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Q&A: New Developments in Trade Secret Law

by Michael Katz, Partner and Adam Sechooler, Associate, Greenberg Gross LLP

According to one estimate, each year trade secret theft amounts to one to three percent of US GDP. This range reflects the contested nature of trade secrets. This month, for example, a California federal jury rejected a \$554 million claim by a US company, InfoSpan, that a Dubai-based bank stole trade secrets related to a cellphone-based payment system. This claim exemplifies the significant value placed on trade secret IP and its global nature.

The rise in value of information assets stems from a shift towards a knowledge-based economy. Increasing digitization of information, employee mobility, and portability of work all increase both the opportunity for theft, as well as for the assertion of unwarranted, anti-competitive claims of trade secret misappropriation. Either way, the hard fact is that litigation involving trade secrets is on the rise. Below, we discuss changes in trade secret law, in the US and abroad, that provide for greater enforcement of trade secret rights.

What do I need to know about the federal Defend Trade Secrets Act?

On May 11, 2016, President Obama signed into law the Defend Trade Secrets Act ("DTSA"), creating a federal cause of action for trade secret misappropriation. Before the DTSA, a private party could only pursue an action for trade secret theft under state laws. While every state other than New York and Massachusetts has adopted some form of the Uniform Trade Secrets Act, state laws still vary. The DTSA, in contrast, provides consistency across all 50 states.

Unlike state laws, the DTSA protects whistleblowers from civil or criminal liability for confidentially disclosing trade secrets to government officials "solely for the purpose of reporting or investigating a suspected violation of law." Employers are required to provide notice of this immunity in any agreement with an employee that governs the use of confidential information.

What advantages are there to suing under the DTSA versus state court enforcement?

Because the DTSA does not preempt state laws, a plaintiff can sue under the DTSA, state law, or both. Although the DTSA is similar to existing trade secret protections under California's Uniform Trade Secrets Act ("CUTSA"), there are important differences. Most notably, the DTSA allows a court, without notice to the opposing party, to order the seizure of property to prevent "the propagation or dissemination of the trade secret" that is at issue. This remedy is only available in "extraordinary circumstances." The plaintiff must show that, absent the *ex parte* seizure order, the defendant "would destroy, move, hide" or otherwise make the property to be seized "inaccessible to the court." The court must also find that "an immediate and irreparable injury will occur" if the seizure is not ordered.

Despite the DTSA's open door to federal court, strategic considerations may favor bringing a CUTSA claim in state court. California state courts apply a less rigorous pleading standard and liberally allow the naming of anonymous "Doe" defendants. Further, non-trade secret causes of action may be treated differently under federal and state authorities. Each case must be carefully appraised to determine which forum is best.

Is the DTSA good for innovators?

The DTSA's *ex parte* seizure provision may be invaluable in some cases. The abuse of this procedure, however, can stifle competition. The heightened proof requirements are intended to guard against such tactics, which should increase protection of trade secrets without stifling innovation.

The DTSA is also pro-innovator in that it preserves California's strong protections for employee mobility. For example, the DTSA follows California's rule in rejecting the "inevitable disclosure" doctrine, which allows an employer to enjoin a former employee from working for a competitor where the job would "inevitably" lead to the use of trade secrets. Rather, an injunction placing conditions on employment under the DTSA must be "based on evidence of threatened misappropriation and not merely on the information the person

knows." The DTSA also precludes injunctions that conflict with state laws "prohibiting restraints on the practice of a lawful profession, trade, or business," such as California's limitations on non-competition agreements.

Protection of trade secrets and the preservation of employee mobility are both critical to innovation. The DTSA appears to strike the right balance between these two imperatives.

Have there been important developments in trade secret law outside of the United States?

Recent developments in foreign jurisdictions also strengthen trade secret protections. On May 27, 2016, the European Council adopted the "Directive on the protection of undisclosed know-how and business information (trade secrets) against their unlawful acquisition, use and disclosure." The EU Directive provides stronger protection for whistleblowers than the DTSA, as the protection is not limited to disclosures to the government, but broadly protects disclosures of trade secrets that serve the public interest.

Like the DTSA, the EU Directive does not "preempt" the laws of individual member states. EU member states are free to adopt more stringent trade secret protections, as long as they meet the standards of the EU Directive.

Japan also recently amended its Unfair Competition Prevention Act, strengthening the protection of trade secrets. Of particular importance for US-based companies doing business in Japan, the law now provides criminal penalties for the theft of trade secrets outside of Japan. Previously, trade secrets were only protected if they were "controlled" in Japan. The revised law also adds liability for *attempted* misappropriation and the distribution of goods made with stolen trade secrets.

Should I patent my innovation or keep it secret?

The expansion of trade secret enforcement in the US and abroad invites renewed consideration of whether patent protections are the best recourse to protect a company's IP. Many factors should be considered when deciding whether to patent an innovation or to rely on trade secret protection. If an innovation is easily reverse engineered, a patent may be best, because the innovation cannot be used without being disclosed. On the other hand, patent portfolios are expensive to maintain and cover a narrower range of innovations. There is also a risk that rejection of a patent application will result in disclosure of the innovation, leaving it unprotected by either patent or trade secret law. Another consideration is whether it will be easy for competitors to "design around" the patent. If so, trade secrecy may provide more security.

In this global information age, a proactive approach to protecting trade secrets is required to both address trade secret theft and defend against such claims.

Please feel free to call Michael at 949.383.2790 if you would like to learn more about this subject.

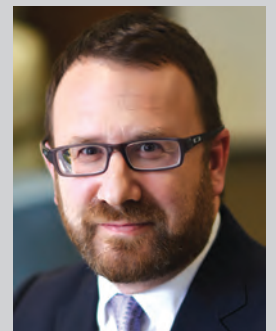
Michael Katz

Michael Katz, a partner at Greenberg Gross LLP, has handled dozens of high stakes trade secret lawsuits, including most recently defending SpaceX engineers against claims by Broadcom Corporation.



Adam Sechooler

Adam Sechooler is an associate at Greenberg Gross LLP whose practice focuses on trade secrets and other complex business litigation and white collar defense. Mr. Sechooler, with Mr. Katz, will teach a course on Trade Secrets Law at UCI Law School in the Spring of 2017.



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Your Patent May Have Just Become More Valuable

by Derek Bayles, Partner, and Mark Speegle, Associate, Knobbe Martens

The U.S. Supreme Court just changed the requirements for being awarded “enhanced damages” from patent infringers. Enhanced damages can TRIPLE the value of a patent infringement verdict, which in some cases could be tens of millions of dollars. The Supreme Court’s recent decision greatly increased the availability of these enhanced damages, which means that now—more than ever—it is critical to be proactive in anticipating and addressing potential patent infringements.

The New Standard for Enhanced Damages Awards

In the past, accused infringers could avoid enhanced damages by making an “objectively reasonable” case that they did not infringe the patent or that it was invalid. Under this standard, as long as competent counsel presented a decent defense at trial, enhanced damages were unlikely to be awarded—even if the infringer acted in bad faith. But the Supreme Court has now rejected this rule. The new rule is that enhanced damages should be awarded for egregious cases based on the infringer’s conduct and mental state at the time of infringement, not theories created for litigation. But the Supreme Court went even further; it also relaxed the burden of proof. The prior rule was that the right to enhanced damages must be proven with “clear and convincing” evidence. Now, a patent holder need only show that it is “more likely than not” that the infringement was egregious.

The Importance of Being Proactive

Because accused infringers can no longer retroactively rely on litigation theories to prevent enhanced damages, it is critical to act proactively—before any threat of litigation—to establish good faith efforts to avoid patent infringement. A good patent attorney can help you evaluate your risks and manage them with tools like prior art searching, opinion letters, or design-arounds. An accused infringer who can show a healthy respect for the patent system will be much better off than those who ignore the risks.

Capitalizing on the New Standard

For patent holders, the new law changes the calculus for patent litigation. With the increased likelihood of enhanced damages, the potential reward to patentees for investing their resources in the enforcement of their patents goes up dramatically. In order to maximize the likelihood of recovering enhanced damages, a patent

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INTELLECTUAL PROPERTY LAW

holder may consider notifying potential infringers about its relevant patents. A defendant who ignores or fails to thoughtfully respond to a polite letter about a patent may look reckless and irresponsible in front of a court, further increasing the likelihood of enhanced damages. But these types of letters also carry risks, so they should only be sent under

guidance from competent counsel.

The Supreme Court’s decision opens up new possibilities for patent holders. But remember, the same possibilities are now available to your competitors as well. A good patent attorney can help you leverage your patents in this new regime while at the same time navigating risks posed by your competitors’ patents.

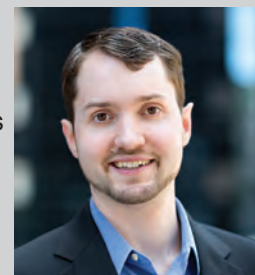
Derek Bayles

Derek Bayles is a partner in the Orange County office of Knobbe Martens, where he assists clients with strategic patent preparation and prosecution in a variety of technological fields, including optics, photonics, semiconductors, electronics, medical devices, and signal processing. Derek also assists clients with intellectual property due diligence, patent invalidity and non-infringement opinions, licensing, and inter-partes disputes at the USPTO, including Interference proceedings and Inter Partes Review proceedings. He can be reached at 949.760.0404 or derek.bayles@knobbe.com.



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CAPITALIZE ON THE HOT M&A MARKET?

Last year, the value of Merger and Acquisition (M&A) transactions reached a record high with aggregate deals in excess of \$4.8 trillion. This exceeded the previous high in 2007 which surpassed \$4.1 trillion. While this record pace may not continue into the future, the demand is expected to persist. This is largely due to historically low interest rates, availability of capital, corporate balance sheets flushed with cash, and the continued pressure of many companies to increase revenues and profits (and increase shareholder value).

Is now the time for you to capitalize on this opportunity?

If the answer is yes, or maybe, you need to make sure you are prepared. This preparation includes a detailed plan of action. As a business owner or entrepreneur, surround yourself with the right team of professionals. This includes, at a minimum, a very qualified attorney or law firm, accounting firm and investment banker. While each M&A transaction is unique, there are some key similarities and the right team of experts can help you avoid many painful and often times, expensive mistakes. The key saying is "you don't know what you don't know".

Most M&A deals will focus on core business activities or key technologies of a company. These focus points can always be traced back to the financial statements of the business. Are your financial statements in compliance with Generally Accepted Accounting Principles (GAAP)? Have they been audited or reviewed by an independent CPA firm? If you are serious about a future transaction, it is imperative to address your company's financial statements now. The time involved to ensure GAAP compliant financial statements or to complete an audit can be lengthy, and you could be missing out on the "perfect" opportunity. Planning and forward thinking is the key, as you never know when a company could be knocking on your door to make an offer.

Involve your team early and often. The legal side of an M&A transaction involves deal structuring, with such considerations as:

- Will the transaction be a stock sale or an asset sale?
- All cash transaction, or part cash, part stock or even a seller note?
- Will it be structured as an installment sale?
- Will it have earn-outs?
- Are future employment agreements needed?



Gordon S. MacLean,
CPA

- Will there be a covenant not to compete?
- What are the tax ramifications, etc.?

While many M&A transactions seem to make sense at the beginning, there are countless examples of failed M&A deals, many of which can be traced to poor planning. And, while good planning is critical, it is not always a fail-safe. Execution of the plan to ultimately close the transaction is another key component. The details of an execution plan can be a topic for a later date.

If you are considering a potential merger or acquisition, or sale of your business, you should contact your accountancy firm or legal firm for assistance.

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 has been involved in numerous merger and acquisition transactions (both buy-side and sell-side transactions), and assisted various companies with their related due diligence and accounting assistance in anticipation of a sale or M&A transaction.

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The Cybersecurity Blind Spot:

What Executives Just Aren't Seeing



Technology has changed the way companies do business. From improving performance and driving product strategies to enabling near-continuous innovation, technology is creating more opportunities, every day. But with these benefits comes a new set of risks.

"For years, executives have managed and mitigated many types of risk," said Shahryar Shaghaghi, head of BDO's international Cybersecurity Practice. "But with these new kinds of risk – digital, internet, and cyber – they often have a blind spot."

Indeed, failing to recognize and protect against cybersecurity threats can cost a business, not only through direct monetary expenses, but through damaged reputation – with customers, with suppliers, and with partners throughout the supply chain. Today, it is essential for executives to implement a comprehensive cybersecurity strategy.

