

# Women in Business

An Orange County Business Journal Special Report



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# Businesswoman Thrives in Male-Dominated Realms

## Julie Hill Combined Drive, Dream to Defy Naysayers

By DEIRDRE NEWMAN

“Pretty little girls like you become bitches-on-wheels if you go into business.”

That’s what **Julie Hill** remembers her high school guidance counselor telling her in the 1960s. She had told him she wanted to go into business, and he tried to direct her into teaching.

Instead of discouraging her from pursuing her chosen career path, the comment engendered a sense of “righteous anger” that fueled her career, she said. That career has taken her from creating and selling land development companies to the boardrooms of Fortune 50 companies, such as Indianapolis-based **Anthem Insurance Companies Inc.**

“It’s a stereotype about women,” Hill said, referring to the guidance counselor’s comment. “And very surprisingly, it still exists today. It’s utterly frustrating.”

She now channels that frustration into mentoring and encouraging women through informal guidance and involvement in a number of organizations, including West Palm Beach, Fla.-based **The Women Corporate Directors Foundation**. She’s on a mission, she said, to get more women in the pipeline for board positions and C-suite offices.

Another passionate pursuit is trying to get companies to realize that it’s important to focus on two things: corporate profits and raising good kids, that they’re not mutually exclusive.

She also tries to inspire businesses to be a force for good in the world, as evidenced by her work with groups such as the **B-Team**, a global nonprofit initiative co-founded by **Richard Branson** and **Jochen Zeitz** that brings together



Hill: ‘take risks, stay challenged, and enjoy the results’

chief executives and business leaders from across the world to “make business work better,” and **Leader’s Quest**, a social enterprise that works with leaders to create a more equitable and sustainable world.

She’s also channeled her business acumen into the boards of nonprofit organizations, including Irvine-based **Human Options**, which serves domestic violence victims. In May, she takes over the reins of the **University of California-Irvine Foundation**.

### Stereotype vs. Desire

Hill grew up in Colton in San Bernardino County. She received a scholarship to attend the **University of California-Los Angeles**. She majored in English since her high school counselor had suggested something traditional and “lady-like,” she said, though business still fas-

inated her. It seemed “creative” and an opportunity to bring “something good into the world that people need,” she said.

Hill fulfilled requirements for her degree in her junior year and took mostly business classes as a senior. The school didn’t offer a structured business minor at the time, she said.

A few years later, she accompanied a romantic interest to Illinois, where, despite her determination to avoid the guidance counselor’s advice, she taught school for a few years. She soon realized that, sure enough, teaching wasn’t her calling. And it didn’t quench her thirst for business. She found her way to the **University of Georgia**, where she received a master’s degree in marketing to get back on the business track.

The Atlanta real estate market was “in the tank” when she graduated in 1975. Several

banks had repossessed high-rise condo buildings and were having liquidation sales. At a cocktail party one evening, she met an area banker who said his institution had a lot of real estate and didn’t know what to do with it.

“I said, ‘I can handle that for you,’” she said. “I have a marketing company.”

She actually didn’t have a marketing company but formed one that weekend and started business the following Monday, handling the bank’s real estate for five years.

“I taught myself (how to do it),” she said. “I just figured I would try it. The worst thing I could do was fail. He was desperate, and it worked.”

She then decided to apply her skills to an area of the country that excelled at land planning due to understanding the value of market research. The two places she identified were the Reston, Va.-Columbia, Md. area and the Irvine Ranch area of OC. She chose the latter.

### Building a Career

She worked for two former merchant builders—capital partners to conventional builders who want to share in the development profit and assume a portion of the risk—on the ranch for four years and was then recruited by a headhunter to move back to Atlanta for a senior executive position with **Mobil Oil** division **Mobil Land Development Corp.**

She said she got the itch to move back to Orange County after four years and took a job as president and chief executive of **Costain Homes**, a division of London-based **Costain Group PLC**, which she worked for from 1991 to 1998.

She then created **Hiram-Hill Development**, a land-development company in Newport Beach, and sold pieces of the business to dif-

► Hill 40

## Women in Business

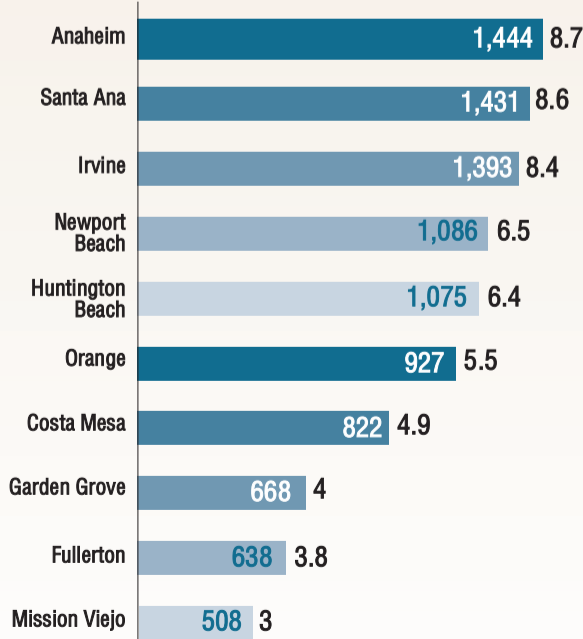
### OC CITIES, EMPLOYEES, INDUSTRIES

Charts show female-owned businesses in Orange County at the end of the first quarter—the 10 cities with the most companies owned by women, the range of employee totals at all of them, and the top industries they’re in. Researcher Inside Prospects Inc. found 16,576 women-owned businesses in OC, with 116,257 workers.

The U.S. Census and National Women’s Business Council report that one-third of OC privately held firms are female-owned and that those with at least one paid employee combine for \$18 billion in revenue and \$4.3 billion in payroll annually.

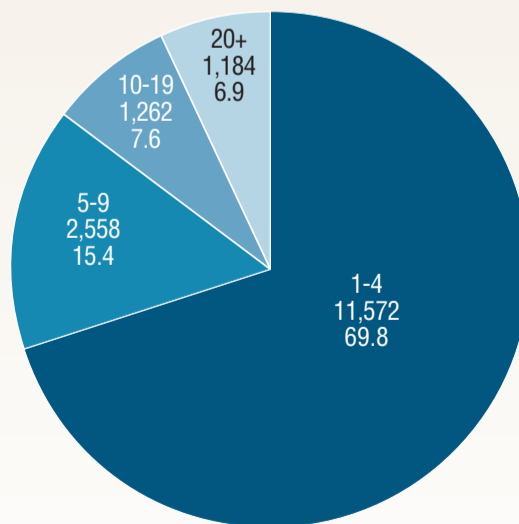
#### Top Cities

City, Companies, % of Total



#### All Employees

Range, Companies, % of Total



#### Top Industries

Industry, Companies, % of Total



Note: Graphics for top cities and industries don’t total 100%  
Sources: Inside Prospects Inc., U.S. Census, National Women’s Business Council, Business Journal analysis

Research by Paul Hughes  
Graphics by Brette Miller



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# Mom's Love for Baby Inspired Specialized Line

## LulyBoo Creator's Naiveté Powered Her Through Snags

By **MEDIHA DIMARTINO**

They say that what you don't know won't hurt you, or in **Pazit Benezri's** case, stifle her entrepreneurial spirit.

She founded **LulyBoo** in 2008 after creating a portable baby bassinet her infant son preferred to nap in. The innovative product, which folds into a backpack, got thumbs-ups from retail buyers from the get-go, but it took another five years and numerous lessons learned for the Lake Forest-based business to become profitable.

"I'm glad nobody told me how long it takes to really have the item in the market, and for the business to start to make money," said Benezri, chief executive. "If I knew from the beginning ... I would probably shut (everything) off and not do the business. I really threw myself out there, step by step, and got excited from every little success."



**Benezri: wants 'every mom in the market to know about the brand'**

Her patience—or naiveté—paid off. LulyBoo products are now sold at every major retailer, including **Walmart**, **Target Corp.**, **Amazon.com**, **buybuy Baby** and **Geoffrey LLC's** Babies R Us. The private company doesn't disclose its financials, but Benezri said sales have doubled every year since its inception. The LulyBoo "lounges" range from \$39 to \$79, including LulyZoo, a toddler version of the product. Next month, it plans to introduce a travel line, ModCot, that will bring its product offering to about 20. The "carrycot" weighs less than 4 pounds and is "designed to make travel easy for parents while providing comfort for baby anywhere, any time."

LulyBoo shares an office building and warehouse space with **Imex Vision LLC**, a paper food and beverage packaging company that Benezri's husband, **Nati**, founded in 2006. LulyBoo employs 15, including a China office that oversees sourcing and manufacturing.

"We are making a high-end product that needs to be 100% clean," she said. "The seams should be perfect, so we need someone there in the factory."

### Startup Days

Benezri contracted **Classic Quilting** in Santa Ana to manufacture the inaugural line, which debuted in 2009 at the ABC Kids Expo in Las Vegas. The tradeshow netted zero sales but plenty of feedback.

## Hill

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ferent buyers. She also created the Newport Beach-based consulting and investment firm **Hill Co.**

### Board, Charity Work

Hill also sits on the board of directors of the **Lord Abbett Family of Funds**, part of Jersey City, N.J.-based **Lord Abbett & Co. LLC**, and was the first woman to head the board of Australia-based **Lendlease Corp.**, a multinational property and infrastructure company. During her six years on the Lendlease board, she traveled to about 40 countries to talk to company executives about best practices for gender equality in the workplace, bringing some of the



**Portable bassinet: 'Lounge' one of about 20 products**

"I didn't sell anything, but I learned so much," she said, adding that she had the chance to size up the competition and talk to retailers who wanted to see a variety of designs, and thought her product was overpriced.

"I tried to make the item here in the U.S., and then I realized that it's just not going to work because" the cost of the production left her only breaking even instead of making a profit.

Benezri bootstrapped the company and got technical support from the Orange County chapter of **SCORE**, a nonprofit association whose volunteers—usually retired executives—help small businesses get off the ground. Mentors worked with her on "marketing, financing, accounting, insurance, sales pitches, operations, social media strategies and trademark/patent decisions."

Benezri, aside from retailers' buyers and the former business pros, also tuned in to what other moms and parenting bloggers were saying about her products.

"The market changed since I started," she said. "People moved to shop more online, to read product reviews, to follow bloggers and their recommendations. We are not doing a lot of advertising. Most of the sales are coming

from word-of-mouth recommendations."

LulyBoo is "working with a very big group of moms" in Orange County, Los Angeles and San Diego who are invited to test the products and brainstorm with Benezri's team on "how to make it better, what's missing, is the (packaging) message clear, how much would you pay for this item."

"You need to think about the customer you are selling to," she said. "Ask people, 'Where are you reading reviews? What makes you buy or not buy a specific item?' and really go with that. I really believe that your customers know what they are looking for."

### Operations

LulyBoo values digital feedback but doesn't have its own e-commerce website—Benezri said she doesn't want to compete with retailers.

She took her line overseas about two years ago to Turkey, Brazil, Mexico, Canada, and is about to enter Japan. Lessons learned from international expansion include finding the right distribution partner.

"Many contacted us, but we were really picky about choosing a very good one," Benezri said. "It's only going to work if they

believe in the brand."

The company is named after Benezri's daughter, Meshi, now 14, whose nickname is Luly.

"We also tried to combine words for playtime and sleep time," she said adding "Luly, as in lullaby, and Boo, like peekaboo."

### The Future

Benezri, despite challenges, still isn't afraid to dream big.

"I want every mom in the market to know about the brand," she said. "We are working hard and always thinking about the next step. My tip (for up and coming business owners) is don't stay where you are. Think about where you want to be in a year or two, what items (you are selling) and start working toward it. If you are not growing in the business, I feel like you are going backwards. You need to be creative, and you need to invest in the business."

Benezri has four children, including a 10-month-old boy. Being a female entrepreneur and a mom is "the best combination," which gives her "the freedom to balance my schedule doing the two things I love: creating and being a parent. What more could I ask for?" ■



**In Shanghai: Hill has traveled world for work**

world's experts along with her, such as **Lynda Gratton**, a British organizational theorist, consultant and professor of management practice at London Business School.

Her involvement with Human Options is part of Hill's overarching theme of giving women a voice.

"Domestic violence is domestic terrorism,"

she said. "It's squelching a women's right to have a voice."

She said she's looking forward to taking over the helm of the UCI Foundation, UCI's main advisory and fundraising group. The campus is planning a comprehensive fundraising campaign, though UCI spokesperson **Tom Vasich** said it's in the planning stages and "premature to discuss."


### Not Finished

Don't think Hill has stopped taking risks. She's signed up to be one of six passengers on a rocket ship designed by Branson's team that's scheduled to launch late next year. An innovative airplane will take the rocket ship to an altitude of about 40,000 feet, Hill said. From there, the rocket will be launched for a suborbital trip.

