care, Irvine**

Lou Silverman, CEO

Advanced ICU Care's high-acuity telehealth solution brings the "gold standard" of 24/7 intensivist oversight to a broad range of hospitals by combining innovative tele-technology that provides a constant stream of patient data and intensivist-led care teams. The resulting solution drives improved patient care and operations and a compelling ROI. The company saves lives and reduces care costs, consistently delivering 30-40% reductions in ICU mortality and 25-35% reductions in ICU length of stay. In Lou Silverman's first year as CEO, Advanced ICU Care grew nearly 40% and in 2015, the company opened three operations centers. Most importantly, in 2015, Advanced ICU Care saved more than 1,400 lives and reduced patient days by nearly 52,000 days in the ICUs of their 60+ client partners. Additionally, the elevated care to these most critically ill patients contributed to 2,700 lives and 140,000 hospital days saved. In his 20+ year career serving in executive leadership roles for health care technology and services companies, Silverman has driven growth and elevated performance and reputation through an unrelenting focus on quality, processes and innovation.

**Air Oasis LLP, Irvine**

Woody Young, General Partner

Woody Young was already a highly successful entrepreneur by the time he graduated from Ohio State University. He has had interest in over 15 companies

that improve people's lives and has built multiple worldwide companies out of nothing. Young was recruited for IBM's Young Executive Program straight out of college, followed by time at Kidder Peabody on Wall Street. He started Young's Evergreen Nursery Co., where he revolutionized how the landscaping industry met the needs of high-end hotels and movie sets. In 1982, Young took over the California Clock Co., home to the iconic 1930s Kit-Cat Clock. In 2004, Young started Street Surfing and brought the popular "Wave Board" to market. With his latest venture, Air Oasis, the company improved upon the PhotoCatalytic Oxidation developed by NASA with Air Oasis's proprietary AHPCO nanotechnology. Young's goal was to make the technology widely available to help protect children against germs. This is what inspired Young to create the Air Angel Air Sanifier. The Air Angel purifies and sanitizes the air and surfaces in rooms up to 250 square feet. Today, Young is bringing this purification technology to homes, hospitals, 5-star hotels and the world's tallest building in Dubai.

**Anaheim White House, Anaheim**

Bruno Serato, Chef/Owner/Proprietor

Anaheim White House has been owned and operated by the Serato Family since its inception in 1987. Bruno Serato, who traveled to America from Italy with just \$200 in his pocket, came here with a dream to be a restaurateur. With the strong support of his family, and after many years as a dishwasher, busser and waiter, Serato opened the White House, bringing Anaheim the finest Italian steakhouse. In honor of his mother, he also founded Caterina's Club, an organization dedicated to making sure the region's most vulnerable population — its children — receive a hot meal before they are tucked into bed each evening. The organization has fed more than 250,000 "motel kids" since its inception in 2003. In addition to being knighted by the Italian government, Serato was named CNN Hero for his extraordinary work and even mortgaged his home when the recession hit in 2008 to keep the program going. Over the past year, he has been actively moving these motel families into permanent housing. So far, he has moved 61 families — 350 individuals — into homes of their own.

**Antis Roofing & Waterproofing, Irvine**

Charles Antis, President/Founder

Charles Antis began his successful career in the roofing industry after moving to

CONGRATULATIONS!

Congratulations to visionary entrepreneur H. Michael Schwartz on being nominated for the Excellence in Entrepreneurship Awards. H. Michael Schwartz and his team recently negotiated the sale of SmartStop Self Storage Inc. (SmartStop) to Extra Space Storage, Inc. (NYSE: EXR) in an all cash merger transaction totaling \$1.4 billion.

"Entrepreneurship is neither a science nor an art. It is a practice." – Peter Drucker



H. Michael Schwartz
CEO, Founder



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Southern California from Myrtle Creek, Oregon. Antis Roofing and Waterproofing Inc. was founded in 1989 and from the beginning, Antis has worked primarily in the HOA and multi-tenant family market in Orange, Los Angeles and San Bernardino counties, providing roofing, decking and maintenance solutions for more than 1,000 communities. In his first year as a young entrepreneur, Antis responded to a call from a single mother with seven children who was concerned about her leaking roof. Upon walking in the front door, Antis was overwhelmed by the strong smell of mildew. As he stood there unable to avoid breathing in the toxic air, the youngest daughter grabbed his hand to proudly show off her home. When she led him into her bedroom, Antis witnessed a sight he would never forget: four mattresses with moldy bedding. That weekend, he and volunteers provided a free roof for the family, a generous gesture which eventually led Antis Roofing and Waterproofing to Habitat for Humanity of Orange County, where it has donated roof installation for every single build in Orange County since 2009 — \$500,000 worth of installations.



Austin Taylor Inc., Irvine
Ron Viggiano, President

Since opening its doors in 2000, Austin Taylor has become the premier men's haberdashery in Southern California. Austin Taylor creates custom men's clothing uniquely suited for each client's personal needs, wants and preferences. Ron Viggiano has been creating custom wardrobes for successful business leaders and athletes in the region since 1986. During his 29+ years in the industry, Viggiano has learned every aspect of the business from scheduling sales calls, consultations, pattern making and on-time delivery. Viggiano started his own company in 1992, and subsequently has become an expert in fabrics and color coordination. He was brought in as a partner and president of Austin Taylor Inc. in 2000, and he purchased ownership in 2010. Fittingly, Viggiano's favorite quote by Mark Twain is "Naked people have little to no influence on society."



B. toffee LLC, Newport Beach
Betsy Thagard, Founder/CEO

B. toffee is Betsy Thagard's high-end interpretation of traditional English toffee, using a recipe of savory butters, fine domestic sugars, premium Guittard and Callebaut chocolates, and superior quality pecan nuts. Thagard's love affair with cooking began when she was a young girl watching her parents cooking together in the kitchen. As an adult, she wanted to create something beautiful

and unique to gift to family and friends during the holiday season, so she started making toffee. Her friends couldn't get enough of it, and everyone urged her to introduce her toffee to the world. Handcrafted with the finest and most natural ingredients, B. toffee offers chocolate enthusiasts a "crunchy perfection of sweetness" that the world cannot get enough of! B. toffee has received top GOLD honors for "Top Toffee" and "Best Packaging" by the Taste Awards in San Francisco, Calif. and was recognized as the Official Toffee of The Golden Foodie Awards. Enjoyed by celebrities and neighbors alike, B. toffee has also been featured on Good Day LA, KCAL/CBS News and Redbook.



Bella Brands Inc., Aliso Viejo
Jon Harb, President

Jon Harb's business accomplishments include starting Bella B, a full line of more than 25 natural and organic products for mom and baby, from the ground up in 1999. Bella B was one of the first natural and organic lines on the market, before the industry exploded with several different brands. Harb grew the company and eventually sold it for more than \$4 million. After working for the acquiring company for five years — that company was acquired itself — Harb bought back Bella B and continued to expand the business. Today, Bella Brands Inc. is a collection of brands founded or acquired by Harb. Bella B is now in hundreds of stores within the U.S., including Mother's Market and several Albertsons and Pavilions in Southern California. The company acquired Due Maternity and My Little Seat, both of which now fall under Bella Brands Inc. New trilingual packaging will allow for broad international expansion to add to the current base of U.S. sales.



BEST-VIP, Huntington Beach
Robert Vaughan, President/CEO

BEST-VIP Chauffeured Worldwide began in 1995 as Best Chauffeured Worldwide and has grown from a one-person, one-limousine business to an award-winning, first-class transportation provider. With the recent acquisition of highly respected competitor, VIP Limousines & Coaches, BEST-VIP Chauffeured was born, and the company now offers a united staff and an extraordinary fleet of more than 140 vehicles. Starting with the purchase of one limousine, BEST-VIP



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Chauffeured founder Robert Vaughn has led the company through the impressive expansion. The company's commitment to providing guests and clients with the freedom to make the most of their time — and their life — whether for business or leisure travel, has earned BEST-VIP Worldwide an enviable reputation within the premium transportation services industry. In addition to serving an array of Fortune 500 executives, VIPs, celebrities and leisure travelers, the company continues to distinguish itself by its involvement within the community. Organizations such as Make-A-Wish Foundation, CHOC Children's Hospital and Living the Dream Foundation are just a few nonprofit organizations that have benefited from BEST-VIP and its employees' volunteer efforts.

Beyond Fifteen Communications Inc., Newport Beach

Lauren Ellermeyer, Co-Founder/President (Odd Days)

Beyond Fifteen Communications has a penchant for going beyond the norms of traditional PR to bring the highest level of media and market attention to its clients' brand propositions. By skillfully tying entrepreneurial ideas to results-driven strategies, the agency is setting new standards of PR execution, while redefining the agency/client relationship. Since 2009, co-founder Lauren Ellermeyer, has leveraged her progressive business style, keen eye for new talent, and rock-solid public relations and social media expertise to grow a home-based startup into a flourishing, nationally acclaimed communications powerhouse that has virtually doubled in size year over year since 2010, with another expected doubling in 2016. Apart from cultivating Beyond Fifteen's collaborative, "client first" business approach, Ellermeyer pours generous support into a variety of community organizations. She is a long-time partner of TedXOrange Coast and currently serves as a board member and philanthropy chair for American Family Housing. In addition to serving on multiple executive leadership boards, her favorite extracurricular activity is inspiring students and industry leaders alike on how to bring their entrepreneurial ideas to fruition.



BigRentz.com, Irvine

Dallas Imbimbo, Founder/CEO

BigRentz was founded in 2012 when Dallas Imbimbo saw an opportunity to introduce technology to the construction equipment rental process. By a single phone call or a click of a button on a mobile device, the BigRentz team sources and delivers the equipment the customer needs to their job site, anywhere in the nation. The idea of BigRentz has transformed into the world's first and largest online construction equipment rental network, with more than 7,000 rental locations in more than 2,000 cities. The company's revenue has grown by 400% year over year since its inception. The business continues to revolutionize the old school construction industry by developing new technology solutions and partnering with companies such as Wynne Systems and SolarTrak to offer ERP integration and GPS tracking. BigRentz was recognized by the Orange County Business Journal as the No. 1 "Fastest-Growing Small Private Company" in 2014 and the No. 3 "Fastest-Growing Medium-Sized Private Company" in 2015.



Bioniz Therapeutics Inc., Irvine

Nazli Azimi, Founder/CEO

Dr. Nazli Azimi is the founder and CEO of Bioniz Therapeutics, as well as the co-inventor of its core technology. Bioniz Therapeutics is a biopharmaceutical company leading the discovery and development of first-in-class therapeutics to address autoimmune diseases and cancer. Dr. Azimi's vision and passion for the future of immune therapeutics have driven Bioniz's core technology from a hypothesis shared with her co-founder to a fully realized platform technology. Bioniz leverages world-class expertise in immunology to create an entirely new class of medications that will be potentially safer, more effective and less expensive than current standards of care. The company's technology is poised to transform the therapeutic landscape with the market opportunity of more than \$100 billion. Bioniz Therapeutics' management has raised more than \$10 million of capital to translate a purely scientific discovery into actual drugs that will enter into multiple clinical trials in 2016. Bioniz Therapeutics has also attracted world-renowned executive leadership to the company's board of directors, including leaders such as David Pyott, the former CEO of Allergan; Joe Kiani, founder, chairman and CEO of Masimo Corp.; and Kleanthis Xanthopoulos, a highly successful biotech entrepreneur.