"Every board has to be on top of this from an oversight perspective," Shaghaghi continued. "Cybersecurity initiatives must be an integral part of the overall risk profile. And they must be presented in a way that everyone can understand."

"It's not just a tech issue," he added.

At BDO, we believe there are three key steps to make sure businesses stay up, running, and protected.

1. Take Stock of Your Assets

Every organization is at risk, but for different reasons. By determining which information might be most valuable to potential attackers, you can better identify the steps needed to protect it.

"Very few companies do this, but it's vitally important," explained David Yasukochi, national co-leader of BDO's Technology and Life Sciences Practice and Tax Managing Partner for BDO's Orange County office. "Organizations need to evaluate their assets. It's the critical first step."

2. Be Proactive

"If your business does experience a cybersecurity breach, you don't want to be left scrambling," said Yasukochi. "By preparing, you can minimize the impact of any situation that might arise."

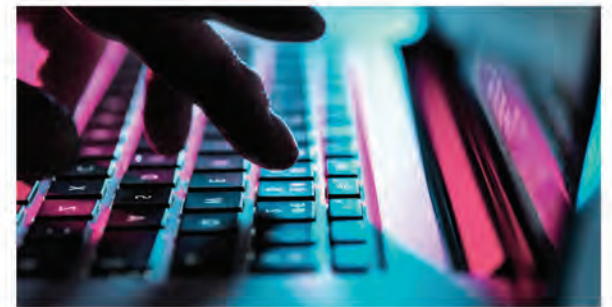
Don't wait. Employing predictive threat intelligence data can help you plan and test strategies, helping mitigate potential risk and helping you spot any vulnerabilities in your current cybersecurity infrastructure and protocols.

3. Develop an Appropriate Risk Management Profile

To help board members better understand cybersecurity risk – and the importance of mitigating it – create a risk management profile that everyone can understand.

"I would recommend developing a 'cybersecurity baseline,'" said Joe Johnson, Assurance Managing Partner

for BDO's Orange County office. "It will serve as an important reference point for decision-making. And by getting direct reports that are aligned with the baseline, your organization will be well-positioned to create more mature reports regarding cyberthreats."



HOW BDO CAN HELP

BDO's Technology Advisory Practice provides strategic and advisory services that enable organizations to achieve their business goals and objectives, including aligning IT and corporate strategy, redesigning technology architecture, and transforming IT operating models.

"We help our clients throughout the entire lifecycle," said Shaghaghi. "From defining strategy to measuring results, we remain committed to keeping our clients not only prepared for current threats, but ready for what's to come."



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Joe is Assurance Managing Partner for BDO's Orange County office and a member of the firm's Board of Directors. He has more than 30 years of public accounting experience and provides business consulting and assurance services to growing private and publicly held companies.



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For more than 25 years, Shahryar has provided IT, operations, and risk management consulting services to global organizations. A recognized thought leader, Shahryar is part of the Cybersecurity Working Groups of both the AICPA Center for Audit Quality and the Assurance Services Executive Committee.



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David is Tax Managing Partner for BDO's Orange County office and national co-leader of the firm's Technology and Life Sciences Practice. With 30 years of public accounting experience, he serves a diverse group of clients in the technology industry, including hardware manufacturing, storage media, software as a service (SaaS), video game publishing, lead generation software, business management software, and online retailers.

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DESIGN PATENTS

AN OFTEN OVERLOOKED ASSET

One of the best ways to strengthen a company's value, particularly for young companies that have few other assets, is through a strong intellectual property portfolio. The crown jewels of such portfolios are most often utility patents. Savvy companies also look to secure trademarks and copyrights to further establish tangible value in their business. Often, however, design patents are the forgotten intellectual property right. Yet despite being frequently overlooked, design patents are valuable assets that companies should consider adding to their portfolios.

The most high profile example of a design patent case that successfully asserted infringement is the Apple v. Samsung case. This mega-trial, which captured the attention of the country and was even called "The Patent Trial of the Century" by the Wall Street Journal, centered largely on Apple's design patents. Most people know that the jury award was over \$1 billion to Apple, but what isn't as widely known is that approximately \$600 million of that amount was attributable to Apple's design patents, such as the following:

U.S. Patent Jun. 29, 2010 Sheet 1 of 2 US D618,677 S



FIG. 1

This case has now made its way up to the U.S. Supreme Court, but no matter the outcome, companies are now taking note of the value inherent in acquiring and asserting design patents.

Indeed, in recent years many high-profile companies have begun to rapidly increase their design patent portfolios. Over the past several years the number of design patent applications filed with the U.S. Patent and Trademark Office (USPTO) has steadily increased. In 2005, the total number of applications filed for design patents with the USPTO was 25,304; by 2015, that number increased to 36,889. More significantly, many large companies such as Samsung, Ford, Apple, and Google have all recently increased their design patent portfolios. Notably in 2005 Samsung was granted 80 design patents, Ford was granted 2, Apple was granted 16 and Google was granted 0. Contrast that with 2015 where Samsung was granted 1,428 design patents, Ford was granted 141, Apple was granted 189 and Google was granted 124. These examples highlight the trend of large companies seeing the benefit and value of adding design patents to their IP portfolios.

Several features of design patents make them potentially more lucrative than utility patents. Foremost is the relative ease and speed with which they can be secured. In contrast to applications for utility patents, design patent applications are generally short and straightforward, thus costing significantly less to draft and prosecute. Once the application is drafted and filed, the average time from filing to issuance for a design patent is only 15 months. In contrast, utility patents usually take an average of 29.1 months to issue. Second, once a utility patent issues the patent holder must track and timely

pay maintenance fees throughout the life of the utility patent. These fees currently are \$12,600 over the life of the patent for a large entity. Design patents, however, require no maintenance fees after issuing. In addition to these savings and efficiencies, design patents, like utility patents, grant the patentee the right to exclude all others from making, using or selling the invention.

There are also several advantages to enforcing design patents in litigation. One of the most significant benefits in design patent litigation is that infringement is established based on the "ordinary observer" test. Under the "ordinary observer" test, juries are simply asked to compare the drawings in the design patent with the accused product; as long as the overall appearance is substantially similar in the eyes of the "ordinary observer" jury, the accused product can be found infringing. This is an easier showing than the standard in utility patent suits, which require all elements of the patent to be present in the accused product and which usually requires expert testimony to establish.

In fact, in some instances, **enforcement of a design patent can even lead to a larger monetary award** for the right holder than what would be entitled under a traditional utility patent. This is largely due to the way in which damages are calculated in the two types of cases. In a design patent litigation, the patent owner may be awarded the total profits of the infringer rather than the reasonable royalty or lost profits, which are generally awarded for a utility patent infringement. To be clear, reasonable royalty is simply a percentage of the infringer's profits, not 100% of the profits potentially awardable in design patent cases. Similarly, lost profits is tough to establish because the patent owner must demonstrate, among other things, "the amount of profit the patent holder would have made if the alleged infringer had not infringed" and "the patent holder had the manufacturing and marketing capacity to make any infringing sales actually made by the infringer."

Of course, **there are some disadvantages to design patents as well.** One is that the term of a design patent is less than that for a utility patent. Whereas a utility patent is valid for twenty years from the date of filing, a design patent is only valid for fourteen years from the date of grant. A second disadvantage is that design patents lack written claims. Although this tends to streamline design patent infringement suits, as mentioned above, it can also be a disadvantage because the figures of a design patent must stand on their own merit. As such, design patents, though somewhat easy to file, must be prosecuted with care to include all views of the invention. This is critically important because design patent protection is very narrowly construed; covering only what is shown in the patent figures.

Given the above, **companies should consider a well-rounded approach to their intellectual property portfolio.** Though much of the focus is devoted to utility patents, companies should consider expanding their portfolios to include both types of patents where applicable. These rights are rapidly becoming too valuable to overlook.



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Capitalize on Technology Trends and Stop Missing Out on Top Talent!

by Parik Mattoo, VP-IT Business Development & Marketing, Marquee Workforce Solutions

The evolution of technology in recruiting has been a constant game changer for Talent Acquisition in streamlining recruitment processes and hires. Let's look at a couple of key trends that will be changing the way we recruit!

► **Mobile:** today, mobile devices account for 50% of all traffic and 59% of consumers use their device while doing various tasks; Glassdoor estimates that 90% of candidates will search for jobs using their smart phone. How can recruiters leverage this evolving trend? For starters, employers can focus on making their career site and application process mobile friendly such as allowing candidates to apply using their LinkedIn profile. In addition, candidates are expecting immediate and constant updates; job pages and social media platforms should be regularly updated with new positions and statuses. Finally, various job boards such as Monster have actually adapted specific applications to allow recruiters to better reach out to these mobile job seekers.



Parik Mattoo

► **Interviewing goes Virtual:** according to the Bureau of Labor Statistics, the average time to hire is on the rise but with the job market today being candidate driven, it is crucial for employers to increase their hiring efficiency in order to not miss out on Top Talent. As a result, many recruiters are turning towards video

interviews; this tactic decreases the average time for phone screens and decreases the hassle of scheduling with hiring managers (as they can now connect from anywhere). Companies are also having applicants record their interviews for later on demand viewing; this allows recruiters to share these links to hiring managers in order to make hiring decisions faster.

► **Using Analytics Programs:** many organizations are turning towards analytics programs such as cloud based hiring tools to streamline recruiting processes. These systems eliminate the time it takes recruiters to research the candidate (for instance, sorting through social networks) as it utilizes intelligence to summarize important information.

While utilizing technology and digital trends can be a great way of improving hiring techniques, it can never replace the value of human instinct necessary for identifying the right candidates. Progressive organizations always need to combine a strong team of recruiters with up to date technological advancements.

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Visa Options for Innovators

Most aspiring immigrants to the United States must have either an immediate family member or employer willing to sponsor them for a visa. In the employment context, the employer must be willing to pay the salary specified by the Department of Labor and pay the legal fees associated with the immigration process.

For many innovators, whether artistic or scientific, the prospect of committing to a single employer remains unappealing, so what is the best path for a foreign-born innovator who wants to live and work in the United States?

The National Interest Waiver

The national interest waiver (NIW) allows an immigrant to avoid the Department of Labor process and full-time employer requirement and obtain permanent resident status in the United States. The alien must have either an advanced degree or exceptional abilities to qualify. Additionally, the alien must prove that her expertise is in the national interest of the United States. When adjudicating an NIW, the government will focus on whether the alien's expertise will improve U.S. working conditions and wages, educational programs, the environment, health care, or the economy in general.



Jay Nuñez

national interest waivers have found success.

Although many NIW cases will involve STEM specialists, artists and musicians are eligible as well. The current processing time for an NIW is about one year.

The Superstar Visa

Often called the superstar visa, the O-1 is how world famous foreign athletes, artists, businessmen and scientists work temporarily in the United States. Unlike the National Interest Waiver, the O-1 visa is not permanent permission to live and work in the U.S., so for an innovator looking to live in the U.S. for a few years, the O-1 is perfect.



John Nelson

The superstar visa nickname often scares away many aliens, but being world famous is not a prerequisite to the O-1. Instead, the alien must show an extraordinary ability in the sciences, arts, education, business, athletics, motion picture or television. The term "extraordinary ability" is clearly vague, but its application depends on the alien's expertise.

For scientists and educators, the government likes to see awards, noteworthy recommendations, patents and extensive publishing that has been cited often. For entrepreneurs and athletes, high-ranking employment with well-regarded organizations and a history of high salary go a long way. For artists and musicians, critical reviews, recommendation letters, reputation and commercial success help strengthen the case. The processing time for an O-1 visa can be as fast as one to two months.

To inquire about a National Interest Waiver or O-1 visa, contact Jay Nuñez or John Nelson at 949.833.2616.

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21 carat sapphire with 6 carats of FG SI white diamonds mounted in platinum



11 carat yellow radiant diamond flanked by two white 1 carat each collection good diamonds, mounted in 18k yellow gold and platinum



3 carat pink diamond encircled by .70 carats of white collection quality diamonds and mounted in platinum and 18k rose gold



13 carat white collection quality mounted in platinum and more than .75 carats of like color and clarity



7 carat emerald with more than 1 carat of white collection quality diamonds, mounted in platinum and 18k rose gold

YOU'RE AN INNOVATOR DOES YOUR BANKER GET IT?