Her brother, **Jeff Kincaid**, will also be a passenger. She said he worked for NASA contractors on the design of all of the U.S. space shuttles, which have recently been retired. The siblings paid \$200,000 each to ride on the historic flight.

She signed up for the adventure about six years ago and has done zero-gravity training at a Philadelphia facility where fighter pilots train, as well as centrifugal force training to prepare for 3G and 6G forces. She will undergo weightlessness training in advance of floating in the cabin.

"I want to be part of it because it will be a thrill, and thrills are good," she said "And I suppose it is consistent with my attitude in life in general ... take risks, stay challenged, and enjoy the results. It is certainly what made me keep moving forward in my career." ■



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# Now is the time to plan for your legacy

By Laura Dang, Private Wealth Advisor

Congratulations to the *Orange County Business Journal's* Women In Business honorees. Thank you for your leadership and dedication—we appreciate how much your efforts help sustain the health of our local Orange County economy. This strong commitment can sometimes mean that personal planning takes a backseat, including legacy planning. As you look ahead to the coming year, consider that now, regardless of age, is a good time to determine how you would like your finances handled as part of your estate plan.

*"When your children are adequately prepared, they become good stewards of what they have been given."*

— Maricella Solorzano, Regional Manager,  
The Private Bank at Union Bank®<sup>1</sup>

Over the next three decades, more than \$30 trillion in assets will shift from one generation to the next, as baby boomers pass on their legacies to children.<sup>2</sup> While those who plan ahead can look forward to a predictable transition of wealth to individuals and charities, the reality is many are not prepared for this transfer. There are a variety of different reasons for putting off estate planning. Some believe their children are too young or it's too early in their lives to plan, while others feel their family situations are too complex. However, the risks of not planning are very real. Those without plans risk probate issues, unsuitable custody of children, lengthy settlements, unnecessarily high estate taxes, mismanagement of assets, beneficiary disparities, and lack of control over end-of-life decisions.

If you need an estate plan, these five steps can help you begin the process.

**1. Start Planning.** Maricella Solorzano of The Private Bank at Union Bank recommends parents discuss planning and wealth transfer as early as possible with their children. "By laying the solid foundation, your children understand and appreciate money for what it is: an incredible tool that can fuel their greatest ambitions and support causes that are important to them. They learn to invest wisely so they can pass a legacy on to their own children and grandchildren."

**2. Engage and Share.** In their book, *Preparing Heirs: Five Steps to a Successful Transition of Family Wealth and Values*, Roy Williams and Vic Preisser blame a breakdown in family trust and

## Having the conversation

Discussions about estate planning can be difficult, but having an open discussion is crucial to establishing a plan that addresses the wishes and needs of both parents and children.

### WITH PARENTS

- Approach the discussion with sensitivity and a respect for parents' privacy
- Frame it within the context of preparing for the future—advance planning ultimately keeps them in control of how their assets are spent and/or distributed
- If there are grandchildren, stress the need for multigenerational planning

### WITH CHILDREN

- Determine your goals and objectives
- Approach children and other heirs when all together, not individually
- Take a long-term view focused on your multigenerational legacy
- Ask for input and feedback by encouraging open discussions

communication for most estate transfer failures. To prepare heirs, they suggest engaging them in open communication and shared decision-making. Give them financial context for their inheritance and foster a culture of achievement and independence. By the time they inherit, your heirs have a mature, healthy attitude toward money that serves them well.<sup>3</sup>

**3. Have a Family Meeting.** A cornerstone of successful multigenerational planning is open dialogue, in which parents and children share their visions for the family. Ideally, this takes place at a group meeting with the whole family present. Involve all family members to emphasize that planning is for the good of both parents and children. It may also help to have a trusted advisor present to serve as an impartial voice.

### 4. Discuss Personal Property Wishes.

Who will receive dad's watch? Mom's silver? Misunderstandings about treasured items can sour family relationships and lead to lawsuits. Have frank conversations to determine each heir's preferences for sentimental items—the more open the dialogue, the better.

### 5. Seek the Help of Professionals.

Multigenerational planning can be complex. After you have an initial conversation within the family, involve a trusted attorney, estate planner, and/or wealth strategist who can work with you to put a plan in place. A wealth strategist can also discuss the important role of the trustee as well as tax and gifting strategies to make the transition smooth and efficient.

Regardless of age or complexity of a family situation, it's never too soon or late for legacy planning. Parents and children who communicate openly about their wishes and needs can enjoy peace of mind that a mutually understood plan is in place for the future.

*Wills, trusts, foundations and wealth-planning strategies have legal, tax, accounting and other implications. Clients should consult a legal or tax advisor.*

<sup>1</sup>The Private Bank is an exclusive part of MUFG Union Bank, N.A. dedicated to the financial needs of high net worth individuals, non-profit organizations, business owners, corporate executives, and professional service firms. Bank products available through MUFG Union Bank, N.A. are FDIC-insured within permissible limits.

<sup>2</sup>The "Greater" wealth transfer: *Capitalizing on the intergenerational shift in wealth*, Accenture, 2015.

<sup>3</sup>*Preparing Heirs: Five Steps to a Successful Transition of Family Wealth and Values*, Roy Williams and Vic Preisser, Reed, Robert D. Publishers, 2010.



**Laura Dang** is a Vice President and Private Wealth Advisor for The Private Bank. With more than 20 years of banking experience, she works in wealth planning, investments, risk management, trust and estate services, and banking. Laura can be reached at [laura.dang@unionbank.com](mailto:laura.dang@unionbank.com) or 949-553-4307.

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## 3 HR-Payroll Pain Points and How to Overcome Them

by Matt Whiteley, Director of Sales, SBS Payroll

### Ensuring Compliance with Changing Laws and Regulations

In just the last few months, there have been changes to the California minimum wage, FUTA credits affecting how much more California employers have to pay, and the implementation of new FLSA overtime rules that were later halted by a federal judge.

### How to Keep Up

You've got two choices to keep up with all of these changes:

- ▶ Dedicate one to two staff members to monitor, implement and comply with all labor law news
- ▶ Rely on a partner to keep up with them for you and to let you know when you need to make changes and who can also help you make these changes

### Buyer Beware

If you choose the latter, just make sure you understand how they keep up with changes themselves, how they communicate these changes and how many communications they've sent out in the last six months. Many payroll providers claim to have this capability but the devil is in the details.

### Doing More with Less

Organizations of all kinds, from businesses to government agencies to nonprofits, all have to do more with less. How can technology be leveraged to do more with less in HR and processing payroll?

### Employee Self-Service

From on-boarding to updating contact and banking information to vacation requests to signing off on the new employee handbook, having employees make updates themselves can give HR a major productivity boost – especially by avoiding data entry and the headache of the inevitable mistakes. Just say “no” to managing this information in email, Post-It notes and cocktail napkins.

### Workflow Automation

From simple automated reminders to streamlining onboarding and benefits enrollment, workflow automation software can increase productivity by 50% or more.

Being reminded to collect new and expired I-9s, to update credentials and for managers to approve requests also helps to ensure legal and regulatory compliance.

### HCM Software and Effective Decision Making

Human resource information systems (HRIS) followed by human resource management systems (HRMS) were developed to be a repository of employee and other HR information.

Today, HRIS and HRMS represent HR databases and just a part of human capital management (HCM) software. HCM also includes payroll, benefits administration, and time and attendance tracking. Instead of siloed databases, HCM includes executive dashboards, reporting and analytics so that management can make decisions anytime without needing someone to manually run a report and email it to them every time they have a question.

### Document Management and Storage

HCM also includes document management and storage so that employee files can be searched and retrieved quickly, from anywhere that authorized employees have access rather than having to search through file cabinets, hard drives or shared drives.

### Payroll Integration

California businesses often run payroll out of multiple systems: information is exported from their HRIS/HRMS software, organized and modified in Excel, and then imported to their accounting software. Depending on the number of employees, we often see HR spending 4-5 hours per pay period or more being spent to do this process manually.

With HCM software, all payroll information is already in the system, and with a simple export to your general ledger in QuickBooks, you can avoid the manual processing in Excel and conduct payroll in a fraction of the time it takes today.

### Tips for Success

We recommend that you make sure to have your prospective payroll and HCM partner provide an estimate of the professional services involved to set everything up. A significant amount of time may be required, so it's important to understand up-front costs and how long it will take to see a positive return on investment (ROI).

We also recommend that those in HR who will use the HCM see a demo before you decide which HCM is right for you to evaluate ease-of-use. This will stimulate their buy-in of the new software and minimize resistance, the latter of which is one of the main reasons why new software implementations fail.

If your company is growing, you'll also want to make sure the HCM system can handle your current workforce as well as what you expect in the next three years. One of the national payroll providers has three separate payroll software systems for small, mid-sized and large organizations that do not scale or work together.

Lastly, it's far more cost-effective when your payroll provider charges on a *per active employee, per month basis* rather than a flat fee per payroll.

### Engaging the Millennial Workforce

Though you may not be feeling this one yet, effectively engaging Millennials will be key to the success of many Southern California organizations for decades to come.

Approximately 73 million Millennials were born between 1980 and 1996, and they are expected to comprise about 50% of the U.S. workforce in 2020 and 75% of the global workforce by 2030.

### Millennials Want More

“Are Millennials getting what they want out of work and life? Not so much,” concluded Gallup as part of their recent report, *How Millennials Want to Work and Live*. Gallup found that Millennials struggle to find good jobs that engage them and only 29% of employed Millennials are engaged at work.

### How to Engage Millennials

Millennials are the most tech savvy generation yet to enter the workforce. They've probably never faxed anything and wonder why there is so much paper in a digital world. They also expect intuitive cloud software to get their work done in the office or remotely.

Which of the following do you think is a better way to engage Millennials?

- ▶ With a paper-based on-boarding process and clunky on-premises HRIS/HRMS software
- ▶ With paperless processes, cloud-based HCM software and mobile-friendly access

The answer not only creates stronger engagement with the Millennial workforce but is also crucial for doing more with less from all employee generations.

### Matt Whiteley

Matt has been the director of sales for SBS Payroll for six years. Previously, he worked with the California Credits Group (CCG – the business incentive and tax credit industry leader), as well as ADP. In life, Matt is a teacher, a leader and a Kansas State Wildcat. In business, Matt claims to know a little bit about everything, but a lot about payroll and the most important assets managed by businesses: their employees.



### About SBS Payroll Inc.

Based in Santa Ana and serving small and mid-sized businesses throughout Southern California, SBS Payroll believes that *Payroll Done Right Means Doing More than Just Payroll*. This is why SBS offers a full suite of payroll, HR services and related support, including time and attendance, benefits administration and

human capital management (HCM) software. SBS is committed to providing the most responsive customer care by answering your questions on the first call, and with deep payroll and HR expertise so that you can focus on your core business. Find more at [www.sbspayroll.com](http://www.sbspayroll.com).

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## How a Pedicure Polished My Leadership Skills

by MacKenzie Collins, Wells Fargo Relationship Manager, Orange County Middle Market Banking

Three months ago on a cloudy January day, I was mid-phone call with the CFO of an Orange County landscaping company. She's a client, friend, and someone to whom I confide my professional challenges. We were confirming our plans to meet later that week for something we both looked forward to: pedicures at an Irvine spa where we regularly meet.

What I would soon come to learn is this: Something as ordinary as a pedicure can be an extraordinary opportunity for leadership development, and ultimately my career.

Three days later, we sat side by side, our feet soaking in warm bubbly water, watching the cars drive by on Irvine Center Drive. The sky was still a dreary grey, but the spa was warm with soft light and smelled of lavender. It was the perfect atmosphere for us to relax and be slightly delirious as we relived the hectic work week. Our conversation drifted to a regular topic: challenges women face in the workplace.

I'm fortunate in my career. I work for a company that has promoted the advancement of women and women executives for the past century. Also, in my role as a Wells Fargo commercial banking relationship manager, I have the opportunity to work with leaders of local Orange County businesses. So, the topic of leadership is ordinarily discussed. This is to be expected. It's important to my clients, and it's important to me. In sharing my own experiences and listening to others detail their challenges, I saw a pattern: We struggle with similar problems and find our way to comparable solutions. It's my honor to share with you here this crowdsourced wisdom.

Here are the top five pieces of advice that have helped sharpen my leadership skills:

### 1. Be transparent about your problems

In today's business climate, being a woman with career and leadership aspirations is a lot to balance. Learn how to raise your hand when you have an issue. This was difficult for me, because I thought talking about my problems signified weakness. It doesn't. I expected judgment from my peers. Instead, they empathized with my struggles and wanted to help. This is especially true today with my peers and younger generations of women. So much of what we see online and through social media is filtered by rose-colored glasses to remove any signs of personal and professional struggle. Yet it's impossible for others to help if they are unaware of your problem. Be real in sharing your struggles. It helps people open up and have real conversations.