BizChix.com, Tustin

Natalie Eckdahl, CEO/Podcast Host

Natalie Eckdahl has built a platform for female entrepreneurs and become a rising star in the podcast industry. She hosts The Biz Chix Podcast, where she interviews female entrepreneurs and has developed a worldwide listenership. The podcast provides inspiration and motivation to women who enjoy hearing the success stories of other women. Eckdahl also hosts a free online community for women via Facebook. There, women can interact with



each other daily and find peers online that they may not be able to find in their local neighborhood. Through the Biz Chix Platform, she launched a successful coaching business where she works with women one-on-one and in groups via virtual mastermind meetings. Eckdahl also co-founded ScheduleMAX.com, an online scheduling software application with her husband Mark Eckdahl in 2011.

Blackband Design, Irvine

Greg Blackband, Founder/Owner
Wendy Blackband, Founder/Owner



Greg and Wendy Blackband of Blackband Design opened their first retail furniture store nearly 12 years ago, and it has grown substantially ever since. With a shared background in corporate marketing and an interest in interior design, Greg and Wendy expanded their retail business to include interior design; renovation services; and "showcasing," a furnishings service to help real estate agents advance home sales. Today, Blackband Design has gained national recognition on several occasions, including its most recent award in HGTV's "Fresh Faces of Design" contest where it won first place for its Master Retreat. Blackband was also featured as a runner-up in HGTV's "Kid-tastic Spaces." Many of Blackband's design projects have been featured on Houzz, where they have been awarded "Best of Houzz" for Design and "Best of Houzz" for Client Satisfaction for the last four years in a row. Blackband has also gained recognition in home and interior design magazines including Luxe, Modern Living, Newport Beach and Coast, as well as popular design websites, including Domaine, Style Me Pretty, Lonny and PopSugar.

Bold Girlz, Mission Viejo

Cheryl Beck, Chief Empowerment Officer

Cheryl Beck launched her company in Orange County with just a t-shirt line and quickly opened her first store in Costa Mesa in 2010. Beck's formula to foster girls' self-esteem and passion for causes that empower women quickly garnered the support from OC women's groups and nonprofits such as Girls Inc. and Girl Scouts. The popularity of the concept with girls and parents alike led to the expansion to three retail stores in Orange County. Bold Girlz sells trendy apparel and accessories, but also features a stage; fashion runway; and beautiful, private party room to create the perfect environment to be B.O.L.D. As a single businesswoman, Beck had to learn every phase of the retail world and rely on the expertise of many business mentors. Beck is very hands-on and personally conducts etiquette classes and community service projects at the stores. Parents love Bold Girlz for its mission in fostering a girl's self-esteem and providing services that build confidence and let them have fun.



Brower, Miller & Cole, Newport Beach

Judith Brower Fancher, CEO

Brower, Miller & Cole has served Southern California businesses with exceptional marketing campaigns for more than 20 years. In the evolutionary marketing field, Judy Brower Fancher has created and led a firm that is recognized and highly respected for its proactive and strategic public relations, content and marketing programs. Brower, Miller & Cole has served many of its clients for well over a decade, and has consistently provided effective results on their behalf. Fancher is the vice chair of membership for the national Urban Land Institute's Entertainment Development Council. A board member for the Cabaret Chapter of the Orange County Performing Arts Center prior to its construction, a board member of Hoag Hospital's golf tournament, and a member of the International Council of Shopping Centers. Fancher has also held board positions on numerous other Orange County nonprofits and is a member at the national level of the Public Relations Society of America.



Business Communications Solutions, Irvine

Sunny Rajab, CEO

Sunny Rajab has always tackled challenges head-on, regardless of what obstacles she may face. Age did not stop Rajab from starting her own telecommunications and IT business when she was barely out of high school. She now calls herself CEO of one of Orange County's top business networking and IT infrastructure service providers, Business Communications Solutions (BCS). With her experience, expertise, education and passion, BCS and its leadership has been recognized to be at the forefront of the industry. In 2015 alone, BCS was featured in both Orange County Business Journal and Inc. Magazine as one of the fastest-growing private companies in Orange County and the country.



Butterfli Me Makeup and Lash Studio, Irvine

Delphine Berryhill, President

Butterfli Me Makeup and Lash Studio is the newest addition to the quick-service beauty service craze. The company was started on Delphine Berryhill's

dining table in March 2014 when she decided to act on a long-held dream of starting a business to provide quality makeup application services and tools to women. As an alternative to the pushy departments counters, the new concept would offer licensed professional artists, rigorous hygiene practices and a relaxed environment without purchase minimums. After the development of the brand, online store, mobile app, four product lines and store build-out, Berryhill opened the first studio in May 2015. Many challenges popped up throughout the process — including having all social media sites stolen by a competitor; being denied trademark patent; and separating from her long-time husband, two weeks before opening. Since opening, the studio has garnered raves from clients and media alike and has experienced month-over-month sales increases. Modern Luxury recently featured Butterfli Me in their Best of OC list and the FTC has approved the company to franchise the model in 35 states.



Canyon Catering, Anaheim
Steve Cooper, Owner/Visionary

Steve Cooper opened Canyon Catering in 2006. The key to his company's continual success boils down to a single word: culture. His approach is simple: treat employees like family, instill an ability to create and encourage the Canyon family to believe in themselves. Canyon's ability to do precisely that underscores Cooper's success in fostering an environment where Canyon employees feel part of something very special. Canyon Catering was nominated for "Best Wedding Caterer" on Orange County's Hotlist in 2013 and 2014, and awarded runner-up both years; beating well-known, long-time established competitors. Canyon's creative talents genuinely love the art of creating unique and unparalleled events, and are constantly researching trends and ideas for catering and event planning. With Canyon's continued success, Cooper has signed the lease for Canyon's new 15,000-square-foot headquarters. Cooper and his team are excited for the growth and future opportunities.



CAPO Fireside, San Juan Capistrano
Eric Peterson, CEO

Leaving a lucrative sales job to venture out on your own and start a company with just a pickup truck is the definition of the American Entrepreneurial Spirit. Eric Peterson, CEO of CAPO Fireside, did precisely that in the early 1980s and has grown that company into a \$28 million, 110-employee organization. Capo Fireside has provided expertise, sales and service of fireplaces and hearth products in Southern California for more than 30 years. Not only did CAPO "weather" the recessions of the early '90s and late 2000s, they thrived, growing an average of 20% every year, acquiring some of their competitors and opening new markets while others went out of business. In addition to taking risks to expand while others were tightening the reins, Peterson always invested in his employees and team. He has instilled the "CAPO Fireside Culture," which creates an environment for every employee to succeed personally and professionally, throughout the organization.



Carolina's Italian Restaurant, Garden Grove
Tim Ibrahim, Owner/Managing Partner/Catering Director

Tim Ibrahim is a longtime supporter of the Garden Grove community and the owner of Carolina's Italian Restaurant, a family owned and operated location for more than 35 years. Carolina's continues to offer locals a delicious, authentic Italian dining experience at an affordable price. Under Ibrahim's leadership, the company has grown exponentially. With his wife by his side, he has become a trailblazer in the Garden Grove community because he's a longtime supporter of local schools, churches and nonprofits. Ibrahim offers local organizations a variety of fundraising programs and frequently donates gift cards for auctions and raffles to help benefit a multitude of causes. A testament to how respected he is within the community, when Carolina's suffered a grease fire in 2013, his customers came together and donated their time and resources to help rebuild the restaurant. During this rebuilding, the restaurant was able to expand from 1,100 square feet to 6,200 square feet.



Casa Romantica Cultural Center & Gardens, San Clemente
Berenika Schmitz, Executive Director

There is no more important issue for California's future than enhancing a pulse of the state's civic life. Berenika Schmitz envisioned a crucial method for achieving these goals and, as a performing artist, arts manager and cultural entrepreneur, has successfully enhanced cultural life in Orange County. Schmitz put the results of her Juilliard, Harvard and Oxford education to the service of Southern Californians. Through her involvement in long-term programming cultural activities at the institutional and




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municipal government levels in California, Schmitz has set the path for the future of arts and culture, focusing on accessibility and cultural relevance. The list of Schmitz's accomplishments is long. Her work as executive director of Casa Romantica, a historical cultural institution in San Clemente, has resulted in generating continuous high-quality cultural events involving either world-class artists of diversified genres or educational programs for children. Casa Romantica had its attendance double this year under her leadership. In addition, she also founded the Dana Point Symphony.

CEO Space Orange County, Irvine

Dave Phillipson, Chapter President

CEO Space is the world's oldest and largest network for CEOs and entrepreneurs. Approximately one third of the organization's members are investors, including millionaires and billionaires. In just five meetings in the last year, CEO Space has generated more than \$3 billion in funding for its members. CEO Space helps entrepreneurs, small business owners, corporate executives, inventors, authors, speakers and investors with power networking, improving business plans, marketing and branding, getting capital compliant, legal structure and accelerating business actions, among many other things. As chapter president, Dave Phillipson has hosted more than 600 meetings for entrepreneurs in Southern California, most of which were Orange County and has helped thousands of entrepreneurs during that time.



CGS Business Solutions, Mission Viejo

Nick Chavis, Managing Principal

Nick Chavis is managing principal and founder of CGS Business Solutions, an IT professional services company that provides technology experts who build world-class information systems. The company is celebrating its sixth year anniversary and its third year on the Orange County Business Journal's "Fastest-Growing Companies" List. Chavis, a member of the North Carolina Lumbee Indian Tribe, is a certified minority business owner specializing in IT business solutions and consulting services. For the last 18 years, he has been serving some of Orange County's largest corporations. He is also a guest lecturer at his alma mater, California State University Fullerton, where he has advised both undergrad and graduate business students on being an entrepreneur and career growth strategies.



City Girl Prepper, Seal Beach

Jennifer Stewart-Tai, Founder/President

City Girl Prepper is changing the way women discuss preparedness. By offering emergency preparedness education and ready-made supplies in a home party setting, women are gathering to prepare for any disruption that comes their way. First responders recommend that everyone has at least 72 hours of supplies, and City Girl Prepper is helping families get prepared. Jennifer Stewart-Tai decided to start City Girl Prepper in 2013 after discovering how unprepared her community was for an emergency. Her backpacks are designed for women with women's fit gloves, feminine hygiene products and comfort items. She has also worked with local schools to have supplies in the classroom and presented information on 72-Hour Kits to Boy Scout troops, home owners associations and community organizations. She is inspiring women to be self-reliant and courageous in their lives.