By Kittridge Chamberlain,
EVP & Chief Banking Officer, Pacific Mercantile Bank

DOES THIS COMPANY SOUND FAMILIAR?

Your company is doing something different, novel, evolutionary, or even revolutionary. The path is generally not straight. It can be very, very narrow. And at times it can feel like you're walking on the edge of a cliff.

The process is inherently risky. Your team is all-in. You're investing your company's time, energy, talent, and money for an outcome that is not certain. A competitor could edge ahead of you, so execution is everything. Regulations, the economy, or a tactical hurdle could take you off course.

DO YOU HAVE THE BANKER YOU NEED?

You need a smart, patient, and supportive banker. It's hard to find one who can be all of these things for an innovator. Here is what to look for:

Experience with Innovative Companies

The banker you need is well prepared to travel the path with you. They won't be running to keep up. They understand the innovation process. Not only are they energized by it; they embrace the opportunity and the risk that come with it.

Passion About Your Business

The right banker is passionate about what you're doing. They'll stay close because they care. They'll be a contributor to your process, not an anxious bystander.

You should expect strategy discussions, helpful connections, and insights to help you succeed.

Chemistry

Chemistry is important. Things could get interesting along the way, especially if you're borrowing money. You need to trust and respect each other enough to share the good and the bad.



DOES YOUR BANKER MEET THE TEST? QUESTIONS TO ASK YOUR BANKER:

1 What's their DNA? Where has your banker worked? How has your banker supported innovative teams and companies? What did your banker do to help them in good times and tough times?

Our Commercial Banking Team has many years of experience working with innovative companies. We have clients who innovate in a range of business sectors, from technology and medicine to financial services, logistics, and retail.

2 Since innovation is undertaken with growth in mind, what experience does your banker have with high-growth companies? What challenges and opportunities do they see with rapid growth? What do they like about working with companies that are pushing their boundaries?

We have numerous clients who came to Pacific Mercantile Bank because they were outgrowing their prior bank. We have supported their continued growth with flexible and creative credit facilities and cutting-edge cash management products.

3 What would your banker do if you wanted financing for an unexpected opportunity to innovate or grow? Will they panic or take it in stride?

We relish these opportunities. Late last year, a rapidly growing client approached us about financing new out-of-state locations. We increased their existing multi-million dollar credit facility by 50%. We also expanded their cash management program to manage the cash flow of all their locations from their headquarters in Orange County.

4 Do other people at the bank have the experience they need to support your banker in supporting you? Get specifics. To execute for you, your banker needs to have the right talent around them.

At all levels, our team has experience supporting innovators. Many of us are innovators, too.

DOES YOUR BANKER GET IT?

Innovation is exciting. It's challenging. It's game-changing. Make sure your banking team gets it.

We would welcome the opportunity to be the smart, patient, and supportive banker your company deserves. Give us a call at 714.438.2500.

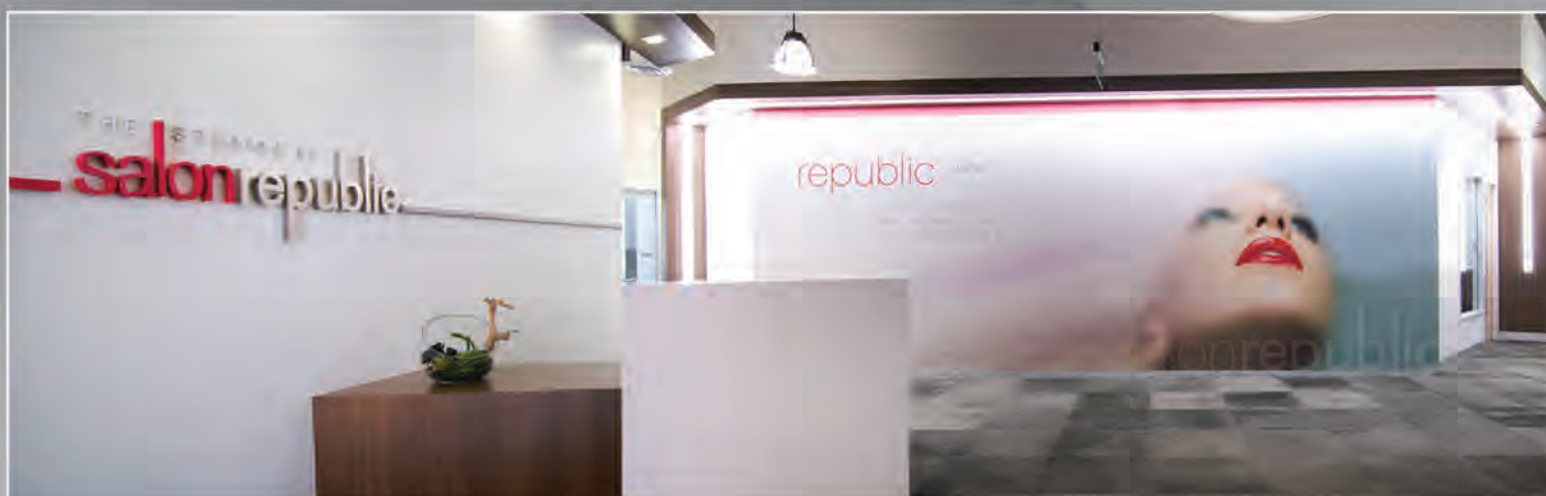


Kittridge Chamberlain is EVP and Chief Banking Officer at Pacific Mercantile Bank. With over 30 years of experience in sales, relationship management, and risk management, she is responsible for commercial banking activities in the Bank's seven regional offices as well as the Bank's marketing programs. Prior to joining Pacific Mercantile Bank, Kittridge was a consultant to banks and other capital providers. Previously, she was a Senior Credit Officer and Senior Relationship Manager at Silicon Valley Bank. Kittridge also held positions at Tokai Bank of California, First Interstate Bank of California, and Bank of America. To explore how Pacific Mercantile Bank could be the right banking partner for you, email kchamberlain@pmbank.com.



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Edwards Lifesciences' Irvine headquarters

More than 300,000 valve replacements are performed worldwide each year through open-heart surgery, utilizing either bioprosthetic tissue valves, like those made by Edwards Lifesciences, or mechanical valves. Since introducing the first commercially available heart valve in 1960, Edwards has continued to meaningfully advance heart valve therapy and, more than 50 years later, remains a global leader in this field.

Edwards also leads the development of technologies designed for the non-surgical replacement of heart valves, called transcatheter aortic valve replacement, or TAVR.

Additionally, for more than 40 years, Edwards has advanced the care for the acutely ill.

The company invests 15 percent to 16 percent of sales in R&D, and recent years' product growth is directly related to the outputs of Edwards' R&D. Over the last several years, Edwards has introduced several innovative products that helped maintain global leadership positions and enabled more patients to benefit from the company's life-saving technologies than ever before.

For more information about Edwards Lifesciences, visit Edwards.com.

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INNOVATOR OF THE YEAR AWARD NOMINEES

Advance Beauty College, Garden Grove*Tam Nguyen, CEO/President*

Tam Nguyen serves as president and owner of Advance Beauty College (ABC) and has led a team to transform the nail service industry through innovative partnerships with leading industry companies such as Dermalogica, Creative Nail Design and Matrix. His company offers training and courses in cosmetology, manicuring, massage therapy and holistic care, among other topics. Early in the company's history, Nguyen and his family recognized that Vietnamese immigrants dominate the nail service industry, making up a majority percentage of manicurists in the nation. Seeing an opportunity, Nguyen and his family created a bilingual manicuring program designed to get students into the job market as quickly as possible. As a result of the tremendous success and growth of ABC in Garden Grove, Nguyen has raised enough capital to open a second location in Laguna Hills. This year alone, ABC has maintained a licensure rate of 99% and graduation rate of 92%.



a systems integrator. Additional achievements include his involvement in helping to develop the first geocoding engine tied to Experian's real estate mainframe system, and building of a sophisticated flood certificate engine for a leading insurer.

Ambry Genetics, Aliso Viejo*Aaron Elliott, CEO*

Dr. Aaron Elliott has been with Ambry Genetics for more than eight years, where during his tenure, the company has experienced tremendous growth from approximately 40 people to about 800 employees. Being a key component of the R&D division of the company and heading it for the last four years, Dr. Elliott has been involved in developing and launching some of the most groundbreaking genetic testing assays in the industry. Dr. Elliott was instrumental in launching many of the tests that were first to market in the industry, such as the first next-generation sequencing panel test to clinical grade exome sequencing and hereditary cancer panels. In addition, Dr. Elliott was heavily involved in Ambry's fight and success against gene patents following the Supreme Court decision, and moving the genetic testing industry forward with Ambry's leadership in the sharing of genetic data. Ambry Genetics is a privately held health care company with the most comprehensive suite of genetic testing solutions for inherited and non-inherited diseases.

**Advanced ICU Care, Irvine***Lou Silverman, Chairman/CEO*

Advanced ICU Care's tele-ICU solution brings the gold standard of 24-hour, 7-day, 365 days a year intensivist-led ICU patient care to a broad range of hospitals. The company combines state-of-the-art tele-technology that provides a constant stream of patient-centric data, U.S. board certified intensivists and critical care nursing resources to drive improved patient care, elevated operations and ROI. Advanced ICU Care consistently delivers 40% reductions in ICU mortality and 25-35% reductions in ICU length of stay for its clients and the patients that they jointly serve. Advanced ICU Care grew nearly 40% in Lou Silverman's first year as CEO, and based on year-to-date data for 2015, the company was projected to save more than 93,000 ICU days while saving more than 2,500 lives – more than triple the number of lives the company saved in 2014. In his 20+ year career serving in executive leadership roles for health care technology and service companies, Silverman has driven growth and elevated performance and reputation through a focus on quality, processes and innovation.

**Anaheim Fire & Rescue, Anaheim***Randy Bruegman, Anaheim Fire Chief*

Recognizing the need for a Mobile Integrated Health Care solution, Chief Randy Bruegman championed the effort to implement Anaheim Fire & Rescue's (AF&R) Community Care Response Unit (CCRU), a public-private partnership with Kaiser Permanente Orange County and CARE Ambulance Service, coordinating with Dr. Gary Smith, a California licensed physician. First to launch in California last year, the CCRU responds to non-urgent medical requests with an ambulance staffed by a certified nurse practitioner and a fire captain/paramedic in lieu of a standard paramedic engine/truck and ambulance response staffed by three or four fire personnel. The nurse practitioner is able to triage and treat low acuity calls in the field in order to lower ambulance transports to the hospital, providing quality care in the field, and reducing health care system costs. Since launch, the CCRU has treated 330+ patients and has kept 48% of them from being transported to overcrowded emergency departments. With the implementation of CCRU, AF&R has been able to increase its ALS/fire coverage – when the CCRU is in service – by 129 hours or 2.7 hours/week.

**AirEL, Irvine***Michael Shipman, President*

AirEL Illuminated and Thermal Identification was formed in November 2013 by inventor Michael Shipman. With no formal business education, Shipman took his passion and determination for lighting to a new level and owns several patents in the industry. Shipman developed an identification system for law enforcement, military, marine, airport and emergency vehicles. The system allows ground and aerial crews to establish quick identification of specific vehicles through illuminated and thermal alphanumeric characters. This is vital in military situations or dangerous criminal engagements that require quick identification. Shipman also invented the illuminated keyboard in the mid-2000s and licensed his invention to many of the most respected technology business in the world such as Dell, Apple and Hewlett Packard.

**Arbela Technologies Corp., Irvine***Nima Bakhtiary, President/CEO*

Nima Bakhtiary brings more than 20 years of experience in software, business consulting, and implementation of complex and multi-national financial and supply chain solutions leveraging Enterprise Resource Planning, Product Life Cycle Management, Advanced Planning and Scheduling, Demand Planning, Lean and Just-in-Time manufacturing. Bakhtiary has led and managed many large projects developing and implementing business solutions for the manufacturing, heavy industrial, automotive, aerospace and retail industries. Arbela is a self-funded, debt-free consulting firm that works at the intersection of business and technology to empower organizations around the world to digitally transform and grow their businesses. Expert consultants offer strategic consulting, implementation services, support and managed services, and pre-built software solutions that help clients innovate and reinvigorate customer, employee, partner and supplier experiences and processes using Microsoft ERP, CRM, Business Intelligence/Analytics and related Microsoft Cloud solution. Bakhtiary has grown Arbela from a three-person startup to more than 70 employees in a range of countries spanning from the United States to Europe. His leadership by example has translated into 100% growth year over year.