### 2. Open communication is your friend

I had a mentor early in my career who taught me to be open and honest with others. Open communication allows you to step back and look at the bigger picture. If you can communicate openly, people are more likely to understand your point of view and better understand your motives. As I began to practice speaking openly, something unexpected began to happen: I received thoughtful feedback from others. The more candid the feedback I gave, the better the dialog.

### 3. Create your support system

In my position, I'm very fortunate to see clients of all backgrounds and heritage. What's surprising is that I hear the same want: the need for female CEO networks. My clients are constantly looking for a support system of peers. Women in the workplace face unique challenges and often struggle to create balance. They want to share their learnings and tribulations with peers. When I struggle with my own balance, I think back to my support system and who I can turn to for help. My advice: Always reach out, and ask for connections. Other leaders are always looking to build their networks. At some point in a career, everyone needs a support system. If you don't ask, you can't build.

### 4. Remember the young leaders

In recent years, I've noticed more transparency and conversations about women's struggles. There is improvement, yet we still have a long way to go. For many of my clients, the issue extends beyond transparency into a different problem: young women in leadership positions. The pipeline of up-and-coming female leaders is a trickle. Established leaders want to connect with and support young leaders in addition to their high-level peers. This can be difficult to find in the business community. I've asked many times about this, and the root of the issue is an age-old problem: Women are less likely to apply for a position unless they are 100% sure they meet the qualifications. I'm guilty myself. We stay put, because it's comfortable, and we would rather be comfortable than approach failure. The imperative is clear: Let's encourage other women to step out of their comfort zones and assume more responsibility, even if they feel they are not 100% qualified.

### 5. Company culture counts

Many studies show that when women are part of an organization's leadership, the organization performs considerably better than its competitors without. And I will add that our communities function more efficient when corporations embrace gender diversity. This is why Wells Fargo has promoted women's advancement and women executives for the past century. Historically, women have a keen ability to engender trust and build relationships, two important qualities in an influential leader. One of my clients said he understands the importance of having women on his team, because they think about problems and solutions differently than men. You get a fuller picture with gender diversity, he added. Doing your part and making sure you advocate for gender diversity in your industry, company, and team will create momentum for future leaders. We all can make a positive impact on our companies, and we are all in this together.

Back at the salon, with our freshly painted toes drying, we came up with an idea: Use our spa time for a bigger networking event. We are expanding our regular meet-up to include other local women leaders in Orange County who are looking to build their networks while treating themselves to a pedicure.

There is still a lot of work to do in promoting and positioning women as transformational leaders in the workplace. With this network, we want to take a small step in making a difference for our leaders' right here in Orange County - to provide a place for women to hear and learn from other successful female leaders, all while getting a pedicure.

I also believe that when women come together, something unique and powerful happens. All of a sudden, we are more energized and inspired to take lessons learned back to our organizations to make a lasting impact on ourselves and those around us. Take something that's ordinary, and turn it in to your own extraordinary.

*This article is based on opinions of the author and is not necessarily the opinions of Wells Fargo, Wells Fargo & Co. and its affiliates do not assume any liability for any loss that may result from the reliance by you or any other person upon the information, opinions or views expressed in this article. Please contact your investment, financial, tax, legal or business advisor regarding your specific needs and situation.*

### MacKenzie Collins

MacKenzie Collins is a relationship manager for Wells Fargo Middle Market Banking in Orange County. Email her at [MacKenzie.Collins@wellsfargo.com](mailto:MacKenzie.Collins@wellsfargo.com).



# VILLA

CONGRATULATIONS TO OUR  
VILLA REAL ESTATE NOMINEES:

**MARCIA BRASHIER**

**NATALIE RANEY**

**LAURA ROCHE**

**SHANA SPITZER**

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THE 2017 WOMEN IN BUSINESS AWARDS



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## Villa Real Estate Offers Premier Residential Real Estate Service

Villa Real Estate, one of Orange County's top luxury residential real estate firms, was founded with a vision to provide unparalleled service to its clients, with unsurpassed local expertise from its agents. Villa ensures exceptional real estate representation for both buyers and sellers, with its seasoned team of professionals, coupled with innovative technology and highly personalized marketing support.

Since its founding in 2013, Villa has expanded to over 150 agents and four office locations in Newport Center, Corona del Mar, Balboa Peninsula and Laguna Beach, to become one of Southern California's most successful and fastest growing luxury residential brokerage firms. All the while, Villa remains committed to hand selecting the most accomplished and attentive real estate professionals who are committed to providing their clients with premier customer service.

### Unmatched Service

Part of what sets Villa apart from other luxury residential brokerage firms is the level of services and support provided to agents, for the benefit of marketing their clients' homes. Villa operates an acclaimed full-service, in-house advertising agency to support the agents' marketing needs with maximum efficiency and unsurpassed customer service.

Villa's creative services staff consists of top marketing professionals with extensive experience in marketing luxury real estate. This group uses thoughtful design and coordinates all custom print materials from brochures to listing presentations and more, ensuring a professional presentation to clients and the marketplace.

The vast majority of homebuyers and sellers begin their real estate journey online, and no other regional residential brokerage firm has the powerhouse web presence – locally, regionally, and internationally - that Villa Real Estate does. Villa's leadership and marketing teams have extensive backgrounds not just in luxury residential real estate, but in marketing and technology as well, which combine for beautiful marketing materials created quickly, allowing the client's home to go on the market as soon as possible. Villa Real Estate also has a strategic partnership with *Who's Who in Luxury Real Estate*, which is a network of real estate professionals across the globe who collectively sell in excess of \$190 billion annually, with an average sales price of \$2,450,000 per transaction. LuxuryRealEstate.com has been the top portal for luxury properties around the world since 1995. Through Villa's alliance with Luxury Real Estate, agents can easily market their properties to reach potential buyers in over 40 countries, offering unprecedented exposure for listings.

In any industry, there is no substitute for great service, but particularly in real estate, as a home is typically the largest purchase a person will ever make. In luxury residential real estate, where transactions have high financial and emotional impact, it is critical to have agents who provide dedicated client service, establish and cultivate trust, and excel in negotiations and communication with the client.

Villa Real Estate agents are selected not only for their outstanding sales productivity, but also for their proven track records in delivering stellar client service that goes above and beyond the typical real estate transaction. Villa Real Estate clients can expect proactive, responsive, attentive and personal service throughout the buying and selling process. Every agent's goal is to ensure a smooth transaction that meets the needs of each client, from buying or selling a first home, a multi-million dollar oceanfront estate, or an investment rental property.

### Unique Listings

Villa Real Estate is known for having some of the most beautiful luxury residential real estate listings along Orange County's coastline. From Newport Coast and Crystal Cove, to Emerald Bay and beyond, Villa has handled some of the area's most notable transactions, including record sales in the most sought-after neighborhoods.

The Wall Street Journal was among the international press that recently featured 27 Emerald Bay in Laguna Beach, a vacation home owned by Warren Buffett. Known as the "Oracle of Omaha," Buffett listed the home with Bill Dolby of Villa Real Estate after having owned it for nearly 50 years.

Another stunning listing with Villa is 92 Emerald Bay, an extraordinary oceanfront property that offers sweeping views of the Pacific. At more than 6,000 square feet, this home is a once-in-a-lifetime opportunity to own in the coveted front row of this exclusive Laguna Beach enclave.

In addition to a portfolio of premier listings, Villa has handled transactions that have set sales records at the time of closing in communities including Dover Shores, Lido Isle, Crystal Cove, and others. With a successful team of neighborhood experts committed to the highest level of customer service, Villa Real Estate is truly coastal Orange County's premier residential real estate firm.

*To learn more about Villa Real Estate, please visit [www.villarealestate.com](http://www.villarealestate.com).*



Two of Villa's partners and own women in business, co-founders Kim Bibb (left) and Evan Corkett (right)

# Lindora Clinic Partners to Improve Employee Health

As Chief Medical Officer at Lindora Clinic, Dr. Amy Lee knows firsthand the serious health complications suffered by people who struggle with their weight. Dr. Lee, who joined the Costa Mesa-based weight management company last December, also sees the dramatic health improvements that result when patients succeed on the company's Lean for Life program.

We talked with Dr. Lee about the Lindora's unique medical approach to weight management, and new ways the company is interacting with physicians and health-conscious companies to provide its programs and services to patients and employees.

### How would you describe Lindora's Lean for Life program?

"Our program is designed to help a patient lose 10% of his or her body weight in ten weeks. Whether they want to lose 20 pounds or 200 pounds, we can help them succeed – rapidly, safely and without surgery. Patients visit our clinics two to five times a week, and experience a structured, supportive approach that guides them through a customized program, including lifestyle education so they keep the weight off. The program is designed to reverse insulin resistance and inflammation, improve blood pressure and cholesterol, and address other conditions – such as prediabetes – that result from being overweight."



Amy Lee, M.D., Lindora Clinic Chief Medical Officer



### How does the program differ from other weight loss solutions?

"Lindora's Lean for Life program is rooted in science and medically managed and delivered by clinicians who specialize in weight loss. We also work with patients to address the behaviors and habits that contributed to their weight gain in the first place. When patients experience significant improvements in their health, it motivates them to maintain the focus required to make lasting changes. Such change is often difficult to make on one's own."

### Lindora is developing partnerships with physicians and companies committed to patient and employee health and wellness. How do such partnerships work?

"We want to help people improve their health and their lives. Working with employers to offer customized weight management programs as part of a benefits program is one way to help accomplish that goal. Good health is good business. Healthier employees are happier, more productive, and take fewer sick days."

Lindora is also partnering with primary care physicians to manage patient weight loss. I know how challenging and time-consuming it is for doctors to provide the guidance and support patients need to lose weight and learn to keep it off. That's what we do at Lindora every day."

### LINDORA AT A GLANCE

Lindora Clinic has been on the cutting edge of weight loss science and treatment since opening its first clinic in Newport Beach in 1971.

### 41 CALIFORNIA LOCATIONS

Lindora Clinics are located throughout Southern and Northern California. Orange County locations include Fullerton, Huntington Beach, Irvine, La Habra, Laguna Hills, Laguna Niguel, Newport Beach, Orange, Rancho Santa Margarita, and San Juan Capistrano. Visit lindora.com for a complete list of clinic locations.

### PARTNERSHIP PROGRAMS

To learn more about how Lindora Clinic is partnering with companies to improve employee health and productivity, call John Tangredi at 1.800.LINDORA.

*"The future belongs to those who believe in the beauty of their dreams."*

*– Eleanor Roosevelt*

Lindora Clinic salutes today's extraordinary honorees - who, from early on, have always dared to dream big.

We've been helping people realize their dreams, reclaim their health, and improve their lives since 1971. If you're ready to make a change, live a healthier life and transform how you look and feel, we can help.

For a limited time, we're offering 45% off our most popular Lean for Life weight loss programs.

*If you can dream it, you can do it.  
We're ready when you are.*

**LINDORA CLINIC**  
weight loss and wellness

\*Offer ends 6/30/17. Restrictions apply.



1.800.LINDORA

[lindora.com](http://lindora.com)





## Getting Your Teen Ready to Drive

*It starts earlier than you think*

Teaching your kids to become safe drivers is one of your important responsibilities as a parent. The Automobile Club of Southern California provides education, safety tools and other resources to make the driver's licensing process a successful one for families.

"Many parents don't realize they have been teaching their children to drive from as early as when the kids are able to observe in the car," said Auto Club Driving School Manager Melissa Vega. "Parents can easily pass on bad habits such as speeding, tailgating and increasingly, distracted driving caused by cell phone use."

### Early preparation is key

But Vega said that with concerted effort before teens begin the driver training process, parents can reverse any less-than-stellar examples they may have set.

"We encourage parents and teens to sign a Parent-Teen Driver Agreement available at [AAA.com/teen](http://AAA.com/teen) to outline the roles and responsibilities for each of them," Vega said. "This will help keep parents aware of the good driving behaviors they need to practice in order to help their teen stay safe behind the wheel."

Vega also encourages parents of 14- and 15-year-olds to attend a free Auto Club Dare to Prepare workshop with their teens, which helps them to understand the requirements of California's driver licensing process. Those requirements have changed since most parents were learning to drive.

To check for class locations across Southern California, visit [AAA.com/safety4teens](http://AAA.com/safety4teens).

### Teen driver risks

The risks California teens face are real. In California, according to the Office for Traffic Safety, teen motor vehicle fatalities for 16- to 19-year-olds increased by nearly two percent from 2013 to 2014. And driver fatalities for 16- to 19-year-olds increased by 26.4 percent from 72 in 2013 to 91 in 2014. Males make up 76 percent of teen driver fatalities.