Community Preservation Partners LLC, Irvine

Anand Kannan, President

As head of Community Preservation Partners (CPP), Anand Kannan has a direct role in enriching the lives of affordable housing residents across the country. He is responsible for leading the preservation and development teams at CPP — a wholly owned subsidiary of WNC & Associates Inc., a leader in the affordable housing industry. Under Kannan's leadership, CPP's award-winning rehabilitation work in the multi-family space is considered top-notch within the industry, and the proof of that is in the company's explosive growth rate. Kannan joined CPP in 2010 and grew its portfolio to 2,000 affordable housing units in 2012. Since then, he has increased CPP's portfolio to almost 4,000 units. His company's projects have improved the lives of thousands; bringing residents upgraded infrastructure, public spaces, sustainable energy and a host of convenient amenities. He is a frequent speaker at affordable housing industry conferences and is well regarded for his innate ability to take complex transactions and make them seem effortless.



Corent Technology, Aliso Viejo

Feyzi Fatehi, CEO

Feyzi Fatehi has spent his career building high-performance, high-tech organizations including multiple independent business units at HP and four

technology startups in Silicon Valley and in Southern California with valuations ranging from \$100 million to \$1 billion, including Corent Technology. Corent Technology is the provider of SurPaaS®, a disruptive SaaS-enablement and software delivery as a service platform. A highly respected and enthusiastic advocate for cutting-edge technology, Fatehi has been an industry speaker around the globe from London to Rome and from Singapore to Sydney, including speaking at events at Harvard Business School, Wharton, Stanford, Pepperdine, Cal Tech, USC and UCLA. Elected to the board of the Technology Council of Southern California in 2007, he has served as chairman of its Orange County chapter since 2008. He is a member of the IBM Partner Advisory Council, UCI Engineering Leadership Council, UCI CEO Roundtable, and a board member at OC Tech Alliance, and at the Software and Information Industry Association.



Devise Interactive, Santa Ana

Dalip Jaggi, Principal

Dalip Jaggi has been recognized as a young entrepreneur, an active soul who is always looking to do more and do better. At the age of 25, he is the founder of the digital agency, Devise Interactive, and hosting company, Hostannual.com. Dalip has tripled Devise Interactive's business and staff. The company works with organizations such as USC, Edwards Life Sciences, Ingram Micro, Cisco Systems, AstraZeneca, and many other advertising agencies in Orange County. He is also the director of technology for Orange County's newest and hottest startup, EvaDrop, a smart shower that will help you save water while you shower. Away from his different ventures, Dalip stays very active in his community. He is the interactive chair at the AD2 Orange County Chapter and the digital lead and chair at Forge54, a nonprofit organization.



Drive Me Cookie LLC, Costa Mesa

Kohlman Verheyen, Doughmmander in Chief

Drive Me Cookie fired up its oven and hit the streets of Orange County in Oct. 2013. This custom Mercedes Sprinter van is outfitted with a full commercial kitchen featuring a professional oven, freezer and refrigerator. Drive Me Cookie serves piping hot homemade cookies and customized ice cream sandwiches at private catered events, public street vending events, and even home and office deliveries. Based in Costa Mesa and operating all over Southern California, Drive Me Cookie has served more than 100,000 people and baked over 300,000 cookies at events with notable clients such as Kelley Blue Book, Honda, Toshiba, Blizzard Entertainment, Keystone Pacific Property Management and the Irvine Co. In the past six months, Drive Me Cookie has doubled its full-time staff, tripled its total staff, and is amid completely revolutionizing internal and external customer service protocol.



Excelerate Test Prep, Newport Beach

Ladan Davia, President

Excelerate Test Prep is the only SAT/ACT software on the market that targets the specific concepts being tested by every question answered incorrectly on a practice exam. Factoring in fatigue and other variables that could interfere with each student's performance, this unparalleled technique helps students achieve their ideal scores after completing just three tests—at no cost to the students. In contrast, most modern, high-quality test prep courses cost an average of \$2,400 and take six weeks to complete. By making elite test preparation a feasible option for all students, Excelerate Test Prep is aiming to revolutionize the American education system. Since winning the Business Plan Competition at Chapman University, Excelerate has provided its software to school districts in Oakland, Los Angeles and Berkeley as a supplement to their college preparation programs. In the past two years, these schools have reported that their students have improved their overall scores by an average of 300 points after their first practice tests. Excelerate has been published in numerous magazine editorials and helps roughly 80,000 people through the website.



Genea, Irvine

Michael Wong, CEO/President

In the years under Michael Wong's leadership, Genea, which provides cloud-based software and services for the commercial real estate industry, has grown from 9 million square feet to more than 115 million square feet. Equally important to its growth, Genea has retained 100% of its customers implemented under Wong's tenure. His strong work ethic along with his unwavering focus to deliver service offerings that enhance the daily lives of his customers are at the core of Genea's success. Wong envisions Genea becoming the leading provider of technology solutions for the commercial real estate industry. The company's value-enhancing ACS Cloud offering establishes Genea's relationship with the customer. It is the only cloud-



based, after-hours solution that integrates with virtually every building management system. As such, the company is uniquely positioned in the industry to provide a tool that can be used across a large portfolio of buildings.

Gina Gomez, Business Coach & Certified Life Coach, Foothill Ranch
Gina Gomez, Business Coach

Gina Gomez.com is a business consulting and coaching company, established in Laguna Beach in 2012. Sole proprietor, Gina Gomez, works with established female entrepreneurs to increase longevity and stability in their respective businesses. Gomez is the creator of the Ms.termind Mastermind™ program for female entrepreneurs. She uses her results-oriented business philosophy, knack for developing relationships, and corporate experience to help clients and colleagues achieve and exceed their professional and personal goals, to live up to their true potential.



Commitment to clients reaching and exceeding their goals sets Gomez apart from others in her field, and shows in her attention and accessibility to both the clients and colleagues she works with. She also contributes a portion of revenue to nonprofits including Project Angel Food, Kiva, The Trevor Project and School on Wheels.

Grenanimal Restaurant Group, Rancho Santa Margarita
Tony Monaco, Owner/Restaurateur

Less than two years after founding Grenanimal Restaurant Group, Tony Monaco opened three restaurants, including The Blind Pig Kitchen + Bar in Rancho Santa Margarita — at only 25 years old — and The Trough Sandwich Kitchen in Rancho Santa Margarita and Newport Beach. Monaco encountered challenges with The Blind Pig Kitchen + Bar, as the diners there are not as adventurous as ones in Santa Ana or Costa Mesa. Even with these obstacles, Monaco and the restaurant have catalyzed the craft beer and cocktail movement in the area, and is pushing the envelope on chef-driven cuisine. Monaco regularly supports local schools and nonprofit organizations such as Miracles for Kids and more.



Grit Cycle, Costa Mesa
Matt Bourne, Founder
Marisa Wayne, President/Founder

Grit Cycle was founded by Matt Bourne and Marisa Wayne in 2012. Grit

Cycle is a premium boutique group fitness and wellness facility, featuring indoor cycling classes. Bourne and Wayne have successfully built up the business leading to packed classes and a busy social media following. They have changed the way people view workouts and have a community of people who support and inspire each other. Grit Cycle has raised several hundred thousand dollars each year for the John Wayne Cancer Foundation.



Guaranteed Rate, Irvine
Ben Anderson, Branch Manager/VP of Mortgage Lending

Ben Anderson has 12 years of mortgage lending experience and has been a nationally verified top originator year after year. According to Scotsman Guide, Anderson was ranked #21 nationally in mortgage lending volume in 2012, #10 in 2013 and #17 in 2014. Anderson was also #2 nationally in refinances in 2014. Anderson's total closed sales for home purchases and refinances have exceeded more than \$1 billion over the past five years, with more than 2,000 closed mortgages. He was recognized by MPA Magazine as one of the "100 Hottest Mortgage Professionals" in the country in 2013 and 2014. Guaranteed Rate is the eighth largest retail mortgage lender in the U.S., due to its low rates, innovative technology, unparalleled processing and unmatched support. Licensed in all 50 states, Guaranteed Rate has funded \$12.4 billion in home loans in 2014 alone.



H. Hendy Associates, Newport Beach
Heidi Hendy, Founding Principal

Heidi Hendy launched H. Hendy Associates in 1979. With 37 years of experience in Orange County and a passion for meeting business objectives, Hendy is a leader in interior architecture and planning, delivering exceptional results and setting an industry standard for design and planning that drives business success. H. Hendy Associates' roster of recently designed Orange County workplaces includes: Mark IV, Yokohama Tires Corp., Kawasaki, OluKai and GE. In a county that the country looks to for leadership in commercial real estate, Hendy is instrumental in keeping firms ahead of the curve when it comes to constructive innovations in workplace design. Hendy is passionate about mentoring up-and-coming leaders at H. Hendy Associates, sharing how actions turn into results to empower an entrepreneurial spirit in each employee. Continuing to grow, H. Hendy Associates reported a 23% growth in 2015.



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Hall & Company CPAs, Irvine*Bradford Hall, Managing Director*

Bradford L. Hall founded Hall & Company CPAs in 1987 in Irvine with a vision to build business value for company owners and executives in a wide variety of industries through sophisticated tax planning, financial analysis and strategy. Under Hall's leadership, Hall & Company CPAs provides high-quality tax, audit, forensic, litigation and specialized business advisory services. As a 2015 Orange County Business Journal Fastest Growing Private Company, the firm's growth has catapulted in recent years. Between 2013 and 2015, revenue increased by 33.8% and the firm's staff grew by more than 36%. Specializing in the manufacturing, distribution, technology, construction, real estate, law, health care, nonprofit and financial services industries, Hall & Company embraces entrepreneurs and CEOs for their visionary and independent spirits and serves their accounting, tax and financial needs. No matter how intricate a business challenge may be, Hall ensures that the Hall & Company CPAs team becomes an entrepreneur's most trusted resource.

**HKA Inc. Marketing Communications, Tustin***Hilary Kaye, President*

Hilary Kaye is founder and president of HKA Inc. Marketing Communications, an award-winning agency serving regional and national clients. The agency's integrated communications strategies elevate visibility, heighten awareness and promote business growth. She spearheads HKA's business development and works with staff developing strategies that enable clients to reach their business objectives with measurable results. A former journalist, Kaye has built an entrepreneurial agency known by clients for excellence and service and known in the community for its generosity. In 2015, Kaye and HKA were the proud recipients of the National Philanthropy Day award in the Small Business Category and also won the global silver Stevie Award for "Community Involvement Program of the Year," the only U.S. company to receive recognition in this category. Kaye serves on the board of Crystal Cove Alliance and Laura's House; is an Alzheimer's OC Visionary Woman; founding member of NAWBO's Women's Business Institute; and member of Women Presidents' Organization. At the MS Walk in Irvine, Kaye has fielded "Ruby's Raiders" in memory of her mother for the past 16 years.

**Idea Hall, Costa Mesa***Rebecca Hall, CEO*

Rebecca Hall has made being ahead of her time a driving career principle. Beginning in 2003, she founded the first hybrid PR/marketing firm in the opening days of the digital revolution. Through the dark days and years of the downturn, she shepherded an agency built on real estate and financial clientele through the toughest economy for marketers in a generation. Today, she remains one of the first and only female heads of an agency, and perhaps the most successful female marketing and PR entrepreneur in Orange County. Being three steps ahead of her industry, her category and the demographics of the boardroom have earned her unprecedented success. Today, Idea Hall is one of the fastest-growing and most sought-after integrated creative firms in Orange County, ranked No. 2 by the Orange County Business Journal's "Best PR Firms" List in 2015. Now 13 years old, Idea Hall has a prestigious client list including The Irvine Co., Bixby Land Co., StorQuest Self Storage, Chapman University's Musco Center for the Arts, Sunwest Bank, CU Direct, Cox, Castle & Nicholson, Buchanan Street Partners and many more.