**Allergan, Irvine***Mitchell Brin, SVP Global Drug Development & Chief Scientific Officer, BOTOX®*

Through his 15 years at Allergan and now as senior vice president of development and chief scientific officer for BOTOX®, Dr. Mitchell Brin has overseen the unprecedented expansion in the clinical uses of BOTOX® to 11 core indications worldwide, with more than 25 indications across 85+ countries to date. The core indications are: strabismus, blepharospasm, primary axillary hyperhidrosis, chronic migraine, adult upper and lower limb spasticity, juvenile cerebral palsy (not approved in the U.S.), neurogenic overactive bladder, idiopathic overactive bladder, and BOTOX® Cosmetic for glabellar lines, and crow's feet lines. Sales of BOTOX® have grown from \$310 million in 2001 to \$2 billion today. Allergan stock has increased from about \$30 per share at the end of 2001 to about \$245 per share today. Allergan is a \$23 billion diversified global pharmaceutical company and a leader in a new industry model - Growth Pharma.

**Athletic Products LLC, Irvine***Robert Livingston, President/CEO*

Robert Livingston is the inventor of Racquet Power Weights® – U.S. Patent (D703283) – developed nearly 50 years ago. The Racquet Power Weights® is an innovative device for improving the strength and tennis racquet swing for the tennis player. To this day, there are no products on the market that offer these unique benefits and functionality. Through R&D, it was also determined the product is adaptable for the golf industry. Athletic Products LLC is in the start-up stage and seeking manufacturing funding to launch the product. All R&D is complete, and the company has a working prototype. After more than a year of testing the detachable weights and consulting with tennis instructors and physical trainers, the optimum additional strength training weight for the tennis racquet was determined. After several prototypes were built, Livingston contacted Dr. Don Klotz (Hall of Fame collegiate tennis coach). Dr. Klotz tested the prototype and wrote a letter to Livingston providing "an unqualified recommendation" for the product.

**Alteryx, Irvine***Dean Stoecker, Chairman/CEO*

Dean Stoecker co-founded Alteryx in 1997 with the mission of building software products that provide data analysts with deeper insights about their business. Through Stoecker's leadership and motivational skills, along with his ability to visualize a concept and develop it into reality, Alteryx has become the leader in self-service data analytics. Stoecker's industry vision and market knowledge have aided Alteryx (formerly SRC) in its 20% annual growth since its inception in early 1997. Under Stoecker's guidance, Alteryx has received a total of approximately \$163 million in four separate funding rounds and has grown to become a leader in data blending and advanced analytics software. Prior to co-founding Alteryx, he led business development efforts for Integration Technologies,





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Greenberg Gross LLP was selected for the 2016 edition of "Best Law Firms" for the metropolitan area of Orange County in the practice areas of Commercial Litigation and Criminal Defense: White-Collar. Michael Katz was recognized by Best Lawyers® 2017 for the practice area of Litigation - Intellectual Property in the metropolitan area of Orange County.

INNOVATOR OF THE YEAR AWARD NOMINEES

Axonics Modulation Technologies Inc., Irvine
Ray Cohen, CEO

Raymond W. Cohen has spent the majority of his career dedicated to fostering the invention and advancement of promising medical technologies aimed at improving patients' lives. Axonics' technology is directed toward treating overactive bladder, fecal incontinence and urinary retention, conditions that affect more than 100 million adults around the world. Recently garnering CE mark, the company's sacral neuromodulation system is the only approved rechargeable implantable device in this product category. Cohen has a strong track record of raising equity and debt capital, fostering licensing and partnership deals, mergers and acquisitions, and investor relations. Under his leadership – beginning in March 2014 – Axonics, has approximately \$60 million in series A and B round financing. Prior to Axonics, he raised \$27.5 million for Vessix Vascular and eventually sold the company to Boston Scientific for \$200 million in upfront cash, in addition to contingent milestone payments.



been a human development engineer on a personal mission to build a sustainable middle class in America. Base 11 is a nonprofit STEM (Science, Technology, Engineering and Mathematics) workforce and entrepreneur accelerator created to solve two of the country's largest problems: the growing STEM talent gap crisis in America, which fueled by the underrepresentation of women and ethnic minorities, and the eroding middle class. Since Taylor became CEO in January 2015, Base 11 has engaged more than 180,000 people. He has forged partnerships with Visa, Ellie Mae, USC, UC Irvine, Caltech, the Smithsonian and Orange Coast College to develop scalable STEM accelerator programs. He has set an initial goal of helping 11,000 students move into the Base 11 "Victory Circle" by 2020 – that is to get them engaged in STEM with a job, admission to a university or as entrepreneurs.



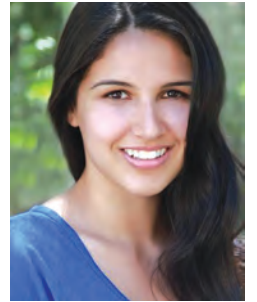
BANKCODE, Laguna Beach
Cheri Tree, Founder/CEO

With more than 20 years of experience in sales and a multi-million dollar income, Cheri Tree is a leading authority on sales and sales training systems. As a coveted speaker and trainer, Tree teaches the B.A.N.K.® system to top sales organizations worldwide. B.A.N.K. is a reverse-engineered personality profiling system designed to dramatically improve communication, accelerate negotiations and help close more sales. Tree built BANKCODE, a training company, in a 1,600-square-foot storage unit in Newport Beach, where she lived for 18 months, into a company that has sold more than \$5 million worth of products/services in more than 40 different countries. She invented a 90-second assessment tool and proved scientifically that B.A.N.K. predicts buying behavior, and by using the methodology, sales will increase up to 300%. Tree is a featured keynote speaker and has appeared at Harvard University and UC Berkeley.



Beeya, Laguna Beach
Ladan Davia, CEO/Founder

Ladan Davia created a platform that automatically matches employers and employees using a matching algorithm. The website brings the online job hunt, social network and professional network all onto one platform. Beeya allows users to look for exactly the job or candidate they desire, while filtering out those that don't meet their requirements. It then shows a video of the person on the other end, while showing all their professional requirements. The website is the first professional job site that appeals to any age group, any job, in any field. Davia started this business with her savings in September 2014, and then successfully raised her first round of capital from a private investor in January 2015. The company launches August 2016 and Davia plans to go for her Seed A round of funding in January 2017. Although the business is a startup, thus far 66 companies have committed to the site pre-launch ranging in various fields from medical device, food and beverage, technology, fashion and entertainment.



Base 11, Costa Mesa
Landon Taylor, CEO

Landon Taylor has more than 25 years of business experience that spans launching his own startups to developing and executing national strategies within First American Corp., a Fortune 500 company. Throughout his career, Taylor has

Blossom, Irvine
Manrique Brenes, CEO/Founder

As Blossom's CEO, Manrique Brenes oversees all aspects of the Blossom System, and is responsible for budget management, legal, sales and operations. Statistics show that 60% of residential water is used for irrigation – and almost half is

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INNOVATOR OF THE YEAR, 2016 NOMINEE

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INNOVATOR OF THE YEAR AWARD NOMINEES

wasted. The Blossom Smart Watering Controller conserves water, reduces water utility bills up to 30% and is controlled from a mobile device. Blossom is an easy retrofit. The 12-station unit gained traction last year and the company launched the new Blossom 8 in March 2016. Priced lower than any other smart controller available today, the smart yard is now accessible to mainstream consumers. Brenes designed Blossom to be different, and both customer and investor reception has been extremely favorable. In fact, Blossom has raised more than \$4 million in funding. Blossom is available in the continental United States – sold at Best Buy; Home Depot and via Amazon, SmartHome.com and NewEgg.com. With a growing team, Blossom has an international presence and will expand into Australia and Canada next year. Blossom will also be found at Lowe’s, Wal-Mart and Costco in 2017.



Business Communications Solutions, Irvine

Sunny Rajab, CEO

Sunny Rajab is CEO of one of Orange County’s leading, start-to-finish technology solutions providers for: audio/visual, structured cabling, cloud services, voice, IT networking, surveillance, and wireless and managed services. The founding and subsequent development of Business Communications Solutions (BCS) has been her greatest entrepreneurial achievement. Equipped with unwavering motivation and a self-starter mentality, she has led BCS to prosperity since the company’s inception in 2001 – showing continued growth even through times of national recession. Choosing to invest time and resources into innovative technologies and forward-thinking solutions has been critical in maintaining year-over-year improvement to the company’s bottom line. Rajab personally funded the start-up of the company and managed cash flow without incurring any debt by self-sustaining through sales growth, concurrently maintaining excellent business and personal credit. Her success empowered her to evolve and grow as an entrepreneur through additional business ventures including: Rajab Investment Group, a commercial real estate development company and RK Management, a property management company. With each of these undertakings, she continues to enhance her skills and knowledge-base in business and entrepreneurship.



ChromaDex, Irvine

Frank Jaksch, Founder/CEO

Frank Jaksch is the founder of ChromaDex, a leading provider of proprietary, science-backed technologies and analytical services for dietary supplement, food and beverage, skin care, sports nutrition and pharmaceutical products. Ten years ago, Jaksch identified nicotinamide riboside (NR), a form of Vitamin B3, as a potential blockbuster in the emerging category of NAD+ precursors. ChromaDex was able to acquire all of the significant IP surrounding NR, and register the tradename NIAGEN®. Today, ChromaDex is gatekeeper to the entire NAD+ precursor category. In November, the company made one of the most significant announcements in its history – a joint development agreement with The Procter & Gamble Company (P&G) whereby P&G will have exclusive rights to NIAGEN® for use in specific multi-billion dollar consumer product fields for both existing and new P&G branded products. ChromaDex Corp. (NASDAQ: CDXC) was listed on the NASDAQ market on April 25, 2016, with Jaksch invited to ring the open bell at NASDAQ on May 6, 2016.



Chun-Ha Insurance, Garden Grove

Ki Hong Park, CEO/President

Ki Hong Park has been actively engaged in the insurance industry since 1988, starting his career at Equitable Life (AXA Life). Park founded Chun-Ha Insurance Services Inc. in 1990, serving as the president and CEO since inception. Park began Chun-Ha operations by establishing key partnerships with prominent insurance companies such as Cigna Insurance and Fireman’s Fund Insurance. His company is the largest Korean-American insurance agency and has four subsidiary companies under the parent company Chun-Ha Holding, including Chun-Ha Insurance, All World Insurance, Chun-Ha Korea and Medi2Korean. Park currently has sales contracts with prominent international insurance companies and is also the only Korean-American agency in the U.S. that is contracted with major Japanese insurance companies, Tokyo Marine, Sompo Japan and Mitsu Sumitomo. Chun-Ha has continuously achieved phenomenal growth. His company’s first year in business in 1990 resulted in total sales of \$150,000. Today, Chun-Ha is anticipating reaching its goal of \$100 million in total sales this year.



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INNOVATOR OF THE YEAR AWARD NOMINEES

Cianna Medical Inc., Aliso Viejo*Eduardo Chi Sing, VP, Research & Development*

As the only company dedicated exclusively to breast conservation therapy, Cianna Medical's commitment is to improve care and reduce the burden that breast cancer treatment places on women and their families. Eduardo Chi Sing has been a big part of this commitment, devoting his 30-year career to developing innovative medical products and processes, many of which have become the new standard of care for treating patients and/or performing surgical techniques. At Cianna Medical, Chi Sing led the development of the SCOUT® radar localization system – the first medical device to use radar in human tissue. SCOUT is quickly becoming the device of choice for breast surgeons and radiologists for locating – and guiding the removal of – nonpalpable breast tumors. In addition to SCOUT, Chi Sing holds more than 25 patents, including SAVI Brachy, a multi-catheter apparatus for delivering customized breast cancer radiation therapy in five days. Chi Sing's passion for innovation and his untiring pursuit for excellence have made a difference in the lives of women with breast cancer.