"Quality instruction is necessary for safe driving and learning good driving habits," said Vega. "It could save a life. So it's important for parents to be fully invested in their teen's driving instruction."

Laying a good foundation of driver education and behind-the-wheel driving skills will help young drivers later on with resisting poor driver behavior like texting while driving, running red lights and speeding, which the AAA Foundation for Traffic Safety recently found to be exhibited by millennial drivers (ages 19-24) – earning them the top spot for the worst behaved U.S. drivers.

### How to choose a driving school

For those whose teens are ready to begin learning to drive, Vega recommends researching driving schools and identifying which type is best for the teen. A quality online driving school can be a good option for those with heavy activities schedules who are self-motivated, while a traditional classroom model might be best for students who benefit from in-person discussion and interaction. The Auto Club offers both types of training for the required 30 hours of driver education, along with behind-the-wheel training required for all new drivers, at eight convenient Orange County locations. More information on the Auto Club Driving School can be found at [AAA.com/teen](http://AAA.com/teen).

### The Auto Club recommends the following tips to help choose the best driving school:

- ▶ **Ask friends and family.** Don't just ask for the name of the online education program, but why it was selected and what features it had for successful understanding of the "rules of the road."
- ▶ **Ensure quality content is offered.** Make sure that the curriculum is state-approved and that there are structured lesson plans that the teen can move through at a steady pace. Quality programs incorporate interactive activities, videos and quizzes, according to Vega. Ensure that teens absorb online lessons gradually. Teens cannot incorporate all the online driver education components in one day or even one week, said Vega.
- ▶ **Find a school that emphasizes learning.** The goal should be to understand the rules of the road, and to be prepared for behind-the-wheel training and supervised practice, not just getting sufficient information to pass the DMV exam to be issued a permit.
- ▶ **Find a driver education program with an established history.** Driver education schools can come and go, but typically quality programs last longer.
- ▶ **Check references and complaints.** Check with the Better Business Bureau for any complaints against the school. Ask for references of previous students and parents that can be called about their experience with the online driver education program.

### Choosing the best car

In general, teens should drive vehicles that offer excellent occupant protection and less powerful engines to maximize safety. Many teens are also interested in improving the environment and reducing vehicle pollution. Luckily, many environmentally friendly vehicles provide safe teen-friendly features while helping them to reduce gas costs.

The Auto Club's 2017 Green Car Guide, available at [AAA.com/greencar](http://AAA.com/greencar), provides a list of the best new green car models for teen drivers.

Parents and teens can research new cars and an extensive inventory of used cars available to Auto Club members at special pre-negotiated fleet prices by visiting [AAA.com/carbuying](http://AAA.com/carbuying).



# Financial Monitoring for the Health of Your Business

by Susan Levinstein, CPA, Partner, HMWC CPAs & Business Advisors

In order to keep a business “healthy” from a financial perspective, management should periodically monitor several key indicators. Failing to do so could eventually result in poor financial performance and even the demise of your business.

## Cash Flow Management

When your business is growing, you may experience a “cash flow crunch” as you struggle to make ends meet. The lagtime between the due date for current debt (e.g., accounts payable and payroll) and the time you collect from your customers is the problem, and a key part of the solution is cash flow management. Here are a few tips:

**Improve Receivables Collections** – Accounts receivable activity should be reviewed regularly. As a general rule, monitor and take action on accounts receivable over 60 days old. Be careful that you don’t assume accounts receivables will continue at the same collection rate as in times past. Instead, consider seasonal or cyclical sales fluctuations and regularly monitor receipt of each receivable.

**Manage Payables** – Some key tips to manage your accounts payable:

- ▶ Take advantage of creditor payment terms. If a payment is due in 30 days and cash flow is tight, pay it on the last day, not the first.
- ▶ If a creditor offers a discount, consider taking advantage of it if cash flow allows, but don’t put yourself in a bind, especially if the discount is negligible. Also, be very careful that these are trustworthy vendors, because you may find yourself essentially loaning them funds in certain situations.
- ▶ Use electronic funds transfer to make payments on the last due date.
- ▶ If you will may be late with payments, it is usually a good practice to let suppliers know when they can expect payment and how much.

**Project Cash Flow** – An accurate cash flow projection can alert you to trouble before it occurs. Consider factors such as accounts receivable payment histories, potential expenditures, and relations with your vendors and suppliers. Also consider expenses such as capital improvements, loan interest and principal payments, as well as variable expenses.

## Monthly Financial Statement Reviews

Monthly financial reports provide a broader perspective of the financial health of your business. Obtain “benchmark” data to compare your business to similar businesses across the country, which will aid you in identifying where to improve your financial performance.

An income statement reports details of your revenue and expenses for given periods. It can be set-up to provide comparison to previous years or months, so that you can easily spot any variances from the same period in a previous year. If there are any significant differences in an income or expense category, these should prompt a thorough review.

Your balance sheet provides a snapshot of your assets, liabilities and net worth. Evaluate your assets to see how much cash you have available, what you are owed, and the value of your fixed assets, such as property and equipment. Your balance sheet will show current liabilities (such as accounts payable) as well as long-term debt (such as a real estate loan on your building). Understand the financial health of your business by employing a variety of financial analysis tools to gauge your current strengths and weaknesses. Ratios that are commonly used include working capital, current ratio, and debt to worth. If you have a bank loan, analyze ratios such as “interest coverage” (which is a key ratio for a banker when analyzing your ability to pay back credit), return on average assets, and return on equity.



### Susan Levinstein

Susan Levinstein, CPA, is a partner with HMWC CPAs & Business Advisors (www.hmwccpa.com) in Tustin. She heads the firm’s Women Owned Business practice and the Complete Financial Office Solutions department. Susan can be contacted at 714.505.9000.



**Women in leadership is our practice, too!**



Our *Women-Owned Business* practice is led by partner Susan Levinstein, who along with fellow partners Jodi Ristrom and Sheila Ashrafi, provide key leadership roles within our firm and the OC business community.

As your trusted business advisors, HMWC offers the services that you need to help improve productivity and profitability. Talk to us about how we can make a difference for your business.

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## Will, Trust...What's the Difference?

You've probably heard the terms "will" and "trust" and think they have something to do with giving away your assets to other people. But what's the difference?

Clearly there's a lot of confusion and procrastination surrounding the use of these tools in estate planning. According to a recent survey, over half (56 percent) of U.S. parents don't have a will or living-trust estate planning document. Now is the time to get this critical conversation started with your financial advisor. Here's a brief overview of differences between these two tools.

### Will

A will is a legal document that, with court approval, empowers someone you name to wrap up your affairs after you pass away and names who will inherit your assets after your death.

A probate court typically administers this process, but most states have a non-court process in place for small estates (known as "informal probate"). A will first gives instructions to an executor to pay the expenses of your last illness, funeral expenses, unpaid taxes and other debts, and then tells the executor about who will inherit your assets and what assets they will inherit.

Most wills for larger estates go through the court-administered process called "probate" (also known as "formal probate"). During this process, the court determines if your will is valid, hears any objections to it and appoints your executor (usually the person you name), and then monitors the executor until all your debts are paid and your assets delivered to your heirs.

### Wills do have limitations.

- ▶ You have to review them regularly to make sure they reflect your current wishes.
- ▶ Not all your assets are covered if they pass outside of probate. Accounts that have beneficiary designations (such as retirement accounts and insurance policies) are not governed by the terms of your will. They go outright to whoever is named as the beneficiary. It is important to make sure your beneficiary designations on these types of accounts are up to date.
- ▶ The probate process can take a long time, often over a year from start to finish.
- ▶ While some probate fees are fixed, probate usually requires that your estate have a lawyer to take the estate through the legal process, and there can be extraordinary services that cost extra, and the costs are deducted from the estate principal.
- ▶ They don't help you if you are disabled or in need of care.

**Caution:** Without a will, you die "intestate," and the court decides what happens to your assets based on the way the law instructs. This is called "intestate succession" and might mean your assets go to people, or in ways, that you would not want.

### Trusts

So how is a trust different? A trust is a contract between you and a "trustee," usually a person or company you know and trust. The trustee holds title to the property you give the trustee in trust and administers it in accordance with the terms of the contract for the benefit of the beneficiaries of the trust. The property can be almost anything you own – money, your home and other real estate, stocks, bonds, business ownership, collections and other personal possessions.

When you create a trust, you are the "settlor." The property in the trust is managed by the trustee you name in the agreement. Though your assets are placed in trust, they don't change location; they just change owner – the John Smith trust, not John Smith.

Most people set up a form of trust called a "revocable living trust." In a revocable living trust, you typically name yourself as trustee, so you can control your trust's assets until you are no longer capable of managing your affairs due to disability or death, at which time the person or company you named to be your "successor trustee" takes over. If you don't make the trust non-amendable, you can reserve the right to change the terms and beneficiaries as long as you are competent.

### Why do people choose a trust?

The most common reason is to keep their property from being administered by the probate court after they die. However, a more important reason is that if you, as a beneficiary, become disabled, your trustee can take over the management of your affairs at once without needing to go to court to ask for permission or without having to rely on other documents you have in place, such as a power of attorney. There can also be tax benefits available through a properly structured trust following your death.

Most people have both a will and a trust because the will covers property not placed in the trust and can leave that property to the trust. You still need to nominate a guardian for minor children, and there are other important documents you should

consider, such as a power of attorney for health care and funeral instructions. It is all part of a carefully thought-out estate plan, and it is never too early to plan, only too late.

Whether a trust-centered estate plan or a simple will is the right arrangement for you is something that you should decide with the assistance of a qualified estate planning attorney.

*Opinions expressed are not necessarily those of CNB. The information is provided without warranty and no recommendation or endorsement by CNB is intended or should be inferred unless specifically stated.*

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### Carla L. Furuno, CIMA®, CPWA®

Senior Vice President  
Regional Manager, Private Banking

Carla Furuno manages City National Private Banking in the San Diego and Orange County region, leading a team of skilled professionals who provide holistic wealth management and banking solutions to high net worth individuals and their families, professional firms, real estate investors and non-profit organizations.

Ms. Furuno holds Certified Investment Management Analyst and Certified Private Wealth Advisor designations as well as certificates in Personal Financial Planning and Advanced Portfolio Management. She earned a Master's Degree in Business Administration from Pepperdine University. To contact Ms. Furuno, call 949.223.4047.



### City National Bank

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# Business Leaders and Girl Scouts Invest in Girls

*Imagine a future where every girl grows up with the confidence and skills to be a change maker*

Orange County's business community understands the importance of investing in the next generation of female leaders— and Girl Scouts is leading the charge. Girl Scouts is the expert in providing girls of every age with life-changing skills and experiences to use the G.I.R.L. (Go-getter, Innovator, Risk-taker, Leader)™ within to take action and enhance countless lives and communities.

### Girl Scouts Works!

- ▶ 52% of all businesswomen in the United States were Girl Scouts
- ▶ 53% of female business owners were Girl Scouts
- ▶ 77% of girls say that, because of Girl Scouts, they are considering a career in technology

### Securing a Strong Future for OC Girls

Opening in 2017 in Newport Beach's Marina Park is the Argyros Girl Scout Leadership Center, named after philanthropist and community leader, Julia Argyros. The Leadership Center will serve as Orange County's hub for Girl Scout STEM (Science, Technology, Engineering and Math) programs and welcome nearly 21,000 OC Girl Scouts from all cultures and backgrounds. Girls will explore diverse careers and learn how they can take action to make the world a better place – all while creating lifelong memories and enjoying the waterfront surroundings and activities.



At the heart of the Leadership Center is INSPIRE, Girl Scouts of Orange County's signature multimedia program, through which girls virtually meet extraordinary women spanning diverse careers and learn the vital role STEM plays in what they do. Girls will also hear from distinguished Girl Scouts, trailblazers across the nation, who have taken action using STEM skills to change the world – **and learn to do it themselves.**

For information about sponsor/donor opportunities, contact Michelle Dramé, at [mdrame@girlscoutsOC.org](mailto:mdrame@girlscoutsOC.org).

### Celebrating Female Leaders

Girl Scouts of Orange County's eighth annual Celebrate Leadership event will recognize outstanding local leaders, all Girl Scout alumnae, who are making a



2016 Celebrate Leadership Honorees (from left): Ellen S. Bancroft, Kelly Vlahakis-Hanks, Karen Caplan, Jackie Caplan Wiggins, Socorro Vasquez, Mary "Muff" Tennyson, Lucy Dunn, Girl Scouts of Orange County CEO Nancy Nygren

difference in our community and raise funds for transformational Girl Scout programs. Celebrate Leadership will take place on Friday, November 10 at The Island Hotel in Newport Beach. Honorees will be announced soon! Find out more at [GirlScoutsOC.org/CelebrateLeadership](http://GirlScoutsOC.org/CelebrateLeadership).