**Inside SKUP, Fullerton***Nyk Hong, Owner*

Inside SKUP, serving handcrafted ice cream sandwiches with cookies made from scratch and baked fresh every day, opened in the summer of 2015. Since the company's inception, Inside SKUP has been involved in helping organizations from Cal State Fullerton with its fundraising needs. Inside SKUP has donated a percentage of its sales back to these organizations and continues to do so every semester. The business faced numerous challenges at the start. Without any knowledge of the cookie and ice cream business, Nyk Hong forged ahead and opened the shop by herself. In addition to the usual construction-related problems and unforeseen issues with the architect — all of which caused numerous delays and legal proceedings — Hong had to also juggle raising three children all under the age of five and helping at her parents' family business. Despite these obstacles, Hong was able to successfully start and grow Inside SKUP.

**Katie B Cosmetics, Irvine***Katie Bayliss, Creator/CEO*

In 2006, entrepreneur, beauty expert and attorney Katie Bayliss, along with

her husband Shaun Bayliss combined their passion for makeup and law, and set out to revolutionize the cosmetics industry. Their mission was advocate for the beauty industry by developing innovative, on-trend products that are safer and have more natural, beneficial, skin-loving ingredients. Their products are free of or have fewer artificial ingredients and toxic chemicals. Their message has connected with thousands of women who want to look beautiful, but do not want to sacrifice their skin. Under Katie's vision and her understanding of the new social era, Katie harnessed the power of social media, digital marketing and multi-channel distribution to profitable success. Katie was able to grow the business from a bedroom out of her parents' home to a large warehouse and distribution center in Irvine, Calif. Today, her products ship worldwide to more than 20 countries.

**Kush Bottles, Santa Ana***Nicholas Kovacevich, Co-Founder/CEO*

Under Nicholas Kovacevich's leadership, Kush Bottles has grown to become a leader in its market. The company, a leading wholesaler of marijuana and cannabis packaging and dispensary supplies, grew from \$1.7 million in revenues in fiscal year 2014, to more than \$4 million in fiscal year 2015 — an increase of 135%. Gross profits in fiscal 2015 increased by 97% over fiscal 2014. Of particular note, the company recently completed filings with the SEC and has become a publicly traded company — with the ticker symbol KSHB. The move from a private to a public company was painstaking and arduous, but under Kovacevich's steady hand, the company completed the transition with success. Kush Bottles recently filed Q1 FY 2016 financials, and they show the company is profitable, and up 177% from Q1 FY 2015. The company recently reached the milestone of selling its 100 millionth unit. Kush Bottles was recently named to the Inc. 5000 list of "Fastest Growing Companies in America."

**Laguna Mercantile, Laguna Beach***Melissa Rohani, Founder*

Melissa Rohani created the Laguna-Beach-based fine home furnishings business — Laguna Mercantile. After a long career in technology, Rohani found herself in a place in life where she could follow her passion as a curator of fine home furnishings collected from around the world. Her focus is procuring antiques and vintage-inspired goods and textiles selected to transform an interior space. Rohani travels the world in search of beautifully designed goods, crafted with artistry and skill. She has a strong desire to support hard-working colonies of women that handcraft the beautiful plates, pots, rugs, throws and more, all of which she craves back to Laguna Beach. Rohani and her great finds are featured on the long-running TV series, Canaday Group RE/MAX Fine Homes. Rohani's mission is to cultivate relationships with artisans from around the world and provide them a stage for others to discover their creations.

Lugano Diamonds, Newport Beach*Moti Ferder, President/Design Director*

Master craftsman and jewelry visionary, Moti Ferder, is not only the president and design director at Lugano Diamonds, but also an incredibly influential person, given his extensive charitable efforts in Orange County. His company, Lugano Diamonds, is currently celebrating its 10th anniversary with two Orange County locations in Newport Beach and at Montage Laguna Beach. Ferder's impeccable talent, combined with his strong community ties, generous heart and passion for philanthropy, have helped establish Lugano Diamonds as one of the finest jewelers in the world. Recently named a board member of the Segerstrom Center for the Arts, Ferder is dedicated to serving his community. He supports a variety of nonprofit and local causes by creating signature Lugano Diamonds' designs and donating magnificent jewelry pieces, which are then used to raise substantial funds for the organizations they are donated to. Additionally, Lugano Diamonds underwrites many local and national events.

**Madison Alexander PR, Tustin***Dan Chmielewski, PR*

In the wake of an employer being acquired, Dan Chmielewski took his severance package, and with the encouragement of several IT security industry analysts, started Madison Alexander PR — a boutique technology consultancy named after his children, Madison and Alex. Madison Alexander PR started from scratch, completely bootstrapped, and targeted smaller technology firms and companies engaged in IT security. The agency now has 18 retainer and project clients all over the country and world. Madison Alexander was selected as the 2013 "Security PR Team of the Year" and 2011 "PR Agency of the Year" by Info Security Products Guide at the RSA Conference in 2013 and 2011. Additionally, Madison Alexander PR is the only U.S.-based PR firm that's a member of the by-invitation-only CodeRed Network of Global PR agencies, which specialize in IT security. The agency has built a reputation for delivering solid results-oriented PR programs that generate mindshare for its clients.

Maison Du Soir Inc., Newport Beach
Courtney Kates, President

Designed and produced in Los Angeles, Maison Du Soir is an independent sleep and loungewear line dedicated to impeccable quality, luxurious fabrics and thoughtful silhouettes. Courtney Kates started Maison Du Soir out of her love of fashionable sleepwear and the lack thereof in the market. After working for many years in the Orange County corporate clothing industry in product and brand development, Kates' entrepreneurial spirit was set aflame the day she bought her first quality sleepwear set. When she tried to buy more, she couldn't find anything that she felt was fashionably relevant. Seeking to capitalize on a hole in the sleepwear market, the company offers sleepwear that echoes daywear style and can consequently be worn out of the house. Maison Du Soir aims to be a leader in changing the perception of sleepwear. The main objective is to become a brand that has broad appeal and growth potential in the sleepwear market, giving women more fashion, function and quality from their sleep and loungewear at an attainable price.



Managed Direct Response, Yorba Linda
Pat Mercuri, President/Founder

Pat Mercuri is founder and president of Managed Direct Response — a full-service marketing company. Mercuri is a veteran of the direct marketing industry in Orange County with more than 20 years of experience in the industry. Mercuri is recognized within the industry for his expertise in direct response, having introduced a number of innovative marketing programs for the mortgage, solar, automotive and retail services. Mercuri's desire to create a company that was different and better, combined with fulfilling broader social responsibilities, led to unprecedented growth. Mercuri begins his working day at 3 a.m. and doesn't stop until everything for the day is done. During his career, Mercuri has mailed more than 100 million lead-generating marketing materials. In the last 20 years, Mercuri has grown his companies through three recessions and emerged as a leader in the industry. He is also a member of the Direct Response Marketing Association and has spoken at a number of conventions.



Manna Kadar Cosmetics, Irvine
Manna Kadar, CEO

In 2011, Manna Kadar pursued her ultimate dream of starting her own cosmetics line, Manna Kadar Cosmetics (MKC). Manna Kadar Cosmetics quickly grew from a community favorite to an internationally distributed brand in the first few years of the company's inception. MKC now has a beautiful showroom space in Irvine and is a sponsor for Orange County Fashion Week and Miss California USA/Miss California Teen USA. The company has had millions of samples included in prestigious beauty subscription boxes, such as Birchbox, IPSY and FabFitFun. The brand is a cult favorite amongst beauty social influencers, and has been mentioned by Kim Kardashian West on her website and app as a part of her new book cover. MKC has also been featured on Good Morning America, The Ellen Show and ExtraTV. The company has made a name for itself by simplifying the beauty routine with double-duty, high-quality products.



Mark 1 Real Estate & Mortgage, Orange
Mark Prather, President

Mark Prather is an entrepreneur who continues to create innovative programs — even after three decades in business. Prather was just 22 when he joined his father's real estate company, Mark 1 Real Estate. Thirty-five years later, Prather leads Mark 1 Real Estate and Mortgage, which now has three locations across Southern California. Over the years, the company survived and thrived, as he accurately predicted the subprime mortgage fiasco and took defensive measures. Prather is passionate about education — for his teams, his clients and the community at large. Prather's Mark 1 Wealth Academy offers free online financial tools, videos, seminars and webinars — all designed to educate and empower individuals to use real estate investing to enable them to retire with sufficient financial resources. His recent book, Why the Rich Stay Rich and the Poor Stay Poor, available through Amazon, provides further consumer education. Prather funds scholarships for John F. Kennedy and El Modena High School students; serves on the board of Junior Achievement, OC; and is a financial advocate for CASA and Grandma's House of Hope.



Marketing War Inc., Santa Ana
Chris Shihadeh, President

Chris Shihadeh is president of Marketing War Inc. — a firm that builds customized marketing systems tailored to any business, industry and its goals. The system focuses on customer acquisition and retention through digital and traditional advertising methods. These methods include social media management, pay-per-click ads, email marketing,



webcasting, radio, television, print ads and more. This has helped integrate the community in the Orange County area by bringing together networks of business owners. Marketing War has stood as an advocate for clients, becoming a brand's best friend by committing to one single goal: create marketing that drives audiences to take action.

MBN Design Inc., Anaheim
Hector Garcia, Founder/Brand Guardian

Hector Garcia, the president of MBN Design Inc., has been in business for more than 20 years and is the first in his family to venture into starting his own company. MBN Design has become one of Orange County's most-established and well-respected design firms as a result of Garcia's astute choice of employees and vendors. Garcia has assembled a team that's big on talent, big on core values and big on results. The company has successfully branded products, as well as Fortune 100 and 500 companies. MBN has also successfully teamed up with organizations such as NASCAR, the NFL, NBA and MLB. MBN artwork graces the shelves of virtually every grocery, club, drug and office supply chain regionally and throughout the U.S., with some products being sold in more than 90 countries. The company's wheelhouse of services include brand development, packaging, website design, photography, illustration, printing and fulfillment.



Medelita LLC, Laguna Hills
Lara Francisco, Founder

As a licensed clinician working in an emergency setting for more than 10 years, Lara Francisco, PA-C recognized the growing demand for gender-specific, professional uniforms that she and her colleagues could feel proud wearing while caring for patients. Her passion was rooted in a strong belief in the connection between self-confidence, poise and outward appearance. This led her to transition from a practicing clinician to a full-time entrepreneur in May 2008. The Medelita collection provides health care professionals with uniforms distinguished by style, comfort and exceptional performance. Over the course of seven challenging years, Francisco learned what it took to be an aspiring designer, marketer, leader and salesperson, and she achieved profitability and growth in the process. Medelita products are sold internationally in every country where products can be shipped. Francisco oversees almost 20 employees and a three-year compounded annual growth rate exceeding 50% as of 2015.



Woo Hoo!