**cloudvirga, Irvine***Bill Dallas, CEO*

Bill Dallas has been in the mortgage industry for nearly 30 years. Success in the mortgage industry wasn't enough for Dallas, he wanted to improve it. He found weak spots in the industry and founded a company to strengthen them. Outdated technology and a sluggish operations process affected everyone: the lender, the mortgage loan officer and especially the home buyer. Dallas sought a team to create cloudvirga, the most innovative mortgage technology of our generation. Considering the trends of the modern homebuyer, Dallas and his team had a goal to make getting a mortgage easy, organized and paperless. Through the cloudvirga system, home buyers can submit all of their documents online, saving themselves and their loan officer's money and sanity. This innovation speeds up the funding process by as much as a week and a half. cloudvirga has already been used to close more than 10,000 loans, and has been adopted by 15 of the nation's top mortgage lenders. The company has also already raised \$7.5 million in Series A funding.

**Content.ad, Irvine***Jonathan Markiles, CEO*

Jonathan Markiles revolutionized digital marketing by inventing the first Native Advertising model, which helped spawn a \$7.9 billion industry. He has continued to innovate to maintain a free web, bringing benefit to publishers, advertisers and consumers. Since inception, Content.ad has been profitable, self-funded and has never outsourced. The company's success is based on a dedicated triumvirate of innovating the best technology, delivering hands-on customer service and maintaining the highest ethical standards. With 50 Orange County-based employees, the company is growing at a 30% annual growth rate, with revenues growing 66% with \$100 million in revenue in sight for 2017. Year over year, the company's client base has more than doubled, with triple the number of advertisers and twice the number of publishers. Year over year, the number of campaigns on the Content.ad platform grew by 486% and clicks increased 139% for its 10,000+ websites and 1,600+ advertisers.

**Cosemi Technologies Inc., Irvine***Nguyen Xuan Nguyen, President/CEO*

With the conviction that high-speed connectivity would play a critical role in the future, Dr. Nguyen Xuan Nguyen founded Cosemi in 2006. His goal was to tackle the prohibitively expensive cost of optical connectivity to enable the widespread deployment of optical fibers in high-speed bandwidth applications thereby, allowing Cosemi to "Enable Optical Connectivity Everywhere." With its unique business model and proprietary technologies, Cosemi has been recognized by *Inc.* as one of the "Fastest-Growing Private Companies in America" (Top 500 in 2011). Under Dr. Nguyen's leadership, Cosemi continues to re-invest in technologies and innovations that deliver breakthrough cost and performance. In January 2015, Cosemi was granted a broad patent by the USPTO (US Patent No. 8,948,197) on its hybrid optical cable platform. This achievement validated Cosemi's years of engineering and development innovation. The company's hybrid optical cable enables high-speed connections for the many devices in our daily lives – from HDMI cables for 4K and 8K TVs, to DVIs for commercial and large signage displays, to USB3.1 for mobile devices and cameras, etc.

**CrowdStrike, Irvine***George Kurtz, Co-Founder/CEO*

Serial entrepreneur George Kurtz is the CEO and co-founder of CrowdStrike, the leader in next-generation endpoint protection, threat intelligence and incident response services. Kurtz is an internationally recognized security expert, author,

entrepreneur and speaker. When companies want to protect their assets from cyber espionage, CrowdStrike is their first and last line of defense. CrowdStrike is the only company successfully unifying next-gen antivirus, endpoint detection and response, and managed hunting, all through one cloud-based, API-driven platform. Perhaps the best indicators of Kurtz's recent successes as CEO are the back-to-back years of triple-digit revenue growth the company has experienced, or the fact that Google Capital was the lead investor in CrowdStrike's \$100 million Series C financing round, or that World Economic Forum named CrowdStrike a Technology Pioneer in 2015 and MIT ranked the company as one of the 50 most disruptive. CrowdStrike's technology platform is deployed in more than 170 countries and used by the top companies in the world.

**Cylance Inc., Irvine***Stuart McClure, CEO/Co-Founder*

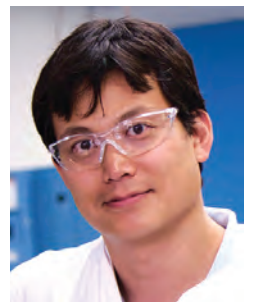
Stuart McClure is one of the world's most recognized cybersecurity experts. He is the creator and lead author of *Hacking Exposed*, the most successful security book of all time. McClure's first startup, Foundstone, was acquired by McAfee. He later served as the Worldwide CTO for Intel Security. McClure founded Cylance to protect everyone under the sun from advanced persistent threats and malware, and with the success of the company's award-winning product, CylancePROTECT, McClure is on his way to accomplishing his goal. McClure has grown Cylance from just a handful of employees to almost 500 in just four years and led the company to consistent profit increases, year-over-year revenue growth of 1,089%, and consistent quarter-over-quarter growth of 100-200%. His efforts have secured four rounds of funding led by Blackstone, Khosla Ventures, Fairhaven Capital, Dell Ventures, DFJ, KKR, Capital One Ventures, Ten Eleven Ventures and several other firms, totaling \$177 million and placing Cylance's value at more than \$1 billion.

**Educasic, Huntington Beach***Melissa Murphy, Founder/CEO*

Melissa Murphy is founder and CEO of Educasic, the world's first classroom-connected, digital sight word platform that kids and parents use together at home to study in conjunction with the child's teacher. Sight words are all the common words young kids need to memorize by sight to help them learn to read. Using Educasic, teachers can quickly and easily create their private classroom dashboard; parents can then download the Sights app onto their smartphones, connecting them back to the classroom. The company has incorporated its own proprietary adaptive algorithm into both the teacher dashboard and the parent/student facing app that shows the history for each practice test taken, as well as words known and words the student is struggling with. Thus far, the company has achieved many milestones, including adding 50K+ teachers and parents since February 2016. Students that use Sights – the company's first product – at home retain three times more sight words versus paper flashcards. Educasic will be expanding this platform in early 2017 by adding four additional products.

**Enevate Corp., Irvine***Dr. Benjamin Park, Founder/Chief Technology Officer*

Dr. Benjamin Park founded Enevate (originally Carbon Micro Battery) in 2005 and, as CTO, leads the battery research and development efforts. He is an expert in surface and bulk chemistries, novel battery manufacturing techniques, battery materials screening and development, and battery chemistry. Dr. Park has successfully helped raise some \$60 million from venture capital and strategic corporate investors, including Tsing Capital, Mission Ventures, Infinite Potential Technologies, Presidio Ventures (a Sumitomo Corp. Co.), CEC Capital (China Electronics Corp.) and Draper Fisher Jurvetson. For a number of reasons – long testing times, cost, safety, and the difficulty of acquiring capital and entering the market – battery improvements are on the order of 5% each year. Dr. Park is not only the driving force behind Enevate's innovative silicon-dominant batteries, his unique design represents a monumental advancement in energy density and ultrafast charging that hasn't been seen in commercialized batteries to date. Where other battery innovations have historically required significant and expensive changes in the manufacturing process, Dr. Park's battery design can be cost-effectively produced within the existing lithium-ion manufacturing process.

**The Escape Bus, Laguna Beach***Tyler Russell, Co-Founder/CEO*

After experiencing the escape rooms in Budapest, co-founders Tyler Russell and Jonathan Katz, were inspired to bring this immersive form of entertainment to the United States. They started The Escape Bus by buying a Blue Bird School Bus and converting it into a multi-room escape experience. Each room contains state-of-the-art tech and unique puzzles that differ from the traditional escape game mold. Unlike other escape rooms, The Escape Bus not only has a theme, but also

INNOVATOR OF THE YEAR AWARD NOMINEES

a story that will change annually. The story that is currently in The Escape Bus is "Firewall." Once participants enter The Escape Bus, they are now members of an elite hacker consortium. They have been caught and are being transported to prison and must work together, use their surroundings and outsmart the bus if they want to escape. The Escape Bus is the largest mobile escape game in Southern California. Russell also started an FM radio station, grew it to an annual operating budget of \$500,000+ a year, making it one of the highest-grossing, low-power FMs in the country.



EvaDrop Smart Shower, Santa Ana

Torrey Tayenaka, Founder

In 2014, Torrey Tayenaka invented EvaDrop Smart Shower, the world's first smart shower designed to reduce the amount of water used while maximizing the user's shower experience. The product is still currently in development, but the company has pre-sold more than \$130K in orders. Over \$20K in units were sold in just a single day. The company is in talks with water municipalities around the world looking to integrate the shower as an offering for their customers in order to help save resources. From founding his first production startup in high school to his multi-faceted role as CEO of Sparkhouse Media today, Tayenaka is an acclaimed force in high-concept, branded video production and serial entrepreneurship. Fueled by a strong desire to pay it forward, Tayenaka has his hands in a wide range of pursuits — environmental, technological, medical and charitable. At any given time, he may play the role of inventor, producer or promoter, designing and developing projects he believes have the potential to change the world.



Givsum Inc. & Future Leaders of Our Community, Dana Point

Shawn Wehan, CEO/Executive Director

In 2009, Shawn Wehan gathered a group of friends to discuss the need for more young people to engage in the nonprofit community. Together, the group founded FLOC (Future Leaders of Our Community), a community-based organization that bridged the gap between nonprofits and young professionals seeking greater community engagement through philanthropy. Over the course of seven years, Wehan's leadership of FLOC has brought greater awareness to more than 350 local organizations, raising more than \$1.5 million in donations. To make even greater advances in philanthropy, he partnered with a team of web engineers to develop a new philanthropic online platform called Givsum. The technology application is a one-stop source for volunteers, nonprofits organizations and corporations. Givsum allows individuals to conveniently track and promote their philanthropic interests, and at the same time, provides charities with an effective tool for raising awareness and funds. His leadership of Givsum, which launched in the fall of 2015, has quickly raised more than \$500,000 for local organizations and causes. Nearly 300,000 volunteer hours have been logged and currently there are 4,000+ users.



GlobeChat, San Juan Capistrano

Kevin Strom, CEO

Kevin Strom has created the first global universal communication platform connecting people throughout the world regardless of language or distance. GlobeChat enables people to communicate with others anywhere in the world with video, photos, text, voice-to-text and audio files on Android, Apple and Windows mobile devices, as well as tablets, laptops and desktops. The platform translates languages real-time within private one-to-one, group, as well as public chat environments — each person receives messages in their native language regardless of the language of the sender. Strom's patent pending multi-lingual simultaneous translation engine also allows a person to send a message in one language to many people simultaneously, each of which would receive the message in their own individual language. GlobeChat was released throughout the world on April 1, 2016. GlobeChat won the Tech Coast Angels 2016 Celebration of Entrepreneurship Competition placing No. 1 among 120 of the top new companies in Orange County. In the first 90 days, GlobeChat has spread to more than 100 countries.



Greenwave Systems Inc., Irvine

Martin Manniche, Founder/Chairman/CEO

Martin Manniche's vision was to provide consumers with the technology to easily control their internet of things (IoT) connected devices on one manageable platform. Greenwave Systems Inc. is an IoT software and services company. Greenwave Systems Inc.'s AXON Platform is able to bridge the communication gap between devices by translating all major protocols into one IP-based language. Manniche's ability to visualize and bring a product concept to life distinguishes him in the industry. Talent, commitment



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and passion for innovation have earned him more than 100 industry accolades. Manniche has piloted Greenwave in raising \$90 million in total funding. The company's global presence has expanded to Denmark, UK, Germany, Korea, Silicon Valley and a new Singapore R&D facility. These expansions have led to a 52% increase in global headcount and a 46% increase in sales since 2013. Greenwave's offering has resulted in successful partnerships with industry giants, Verizon, E.On, IBM, DIRECTV, TCP, NXP and more.

Health 2 Humanity, Irvine

John Cefalu, President/Founder

John Cefalu founded Health 2 Humanity (H2H) after visiting Kenya on a charity trip and seeing the many health problems children in third world countries face due to lack of proper hygiene. Cefalu sought to create a nonprofit that would not only help to prevent these hygiene issues, but also enhance the third world country's economy and empower its people. H2H sells hygiene products and for each purchased product, the nonprofit provides resources and business training to underprivileged youth to make and sell their own hygiene products. In the two years since its founding in 2014, H2H has created 22 jobs, four scholarships and six career advancements. There are currently 12 facilities and sponsored locations throughout Kenya, Uganda and Ghana that are given more than \$4,000 in employment subsidies. It costs \$10,000 to establish a new program, which provides 10 years of sustainable business and 125,000 bars of soap. H2H has sponsored and educated more than 1,500 children in hygiene awareness.