For more information about Girls Scouts of Orange County's upcoming events, or to volunteer or make a donation, visit [GirlScoutsOC.org](http://GirlScoutsOC.org).

# Congratulations!

## Congratulations to the 2017 Women in Business honorees and nominees.

Orange County's nearly 21,000 Girl Scouts thank you for demonstrating courage, confidence, and character and for inspiring them to become the next generation of female leaders!

Invest in Girls.  
Change the World.  
[www.GirlScoutsOC.org](http://www.GirlScoutsOC.org)



## UCI Paul Merage School of Business

# UCI's LIFEvest Financial Literacy Program Empowers Teens From Underserved Communities With a Pathway Out of Poverty

What started as a one-week pilot program on financial literacy has blossomed into a highly sought after summer residential for underserved ninth and tenth grade boys and girls from Southern California. This year will be no exception, as the Center for Investment and Wealth Management (CIWM) at UC Irvine's Paul Merage School of Business gets underway with plans for the seventh annual LIFEvest Financial Literacy Summer Residential Program scheduled to take place July 16-22 for 30 young men and July 30-August 5 for 30 young women.

"The primary purpose of our LIFEvest Financial Literacy program is to provide a foundation of financial knowledge, while creating an enjoyable environment and summer experience for our students," explained Andrew J. Policano, faculty director for the CIWM at the Merage School. "Each year has been a tremendous success, exceeding our expectations and those of the truly fantastic kids who attend."

Established by Mark Moehlman, managing director for Beacon Pointe Wealth Advisors and founding chair of the CIWM at the Merage School, the program was designed to instill a strong desire for understanding financial matters, encourage admission into a four-year college or university, and inspire confidence and success in all areas of life. "It is alarming to me that to this day students receive little to no formal training in money management. In fact, those we're targeting with this residential program will be the first in their families to go to college," said Moehlman. "I have a special place in my heart for the plight of our youth who do not know how to handle money and I'm thrilled this program has become so successful."

### Real-World Exposure

This year, students will tour Taco Bell headquarters and Pacific Alternative Asset Management Company (PAAMCO). In addition, the program features supplemental educational sessions on dressing and presenting oneself for success, a social etiquette dinner and myriad inspiring speakers, including a local Olympian and distinguished UC Irvine alumni.

During the six-day immersive program, students live in dorms on the beautiful UC Irvine campus. For most of these students, this will be the first time they have been away from their families, let alone spending a week in a college campus setting. They learn about basic budgeting, banking, credit and financial markets; all essential life skills that are not readily available to most youth. Classroom speakers and workshops are augmented by fieldtrips, corporate visits and fun events highlighting the college experience including cheering on UC Irvine sports



teams and athletes, building confidence on the agility ropes course and making lifelong friends.

### Program Support Crucial to Helping Students Excel

The cost for this once in a lifetime program is \$2,100 per student for the weeklong experience. Sponsorships and private donations support the program so it is provided completely free-of-charge for all accepted students. "Many of our sponsors have returned to support this special program year after year. They see the impact it has on the participants and want to continue to "pay it forward." We are always looking for new businesses and individuals to get involved, support the program and its students, and offer their facilities for some of our workshops and educational experiences," said Policano. "This will ensure the viability of the program and allows us to expand it so more deserving youth may participate."

A recent path-breaking gift in the form of an endowment from CIWM board member Pamela M. Adams will allow students from economically disadvantaged communities to attend the LIFEvest Financial Literacy Program for years to come. Says Adams, "My goal is to teach financial literacy to the point where students will, ultimately, earn enough money and learn how to invest it so that they have more to give."

Other recent generous donations from companies and individuals include Beacon Pointe Wealth Advisors, The Boeing Company, Charles Schwab Foundation, Duckworth Wealth Advisors, JP Morgan Foundation, US Bank Foundation, Pacific Life Foundation, Feyzi Fatehi, Dr. Christine Bren, Robert and Barbara Edmonds, O'Grady Foundation, Scheppe Family, Rick and Anne Keller, Ranney and Pricilla Draper, Affinity Investment Advisors, First Foundation Advisors, Dubchansky Family Foundation, Jordan and Dan Floriani and Taco Bell. A generous donation by PAAMCO in 2016 allowed the Center to expand LIFEvest from supporting 30 students to 60 students per year.

Each year, the program receives over 200 applications from our social impact organization partners in the community. The number of organizations has tripled since the program's inception and now includes: Big Brothers/Big Sisters, Boys and Girls Club of Central Orange Coast, El Viento, El Sol Academy, Kidworks, Operation Jump Start, Orange County Hispanic Chamber of Commerce, Project Hope Alliance, The Wooden Floor, Samueli Academy, Garden Grove Unified School District and the Santa Ana Unified School District.

To get involved or help sponsor a student, contact Lee Anne Maki at [lmaki@uci.edu](mailto:lmaki@uci.edu) or call 949.824.8470. To learn more about the program, visit [merage.uci.edu/events/merage/literacy](http://merage.uci.edu/events/merage/literacy).



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# DIAMONDS ARE A GIRL'S BEST FRIEND

by Lugano Diamonds

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Women are more financially independent than ever before and are making a statement about their ability and purchasing power by buying their own jewelry. They want not only their own selection and style, but they desire jewelry that compliments both their business attire and lifestyle. Beautiful jewelry is also tangible evidence of one's career success.

Lugano Diamonds has seen this international purchasing reality with many of their female clients who are demanding the highest quality stones, coupled with beautiful design and craftsmanship. After all, diamonds are a girl's best friend!

## Ring It On!

Women are so in control of their jewelry purchases that fewer men are buying engagement rings for their fiancées on their own. Today, many women are researching their ring style and design and the couple then comes in together to purchase the perfect ring. Who would not desire this 5.03 carat Oval Rose Cut Halo Ring with 418 round diamonds totaling 3.09 carats? Lugano has a large inventory of many sizes and styles of wedding rings and can also custom design to your budget.

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## What to Wear?

There are many social functions that requires one to look fabulous and successful, wherever they are. These Sliced Diamond Flower Earrings are perfect for spring and summer soirées from an off-the-shoulder casual dress to your classic wedding guest ensemble. This design has 17.36 carats of sliced diamonds set with 2.24 carats of round diamonds and 1.91 carats of rose cut diamonds.



## Celebrate With Style!

Women are purchasing beautiful jewelry to celebrate a work promotion, significant life milestone or even a special bonus. This 38.55 carats Mixed Color Rose Cut Diamonds by the Yard Necklace exudes success and makes a beautiful statement with a white silk blouse, cocktail dress or business suit.

Long diamond necklaces are elegant, tastefully subtle and versatile. Wear them as a single long chain that is on trend for the minimalist look. Double the chain in two and create a short collar and longer length. Mix it with a strand of pearls. You can also double or triple-wrap these necklaces and wear them as a shimmering bracelet. Evening event? Wear it draping down your back...



## Just Because.

Why wait to receive a taste of luxury when you know exactly what you want? Buy it because you like it. This Rose Cut and Brilliant Diamond Bangle with 7.9 carats of round diamonds set in Yellow Gold, goes from daytime to evening. Wear it with confidence knowing you earned it. Buy it, "just because."



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View Lugano Diamonds' stunning collection at the Grand Salon located at 620 Newport Center Drive, Suite 100, in Newport Beach, or at Lugano's Montage Laguna Beach Jewelry Salon, conveniently located within the resort at 30801 S Coast Hwy in Laguna Beach. For more information and pricing, please call 866.584.2666 or email [info@luganodiamonds.com](mailto:info@luganodiamonds.com). "Like" Lugano Diamonds on Facebook and follow them on Twitter and Instagram.



# BHINDI®

Bhindi Jewelers began its journey in 1929 in the Fiji Islands. Eighty-seven years, three generations and four store locations later, Bhindi Jewelers has become a household name and trusted source in the jewelry and timepiece industry.

With the firm belief that both a truly personal experience and high-end ambiance need not be mutually exclusive, Bhindi created a showroom that exemplified the marriage of these two principles. In March 2016, the flagship store in Artesia underwent a major renovation. The once 7,000-square-foot showroom now spans more than 17,000 square feet and boasts a market-leading collection of gold and diamond jewelry and luxury timepieces over two floors. Custom-built shop-in-shops within the showroom dedicated to six watch brands allow clients to immerse themselves in the individual brand experience. From its early years trading primarily in gold jewelry, to custom-designed diamond pieces, and now to high-end timepieces, the Bhindi brand has

undergone an evolution of luxury making it a one-stop shop for all clients looking for a truly upscale and intimate retail experience.

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- ▶ Omega
- ▶ Panerai
- ▶ IWC
- ▶ Hublot
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- ▶ Tudor
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# ORANGE COUNTY BUSINESS JOURNAL

## Presents 23rd Annual



- Kellie Aamodt** - UPS  
**Olivia Duane Adams** - Alteryx  
**Anne Albertine** - Del Taco Restaurants Inc.  
**Tina Aldatz** - Savvy Travelers  
**Gina Alshuler** - Rauxa  
**Paula Ansara-Wilhelm** - Surterre Properties / Bask Magazine  
**Dawn Antis** - Mom & Tot OC  
**Patty Arvielo** - New American Funding  
**Nazli Azimi** - Bioniz Therapeutics Inc.  
**Mary Ann Azzolina** - Surterre Properties  
**Katie Bayliss** - Dodge Probate - Trust Law Attorney  
**Margaret Bayston** - Laura's House  
**Jacqueline Beaumont** - Call & Jensen  
**Melissa Beck** - Big Brothers Big Sisters of Orange County and the Inland Empire  
**Shirin Behzadi** - Home Franchise Concepts  
**Pazit Ben-Ezri** - LulyBoo LLC  
**Kimberly Bernatz** - First American Trust Co.  
**Janie Best** - WHW  
**Diane Biagianti** - Edwards Lifesciences  
**Clare Bielecki** - Kitchell  
**Ashleigh Blatt** - Ashleigh Blatt  
**Cynthia Bobruk** - The Orange Catholic Foundation  
**Monica Bonakdar, MD** - Bonakdar Institute  
**Amber Bonasoro** - Berkshire Hathaway HomeServices California Properties  
**Marla Borokoff** - Balloonzilla  
**Sherry S. Bragg** - Weintraub Tobin  
**Adrienne Brandes** - Surterre Properties  
**Marcia Brashier** - Villa Real Estate  
**Caroline Callaway** - Bolt Public Relations  
**Rita Campbell** - Global Media Group  
**KaSondra Carver** - R.J. Noble Co.  
**Zara Cerni** - Physicians Center For Renewal  
**Kimberly Chase** - Haynes and Boone LLP  
**Dr. Seema Choudhary** - Montessori Funtime Preschool  
**Claudia Chyang** - International Home Realty  
**Ronda Clark** - JLL  
**Sally Newell Cohen** - Toastmasters International  
**Dr. Amy Osmond Cook** - Osmond Marketing  
**Kristin Daher** - Powerhouse Communications  
**Ladan Davia** - Beeya  
**Laura Davick** - Crystal Cove Alliance  
**Brittany Davis** - Surterre Properties  
**Sara D'Elia** - The REMM Group  
**Carol DeNembo** - Juice It Up!  
**Laura DeSoto** - Experian  
**Tamara Devitt** - Haynes and Boone LLP  
**Deborah Dickson** - Smith Dickson an Accountancy Corp.  
**Kate Duchene** - RGP
- Rhonda Ducote** - Apriem Advisors  
**Christa Duggan** - Portola Coffee Lab  
**Jamie Duran** - Coldwell Banker Residential Brokerage  
**Jodi Duva** - Cox Business  
**Laurie Eastman** - Surterre Properties  
**Neda Eaton** - Irvine Public Schools Foundation  
**Barbara Eidson** - Island Hotel Newport Beach  
**Jami Eidsvold** - Smarty Social Media  
**Lauren Ellermeyer** - Beyond Fifteen Communications Inc.  
**Kelli Ellis** - Kelli Ellis Interiors LLC  
**Kianna Estenson** - Health 2 Humanity  
**Shannon Eusey** - Beacon Pointe Wealth Advisors  
**Amanda Ferrari** - St. Joseph Health  
**Amanda Ferris** - Hart  
**Janelle File** - Surterre Properties  
**Lara Fisher** - South County Outreach  
**Trina Fleming** - WHW  
**Rebecca Flood** - New Directions For Women  
**Suzette Ford-Duffus** - American Heart Association  
**Shirin Forootan** - Call & Jensen  
**Jennifer Friend** - Project Hope Alliance  
**Carla Furuno** - City National Bank  
**Dr. Zena Gabriel** - ZENA Medical  
**Donna Gallup** - American Family Housing  
**Erin Gargan** - Socialite Agency  
**Eulyynn Gargano** - FutureWise Consulting  
**Dr. Leslie Gargiulo** - California Intercontinental University  
**Erin Giglia** - Montage Legal Group  
**Loren Gilbert** - WealthWise Financial Services  
**Estelle Toby Goldstein, MD** - New Day Psychotherapy Group  
**Liz Goodgold** - RedFire Branding  
**Cindy Goss** - Propel Business Solutions Inc.  
**Anne Grey** - Alzheimer's Association Orange County Chapter  
**Jill Griffin** - Advantage Marketing Partners  
**Jamie Gwen** - Tastebud Entertainment Inc.  
**Holly Hagler** - SeniorServ  
**Carol Halesworth** - Stampington & Co. Publishing  
**Kaaren Hall** - uDirect IRA Services  
**Rebecca Hall** - Idea Hall  
**Kristin Halton** - The Halton Group  
**Heidi Hendy** - H. Hendy Associates  
**Susan Hensey** - Little  
**Alix Hobbs** - Crystal Cove Alliance  
**Danielle Horton** - Urban Produce  
**Stacy Hubbard** - Marsh & McLennan Agency  
**Jo-E Immel** - Snyder Langston  
**Karen Inman** - Antis Roofing & Waterproofing  
**Michele Johnson** - Latham & Watkins



### Luncheon & Awards Program

May 2, 2017  
12:00 p.m - 2:00 p.m.  
Hotel Irvine

**\*Tickets: \$160 / Table of Ten: \$1500**

\*Tickets are non-refundable. Ticket price includes self-parking and a one-year subscription to the Orange County Business Journal (\*\$30 allocated to the subscription) New subscribers only.