All of us at Nutripy are proud of our Founder's recognition for revolutionizing nutrition, and making Nutripy.com the simple, yet thorough start for every lifestyle.

And we commend the OCBJ along with all of the nominees for their contributions in advancing the presence of the Orange County business community.

Jeffrey Moore
Founder & CEO
Nutripy, Inc.

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Mint Machinery, Costa Mesa*Alex Pal, Owner*

For years, Mint Machinery has provided luxury wheels to the automotive industry. More importantly, when most of the industry valued profit above all else, and moved outside of Orange County while sourcing most of their supplies overseas, Mint Machinery kept everything local. Alex Pal truly believes the customer comes first. He still wants everyone to call him personally, and if his assistant answers his cell phone, he still will call clients back. As a son in a long-run family business, Pal saw the shift in the automotive industry. As more and more people were getting their cars serviced at dealerships and buying aftermarket products, he knew he needed to be more creative. He decided to become a manufacturer. The economic downturn in the past few years has created many challenges. Despite this, Pal did not move out of the area or reduce the product's quality for profit.

**Modern Pop LLC, Dana Point***Julie Podolec, Co-Founder/Brand Ambassador*

Julie Podolec and her husband Brad Podolec never envisioned themselves becoming food entrepreneurs, but the timeless challenge of a first born's teething troubles set in motion a rapidly growing "better for you" consumer foods business. Soon after Brad and Julie failed at several attempts to find a frozen fruit bar they felt comfortable giving their child, Modern Pop was born. Modern Pop products were sold at Bristol Farms and Whole Foods Market by early 2014, after attracting early attention from local media outlets. In 2016, the company plans to expand to more than 80 stores (from roughly 15 in 2015) in Southern California, including those of a big box retailer and major national club. In the community, Modern Pop — a majority woman-owned business — has supported breast cancer awareness, as well as several local school food education initiatives.

**Mom & Tot OC, Irvine***Dawn Antis, Founder*

Dawn Antis launched Mom & Tot OC out of necessity. After joining a mommy and me group with her twins in 2014, she realized there were no options for toddlers in Orange County. There are a handful of mommy and me groups for newborns in Orange County, but Mom & Tot OC is the first and only group to cater to moms with toddlers. Since opening its doors in February 2015, the classes have doubled in size. Mom & Tot OC is recognized by OC Family and the Orange County Register as a local resource that helps connect parents. Antis holds the classes in her home for a safe and relaxed environment. Each week, a local expert is brought in to educate the moms on CPR, car seat safety, toddler swimming, nutrition, holistic health, sleep, marriage, family, relationships, photography, music, literature, local parks and more. There are also crafts and sing-a-long songs for the toddlers. Antis arranges play dates at local parks and zoos, and mom's night out events for current and past members once a month.

**Money360, Ladera Ranch***Evan Gentry, CEO/Founder*

A serial entrepreneur, Evan Gentry sought to replace pre-Great Recession banking models with a less costly, more efficient lending model for commercial real estate financing. As the founder of two successful real estate investment and finance firms, G8 Capital and MoneyLine Lending Services, Gentry understood the intricacies of commercial real estate finance and how technology could dramatically streamline frequently time-consuming processes and make them more accessible to potential investors. Using his more than 18 years of experience, Gentry founded Money360, a marketplace lending platform that provides opportunities for qualified private lenders to make real estate-secured investments through an online marketplace. Since inception, Gentry and his Money360 team have delivered exceptional results for borrowers and investors, and have set an industry standard for commercial real estate marketplace lending. Closing more than \$50 million in loans in 2015, Money360 is an example of how commercial real estate will be able to scale in the marketplace lending arena.

**Mopro, Costa Mesa***Cary Levine, CEO*

Cary Levine, founder and CEO of Mopro, is a digital marketing visionary and a driving force in the revolution of website technology. Mopro is the all-in-one digital solution for business owners — equipping them with an HTML5, mobile-responsive website and an ever-expanding product suite to help them build their business online. Levine leads a team of more than 220 designers, developers, editors, account managers, digital specialists and marketers in Costa Mesa. Levine and his team have won numerous digital media awards, including two Gold Lions at Cannes and the Jay Chiat Award for Strategic

Excellence. Levine has led product, technology and creative work for more than 150 enterprise clients, including General Mills, Levi's, Lenovo, Microsoft, the Global Poverty Project, HP, The Economist and Hyatt. His first startup, InTheMo, was funded with a portion of his student loan, offering video-based search that integrated personalization algorithms. Levine then launched digital media agencies in San Francisco, New York, Los Angeles and Washington, D.C.

My Choice in Home Care, Dana Point*Julie Zimmerer, CEO/Founder*

Julie Zimmerer retired from her chiropractic practice after 20 years and created My Choice in Home Care from personal heartache when a caregiver took advantage of her Korean War vet paraplegic father following his last stroke before he passed. She founded the senior homecare company on specific family values and hasn't let anything get in her way since. My Choice has earned numerous awards, setting its practices and team apart from others. Since 2007, My Choice has grown from one small area in Canyon Lake, Calif. to serving people in Los Angeles to the tip of San Diego and everywhere in between. In addition, there are now two offices — one in Canyon Lake and another in Dana Point — with more than 100 employees working at all times in each location, and a caregiver list that exceeds 400 people combined. Zimmerer also earned the Veterans Homecare Contract of Loma Linda Hospitals serving veterans deemed disabled during time of war with homecare services. She recently renewed this contract for another five years.

**Nekter Juice Bar, Santa Ana***Alexis Schulze, Co-Founder/Chief Visionary Officer*
Steve Schulze, CEO/President/Founder

Alexis and Steve Schulze founded Nekter Juice Bar in 2010 with a distinct mission in mind: to motivate people to adopt healthy eating habits by offering both affordable and accessible options their customers could incorporate into daily life. In the process, they planned to reinvent the juice space similarly to the way Starbucks did in the early '90s. Starting from scratch with personal savings and an SBA loan, the Schulzes built Nekter to more than 50 locations, with 700+ employees and nearly \$40 million in revenue — all in only five years. However, their goals go far beyond simply making a profit. Each store is a way to inspire others by bringing a sense of purpose to their team members and local communities. To this end, each store adopts a local elementary school as a way to reach the most important people: the children.

**New Horizons Learning Group, Anaheim***Kevin Landry, CEO*

New Horizons Learning Group (NHLG) is part of the world's largest provider of technical training with more than 300 locations in 70+ countries globally. NHLG trains both enterprise professionals, as well as individuals who are either paying for the training themselves or are being funded under a federal program such as the VA or Workforce Partnership program. NHLG is committed to supporting the veteran community in getting them back to work and advancing their careers. The company partners with organizations to assist veterans in earning industry-recognized stackable certifications, enriching their resumes. Kevin Landry joined the company as the general manager of the franchisor's corporate Southern California operations. In 2007, Landry purchased the assets of the Orange and Los Angeles County operations under his holding company, KML Enterprises Inc. He later acquired assets in San Bernardino, Riverside, San Diego and Imperial counties. In July 2015, NHLG acquired two Southern Arizona locations, which has contributed to the growth of the company. Under Landry's leadership, the company has won numerous awards and was also one of Inc. 5000's Fastest Growing Private Companies in America.

**Newport Coast Auto Inc., Costa Mesa***Paul Passero, President*

Paul Passero founded Newport Coast Auto in 2002. A graduate from San Diego State University with a masters in marketing and finance, Passero created a unique, high-end, boutique-style resale dealership in Orange County. While most dealerships will acquire their pre-owned inventory from auctions, which tend to have low-quality vehicles, Passero structured his automotive business around quality pre-owned cars, trucks and SUVs from high-end dealer trade-ins, lease returns and private parties. Over the last decade, Newport Coast Auto has maintained a superior level of customer satisfaction in the California automotive industry. Newport Coast Auto Inc. is actively involved in the fight against cancer research. When a customer buys or sells their car, Newport Coast Auto makes a donation (a minimum of \$500) directly to cancer research charities.



Newport Mental Wellness, Newport Beach

Tina Sadri, Founder

Tina Sadri is a licensed family therapist who specializes in the new field of social media disorders. She is the founder of Newport Mental Wellness in Newport Beach. Her ambition is to care for the community that helped her to become who she is today. Sadri is also the driving force behind an affordable wellness program that caters to those that don't qualify for welfare. Sadri's advocacy and experience in women's and children's wellness was instrumental in writing her first book, #OBSESSION: Freeing Yourself from Social Media Disorder, which she completed in 2015. The book explores the outer extremes of social media disorder, thus furnishing several important, yet simple, processes and tools by which an individual who may have the disorder can restore psychological balance.



Nicole Longstreath, Costa Mesa

Nicole Longstreath, Founder

Nicole Longstreath founded her styling and consulting practice in 2011 after her own image transformation. After a whirlwind "guerrilla shopping experiment," she had a new wardrobe, a new look and a new perspective. Inspired by the possibility for helping other women achieve the same results, Longstreath began to work with other ambitious, image-conscious clients. She quickly began to attract clients from all over the world and took her practice online — teaching women as far as Australia and Hong Kong the secrets of self-styling. In 2014, she launched an online, multimedia program — Style Mastery — that teaches clients how to create authentic personal style on their own time. Longstreath has also worked closely with WHW and Working Wardrobes in Orange County to help raise money and awareness, and has styled clients re-entering the workforce.



NoteStream, Irvine

Michelle Forsythe, CEO/Co-Founder

An idea that began around the kitchen table has become a thriving community of likeminded readers. Michelle Forsythe developed the NoteStream™ app, which presents hundreds of authors covering an array of topics and includes a fully interactive and immersive virtual book club, the first of its kind for mobile users. NoteStream is free and encourages personal growth through exploration of both classic and contemporary text; recently popularizing a return to the serialized novel by releasing new chapters each week. The app doesn't summarize or trim long-form content; instead, delivering manageable 'notes' of text which are designed to be read in sequential order on mobile screens. As you swipe to the left, you're turning the page, completing articles from environmental conservation to classic novels like Pride and Prejudice. Nonprofit organizations including the Pacific Symphony, Aquarium of the Pacific and The Ecology Center have partnered with the platform to help realize their goals and increase awareness.



Nutripy, Laguna Beach

Jeffrey Moore, Founder

Jeffrey Moore's experience along with his lifelong commitment to fitness gave him a front row seat as nutritional supplements and fads took money from hopeful people's pockets. His mission is to make better nutrition and the achievement of personal goals possible in every lifestyle. To do this, Moore takes what he has learned about western medicine and uses it in a more interactive, consultative and preventive approach. Thus, Nutripy was founded. With Nutripy, Moore addresses the vast majority of Americans who don't know why or what they are taking in their nutrition supplements. With a quick assessment of a client's lifestyle, Nutripy accommodates the way they live to get the right fuel in their body. Members get an objective nutrition supplement plan for an immediate benefit along with easy recipes, meal plans, activities and motivation for long-term health and wellness.



Osmond Marketing, San Clemente

Dr. Amy Osmond Cook, CEO

Dr. Amy Osmond Cook started Osmond Marketing in 2012. The firm is a woman-owned, full-service content marketing organization specifically designed to meet the needs of small businesses and health care companies. The firm's innovative model allows companies to operate on retainer, but with the oversight to have all contracted hours available for their perusal at all times. With Osmond Marketing's unsurpassed quality and customer service, the company experienced 148% growth in 2015 and is on track to experience the same levels of growth this year.