**The Innovation Institute, La Palma / Newport Beach**

Joe Randolph, President/CEO

Since inception in January 2013, The Innovation Institute has grown from just a few employees to more than 650 nationwide. The Innovation Institute is an organization focused on transforming health care through the development of innovative new products, services and ideas. Through Joe Randolph's vision, strategic focus and guidance, The Institute formed a business model made up of three distinct elements: an Innovation Lab, which has already taken in more than 600 invention ideas that are in various stages of the development process; an Enterprise Development Group, which has grown from one health care service company to 12; and a Growth Fund to raise capital for medical technologies. Five major health systems have each invested in The Innovation Institute. Plans are to continue to grow and expand The Innovation Institute's health care service offerings to health care organizations across the U.S. These portfolio companies, mostly based in Orange County, are projected to provide revenues of \$165 million and an EBIDA of \$13 million this year.

**Inspired Art Wine, Costa Mesa**

Karen Nguyen, Founder/CEO

Within five years of earning her MBA at UC Irvine, Karen Nguyen had worked and traveled to approximately 40 countries where she led global marketing and business development efforts that resulted in \$300+ million in closed deals. During her time heading global loyalty marketing for Western Digital, Nguyen developed and launched the worldwide rewards program in 90 countries and 17 languages. Nguyen left her career in global marketing to pursue her dream of becoming an entrepreneur – opening the first premier art studio wine bar in Costa Mesa in February 2016. Currently, as founder, owner and CEO of Inspired Art Wine, Nguyen quickly grew the Inspired brand across various digital channels, resulting in double-digit growth in monthly sales and earning excellent customer reviews in less than four months of opening. Inspired Art Wine is a one-stop art studio that offers art classes ranging from "fun" to fine art. Nguyen also started a "Paint for Cause" initiative that helps raise funds for nonprofit organizations.

**The KPC Group, Santa Ana**

Kali Chaudhuri, Chairman/Founder

The KPC Group and its affiliates have successfully established a chain of integrated health care delivery system consisting of seven acute care hospitals, Independent Physicians Associations (IPAs), medical groups, and various fully integrated multi-specialty medical facilities in Southern California. The KPC Health hospitals function as "safety net" hospitals for the communities they serve. For many years the hospitals struggled financially. With great leadership and vision, in less than a year and a half, Dr. Kali Chaudhuri and his management team streamlined the company's operations, maximized operational efficiencies and improved services, taking KPC Health from being a company that was losing \$2.5 million per month to a company that closed its fiscal year end with an EBITDA of \$34 million. A real estate entrepreneur, Dr. Chaudhuri and his affiliates are currently developing more than 3.3 million square feet of commercial real estate comprising of hotels,



resorts, apartments, health care facilities and educational institutions. In 2003, Dr. Chaudhuri also successfully established the first private medical school in West Bengal, India.

Kush Bottles, Santa Ana

Nicholas Kovacevich, Co-Founder/CEO

Nick Kovacevich has the distinction of co-founding and building one of the best-known packaging and accessory companies in the cannabis industry. Having sold more than 100 million containers – Kush Bottles, under Kovacevich's guidance, has grown to become a leader in the industry – with offices in several states, proprietary product lines and a fully staffed compliance department. Kush Bottles recently completed the transition from a privately held to a public company, with Kovacevich helping to raise more than \$2 million in funding. The company opted to do a natural IPO, rather than take dubious shortcuts. Kush Bottles also created an all-new packaging system to meet federal and state child resistant regulations. This unique system is innovative in its design and functionality, and is being rolled out with great market acclaim and uptake. The company was recently named an *Inc.* 5000 "Fastest-Growing Company in America." Widely interviewed in major media, Kovacevich has emerged as an expert in matters pertaining to child safety, cannabis compliance issues, industry trends, marijuana packaging and branding, and canna-business financing options.

**LeaseCalcs, Irvine**

Marc Maiona, Founder/CEO

In 2010, Marc Maiona founded LeaseCalcs, a solution to the highly anticipated changes to the lease accounting rules under GAAP and IFRS. Since launching in 2013, LeaseCalcs has analyzed and accounted for 593 million square feet of leases around the world. LeaseCalcs' cloud-based enterprise solution saves commercial real estate brokers thousands of hours by streamlining the lease accounting and analysis process. His passion for LeaseCalcs and its users has resulted in over \$3 trillion of cash flows of leases accounted and analyzed around the world. He began his career in commercial real estate with Cushman & Wakefield, later joining CyberLease LLC, the leading North American lease audit and lease accounting firm. Maiona has bootstrapped LeaseCalcs since 2010, investing hundreds of thousands of his own capital to fund product development. This year marks the first year that LeaseCalcs has become cash flow positive. He has been responsible for signing all of LeaseCalcs' subscribers including, Intuit, JLL Los Angeles, Cresa San Diego, Cresa Orange County and Avison Young Los Angeles, among many others.

**Levyx Inc., Irvine**

Reza Sadri, CEO

Reza Sadri, PhD has been a visionary leader in the data storage industry in Orange County for more than 25 years. Over the years, he has built highly successful businesses based on his pioneering work in the fields of advanced search, high-performance databases and enterprise software. He is currently the CEO and founder of Levyx – a company that is disrupting the economics of Big Data processing. Levyx is effectively bringing the data processing capabilities that were once reserved for very large webscale companies to companies of all makes and sizes. He has guided Levyx through multiple rounds of venture capital funding and has recently closed a \$5.5 million round with top-tier VCs in April 2016. Prior to that, he was the CTO-Software at STEC (NASDAQ ticker: STEC), a company that was sold to Western Digital in 2013. Before that, Sadri held the CEO and executive management positions at Digital Spectrum, Clenova and Procom Technology (NASDAQ ticker: PRCM) – all of which are based in Orange County.

**Lexmark International Inc., Irvine**

Anthony Macciola, SVP, Advanced Research

Anthony Macciola's innovations span across 30 years and include 88 active and pending U.S. and international patents, empowering enterprises and government agencies worldwide to digitally transform their back-end and customer-facing processes and engagement channels. He joined Kofax in 1990 where he was CTO until the company was acquired by Lexmark International Inc. in 2015. During his tenure at Kofax, he has been a trusted advisor to executive management and greatly influenced the strategy for acquiring technologies that have supplemented Kofax's business process management and mobile technologies, including data integration, analytics, customer communications management and e-signature capabilities. The technology portfolio was a key contributor to Kofax's acquisition by Lexmark International Inc. for \$1 billion, accounting for a 47% premium on Kofax's stock price. Today, the company is a leading provider of smart process applications that simplify the business critical First Mile™ of information intensive customer interactions.



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Little, Newport Beach

James Farnell, Creative Director

Little is an international architecture and design firm recognized for developing design solutions that generate business results in the workplace, community, health care and retail industries. James Farnell is an international designer having worked with globally recognized brands. Today, he is responsible for the creative output of Little's Brand Experience Studio on the West Coast. Farnell is passionate about creating engaging, memorable retail experiences across multiple categories and has been a champion for Californian design, both locally and internationally. Farnell has consistently contributed to his profession through serving the not-for-profit Retail Design Institute (RDI) to advocate the value of design to business, strengthening connections across the retail industry. The RDI (and its members) in Southern California have benefitted from increased membership, sponsorship and a greater diversity of signature events in the region, while enjoying greater exposure at an international level. Farnell was recognized as "Member of the Year," which acknowledges a professional who has contributed most significantly to furthering the missions of the RDI and for his/her extraordinary contributions.



and many more. LulyBoo was also named as winner of the 2016 "Top Choice of the Year" award by *Baby Maternity* magazine, among many other accolades.

Mavenlink, Irvine

Raymond Grainger, CEO/Founder

Raymond Grainger is a founder and CEO of one of Orange County's fastest-growing SaaS (Software as a Service) companies, Mavenlink. Mavenlink is the leading project and resource management platform transforming how businesses work with distributed teams, contractors and clients around the globe. Its enterprise-class SaaS is purposely built for the \$3 trillion services industry, specifically firms that deliver creative and professional services, including consulting firms, creative and marketing agencies, IT services organizations and professional service teams. By using Mavenlink, customers can manage the entire project delivery lifecycle – tracking time, planning resources, monitoring financial performance – all in a single platform. Successfully raising \$40 million of venture capital to date, Grainger has capitalized the company for continued high growth. In February, Mavenlink announced a major expansion plan following 135% annual growth, this includes opening two new U.S. locations, expanding its current San Francisco engineering and product headquarters, and rapidly adding jobs at its Irvine headquarters.



LulyBoo LLC, Lake Forest

Pazit Ben-Ezri, Founder/CEO

Pazit Ben-Ezri is an Israeli-born, momma-visionary whose story embodies the "American Dream." Shortly after settling down in Orange County, Ben-Ezri gave birth to her second child, Ronnie, and she realized the only place he slept was in the comfort of his own crib. After struggling to find an answer to Ronnie's sleeping issues, Ben-Ezri created a solution of her own. The final product was her LulyBoo baby lounge, a versatile, portable solution that mimics the comfort and feeling of the womb for baby, while seamlessly and in one-click, transforms into a backpack for parents on the go. LulyBoo has demonstrated success through product innovation, consistent product sales and multiple awards. LulyBoo is sold in the U.S., Canada and South America in retailers such as Babies R US, Amazon, FAO Schwartz, Wal-Mart, Sears, Target



Meridian AR, Tustin

Robert Brown, CEO

Robert Brown has more than 25 years of experience as an entrepreneur and senior executive for Fortune 100 brands overseeing P&L, marketing, sales, products, engineering, finance and service initiatives in mobile, wireless, software and content. Founded in 2015, Meridian AR has developed the world's first Mobile Augmented Reality (+AR) Platform for businesses – enabling consumers to experience the things they want before buying them simply by holding up their mobile device to a product, place or situation. Although mobile apps dominate the way people purchase, companies lose billions each year because apps aren't effective at translating marketing spend into commerce. Meridian increases marketing and commerce performance, saving companies billions by unifying +AR, eCommerce, analytics and native content.

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MobilityWare Inc., Irvine*Jeff Erle, CEO*

MobilityWare develops fun, casual games for iOS and Android. The company had been in business for nearly 25 years when Jeff Erle was brought on to consult with the founders on strategic alternatives. Erle saw the tremendous potential as MobilityWare found itself at the nexus of three growing areas—mobile devices, mobile gaming and mobile monetization. With the founders' support, he was able to develop and execute innovative approaches to drive growth and capture this opportunity. One of Erle's key business achievements has been to create and sustain a formal, systematic approach for product development that not only generates new games for MobilityWare's expanding portfolio, but also fosters innovation, creativity and empowerment at all levels of the organization. This has led to MobilityWare pushing the boundaries of innovation in its industry, such as being first to market on new platforms. Since Erle's arrival in mid-2013, revenues have grown 100%, 50% and 65% year over year. In addition to this top line growth, the profits have grown as well: adding \$7 million, then \$9 million, and last year \$11 million to the bottom line.

**Nature Bright Co., Irvine***Joshua Chen, Co-Founder/CEO*

Joshua Chen was born in Shanghai, China. In 2000, Chen and his wife, Ann, founded Nature Bright out of their garage. In those early days, Nature Bright made light therapy devices for researchers conducting clinical studies on treating Seasonal Affective Disorder. Over the last decade, Nature Bright has manufactured and distributed a wealth of mass market and light therapy product lines that are currently being sold domestically and internationally. As an expert in using light to reset circadian rhythms for enhanced mood and sleep, Chen is now taking aim at indoor ambient lighting. A new smart lighting system is currently under testing in two major hospitals in the U.S. If it is successful, the Circadian Lighting will save hospitals millions of dollars caused by patients' delayed check-out. Nature Bright started with annual sales of just \$200,000. To this day, the company continues to demonstrate non-stop, organic growth, even during the economic recession. Nature Bright achieved an annual revenue of \$2.5 million in 2015.

**Netreo Inc., Irvine***Kevin Kinsey, CEO*

Kevin Kinsey and his two partners formed Netreo in March 2000 with a vision of changing the world of network management software. They used their own capital to fund the effort, and did this in an era when other startups were following the "if we build it they will come" mentality and using terms like "pre-revenue" far too often. Netreo's plan was to focus on delighting customers and building a sustainable, viable business in order to quickly hit break-even profitability. Break-even occurred in month 13, and the company has been cash-flow-positive ever since. Today, the company employs 21 workers and conducts business in numerous countries. Their client list includes Wells Fargo, AON, Broadcom, and client retention is 96.5%. The product is packaged as a Software-as-a-Service solution, so virtually all revenue is recurring. Recent growth has been a robust 29% for 2015 and 35% for 2016. The company was recently awarded "Product of the Year" by the Network Computing Awards and named as one of the "50 Innovative Companies to Watch" by *The Silicon Review*.