### Reservation Information

Visit [www.ocbj.com/bizevents](http://www.ocbj.com/bizevents) or contact Jayne Kennedy at 949.833.8373 x 209 or [kennedy@ocbj.com](mailto:kennedy@ocbj.com).

# Congratulations 2017 Nominees!



**Patty Juarez** - Wells Fargo  
**Natalie Julien** - Thomas House Shelter  
**Pamela Jung** - Healthcare Talent and Workforce Solutions Group  
**Manna Kadar** - Manna Kadar Cosmetics  
**Dee Cohen Katz** - Walsworth  
**Hilary Kaye** - HKA Inc. Marketing Communications  
**Shannon Kennedy** - BNY Mellon Wealth Management  
**Julie Kidd** - FunnyMom Productions aka Funniest Housewives  
**Cathi Killian** - Disneyland Resort  
**Robin King** - Zip2Media  
**Stacie Kitts** - Haskell & White LLP  
**Stacey Kumagai** - Media Monster Communications Inc. / Linkronicity  
**Josephine Lee** - The Pointe Shop  
**Julie Leffler** - Big Hype Marketing  
**Adriana Leite** - Century 21 Masters  
**Susan Levinstein** - HMWC CPAs & Business Advisors  
**Jeannie Lorin** - Beauty Society  
**Michele Marckesano** - Ten-X  
**Debra Marsteller** - Project Independence  
**Melissa Mauricio** - Cushman & Wakefield  
**Christine McCauley** - Edwards Lifesciences  
**Stephanie McCormick** - Make-A-Wish OC & the Inland Empire  
**Stacy McKellar** - Surterre Properties  
**Nicole McMackin** - Irvine Technology Corp.  
**Shachi Mehra** - ADYA  
**Celin Miller** - GGG Demolition Inc.  
**Cassandra Miller** - See Jane Go Inc.  
**Alana Mitchell** - Alana Mitchell Skincare & Skincare By Alana  
**Renita Mollman** - Burns & McDonnell  
**Kelly Moore** - Moore Benefits  
**Susan Morehead** - Optima Asset Management Services  
**Darlynn Morgan** - Morgan Law Group  
**Dr. Sandra Morgan** - Vanguard University  
**Helen Norris** - Chapman University  
**Anoosheh Oskouian** - Ship & Shore Environmental Inc.  
**Anya Ostry** - Cushman & Wakefield  
**Neha Patel** - DealerSocket  
**Danette Perkins** - Allied Universal  
**Melissa Pollard** - Comerica Bank  
**Jenn Quader** - Brower, Miller & Cole  
**Sunny Rajab** - Business Communications Solutions  
**Natalie Raney** - Villa Real Estate  
**Dawn Reese** - The Wooden Floor  
**Suzanne Richards** - KPC Healthcare Inc.  
**Maricela Rios-Faust** - Human Options  
**Jodi Ristrom** - HMWC CPAs & Business Advisors  
**Kelly Roberts** - Entrepreneurial Corporate Group  
**Laura Roche** - Villa Real Estate

**Liz Ryan** - Surterre Properties  
**Talia Samuels** - Outshine Public Relations  
**Kathryn Seebold** - CASA of Orange County  
**Shelly Sennikoff** - THINK Together  
**Guita Sharifi** - AIDS Services Foundation Orange County  
**Heather Marie Shelly** - About Senior Living  
**Anna Shi** - Ever-Pretty  
**Gretchen Shoemaker** - Georgia's Restaurant  
**Sandra Sholl** - MadaLuxe Group  
**Maura Short** - Compass  
**Angela Sinickas** - Sinickas Communications Inc.  
**Alexandra Spitz** - The New Mom School  
**Shana Spitzer** - Villa Real Estate  
**Cristen Stapp** - Kitchen Table Marketing + PR  
**Carolyn Stephens** - UCI Institute for Innovation  
**Paula Steurer** - Sterling Public Relations  
**Jennifer Stewart-Tai** - City Girl Prepper  
**Susie Storey** - DealerSocket  
**Eliisa Stowell** - Surterre Properties  
**Mary-Christine "M.C." Sungaila** - Haynes and Boone LLP  
**Nicole Suydam** - Second Harvest Food Bank of OC  
**Naz Tadjbakhsh** - Artemis Search Partners  
**Krista Thompson Talley** - Dolly's Cotton Candy  
**Betsy Thagard** - B. toffee LLC  
**Jacqueline Thompson** - Surterre Properties  
**Jessica Thompson** - Spaulding Thompson & Associates  
**Lori Torres** - Parcel Pending  
**Cheri Tree** - BANKCODE  
**Mei Tsang** - Fish & Tsang LLP  
**Dr. Betty Uribe** - California Bank & Trust  
**Carla Vargas** - Orange County United Way  
**Cathy Volpe** - HB Staffing  
**Tusdi Vopat** - Cylance  
**Victoria Vu** - VF Developments  
**Tracy Weintraub** - Surterre Properties  
**Jamie Welsh** - West of 5 Studios  
**Brenda West** - RAJ Swim / SwimSpot  
**Esther Wildenberg** - BANKCODE  
**Carrie Williams** - Kitchen Table Marketing + PR  
**Robyn Williams** - WHW  
**Genine Wilson** - Kelly Services Inc.  
**Diane Wittenberg** - Haskell & White LLP  
**Yvonne Wonder** - Destination Sitters LLC  
**Dr. Tammy Wong** - Fostering Executive Leadership Inc.  
**Karen Wood** - Irvine Barclay Theatre  
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**Christina Zabat-Fran** - St. John Knits Inc.

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## 2017 Women in Business Nominees

### **Kellie Aamodt, VP of Sales, UPS West Region UPS, Anaheim**

Kellie Aamodt started with UPS as an international account executive in 1991 in the Minnesota District. Aamodt took on many assignments and rose through the supervisor, middle manager ranks and was promoted as her first director assignment in Houston, Texas. After five years, she was transferred to director of sales in Ontario, CA. She was then transferred to the corporate office in Atlanta, GA to handle the growth activities throughout the U.S. In three years, she returned to California as the managing director of sales for UPS in the newly created Southern California district. In 2011, she was promoted to vice president of retail sales for UPS. In 2012, she was then transferred to Chicago as the vice president of the Central Region. In 2013, she was transferred back to her current position as vice president of the West Region where she is responsible for all sales activities within the western 22 states. United Parcel Service Inc. is the world's largest package delivery company and a provider of supply chain management solutions.



### **Olivia Duane Adams, Chief Customer Officer/Founding Partner Alteryx, Irvine**

At Alteryx's inception in 1997, Olivia Duane Adams, along with her co-founders, knew they could make a difference in the self-service analytics sector. Today, the company enables access to business answers through data with software that provides business analysts with easier, faster and more affordable agile technology. In her role, Adams is responsible for overseeing and maximizing the complete Alteryx customer experience, from engagement to on-boarding, communications, performance and retention. She has interacted with nearly every Alteryx customer, giving her a holistic perspective of the overall experience from implementation to adoption success. With a customer satisfaction score of 95%, the importance of the customer experience is truly a cross functional responsibility at Alteryx owned by all teams. The co-founders have always focused on the customer as the most important asset, next to their employees, and they pass that message on every day.



### **Anne Albertine, Director of Research & Development Del Taco Restaurants Inc., Lake Forest**

From tennis shoes to tacos, Anne Albertine has made an indelible mark over the course of her career in the field of research and development (R&D). Today, Albertine leads the evolution behind the menu of Del Taco, one of Orange County's most iconic brands. With more than 25 years of experience in product and culinary development, Albertine's portfolio ranges from product development of footwear for Nike to menu ideation for familiar restaurant brands such as Taco Bell, Pick Up Stix and IHOP. Attracted to Del Taco for its fresh prep approach to operations not typical of quick service restaurants, Albertine joined the team in 2014 with the responsibility of reinvigorating the menu and making the brand's "UnFreshing Believable" promise come to life through food. Since then, she has improved the restaurant's core ingredients and supplier relations, introduced new processes that create symbiosis between operations, marketing, and R&D initiatives, and innovated several of Del Taco's new, top-performing menu items, including its bestselling menu item of all time, The Del Taco, launched in 2016.



### **Tina Aldatz, CEO/Co-Founder Savvy Travelers, Laguna Hills**

Tina Aldatz grew up in a socioeconomically disadvantaged household filled with domestic violence, alcohol/drug and child abuse. As a pediatric burn survivor, Aldatz turned tragedy into a success story. In 2001, Aldatz founded Foot Petals, an insole company, with Margarita Floris that they later sold for \$14 million in 2011. Foot Petals was then recognized by *Inc.* 500 as one of the 500 Fastest-Growing Companies in America. She has been featured on media outlets such as *Entrepreneur*, *Huffington Post*, *LA Times*, *CNN* and *Forbes*. In 2014, she started Savvy Travelers, designer beauty wipes that are curated for the on-the-go travelista. Savvy Travelers offer products in convenient kits and single-use packets that are disposable, eco-friendly and made in California. In 2015, Comerica Bank's Women's Business Awards gave Aldatz the Woman of Entrepreneurship Award. Aldatz also won the National Latina Business Women Association's Business Woman of the Year.



### **Gina Alshuler, President/CEO Rauxa, Costa Mesa**

Gina Alshuler has been an integral part of Rauxa for more than 16 years. Specifically, she has played a key role in transforming the agency from a pure direct response shop to an integrated marketing agency offering digital, media, research and technology solutions to a variety of Fortune 100 clients such as Gap Inc. Alshuler has held various roles, including president, senior vice president of account services, account director and account manager, having worked her way up the ranks since first joining the company in 2001. In 2015, she was promoted to chief executive officer. Year over year, under Alshuler's



leadership, the agency has experienced consistent and dramatic revenue growth. Central to this is Alshuler's direct role in upholding and growing relationships with the agency's most critical clients. She is responsible for business growth that required the agency to expand its footprint across the U.S. – opening offices in Atlanta and New York.

### **Paula Ansara-Wilhelm, Co-Founder Surterre Properties/Bask Magazine, Newport Beach**

Many describe Paula Ansara-Wilhelm as a "serial entrepreneur," able to identify emerging trends and create solutions for industry challenges. Ansara-Wilhelm created a "virtual ad agency" to service businesses that couldn't afford the traditional model – which allowed her the freedom and flexibility to raise her son. She co-founded Surterre Properties in 2006, the leading luxury real estate firm headquartered in Newport Beach with offices in Laguna Beach, Corona del Mar, Monarch Beach, San Clemente and Irvine. Ansara-Wilhelm has developed and managed the company's branding efforts and works closely with Surterre's top agents throughout the competitive Orange County luxury marketplace. Under her leadership, Surterre Properties has grown to more than 400 agents and \$10 billion in sales in one of the most challenging real estate markets in history. In 2010, she also launched and had the creative vision for *Bask Magazine*, a luxury lifestyle publication.



### **Dawn Antis, CEO/Founder Mom & Tot OC, Irvine**

Mom & Tot OC is the first and only mommy-and-me program in Orange County that caters to toddlers. Dawn Antis provides an informal and relaxing space for moms and their little ones by holding the classes in her baby-proofed home. More than 100 moms, 70 toddlers and 24 sets of twins or triplets have completed her program, which is recognized by the *OC Register* as a local resource that helps connect parents living in Orange County. To grow her business, Antis began blogging for Mom & Tot OC, which landed her a position at *OC Family* magazine as a contributing writer. She's had several articles published in *OC Family*, *OC Register*, *Coast* magazine and *The Toronto Star*. Antis was appointed by Irvine City Councilwoman Melissa Fox to serve on the Irvine Child Care Committee. She's also on the board of directors for Valiant Women of Mission Hospital and the Saddleback Mothers of Multiples Club.