Pedego Electric Bikes, Irvine

Don DiCostanzo, CEO

Don DiCostanzo is the co-founder and CEO of Pedego Electric Bikes, the leading electric bike company in the U.S. In 2008, DiCostanzo and his best friend, Pedego CFO Terry Sherry founded Pedego. They were tired of pedaling up hills and bet that lots of other people felt the same way. Their bet paid off big, with Pedego nearly doubling its bike sales every year since its inception or in the last five years. Today, Pedego has nine colorful models, including cruisers, commuters, mountain bikes and specialty bikes. Its innovative bike designs led them to collaborating with Ford for the first-ever Ford Electric Bike. DiCostanzo likes to think differently and in doing so, he created the Pedego-branded store concept and is the first electric bike company with its own stores. The first Pedego store opened in 2011, and today, the company has 60+ independently owned stores in 10 countries. Pedego also sells its bikes in 800 stores in 40 countries.



PeopleG2, Brea

Chris Dyer, CEO/Founder

Chris Dyer founded PeopleG2 in 2001 with a singular goal — to redefine the background checking industry and make his vision for excellence in human capital due diligence services a reality. Over the course of the last 15 years, Dyer has grown his company from a small, family run business to a successful background check firm that is known and recognized nationwide. In 2015, PeopleG2 was named one of the "Top Five Background Check Companies" in the nation by HRO Today Magazine based on customer satisfaction. The company has also been recognized as one of the Best Places to Work in Orange County by the OC Register and the Orange County Business Journal. PeopleG2 presents an annual OC HR Summit, a day set aside to provide HR executives training on topics that are relevant to their field. Dyer also leads HR book clubs in Orange County and Los Angeles County, as well as hosts a radio talk show, TalentTalk.






Performance Strategies Inc., Aliso Viejo

William Robertson, Founder/CEO

Performance Strategies Inc. (PSI) creates training courseware, online universities and marketing campaigns for small to medium-sized companies.

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Included are webinars, seminars, social media projects, workshops and video/audio productions. Performance Strategies Inc. was founded in 1985 by CEO Will Robertson. Some of PSI's accomplishments include video, audio and printed courseware for more than 3,000 telecom retail outlets, as well as local and long distance carriers, satellite service providers and long haul fiber optic systems. In addition, other business sectors that have been supported with consulting projects include banking, finance, insurance, transportation, energy, software, medical and pharmaceuticals.



Philly's Best Authentic Cheesesteak & Hoagie Shop, Irvine

Andrea Levey, Co-Founder

Bob Levey, Co-Founder

Philly's Best Cheesesteaks, the Southern California destination for authentic Philly cheesesteaks and hoagies, is celebrating 24 years of true Philly flavor in Southern California. The company was started by native Philadelphians and husband-and-wife team, Bob and Andrea Levey, who wanted to bring the flavors of Philadelphia to their new home of Southern California. In 1992, they opened their first Philly's Best location in Fountain Valley. The company's authentic flavors start with proprietary recipes, along with ingredients and products direct from Philadelphia, including Amoroso® rolls, Wise® Chips, Taylor® Pork Roll, Frank's® Soda, Pennsylvania Dutch Birch Beer® and numerous TastyTake® offerings. A unique Philly brand and concept, Philly's Best has grown to 22 locations throughout Southern California.



PiKL, Tustin

Paula Lazarus, Owner

In 2014, the company Paula Lazarus worked for closed. Despite her 24 years of experience in the design industry — mainly in hospitality — Lazarus was out of work and her lupus was worsening. She decided to research starting her own business that could accommodate her health issues and made a commitment to herself that failure was not an option. PiKL provides virtual support to independent sales representatives in the hospitality design, website design and social media management industries. Most recently, the company also started a purchasing division. PiKL is the first company to specialize in providing this support in the hospitality design industry. Her vision has translated into a successful venture and career satisfaction that she has never had in the traditional job sector. Lazarus is also a former board member for Westminster Community Theater and the Lupus Foundation, where she was also a support group facilitator for 15 years.



Positive Energy Beverages LLC, Irvine

Mike Cancelleri, Founder/CEO

Positive Energy Beverages is an innovative beverage company focused on the development of healthy and better-for-you drinks. The company developed proprietary, natural flavor-blocking technologies, which has allowed it to combine the best aspects of all-natural fruit juices and functional ingredients. When Mike Cancelleri founded Positive Energy Beverages, he had just welcomed his first child and was struggling in the morning and throughout the day with his energy levels. Since he doesn't like the taste of coffee and wouldn't consume energy drinks or sodas, he found a need in the market for a healthy and natural beverage that would give people a boost while tasting good. The company was able to pioneer the first all-natural caffeinated orange juice that is sold in the country's largest retailers. In just two short years, the company has expanded its product offering to a full 10 SKU lineup of healthy and functional beverages. Positive Energy Beverages will expand its retail presence from just a few local stores two years ago to a few thousand stores in 2016.



Powerhouse Public Relations LLC, Santa Ana

Kristin Daher, President/Founder

With more than 10 of experience under her belt, Kristin Daher has made a name for herself within Orange County's tight-knit public relations community. After just five years at Morgan Marketing and Public Relations, she was promoted to vice president of the agency, the first VP appointment in Morgan Marketing's 25-year history. Once owner Melinda Morgan Kartsonis decided she was ready to pursue her other life passions, she knew that the agency would be in good hands with Daher. Daher purchased Morgan Marketing & Public Relations effective January 1, 2016, and rebranded it as Powerhouse Public Relations LLC. Powerhouse Public Relations, a creative agency providing a wide range of media relations, communications strategy, and social media services, has opened its doors in Santa Ana. With a specialized focus in franchised restaurant public relations, Powerhouse PR's current client roster includes Del Taco, Wienerschnitzel,



Pieology Pizzeria, Juice It Up!, Lugano Diamonds, Philly's Best Cheesesteaks, and Hawaiian Host.

Proove Biosciences Inc., Irvine

Brian Meshkin, CEO

Founded in 2009, Proove Biosciences has grown exponentially to become the commercial and research leader in the field of pain medicine genetics. Using its patent-protected bioinformatics platform, Proove delivers "proof to improve" health care decisions in the field of pain management — the largest and most expensive health care condition in the United States. The company has grown from about 150 tests in 2011 and three employees to more than 200,000 tests in 2015 with more than 250 employees. Physicians in Orange County and across the United States order Proove testing to choose the best medications for an individual patient, avoid addiction to prescription opioids, and help patients reduce their pain. Proove has been profitable every year and won awards for its research from leading medical societies including the American Society of Regional Anesthesia, American Society of Interventional Pain Physicians and others. Through its Proove Promise, the company works to achieve its mission and provides 40 hours of paid volunteer time to its employees who have volunteered for the Special Olympics, United Way, Second Harvest and other charities.



PSG Media Group, Laguna Niguel

Dee A. Faigin, CEO/President

With more than four decades of expertise in the printing industry, Dee Faigin, owner and CEO of Print Service Group (PSG), has carved herself a niche in the world of trade show print and publishing. An entrepreneur at heart, Faigin dreamt of owning her own business throughout her early career, culminating in the founding of her own print brokerage and later Print Service Group. As the industry's champion of the Official Show Daily production and distribution, PSG has never missed a single one of the industry's notoriously tight overnight deadlines in its entire 22 years. For an entrepreneur that sets the bar so high, one of Faigin's most challenging and compelling mantras has been staying on the cutting-edge of her craft. As the print world makes room for digital innovation, Faigin has re-aligned her business goals to reinvent PSG once again. Faigin's most recent endeavor has been to marry print with digital solutions to offer her clients products that evolve with their needs. 2016 will bring many changes for PSG as the company will unveil a new line of digital offerings to complement its print products, as well as a new company name: PSG Media Group.



RE/MAX Prestige, Costa Mesa

Sammer Mudawar, Realtor/Broker

Jay O'Brien, Realtor/Managing Partner

Sammer Mudawar is a realtor and broker at RE/MAX Prestige. An entrepreneur at heart, Mudawar opened the brokerage in 2011 after spending several years cultivating his following in the real estate industry. Choosing to open a brokerage was a strategic decision for him, as he felt compelled to create a team of professionals with a millennial edge. His instincts have paid off as Mudawar's brokerage has doubled its gross revenue year after year since inception. Jay O'Brien is a realtor and managing partner of RE/MAX Prestige. Earning recognition for his evolutionary approach in what is traditionally a tried and true industry, O'Brien was recently awarded the prestigious "30 Under 30" Award by Realtor Magazine and is an established contributor to real estate's respected news authority, Inman.com. O'Brien has played an integral role in the brokerage's success, and his Podcast Series, "Prestige Living" debuted at #3 on the iTunes "New and Noteworthy" List. O'Brien and partner Mudawar choose to donate a percentage of each commission from every agent within the Costa Mesa office CHOC Children's Hospital.



Rescue One Financial, Irvine

Bradley Smith, CEO/Co-Founder

Bradley Smith is the CEO and a co-founder of Rescue One Financial — a full-service financial corporation that has been ranked on the Inc. 500 List of Fastest Growing Companies in the U.S. The company has received this honor for the last three years. Rescue One Financial helps individuals with unsecured debt and advises them on all of their options. The company employs more than 70 financial consultants and is also a licensed finance lender. Smith started his 18-year financial services career on Wall Street, where he worked with the largest retail advisory group at Merrill Lynch. His team was responsible for the largest Rule 144 trade in history, selling more than 5 million shares of Walt Disney stock. They also managed over \$2 billion in concentrated stock positions. Smith later helped pioneer the restricted stock diversification business at Morgan Stanley. Smith has authored a number of published articles and is a regular guest contributor to U.S.-based radio and television financial programs. He writes a twice-weekly blog that appears on the Rescue One Financial website.