**New American Funding, Tustin***Patty Arvielo, President/Co-Founder**Rick Arvielo, CEO/Co-Founder*

In 2003, Patty Arvielo and her husband, Rick Arvielo, launched New American Funding as a 40-employee, refinance call-center. Starting the business from scratch, Rick and Patty's vision of a mortgage company that would operate as a proficient call center focused on good pricing, fast home loan closes and excellent customer service quickly came to fruition. They led the company to support its mission of helping individuals achieve the "American Dream" by providing homeowners and homebuyers a variety of financing options at competitive rates. In the years since, the husband-and-wife team have worked to transform New American Funding into a national mortgage lender and servicer that funds more than \$1 billion in home loans each month. Under Patty and Rick's guidance, in a short amount of time, the company has brought the entire loan process in house – origination, processing, underwriting, funding and servicing. This innovative approach has given New American Funding a great advantage in the marketplace, allowing them to consistently close loans faster than competitors.

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

New Horizons Learning Group (NHLG) is part of the world's largest provider of

technical training. 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. CEO Kevin Landry has achieved not only maximizing revenue for NHLG, but personally and professionally developing the company's employees as well.



These achievements include expanding the company to new locations in Arizona, migrating the entire company from standard telephones to Business Skype and Windows 8.1, and creating multiple opportunities for employees to be recognized for outstanding performances and the freedom to voice constructive criticism. Under Landry's leadership, the company has won numerous awards and was also one of *Inc.* 5000's "Fastest Growing Private Companies in America."

NextVR, Laguna Beach*David Cole, Co-Founder*

David Cole has 27 years of experience in digital imaging, stereoscopic 3D research and development, and business execution. In 2009, Cole co-founded NextVR, originally called Next 3D, and has established the company as a leader in the virtual reality broadcast industry. NextVR made headlines in October 2015 by partnering with CNN to broadcast the first Democratic National Debate, and then continued picking up momentum by producing the first-ever live VR broadcast of a NBA game. In November 2015, NextVR raised more than \$30 million in Series A funding with participation from the biggest names in sports and entertainment. Investors included Time Warner Investments; Comcast Ventures; Dick Clark Productions and The Madison Square Garden Co.; as well as Peter Guber, chairman and CEO of Mandalay Entertainment and co-owner of the Golden State Warriors, Los Angeles Dodgers and Los Angeles Football Club. The Series A funding round was led by Formation 8, a firm with a proven track record of successful investments in virtual reality, and Formation 8 Co-Founder Brian Koo.

**NiN Healthcare, Newport Beach***Bobby Shah, CEO*

Bobby Shah started his career as the co-founder of Bandog Corp., which improved the quality of medical care for future generations by employing safe and cost-effective innovation and adaptation of latest engineering and technological advancements. In 2005, Shah co-founded Indigo Orb, a company that developed innovative medical devices to enhance and improve patient care while meeting the critical decision-making needs of health care professionals without significantly changing the paradigm of the procedures. Shah led Indigo to more than \$1.5 billion in annual revenue. Co-founding vTitan in 2010, Shah continued to innovate, developing cost-effective automation and robotics products. NiN Healthcare, Shah's latest innovation, connects medical products and services to users, specifically targeting those with clinical product knowledge and purchasing expertise to make the best-value product and service acquisition decisions, at a significantly faster and far lower cost than the current method. Shah has demonstrated success in crowdfunding and raising capital for all organizations he has founded or co-founded.

**olloclip, Huntington Beach***Patrick O'Neill, CEO/Founder*

Patrick O'Neill operated as an independent contractor for more than 20 years, providing engineering and product design services to numerous clients. A life-long photography enthusiast, having developed photography accessories prior to the advent of smartphones, he visualized an enhancement to mobile phone photography. Knowing mobile photography would rapidly develop into a new market phenomenon, his quest was to greatly enhance the photography experience. His vision evolved from sketches on paper, to CAD CAM designs, then to the use of a 3D printer to create a supplement to mobile phones. The supplement became an appendage to fit on the iPhone 4. More than 100 prototypes were created in the span of two years. The new olloclip product would expand and greatly enhance the array of photographs to be taken. In May 2011, the olloclip was introduced, and with it a new market was created, mobile photography.

**Pinn Inc., Tustin***Sean Kim, Founder/Inventor*

For the past five years, Sean Kim has worked as an intellectual property and business development consultant, facilitating the success of technology companies and assisting with making their vision a reality. While consulting for these startup clients, a part of him always dreamed of being a creator himself, dreaming of seeing his own innovative product come to fruition. After this epiphany, he started drumming up ideas for his new creation, Pinn – a concept that came to

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INNOVATOR OF THE YEAR AWARD NOMINEES

existence after losing his phone over and over again, and his need for a more efficient way to communicate on the go without all the fuss. He also envisioned a new way of receiving calls without having to use a smart watch. He wanted this new concept to be universally appealing and something that he would be comfortable wearing all day. Pinn combines the key features of your mobile phone and earbuds into a single, go-anywhere clip. Pinn allows users to know where their phone is, know who is calling and answer instantly.

**Plutos Sama LLC, Irvine**

Matthew Browndorf, CEO

Plutos Sama LLC, founded in 2013 by Matthew Browndorf, is a vertically integrated holding company with an expanding portfolio of entities providing its clients comprehensive business solutions. Plutos Sama LLC's umbrella includes Wilson Keadjian Browndorf LLP, a law firm providing services from commercial litigation to corporate counsel. Also included is BP Fisher Law Group LLP, a rapidly growing default services law firm, representing servicers, banks, financial institutions and private sectors in connection with resolution of delinquent secured commercial and residential real estate mortgage portfolios. Recently, Plutos Sama LLC approved the acquisition of J Peterman Legal Group Ltd., a Wisconsin law firm with satellite offices in Illinois and Indiana, expanding the default law firm attorney network. Additionally included is Distressed Capital Management LLC (DCM), an asset manager focused on the valuation, acquisition and liquidation of residential non-performing loans. DCM recently entered into a joint venture with Residential Mortgage Solutions LLC to create Resolution Capital Management SA, subsidiary of Plutos Sama LLC, to expand in investment opportunities in distressed home loans securing Central and Eastern European properties.

**PolarPro, Costa Mesa**

Jeff Overall, CEO

Jeff Overall started PolarPro as a student at UC Santa Barbara where he handcrafted lens filters for his ski team teammates looking to shoot better GoPro footage. The now 27-year-old CEO has since led PolarPro into a diverse brand offering an array of accessories for action cameras, drones and smartphones that are distributed to more than 1,500 retailers worldwide. In just five years, Overall has brought numerous innovative products to market by adeptly leveraging popular crowdfunding platforms and an aggressive strategy to reinvest in product development. Overall recently led PolarPro into the ever-competitive smartphone accessories market, partnering with OtterBox on its new modular case line. This step allowed Overall to fulfill a promise made when he appeared on ABC's *Shark Tank*, where the brand's innovative accessories and Overall's personality led the Sharks to proffer a \$1 million investment. To keep the innovation flowing, Overall relies on his now 14-member team to help conceptualize and create the next generation of problem-solving products.

**Project Hope Alliance, Costa Mesa**

Jennifer Friend, CEO

Jennifer Friend serves as the CEO of Project Hope Alliance (PHA), a Costa Mesa-based nonprofit organization dedicated to ending the cycle of homelessness, one child at a time. A former attorney motivated by her own childhood experience with periods of homelessness, Friend ensures that PHA utilizes innovative, evidence-based and impactful programs. Since 2012, under Friend's leadership, PHA has moved 738 parents and children out of homelessness. PHA's Family Stability Program has consistently demonstrated that 75-85% of families moved out of homelessness will maintain permanent, independent housing for at least 12 months. Outcome data for PHA's Bright Start Program shows, on average, that students have improved by over a quarter of a school year in literacy and a quarter of a school year in math and science. PHA's Promotor Pathway Program has been rigorously evaluated through a randomized control trial study conducted by the Urban Institute. The evaluation tracked 476 participating youths over 18 months and revealed 60% increased housing stability, 33% increased school engagement and 33% reduced child births. PHA has more than doubled revenue over three years, increasing its annual revenue to \$1,215,958 in 2015 from \$593,820 in 2012.

**Proove Biosciences Inc., Irvine**

Brian Meshkin, Founder/CEO

Founded in 2009 during the depths of the Great Recession, Brian Meshkin created Proove Biosciences Inc. with a vision to realize the potential of personalized medicine. Today, the company is a commercial and research leader in personalized medicine. Having worked at the leading edge of the pharmaceutical and diagnostic industries, Meshkin designed a business model that was focused on innovation, profitability and patient care. For the first 18 months, Meshkin was not only the founder, but also the investor and sole employee. He researched and developed the first test to help solve the societal epidemic of prescription pain



medication abuse. He convinced a lab to setup and perform his testing, while he handled the billing, sales, customer service and test reporting. Today, Meshkin has led the company's commercial operation, growing sales dramatically since the founding of the company – from 200 billable reports in 2011 to more than 197,000 in 2015. Meshkin continues to drive the company's growth and its history of positive cash flow, all of which are unparalleled in the field of molecular diagnostics.

Providence St. Joseph Health, Irvine

Annette Walker, Division President

A health care visionary and strategist, Annette Walker is a chief executive with an entrepreneur's heart. The president of Providence St. Joseph Health's Southern Division, she has re-imagined health care services for Orange County. Her brainchild, known as Wellness Corners, makes obtaining a healthy lifestyle more convenient than ever before. Centers offer care for treating illness, along with a wide range of wellness and disease prevention programs. By making wellness so accessible, Walker and her teams are fulfilling a vision to make Orange County among the healthiest communities in the country. In just three years' time, the Wellness Center concept has expanded to seven Orange County sites, with each center tailored to fit the needs of its location. Services range from on-site lab draws to fitness programs to nutrition and weight-loss counseling to meditation training. To date, Wellness Center users report 98% satisfaction rates, along with increases in their activity levels and decreases in obesity and stress-related concerns. Walker and the Providence St. Joseph Health team are considering expanding this born-in-OC concept to more Western locations.

**Ship & Shore Environmental Inc., Signal Hill**

Anoosheh M. Oskouian, President/CEO

Since its 2000 launch, Ship & Shore has developed a comprehensive array of engineering and manufacturing capabilities that have consistently anticipated market needs. With increasing market demand on businesses to reduce operational costs as a driver, Anoosheh Oskouian has continuously expanded her company's product lines and services. Geographically, 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. As a result of its innovative technology, Oskouian's company has grown 57% overall within the last six years. In 2015, Oskouian won the Bronze Medal in the Stevie Women in Business Awards for her achievements within the environmental industry and at her company. In June 2016, she participated in Drupa, the largest printing equipment exhibition in the world, to share Ship & Shore's cutting-edge Pollution Abatement Technology.

**The Showpros Group Inc., Laguna Beach**

John Brown, President

John Brown has been producing innovative live events for nearly 40 years that have raised or saved millions of dollars for organizations. Brown's greatest business achievements are building long-term relationships with people, not companies. Brown serves as trusted and confidential partner who is adept at creating innovative visual programs and live show experiences. He always says, "Creativity is understanding the requirements." Brown listens, finds out what clients want, what they need and then provides customers with emotional experiences to excite the mind and move the heart. As an innovator in the field of visual communications, he takes action and delivers great events inspired by their passion, their ambition and their challenges. The Showpros Group is a creative agency and live event production company. The firm works with companies and organizations to create memorable experiences through Business Theater™, multimedia presentations and video.

**Software Anywhere, San Juan Capistrano**

Jeffrey Scott, CEO/Platform Architect

Jeff Scott has been building innovative tech startups in Orange County since 1995. Software Anywhere, Scott's for-profit, mission-driven software company, is proving that companies can incorporate extreme giving models, while still achieving their for-profit goals. Scott leads the company as the CEO and lead technical architect developing applications on the Salesforce.com platform. Inspired by the Salesforce foundation, Scott and his team spend more than 33% of their time working on community projects including a cutting-edge high school technology internship program that extends to a full college scholarship for students who stay on full-time with his companies. This December marks the 10-year anniversary of giving, and by the end of July, his team of 10 full-time employees will have achieved their most significant milestone of providing more than \$10 million of sustainable community impact since the program started in 2007. Looking ahead, the next phase is already being defined as 10² with sights set on teaching the model to other organizations and providing \$100 million+ in community impact over the next 10 years.