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

Patty Arvielo co-founded New American Funding in 2003. In the past 14 years as president, Arvielo has worked diligently to transform the mortgage banker into a national mortgage lender and servicer that funds more than \$1 billion in home loans each month. Under her guidance, the company has brought the entire loan process in house – origination, processing, underwriting, funding and servicing. She continues to manage operations and sales for New American Funding's headquarters, 130+ branches and 2,400+ employees. Honored as a 2016 EY Entrepreneur of The Year® Orange County and by the *LA Times* Latinos de Hoy Awards, Arvielo is a first generation Latina with 30+ years of experience in the housing industry and a lifetime of dedication to serving the Hispanic community.



### **Nazli Azimi, Founder/President/CEO Bioniz Therapeutics Inc., Irvine**

Dr. Nazli Azimi is founder and CEO of Bioniz Therapeutics Inc., a biopharmaceutical company that is dedicated to the discovery and development of novel therapeutics to treat autoimmune diseases and some forms of cancer. Azimi is also the co-inventor of the company's platform technology. This technology enables development of pluripotent drugs that are safer, more potent and less expensive than currently marketed medicines. Bioniz has obtained FDA approval to conduct clinical trials for its first investigational drug for the treatment of a type of aggressive blood cancer. Bioniz's second drug candidate is for the treatment of celiac disease that will enter clinical trials next year.



### **Mary Ann Azzolina, Real Estate Agent Surterre Properties, Dana Point**

Mary Ann Azzolina has become one of the most respected agents in the South Orange County real estate industry due to her commitment to going above and beyond for her clientele. Azzolina was looking for a career that would support raising her three children as a single mother. Azzolina became a licensed real estate agent in 2002 working for Prudential California Realty. She worked full-time as a real estate agent, while also working as an administrative manager for a small company to ensure she had a consistent income and benefits for her family as she grew her business. Azzolina later joined Surterre Properties®. To date, 2016 was her best year in the real estate market. Her recent accomplishments include winning the Award of Excellence with Surterre Properties® in 2016. Surterre Properties is a leading luxury real estate firm headquartered in Newport Beach.



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- Senior Mobility Programs
- Identity Theft Protection\*
- Member discounts on dining, shopping, entertainment and travel



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## 2017 Women in Business Nominees

### **Katie Bayliss, Founding Partner Dodge Probate - Trust Law Attorney, Irvine**

Dodge Probate - Trust Law Attorney is a law practice focused on estate planning, business law and real estate law. It was founded by attorney Katie Bayliss after a near-death experience while giving birth to her second child that could have caused her to lose everything that she and her husband have worked so hard for – their home, businesses and every dollar of savings. She came to realize how fragile life can be and how circumstances can change instantaneously. Most importantly, Bayliss learned how imperative it is to have a documented plan that protects yourself, your family and your assets. At Dodge Probate, and at the heart of Bayliss's mission as a parent, is a focus to help serve families with young children plan for the unexpected. The company's team provides premium legal services with customized and personalized drafting for the needs of each family. Bayliss is a member of WealthCounsel, an elite national organization for estate planners, as well as a member of the Trust and Estates Section of the Orange County Bar Association.



### **Margaret Bayston, CEO/Executive Director Laura's House, Ladera Ranch**

Since joining Laura's House as CEO/executive director in 2001, Margaret Bayston has helped more than 50,000 women and children escape domestic violence. Under Bayston's direction, the organization has expanded its focus, creating greater awareness of teen dating violence through its innovative program, H.E.A.R.T (Healthy Emotions & Attitudes in Relationships Today). By providing expert guidance, unique start-to-finish legal services, hospitable emergency shelters and educational programs, Bayston has been instrumental in the success of the nonprofit. Bayston's position requires relationship building to achieve high-level fundraising, and she has excelled in that arena as the face and heart of Laura's House. She has spearheaded valuable partnerships with major enterprises, including Urban Decay and See Jane Go. She oversees the popular Laura's House Annual Gala and has been instrumental in bringing social enterprise to the organization, with the opening of two resale stores that have raised significant funds to help the nonprofit pursue its mission to end domestic violence.



### **Jacqueline Beaumont, Shareholder Call & Jensen, Newport Beach**

Jacqueline Beaumont is an experienced employment litigator who has been recognized for her work representing corporate clients in all aspects of employment law and legal advising. She is a shareholder at Call & Jensen, where she has built a practice defending employers in high stakes employment lawsuits, handling a range of matters, including state and federal anti-discrimination, wage and hour, and employee class action lawsuits. She has successfully represented clients in hundreds of legal matters, obtaining trial verdicts, settlements and victories in and outside the courtroom. Beaumont is a leader outside the office as well, co-chairing the Orange County Bar Association's Mommy Esquire Committee; and serving the community through involvement with Girls Inc., WHW, Public Law Center and student moot court competitions. She was selected as a *Super Lawyers'* Southern California Rising Star from 2012 through 2017 for excellence in the practice of law, and has been repeatedly awarded for her pro bono accomplishments.



### **Melissa Beck, CEO Big Brothers Big Sisters of Orange County and the Inland Empire, Santa Ana**

As CEO of Big Brothers Big Sisters of Orange County, Melissa Beck plays an important role in providing youth facing adversity with one-to-one mentoring relationships. Because of her progressive leadership, revenue has doubled since 2013 and the program has made an impressive impact on youth in the community: 99% graduate from high school on time and 89% enroll in college. Beck continues to advocate on behalf of the 3,339 youth the agency serves annually and this year, led OC to become the first in California to expand its program to age 25. Her dedication and passion for the cause are reflected in the agency's major successes, including a top-three ranking among 300 affiliates; a national Board of Directors of the Year Award; and purchasing a 52,500-square-foot building, allowing for expansion of services and the ability for Big Brothers Big Sisters to invest in itself for years to come.



### **Shirin Behzadi, CEO Home Franchise Concepts, Orange**

From her start as a consultant in 1999, Shirin Behzadi has grown Home Franchise Concepts (HFC) to become the top-selling family of direct-to-consumer brands in the home goods and services space and one of the world's largest franchisors. HFC's three retail brands, Budget Blinds®, Tailored Living® and Concrete Craft™, are consistently rated at the top of their categories and supported by 1,300 franchisees in the U.S., Canada and Mexico. As HFC CEO, Behzadi is responsible for expanding the HFC brand family by leveraging her financial, operational and franchising experience, and her personal



passion for helping franchisees realize their dreams. She is now leading HFC on a company-wide initiative to grow installations to record levels in its 25th anniversary year of 2017 – which, for Budget Blinds, means 2.6 million window-covering installations at 50,000 per week. She also projects HFC brands to be operating in more than 9,000 North American cities by the end of the year.

### **Pazit Ben-Ezri, Founder/CEO LulyBoo LLC, Lake Forest**

Pazit Ben-Ezri is an Israeli-born visionary whose story embodies the American Dream. Determined to achieve her business goals and give her family the best opportunity to succeed, Ben-Ezri eventually settled in Orange County. In 2006, after giving birth to her second child, Ben-Ezri realized the only place he would sleep was in the comfort of his own crib. This was frustrating for Ben-Ezri, who was active in her community and enjoyed spending time with her family outside of the house. After failing to find an answer to her son's sleeping issues, Ben-Ezri rolled up her sleeves and created a solution of her own. The final product was her signature LulyBoo baby lounge; a versatile, portable solution that mimics the comfort and feeling of the womb for baby, while seamlessly and in one click, transforming into a backpack. That lounge started Ben-Ezri's company, LulyBoo, which now sells baby travel products all around the world.



### **Kimberly Bernatz, SVP/Director of Wealth Management, Advisory Services First American Trust Co., Santa Ana**

A dynamic leader with more than 20 years of financial services experience, Kimberly Bernatz has worked with high-net-worth individuals, families and foundations in the areas of estate and charitable planning, investment management, retirement planning and real estate. In her current role at First American Trust, a wholly owned subsidiary of First American Financial Corp. (NYSE: FAF), Bernatz oversees an organization that administers approximately \$3 billion in assets. She has remained a steady leader for her clients during periods of economic uncertainty and serves as a member of First American Trust's Officer's Trust and Investment Committee and its New Business Acceptance Committee. An active volunteer in her local community, Bernatz is chairman and CEO of the Philharmonic Society of Orange County, past chairman of the board of Pacific Chorale, founding member of UCI's Paul Merage School of Business Center for Investment and Wealth Management, and is on the Advisory Council of the Assistance League of Newport Mesa.



### **Janie Best, CEO WHW, Santa Ana**

Janie Best became the chief executive officer of WHW in 2011. In that time, the organization has grown from serving just over 1,500 clients annually to nearly 10,000 annually. The annual operating budget has doubled during that time, while eliminating dependence on government funding and increasing privately raised funds. Best has been instrumental in authoring and implementing a comprehensive strategic plan, which has resulted in dramatic growth, increased visibility and overall impact. WHW is a nonprofit that provides the unemployed and underemployed the skills and resources they need to get and keep a good job.



### **Diane Biagianti, VP/Chief Responsibility Officer Edwards Lifesciences, Irvine**

Since joining Edwards Lifesciences in 2011, Diane Biagianti has driven the company's global ethics, compliance and sustainability efforts to be best-in-class. Her leadership has contributed to a strong culture of integrity, honesty and fairness among the company's global employees, who hold themselves to the highest ethical standards. She is also a recognized leader in the medical technology industry, testifying for the successful implementation of U.S. physician payment disclosure law for which she received PwC's Award for Leadership in the Advancement of Ethics in 2013. Additionally, Biagianti has elevated sustainability at Edwards, stewarding goals, leadership engagement and robust global reporting efforts, which led to the company being named a World's Most Ethical Company by Ethisphere Institute and one of the Top 100 Most Sustainable Corporations in the World by Corporate Knights at the World Economic Forum in 2017. Edwards Lifesciences is the global leader in patient-focused medical innovations for structural heart disease, as well as critical care and surgical monitoring.



### **Clare Bielecki, Business Development Manager Kitchell, Tustin**

In her position at Kitchell, a construction management firm with a local office based in Tustin, Clare Bielecki identifies and develops new project opportunities for the Southern California region. Her territory includes all of the SoCal counties, where she searches out and establishes contact with targeted leads for new business, develops client and project-related information to allow strategy formulation for a successful marketing and pre-positioning approach. In addition, she



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coordinates follow-up with clients and business contacts in pursuing specific project opportunities. Kitchell's expertise in the CM delivery method extends to early days, when founder Sam Kitchell realized the niche of providing overall construction management services. Many owners didn't want the headache of overseeing major construction initiatives, and Kitchell was ideally suited to provide expertise throughout the entire project lifecycle – from siting, planning, and overseeing construction to final walk-through and grand opening.

### **Ashleigh Blatt, Online Business Manager/Motivational Strategist/Podcaster** **Ashleigh Blatt, Newport Beach**

Revenue and priority-driven, Ashleigh Blatt has been called "the heartbeat of the organization." She harnesses her expertise inside an organization and maximizes it with online marketing channels to generate multiple income streams for celebrities, experts and small businesses. Part motivator and part organizational engineer, as an online business manager (OBM), Blatt serves as a "right hand man" with a pragmatic approach that empowers teams through her ability to quickly identify viable solutions that net results. Equally important, she is also an authority on increasing revenue by creating strategic partnerships, advancing relationships and driving targeted online marketing campaigns, driving revenue for celebrities, experts and traditional business owners. Blatt is also a proactive advisor for women and mom entrepreneurs who are struggling with the delicate balance between being business owners and full-time moms. She champions their efforts and helps share their trailblazing stories on her podcast, *Mompreneur on Fire*.



### **Cynthia Bobruk, President/Executive Director** **The Orange Catholic Foundation, Garden Grove**

Cynthia Bobruk transitioned The Orange Catholic Foundation from its operation under the USCCB Group Rulings to a 501(c)(3) corporation. Bobruk has led the significant year-over-year increases of the fundraising and stewardship program, "Proud to be Catholic" Pastoral Services Appeal (PSA) for the Diocese of Orange. She initiated and ran the highly successful first-ever capital campaign, For Christ Forever, which has raised a record \$120 million from more than 24,000 participating individuals and families. Five years ago, Bobruk crafted a series of free information sessions led by Catholic estate planning attorneys and financial advisors now known as the Orange Catholic Foundation's Will and Trusts Weeks. These sessions, held each year in the spring and fall, have been attended by thousands of local individuals and families. Under her guidance, the Orange Catholic Foundation now manages more than 45 parish, school and ministry endowments as permanent restricted assets of the foundation, and offers planned giving programs and resources for the parishes, schools and the Diocese.