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Air Oasis LLP - Woody Young
Anaheim White House - Bruno Serato
Antis Roofing & Waterproofing - Charles Antis
Austin Taylor Inc. - Ron Viggiano
B. toffee LLC - Betsy Thagard
Bella Brands Inc. - Jon Harb
BEST-VIP - Robert Vaughan
Beyond Fifteen Communications Inc. - Lauren Ellermeyer
BigRentz.com - Dallas Imbimbo
Bioniz Therapeutics Inc. - Nazli Azimi
BizChix.com - Natalie Eckdahl
Blackband Design - Wendy Blackband
Blackband Design - Greg Blackband
Bold Girlz - Cheryl Beck
Brower, Miller & Cole - Judith Brower Fancher
Business Communications Solutions - Sunny Rajab
Butterfli Me Makeup & Lash Studio - Delphine Berryhill
Canyon Catering - Steve Cooper
CAPO Fireside - Eric Peterson
Carolina's Italian Restaurant - Tim Ibrahim
Casa Romantica Cultural Center & Gardens - Berenika Schmitz
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Drive Me Cookie LLC - Kohlman Verheyen
Excelerate Test Prep - Ladan Davia
Genea - Michael Wong
Gina Gomez, Business Coach & Certified Life Coach - Gina Gomez
Grenanimal Restaurant Group - Tony Monaco
Grit Cycle - Matt Bourne
Grit Cycle - Marisa Wayne
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Mark 1 Real Estate & Mortgage - Mark Prather
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PiKL - Paula Lazarus
Positive Energy Beverages LLC - Mike Cancelleri
Powerhouse Public Relations LLC - Kristin Daher
Proove Biosciences Inc. - Brian Meshkin
PSG Media Group - Dee A. Faigin
RE/MAX Prestige - Sammer Mudawar
RE/MAX Prestige - Jay O'Brien
Rescue One Financial - Bradley Smith
Saint Marc USA - Mac Gregory
Ship & Shore Environmental Inc. - Anooosheh M. Oskouian
Skyco Skylights - Ryan Marshall
SmartStop Asset Management LLC - H. Michael Schwartz
SOCIAL Costa Mesa - Andrew Dorsey
Software Anywhere - Jeffrey Scott
Spara Athletics - Marques Johnson
Sparkhouse - Torrey Tayenaka
Sterling Public Relations - Paula Steurer
StockPKG - Sean Rudner
Teen Entrepreneur Academy/Concordia University - Stephen Christensen
The 12 - Josh Boyd
The Associates Realty Group - Brooks Bailey
The Center for Peak Performance - Dr. John OKeefe
The Modern Pop LLC - Julie Podolec
Tom Ferry - Your Coach - Tom Ferry
Total Apps Inc. - Rey Pasinli
Trade American Card - Michael Ames
Trilogy Financial Services - Jeff Motske
True Investments LLC - Twila True
United Capital Financial Advisers - Joe Duran
Vaco Orange County - Jennifer McCasland
Valenza Chocolatier Inc. - Amy Jo Pedone
VIVE Interior Design - Dean Patton
Vivi Jewelry - Debbie Millar
Zov's - Zov Karamardian

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Saint Marc USA, Newport Beach*Mac Gregory, CEO*

Mac Gregory is CEO of Saint Marc USA and is charged with the inaugural presence of Saint Marc Pub — Café, Bakery & Cheese Affinage in the United States. A master mixologist, certified advanced sommelier, speaker, beverage consultant, and top executive in the international food and beverage community, Gregory is an esteemed industry veteran and visionary executive of 25 years. He has developed, launched and managed hundreds of locations for the world's most elite luxury hospitality brands. Gregory began his career with Club Med Hotels and Resorts International before joining Hyatt Regency Hotels and Resorts, where he was exclusively chosen by the Pritzker family to open and establish all of their equity-owned properties, as well as develop, introduce and implement numerous food and beverage venue concepts throughout the Hyatt Worldwide portfolio over the course of 17 years. Saint Marc USA is a fully owned and financed subsidiary of Saint Marc Holdings, Japan, which owns and operates over 800 restaurants with 17 concepts throughout Asia.

**Ship & Shore Environmental Inc., Signal Hill***Anoosheh M. Oskouian, President/CEO*

Ship & Shore Environmental Inc. is a woman-owned, certified business specializing in air pollution capture and control systems for industrial applications. Anoosheh Oskouian launched her pollution control business in 2000 when the opportunity arose for her to re-invent what had been a metal fabricating company. Since then, Oskouian's company has developed a comprehensive array of engineering and manufacturing capabilities. Growing industrial pollution abatement demand has resulted in new Ship & Shore locations across Canada, satellite sales/service offices in Europe and new offices in Singapore and China. With more than 50 professionals in the Long Beach headquarters and nearly 50 other professionals working at other locations, Ship & Shore has an impressive portfolio of repeat customers. Ship & Shore helps major manufacturers meet VOC abatement challenges by providing customized energy-efficient air pollution abatement systems for various industries. It's the only company in its industry that offers a true "turnkey" solution and complete project management, including assessment, design, testing, engineering, fabrication, construction, compliance and even coordinates product transportation to the customer site for installation and start-up.

**Skyco Skylights, Costa Mesa***Ryan Marshall, CEO*

Ryan Marshall is the CEO of Skyco Skylights. The company proudly offers one of the most complete selections of innovative skylight designs in the industry, manufacturing a full range of products from unit skylights for industrial and commercial applications, UL Listed heat and smoke vents, fall-protection screens and security bars, roof access hatches, custom structural metal-framed skylights and tubular skylights. Utilizing the vast knowledge of the Skyco team, which features more than 150 years of combined practical skylight experience, the company is creatively redesigning typical skylight systems to provide superior quality, higher performance, exceptional value and quick delivery. Skyco understands the demanding energy performance requirements found in the latest energy codes and offers a wide range of high-performance products to ensure that the code requirements are met, or in most cases exceeded, all achieved with a superior level of quality.

**SmartStop Asset Management LLC, Ladera Ranch***H. Michael Schwartz, Chairman/CEO*

In 2007, H. Michael Schwartz founded SmartStop® Self Storage Inc. (SmartStop). SmartStop, formerly known as Strategic Storage Trust Inc., was a fully integrated, self-administered and self-managed, self-storage company, owning and/or operating 170 self storage properties in 21 states and Toronto, Canada. Today, SmartStop Asset Management LLC is a diversified real estate company with a managed portfolio that currently includes approximately 34,600 self-storage units and 3.8 million rentable square feet. The company is the asset manager for 55 self-storage facilities located throughout the United States and Toronto, Canada. The company is the sponsor of SST II and Strategic Storage Growth Trust Inc. (SSGT), public non-traded REITs focusing on opportunistic self-storage assets. The facilities offer affordable and accessible storage units for residential and commercial customers. In addition, SmartStop offers secure interior and exterior storage units, as well as outside storage areas for vehicles, RVs and boats.

**SOCIAL Costa Mesa, Costa Mesa***Andrew Dorsey, Owner/Restaurateur*

SOCIAL Costa Mesa has been awarded Best New Restaurant by Golden Foodie

Awards and Orange Coast Magazine. The restaurant has also been given the city of Costa Mesa's Mayor Award for revitalizing the area. In addition to opening the restaurant in an unassuming strip mall on the west side of Costa Mesa, by early 2016, Andrew Dorsey will be opening a second restaurant concept in the same strip. The team has had to overcome issues due to their location, but have honed in on offering the best food and beverage in the area, therefore overcoming the obstacles and economic slowdown. Since opening SOCIAL Costa Mesa, Dorsey has partnered with various local charities including Project Hope Alliance, National Charity League and more.

**Software Anywhere, San Juan Capistrano***Jeffrey Scott, CEO*

Jeff Scott founded C-Level Management in 2003 with a focus on business technology and consulting. Software Anywhere was created in 2010 and based on an extreme for-profit business model designed to create long-term sustainable giving programs for nonprofit organizations. Scott now leads Software Anywhere as its CEO and lead technical architect. Scott brings more than 20 years of CEO/CIO experience working with companies and has been architecting business solutions and developing cloud applications on the Salesforce Platform for more than 12 years. Under his leadership, Software Anywhere created a socially engineered culture of giving back in partnership with the Salesforce Foundation. The team focuses a significant portion of their time and resources providing in-kind consulting services and developing applications on the Salesforce Platform, at no cost to qualified nonprofit organizations. Since 2007, Scott — through his companies — has provided more than \$8.2 million in community impact to nonprofits and is looking forward to passing the \$10M+ Reasons goal this year, which marks the 10th year of giving.

**Spara Athletics, Santa Ana***Marques Johnson, CEO/Founder/Brand Guardian*

Spara Athletics is a startup company that is geared to providing protective gear for the competitive athlete. Through extensive market research; dynamic product development; and interaction with parents, coaches and players; the company's product is made to cater to the needs, wants and everyday lifestyle of the competitive athlete. Spara Athletics was founded in 2014 by its CEO, Marques Johnson, a lifelong athlete himself. Johnson was a collegiate athlete at the University of Nevada, Las Vegas and in his years playing football sustained many injuries. Johnson vividly remembers returning to the sidelines after each offensive series and his gums would consistently bleed even while having the boil and bite mouth guard in. Johnson wanted to create a mouth guard that not only protected the top and bottom teeth, but could also be an on-the-spot treatment that provided a secure fit. Johnson decided to improve on the already existing product and created his own mouth guard — one that would offer athletes the protection they were looking for and allow them the flexibility to mold the mouth guards on the go.

**Sparkhouse, Santa Ana***Torrey Tayenaka, CEO*

Sparkhouse is a video production and marketing studio. Fusing expertise in the art of filmmaking with an intuitive grasp of the digital world, the company creates branded films and commercials with bold storytelling, cinematic production value and exciting innovation. 28-year-old Torrey Tayenaka has run and grown Sparkhouse for more than 12 years. While running Sparkhouse, Tayenaka has gathered clients including USAA, Metlife, Jacuzzi, GMC and many more. Outside of Sparkhouse, Tayenaka has helped launch a mosquito repellent patch company — Kite Patch — helping to reduce mosquito-borne diseases in Africa. He also invented and launched EvaDrop, a smart shower that helps users save water while still maintaining an enjoyable shower experience. Tayenaka is also the president of Forge 54, a nonprofit event that provides more than \$500,000 of pro bono services to other local nonprofits in need.

**Sterling Public Relations, Corona Del Mar***Paula Steurer, President*

Sterling Public Relations specializes in comprehensive public relations, marketing and branding services for companies targeting luxury lifestyle clientele. Founded in 2008 by media maven Paula Steurer, the company proudly represents some of the most elite brands in Orange County. Client industries include, but are not limited to: real estate, fitness, health and wellness, automotive, fashion, hospitality, as well as salons and day spas. An active member of the Orange County community, Steurer is a dedicated member of several professional development and philanthropic organizations including CASA and Newport Harbor High School's Student Mentor Program.



StockPKG, Dana Point
Sean Rudner, President/CEO

Sean Rudner has a rich history as a businessman. Through his past successes with companies such as Desert Plastics and Tyco Armin Plastics, Rudner built StockPKG, which offers its customers discounted business supplies and quick shipping. Rudner's secret to success is his genuine commitment to his customers. In order to thrive as a company, he puts the needs of his customers first. When they succeed, StockPKG will in turn prosper as well. Since its opening in 2012, StockPKG has grown in triple digits the past three years. Additionally, Rudner has guided and nurtured a supreme customer service team dedicated to helping existing clients and potential customers find their paths to success. When he's not helping businesses — small or large — thrive, he volunteers in his local community, serving as an assistant coach for the San Clemente Youth Wrestling Team.



Teen Entrepreneur Academy/Concordia University, Irvine
Stephen Christensen, Founder/CEO

Stephen Christensen's personal mission is to serve as an entrepreneurship catalyst, personally committed to educating, training and empowering values-based entrepreneurs and intrapreneurs of any age, for success in business and life. He fulfills this role daily as the business school dean at Concordia University. He expands this mission each July by conducting innovative entrepreneurship summer camps for teens and kids. In 2012, he founded the Teen Entrepreneur Academy (TEA). Almost 300 high school students from across the USA and other countries (France, China, Canada, Vietnam, Singapore and Brazil) have learned the principles of free enterprise, self-responsibility and how to start their own business, living and learning on the campus. Students prepare their real-world business plans and investor PowerPoint presentations, competing for \$1,000 for Best Plan. In 2014, Christensen created the Kid Entrepreneur Academy for grades 5-8 serving 50 kids.