INNOVATOR OF THE YEAR AWARD NOMINEES

Sports 1 Marketing, Irvine

David Meltzer, Co-Founder/CEO
Warren Moon, Co-Founder/President
 In 2010, Sports Executive David Meltzer co-founded Sports 1 Marketing (S1M) with Hall of Fame Quarterback Warren Moon. Sports 1 Marketing is a global sports and entertainment marketing agency that leverages the relationship capital that Meltzer and Moon have built up over 38 years.



S1M has had its exponential growth recognized by the 2016 *Inc.* 5000 List. The company was previously named 2014 Best of Irvine: Business Management Consultants. In June, S1M announced its intent for two of its companies, Processing For a Cause and Aggregated Marketing Platform, to “go public” and merge with Acquired Sales Corp. S1M has also successfully raised hundreds of thousands of dollars for charity, providing scholarships to dozens of needy students and even supporting an entire village in Africa through its work with the Unstoppable Foundation. Additionally, S1M has helped many businesses raise capital in its role as a partner of the Southern California innovation catalyst, OCTANe Orange County.

Synova Life Sciences, Irvine

John Chi, CEO

Synova Life Sciences gives everyday people access to the healing potential of their own stem cells through their own doctors. John Chi is the inventor of the separation technology and has co-authored two recent patents pending on the innovation. He has served in both the private and public sectors and has led in corporate and academic environments. Prior to founding Synova, Chi led the College of Natural Sciences and Mathematics at Cal State Fullerton as its expert IT analyst. Synova’s services also include consultation, eligibility screening and provider referrals. The company provides stem cell technology and expertise to medical professionals so they can offer more services to their clientele.



SYSPRO USA, Costa Mesa

Joey Benadretti, President

Joey Benadretti co-founded SYSPRO USA in 1987 with Brian Stein, SYSPRO USA CEO, to fill a perceived void in the market for a feature-rich, cost-effective ERP (Enterprise Resource Planning) software solution to enhance the efficiencies of growing manufacturers and distributors in the United States, the Caribbean, and Central and South America. As president and joint managing director, Benadretti has built an in-depth organization that serves the company’s expanding reseller channel and user base. Today, SYSPRO USA employs a top professional team and boasts a roster of thousands of customers. Benadretti has been a driving factor in gaining international industry recognition for SYSPRO, including four “Company of the Year” awards, as well as a long list of other top industry honors and accolades. Today, SYSPRO is one of the most respected software companies in the USA.



Takeya USA, Huntington Beach

John Lown, President/CEO

While in Japan to learn more about its people and products, John Lown was introduced to Hiroshi Taketani, the founder of Takeya. Lown saw products not yet introduced in the West, and realized the potential impact these products could have. With their passion to inspire people to make healthy and sustainable choices, Lown and Taketani founded Takeya USA in 2009. The focus of the company was on reusable containers and utilizing Takeya’s 55-year manufacturing expertise. These products include a beverage maker for healthy beverages at home, reusable on-the-go drinkware and reusable food containers. The latest product to launch is the ThermoFlask water bottle, which keeps drinks cold for up to 24 hours and hot for up to 12. Prior to launching Takeya USA, Lown invented the tupperware company, Snapware.



Tiger Woods Foundation, Anaheim

Katherine Bihl, Ed.D, VP, Programs & Education

The Tiger Woods Foundation is a nonprofit educational organization. The organization’s focus is to educate students and provide them with the programs, knowledge and training necessary to build the workforce of tomorrow. The Foundation is a fierce advocate for the transformative power of education. The organization’s universal vision is students in need thrive in school, their communities and the working world. In 2016, the Foundation will embark on an expansion plan that includes doubling the number of students attending college thanks to the Earl Woods Scholarship; reaching thousands of teachers through STEM Studio, a collaborative teacher training space based on the philosophy pioneered at the award-winning Tiger Woods Learning Center; and launch the TWF Virtual Academy, a unique digital experience for students.



Total-Apps Inc., Aliso Viejo

Rey Pasinli, Executive Director

Rey Pasinli is recognized as one of the electronic payment processing industry’s foremost experts on emerging internet trends and evolving technologies, providing innovative solutions for multiple industries throughout his career. With more than 15 years of industry experience, he has collaborated with more than 15,000 merchants in a variety of industries. At Total-Apps Inc., Pasinli is responsible for identifying and developing emerging web-based technologies. Total-Apps has been listed as one of *Inc.* 5000’s “Fastest-Growing Companies” in 2013, 2014 and 2015. Total-Apps Inc. provides merchant account services, a payment processing gateway and advanced eCommerce and social commerce solutions. The company develops and sells software products – video checkout systems, Twitter payments, voice checkout and more – to businesses worldwide that make buying and selling through technology safe, fun and easy.



Trulject Medical Corp., Irvine

Gabrielle Rios, Founder/CEO

Gabrielle Rios is the creative force and leader behind Trulject Medical Corp., a digital health company focused on the innovation, development and commercialization of medical device products for the injectable market. After less than three years in development, her first product – a breakthrough aesthetics injector training system – is rolling out in the fall into select dermatologist, plastic surgeon, facial plastic surgeon and oculoplastic surgeon offices around the country. Rios is a recognized leader in medical sales and marketing, her sales achievements in medical aesthetics at Allergan garnered a leadership award for top national performance. She founded and co-developed the technology platform for the Trulject System. She drafted and refined core patents for the system with her attorneys and has led and closed \$2.7 million in financings for the company from its earliest stages, and recruited a team of top technology professionals, advisors and board members.



UCI Applied Innovation, Irvine

Dr. Richard Sudek, Executive Director

Richard Sudek has a lifelong track record of entrepreneurship and innovation. Starting at a young age, Sudek’s childhood business efforts were non-stop. From the classic lemonade stand to washing guests’ cars at neighborhood parties,

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Sudek knew his passion was to build and grow businesses. Soon after graduating from UC Irvine, with a degree in computer science, he founded Nadek Computer Systems, a data networking design implementation firm. Starting with \$250 and bootstrapping the growth of the firm in its early years as CEO, Sudek grew the company into a top technical value added reseller and eventually to an acquisition exit to a multi-billion-dollar firm. Sudek also facilitated the funding of a myriad of firms; built one of the largest – by total award size – competitive collegiate business plan competitions; and his most recent accomplishment, bringing UCI Applied Innovation from concept to reality. UC Irvine's Applied Innovation drives entrepreneurship and innovation in Orange County by facilitating collaboration between community entrepreneurs and angel investors, venture capitalists, accelerators, incubators, companies and industry partners.



Urban Produce, Irvine
Ed Horton, CEO

Since its inception in 2013, Ed Horton has made a name for Urban Produce in the field of sustainable agriculture by radically changing the way produce is grown, transported and consumed. On a mission to globalize local produce, Horton plans to build his sustainable farming units around the world. Urban Produce is currently licensing its patented vertical growing technology. With his patented technology and global vision, his company was named one of "Agriculture's Leading Innovators" by *USA Today*. In just three years, Horton has increased his company's sales by 600%. One of Horton's major company milestones was obtaining USDA organic certification for Urban Produce. As both a commercial producer and packager, whose produce is sold in its own growing medium, their unique product presented a challenge for certification as it did not fit into a pre-ordained category listed by the National Organic Program. Despite its unique challenges, Horton was determined to prove his product's organic merit. He prevailed and became certified and a USDA-certified organic grower in January 2015.



VetCell Therapeutics, Santa Ana
Thomas Yuen, CEO

Thomas Yuen, a founder of former OC-based, Fortune 500 company, AST Research, and former CEO of SRS Labs, began his foray into life sciences with the purchase of PrimeGen Biotech more than a decade ago. Upon taking over PrimeGen, he oversaw the appointment of renowned scientists to study the potential benefits of utilizing adult stem cells derived from fat, blood and organ tissues to treat and potentially cure human degenerative and autoimmune diseases. Last year, PrimeGen announced the

founding of a pet-focused subsidiary, VetCell Therapeutics, a research arm dedicated to discovering and developing cell therapies for pet diseases. Yuen has largely self-funded the research endeavors of PrimeGen Biotech since acquiring the company. In 2015, Yuen invested in a 10,000-square-foot cGMP R&D facility featuring five laboratories and a certified cleanroom. Within months of operation, Yuen expanded VetCell Therapeutics into Asia. Working with a team of veterinarians in Hong Kong, VetCell Therapeutics can now offer a 24- to 48-hour turnaround of cell therapies to veterinary clinics and animal hospitals throughout the U.S. and Asia.



ViridiSTOR, Tustin
Terry Mullin, CEO

After leaving Quest Software in 2002, Terry Mullin focused on a key innovation that he felt would have significant impact. In 2004, after attending trade shows his entire career, it became apparent that the event marketplace had not addressed the need to deliver information digitally. For the majority of Mullin's career, he has innovated hardware and software solutions to make information more accessible, manageable and distributable, all while greatly reducing the costs associated with paper-based information. Mullin founded ViridiSTOR with the goal of removing paper from the trade show and event industry – one of the top three polluters in North America. The ViridiSTOR innovation has become the world's first fiscally sound and sustainable solution for information delivery at the more than 1.3 million events that are held annually in the United States alone. In June 2016, the ViridiSTOR solution was deployed at the annual Lions Clubs International Convention, held in Japan. At the event, more than 20,000 Lions from around the world took a tremendous step towards a paperless event using the ViridiSTOR Presenter USB.



The Wooden Floor, Santa Ana
Dawn S. Reese, Executive Director/CEO

Dawn S. Reese leverages more than 25 years of business and nonprofit management experience to be a life-changer for low-income youth and propel The Wooden Floor forward. Reese's unique blend of experience working in business, arts, education and technology adds to its mission-driven, business-minded focus. Reese led efforts to take The Wooden Floor's programmatic model national and signed its first licensed partner in Washington, DC in November 2015, then subsequently announced plans in April 2016 to serve more youth in Orange County by the end of 2017 at a new annex location in Santa Ana, through an affordable housing partnership. Reese received the 2016 Center for Leadership Award for Innovation from California State University Fullerton, the 2015 Difference Markers Award for Small Nonprofit Person of the Year from the Santa Ana Chamber of Commerce, and was a 2014 Orange County Business Journal CFO of the Year Award nominee. Reese serves on several advisory committees including DifferenceMakersOC, Institute for Influential Community Impact, OneOC Nonprofit Advisory Council and OCBC Latino Education Attainment Committee.



You Can Hide It Inc., Laguna Hills
April Allison, CEO

Over the past 17 years, April Allison has created and run three successful companies. In 1999, Allison was tired of the daily grind, so she decided to start a business, Just For Fun™. Home parties weren't a unique idea, but Allison didn't want to just sell products, she also wanted to build relationships. The company grew and soon needed an office, a staff and a warehouse. With revenues of more than \$1 million, Allison sold Just For Fun™ in 2012 to allow more time to focus on her other endeavors. In 2008, Allison saw opportunities in buying scrap gold from the public and started GlitterBug Gold Buyers™. Allison eventually grew the company to more than \$3 million in revenue annually. True to her entrepreneurial spirit, she scouted for the "next big thing" and launched You Can Hide It™, a unique line of consumer products that offer clever solutions for people to hide their stuff. Although it is still in its infancy, several major retailers carry the product line and sales are growing exponentially.



Yummi, Irvine
Peter Wong, Founder

Peter Wong founded Yummi, a mobile app that lets users share their dining adventures with friends. Wong wanted to create a platform that would allow people to discover good food within their trusted network. Yummi helps users track and share their eating experience with ease and convenience. The app was designed to make it fun to capture, organize and share dining places amongst friends. The app allows anyone to share, discover and remember good food whether they are dining out on a special occasion, traveling to exotic locales or eating at home. Yummi combines the principles found on Instagram, Yelp and Tinder into one app. Yummi launched in Apple's App Store on July 1, 2016. Many influential foodies experimented with Yummi while the app was in development, including Los Angeles TV host, journalist and food/travel blogger, Kristy Hang and Nami Chen, a food blogger from JustOneCookbook.com.



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