The 12, Irvine
Josh Boyd, CEO

Josh Boyd co-founded The 12 in 2013, bringing Afterburn Group Training and Nutrition to Orange County. Since its inception, the dynamic fitness brand has grown from 90 active members to more than 4,000, with two distinct locations in

Irvine and Costa Mesa. The 12 has developed an incredible following as its targeted group training and individually tailored nutrition programs continue to produce unrivaled results. In addition, working alongside corporations such as Western Digital and Houzz, The 12 has continued to expand its corporate wellness division. Passionate about serving others, Boyd and The 12 are grateful to be able to help men and women achieve optimum fitness they can maintain effectively.



The Associates Realty Group, Newport Beach
Brooks Bailey, Realtor/Co-Founder

Visionary and co-founder of The Associates Realty Group, Brooks Bailey has earned his place as an innovator in the world of luxury residential real estate. Inspiring the evolution of today's modern brokerage, Bailey is committed to cultivating a world-class team of professionals who seek to provide five-star service alongside privileged access to the finest properties on the market. Cultivating an unsurpassed network of industry leaders, distinguished service providers and affluent global clientele, The Associates Realty Group offers world-class service to clientele that value relationships. Through his dedicated leadership and commitment to raising the bar for excellence, his team consistently delivers results that supersede expectations.



The Center for Peak Performance, Newport Beach
Dr. John OKeefe, Director

Dr. John OKeefe founded The Center for Peak Performance after a successful career in health care. Prior to The Center for Peak Performance, the idea that the behavioral habits in decision-making processes and actions could be changed, and that success could be attained through a visionary process was relatively unique. OKeefe was able to bring this proprietary process to small, mid-market and larger companies in an affordable, accessible and practical way. OKeefe is the author of four books on optimal performance behavioral mindsets. His work has contributed to businesses realizing that mentorship is a key optimal performance tool for executives and companies, as well as a valuable business tool. Previously, there was a general mindset that executive mentorship and coaching was to help people get up to speed. OKeefe's work has helped in the understanding that with mentorship, top producers can attain even greater achievements and deliverables.



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KEYNOTE SPEAKER
GARY JABARA
CEO & FOUNDER



CEO and Founder Gary Jabara built Mobilitie from an idea to a leader in the installation of distributed antenna systems (DAS), permanent antenna systems that can be placed in indoor and outdoor venues to provide guests with better cellphone and wireless connections. Venues using the company's DAS technology include Churchill Downs in Kentucky, the casinos of Las Vegas-based MGM Resorts International, and the Honda Center in Anaheim, among others. Mobilitie is also one of the largest owners of cellphone towers in the U.S.

LUNCHEON & AWARDS PROGRAM

March 10, 2016
Luncheon 12:00 p.m. - 2:00 p.m.
Hotel Irvine Jamboree Center
17900 Jamboree Road
Irvine, CA 92614

TICKETS: * \$150
TABLE OF TEN: \$1500

Tickets non-refundable. Ticket price* includes a 1-year subscription to the *Orange County Business Journal* (*\$30 allocated to the subscription). Current subscribers may gift the subscription to a colleague.

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Tom Ferry - Your Coach, Irvine*Tom Ferry, Founder/CEO*

Tom Ferry is ranked the #1 coach in the real estate industry by Swanepoel Power 200, and one of the industry's most influential people by Inman News. Through his live events, one-on-one coaching and popular YouTube show, the #TomFerryShow, Ferry influences real estate professionals all over the world to achieve their business and life goals. Ferry is passionate about creating a better real estate experience for both the agent and the consumer. Through his seminars, videos, coaching and training programs, real estate professionals are able to create a successful business that they love. A New York Times bestselling author, Ferry is dedicated to creating a better real estate experience for all.

**Total Apps Inc., Aliso Viejo***Rey Pasinli, Executive Director*

Total Apps Inc. was founded in 2007 to specifically service e-commerce clients looking to grow their businesses. Total Apps is a payment tech company focused on building the next generation of Web 3.0: social commerce tools. The company takes a hands-on approach and has directly engaged with more than 25,000 merchants since its inception. Total Apps qualified for the Inc. 5000 and Orange County Business Journal's "Fastest-Growing Private Companies" List for four years in a row thanks to the company's tremendous growth. Some of the company's products include Twt2Pay.com, a hashtag-based Twitter payment tool that enables merchants to monetize their Twitter followers; VideoCheckout, a platform that can convert any video into a fully engaging shopping experience within social media; and MojoPay.com, a payment platform that allows merchants to instantly sign up and start accepting credit cards via online, mobile and social sales channels.

**Trade American Card, Irvine***Michael Ames, CEO*

Trade American Card is the largest independently owned and locally operated trade exchange in Southern California. Trade American Card participates in the Barter Association National Currency — a program that allows members to conduct business with other barter companies nationally using a common currency. Trade American Card has been active in the barter industry, supporting small to medium-size business owners in secure trading activities, for 45 years. Operated by the Michael Ames and his family, the company has been a central focal point for Chambers of Commerce, as well as professional medical, legal and accounting firms in the Orange County area. Since its founding, more than 5,700 businesses have participated in barter transactions through the support and leadership of Trade American Card.

**Trilogy Financial Services, Huntington Beach***Jeff Motske, Founder*

Jeff Motske is an author, an accomplished executive, radio personality and recognized among the top 1% of financial advisors in America. By creating Trilogy Financial in 1999, and bringing together the resources for middle-class Americans to find financial independence, Motske revolutionized his industry and is still doing so today. As president and CEO of Trilogy Financial, Motske oversees 200 employees in 11 offices in four states. With his guidance, his team of 150 advisors/brokers help more than 45,000 clients around the nation achieve financial independence. From the company's headquarters, Motske oversees more than \$2 billion in client-invested assets. Over the years, Trilogy has achieved tremendous success thanks to Motske's business philosophy of maintaining composure in a volatile financial world. When the markets collapsed in 2008, for instance, Trilogy enjoyed its strongest year ever.

**True Investments LLC, Irvine***Twila True, Co-Founder/CEO/President*

Born on the poorest Indian reservation in the U.S., Twila True is a member of the Oglala Sioux Tribe and is now the co-founder, president and CEO of True Investments LLC, a leading woman- and minority-owned real estate private equity firm that has invested \$38.3 million in properties in 16 states. In the past 15 years, True has put together an impressive private portfolio of real estate in multiple asset classes in Asia and North America, and has managed the construction and development of residential properties in Thailand, China and the United States. In 2015, True opened multiple prototype nail studios that aim to redefine the nail industry under the Polished PerfectSM by Twila True brand and this year, True bought Jewelry by Mardo in Newport Beach, which will become Twila True by Mardo in March.

**United Capital Financial Advisers, Newport Beach***Joe John Duran, CEO*

Joe Duran is CEO and founding partner of United Capital, the nation's first and largest financial life management company. A proven entrepreneur, investor, best-selling author and sought-after industry speaker, Duran previously built Centurion Capital, which he sold to General Electric Financial in 2001 and served as president. United Capital currently manages more than \$15 billion in assets under management, with nearly 80 locations and more than 500 employees. Duran is the most recent

recipient of the prestigious Ernst & Young Entrepreneur of the Year 2015 Orange County Award. His most recent book, *The Money Code: Improve Your Entire Financial Life Right Now*, achieved bestseller status in both the New York Times and USA Today.

Vaco Orange County, Irvine*Jennifer McCasland, Managing Partner*

Although Jennifer McCasland began her career as a CPA, it wasn't until she embarked on her adventure launching Vaco 10 years ago, that she knew she had found her true calling and passion. Vaco partners with clients on critical projects and strategic talent acquisitions in the areas of finance, accounting, technology and administration. McCasland built a team of talented individuals who thrived upon the daunting task of strategically guiding others through the peaks and valleys of their careers. Not only is McCasland involved in the day-to-day operations of regularly placing more than 100 senior executive consultants in accounting and finance projects, but she also manages the business in the technology, financial and administrative divisions of the firm.

**Valenza Chocolatier Inc., Costa Mesa***Amy Jo Pedone, CEO/Certified Master Chocolatier*

Amy Jo Pedone exemplifies the American Entrepreneurial Spirit because she made a 180-degree change from a successful 13-year career in commercial real estate lending into the confections and food industry without any prior formal training, experience, business relationships or product line. She developed a passion for chocolate over the course of her life while making various confections during the holidays with her mother. Shortly after the passing of her cousin to ovarian cancer, she was inspired to live life with no regrets and subsequently pursued her dream of becoming a certified master chocolatier to then form her own company, Valenza Chocolatier, an international, award-winning, Italian-inspired artisan chocolates and confections business. Pedone has developed a loyal and growing national consumer base; designed her own website and online store; built critical new relationships within the food industry; and won numerous local, national and international awards for the quality of her products, all with limited personal equity to invest.

**VIVE Interior Design, Tustin***Dean Patton, President/CEO*

VIVE Interior Design was established through what Dean Patton felt was a major need in the design-building industry. Most clients in the commercial/residential arena were finding that their projects were most always over budget and never finished within the projected timeframe. VIVE, through research, found that the process was backwards. The clients were first calling a contractor for a bid without much knowledge of the design. The VIVE process changes this by putting the consultation with a designer first, then once the design of the interior is decided, a contractor is brought in to develop a tight estimate from the final design. The VIVE process in-turn saves time and keeps to the overall budget. Patton's service guarantee that the project will be delivered on time and on budget is unique and cutting-edge in the design-building industry.

**ViVi Jewelry, Tustin***Debbie Millar, Founder/CEO*

With a strong background in direct selling and passion for mentoring women, Debbie Millar has taken fashion and technology to a new level as the owner and CEO of ViVi. ViVi, the new Cookie Lee, is a jewelry company empowering women to create the life of their dreams. A former personal stylist with extensive experience in the fashion industry, Millar returned to direct selling in 2007, where she demonstrated exceptional leadership and sales acumen. Just two years later, Millar used her sales, recruiting and training skills to launch her own direct-selling jewelry company bamboopink in 2010. Now as ViVi's CEO, Millar is committed to helping consultants continue their success through leadership training while ViVi's executive team explores new platforms to build the ViVi empire.

**Zov's, Tustin***Zov Karamardian, Chef/Owner/Proprietor*

Zov Karamardian has won international attention for her restaurant, Zov's Bistro. Today, the restaurant is open six days a week for breakfast, lunch, and dinner and serves up to 1,200 customers a day — with total seating for 300. Karamardian has consistently expanded the scope of Zov's Bistro, adding a Bakery Cafe, and spreading awareness of her very distinctive cuisine—Armenian, contemporary Middle Eastern and Mediterranean—on cruise ships and European tours. Karamardian's popularity is due in large part to her unique, exotic spice combinations that surprise and delight food aficionados. OC Metro Magazine has praised her as "The First Lady of Food." In 1999, Zov was named California Chef of the Year by Governor Gray Davis. Her public service and contributions to the food industry have been recognized with many awards including a Pace Setter Award from the former Roundtable for Women in Food Service.