### **Monica Bonakdar, MD, Medical Director/Physician** **Bonakdar Institute, Corona del Mar**

As a physician, Monica Bonakdar's goal is to be an early adopter and an expert of new and safe technologies in the aesthetic arena, and to provide clients ongoing correction, maintenance and preventative aesthetic treatments. Through dedicating her entire practice to cosmetic dermatology and letting go of general medicine and general dermatology, the depth of Bonakdar's experience surpasses many of her colleagues. Bonakdar does approximately 40,000 units of Botox and 1,000 syringes of fillers every year. She has also developed an exclusive non-invasive face lifting and neck lifting filler technique, called AmpliPhi, with results unlike any other treatment. Bonakdar's success is due to her unrelenting determination and drive to achieve her goals; she has never let society's expectations of a woman from a third world country dictate what she settles for.



### **Amber Bonasoro, Director of Marketing** **Berkshire Hathaway HomeServices California Properties, Newport Beach**

Amber Bonasoro oversees the marketing, development and creative direction of Berkshire Hathaway HomeServices California Properties. With annual sales of \$12 billion and 3,000 real estate agents, the company is nationally ranked as a Berkshire Elite Brokerage and in the Ten-K Club, an award given to companies who closed a minimum of 10,000 residential units in 2016. Bonasoro applies more than 11 years of experience in the Orange County market to increase brand awareness and implement marketing strategies to strengthen Realtors'® businesses. Bonasoro earned an MBA from Chapman University's George Argyros School of Business and Economics where she received a scholarship for her business leadership and entrepreneurial focus. A founding member of Orange County Young Professionals Network (OCYPN), she has held leadership positions and created a Playbook, used nationwide, to launch local YPNs. She is also a Big Sister with Big Brothers Big Sisters Orange County.



### **Marla Borokoff, CEO** **Balloonzilla, Irvine**

Marla Borokoff has been in the balloon industry for more than 12 years. She is the founder of Balloonzilla, and helped to create and teach many of the designs that

the company sells today. She has helped trained all of Balloonzilla's staff, in all departments. Borokoff is a member of the Qualatex Balloon Network, and is also a Certified Balloon Artist. Balloonzilla has grown from Borokoff's garage to a thriving business in Sky Park, near the John Wayne Airport with more than 20 employees. Balloonzilla has created more than 150 different balloon designs, decorated more than 2,500 venues and events, and have 700+ customers.



### **Sherry S. Bragg, Shareholder** **Weintraub Tobin, Newport Beach**

Prior to 2014, Sherry Bragg was managing partner of Newport Beach litigation firm Waldron Bragg. After Waldron Bragg merged with California firm, Weintraub Tobin Chediak Coleman Grodin, Bragg continued her firm leadership by becoming the sole female representative on the firm's board of directors. While on the board, Bragg was able to advocate for key initiatives that boosted client communication, training and staff morale. In 2015, she served as the law firm's first female administrative managing partner. In this role, she worked closely with the HR Department to focus on initiatives involving women and diversity for both attorneys and staff. Bragg's work on the board laid the foundation for a lasting commitment to diversity and inclusion. Out of the spotlight, Bragg mentors associates and encourages open, firm-wide communication. She is not only recognized as a leader within the firm, but within the Orange County legal community.



### **Adrienne Brandes, Real Estate Agent** **Surterre Properties, Newport Beach**

Adrienne Brandes has been helping clients find and sell luxury coastal homes for more than 25 years. She brings her vast business knowledge and negotiation skills to the real estate industry, utilizing her master's degree in counseling psychology and her experience running both a cosmetics business and a PR firm to help her close some of the biggest real estate deals in Orange County. Brandes has closed more than \$141 million in sales in the last three years, selling homes worth on average between \$5 million and \$7.5 million, and she has done it all on her own. She doesn't have a team helping her, as she prefers to give each client her individual attention and stay with them throughout the entire process. This is why she is considered one of Southern California's premier luxury real estate experts. Surterre Properties is Orange County's leading luxury real estate brokerage.



### **Marcia Brashier, Broker Associate** **Villa Real Estate, Newport Beach**

Marcia Brashier joined Villa Real Estate along with her husband Jim, a commercial broker, in October 2014. Brashier's business has grown with this affiliation, benefiting from its dynamic marketing and respected reputation, stellar ownership, staff, marketing and IT Department. Brashier has been an active broker in Newport Beach since 1982, successfully surviving all of the cycles of the economy during this time. Brashier attributes much of the longevity she's enjoyed to the positive relationships she's built with clients, colleagues and peers. Villa Real Estate was established in 2013 by the region's leading luxury residential real estate professionals to ensure that clients in Coastal Orange County receive the most strategic, innovative and effective representation available in today's market.



### **Caroline Callaway, President/Founder** **Bolt Public Relations, Irvine**

Caroline Callaway built Bolt PR from the ground up in 2007 and will celebrate 10 years in business in 2017. Callaway has worked with clients to drive long-term business growth in industries ranging from technology, travel, hospitality, and health and fitness, to education, retail, marketing and community service. During her career, Callaway has helped organizations appear on the front cover of magazines, on national morning and evening news programs, in newspaper business features and on high-profile news sites. Callaway's work has resulted in high-profile media placements in outlets such as *Buzzfeed*, *Forbes*, *New York Times*, *Wall Street Journal*, *Good Morning America* and *ABC World News*, to name a few. Bolt PR is a national public relations, marketing, events and social media agency with offices in Irvine, CA; Raleigh, NC; Dallas, TX; and Boston, MA.



### **Rita Campbell, President** **Global Media Group, Rancho Santa Margarita**

Rita Campbell founded Global Media Group 20 years ago, and has built a direct marketing advertising agency that parallels the person that she is. Her client relationships span decades in length. Her vendors are established, long-term partnerships. Her employees feel as if Global Media Group is a second family, whether they were hired 18 months ago or the dozen or so who have been with the company for more than 10 years. Campbell cares about people, and has the business sense and



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intuition that is the backbone of her company's success. But it is her personality, character and integrity that represent the true DNA of Global Media Group.

### **KaSondra Carver, Sales & Marketing R.J. Noble Co., Orange**

KaSondra Carver is responsible for the sales, marketing and public relations duties at R.J. Noble Co. For over 65 years, R.J. Noble Co. has been a steady leader in the Southern California asphalt industry. R.J. Noble has been a privately owned and operated business since 1950, with family members spanning over four generations working for the business. The company has completed numerous amounts of contracts with cities in Orange County and Riverside County. In 2016, R.J. Noble was awarded a contract with OCTA and Caltrans to remove and replace more than 100,000 tons of asphalt on the 91 Freeway Toll Lanes.



### **Zara Cerni, Health Coach/Patient Liaison Physicians Center For Renewal, Newport Beach**

Zara Cerni is currently aesthetic director and patient liaison at Physicians Center For Renewal, which she co-founded 10 years ago, with her husband, Dr. Michael Cerni. As a certified aesthetic consultant, it was Cerni's vision to provide wellness through nutrition and lifestyle modifications, along with cutting-edge aesthetic procedures to optimize health and appearance. Physicians Center For Renewal currently has locations in Newport Beach and Laguna Niguel. In addition to aesthetics, Cerni holds certification from the Inflammation Foundation in Anti-Inflammatory Nutrition founded by Dr. Barry Sears, author of *The Zone*. A significant part of Cerni's outreach includes giving lectures with her husband, providing the latest breakthrough trends in healthy lifestyle and fitness.



### **Kimberly Chase, Partner Haynes and Boone LLP, Costa Mesa**

Kimberly Chase is a skilled litigator, trusted advocate and community leader who is recognized by her clients and colleagues for her exceptional advocacy, work product and professionalism. Named a *Super Lawyers*' Rising Star from 2013 through 2017, Chase maintains a diversified practice that includes employment litigation and advice, copyright and trademark litigation, and commercial litigation. She has obtained favorable results for a number of Fortune 500 companies in wage and hour class actions, discrimination and harassment cases, and wrongful termination cases, and she provides employment advice and counseling on company policies and various employment compliance issues. She has also represented brand owners in prosecuting and defending copyright and trademark claims throughout the country. Finally, her commercial litigation practice includes all manner of contract disputes, fraud claims and complex business litigation in state and federal court. Haynes and Boone LLP is one of the American Lawyer top 100 law firms, with more than 575 lawyers in 15 offices and 40 major legal practices.



### **Dr. Seema Choudhary, Founder Montessori Funtime Preschool, Irvine**

In 2007, Founder Dr. Seema Choudhary moved from Boston to teach at the University of California, Irvine. Having children in preschool, Choudhary saw room for improvement in what could be taught to children at this level. Montessori Funtime Preschool started with one child and currently is offering its services to more than 70 families. The preschool now has two campuses in Orange County – Irvine and Lake Forest. Choudhary strongly believes in a whole family's involvement for a child's success. The right environment and resources play important roles in a child's development. Choudhary advocates whole-child development; Montessori Preschool follows a balanced curriculum with emphasis on academic skills, social interaction and appropriate behavior skills.



### **Claudia Chyang, Realtor International Home Realty, Irvine**

Claudia Chyang works tirelessly to assist her international clients in buying homes, businesses and leasing office space. She also helps them to assimilate into Southern California. Assisting in every aspect of this process, Chyang also helps clients enter their children into schools, open bank accounts, join groups and build local relationships. Chyang started in real estate in 2013, and since that time, she has helped 100+ clients. She also consults regularly with international banks, wealth managers and many others to understand the unique and challenging Southern California markets. With more than \$100 million in sales, Chyang is a force in the real estate market. International Home Realty provides realty services, serving clients worldwide in buying, selling and leasing residential and commercial real estate.



### **Ronda Clark, Managing Director JLL, Irvine**

Ronda Clark has been one of Southern California's most successful commercial real estate tenant representative brokers for the past 25 years. As JLL's managing director, Clark specializes in working with businesses on their real estate needs for both global multi-location operations and complex corporate regional or headquarters requirements. Her services include strategic real estate planning, portfolio optimization and reporting, transaction implementation including multi-city (regional, national and global), account operations development, financial, analytical, and operational project and portfolio impacts. In addition to working with her clients, Ronda serves as the Western Region lead representative for JLL's Integrated Portfolio Services' Council, a collaborative group dedicated to developing future best practices for client service and implementation and to assist with strategies to grow the firm's portfolio services business on a national level. JLL offers commercial real estate services for Orange County corporations and investors.



### **Sally Newell Cohen, COO Toastmasters International, Rancho Santa Margarita**

Sally Newell Cohen joined Toastmasters in 2009 as director of communications because she believed in the mission of helping people grow their communication and leadership skills. In 2013, Cohen was appointed chief operations officer, leading the teams responsible for educational development, research, global marketing, communications and meeting planning. While Toastmasters has a global footprint of 350,000 members in 135 countries, there are only 165 employees; it is powered by a workforce of 70,000 volunteers. Cohen has given hands-on coaching and training to leaders around the world; fostered data-driven, decision-making through the establishment of a research team; spearheaded an expansive brand refresh; led the effort to increase awareness of Toastmasters' expanded media coverage; and championed the development of Toastmasters' new education program. Toastmasters is a nonprofit organization developing public speaking and leadership skills through practice and feedback in local clubs since 1924.



### **Dr. Amy Osmond Cook, CEO Osmond Marketing, San Clemente**

Dr. Amy Osmond Cook received her Ph.D. from the University of Utah in communications. She is the CEO of Osmond Marketing, founder of the Divorce Support Center, and a health/wellness columnist for the *Orange County Register*, *Daily Herald*, *Family Share* and *Cupid's Pulse*. Cook has worked as an instructor at Arizona State University, Brigham Young University and the University of Utah intermittently for the past 15 years. Osmond Marketing is a woman-owned, full-service content marketing organization specifically designed to meet the needs of small businesses and health care companies. The firm's innovative model allows companies to operate on retainer, but with the oversight to have all contracted hours available for their perusal at all times. With unsurpassed quality and customer service, Osmond Marketing experienced 148% growth in 2015. She has been featured in publications such as *People* and *USA Today* and on television shows such as *Good Morning America*.



### **Kristin Daher, President/Founder Powerhouse Communications, Santa Ana**

Since founding Powerhouse Communications in January 2016, Kristin Daher has quickly made a name for herself and the agency, having established Powerhouse as a contemporary company providing a wide range of media relations, brand strategy and social media services. Specializing in the restaurant, franchise and hospitality industries, Daher has assembled a talented team of professionals who are equally focused on the creative and strategic elements of the agency's work. In addition to delivering impactful media results, Powerhouse has amplified its digital capabilities, focusing on large-scale consumer campaigns with an emphasis on social applications and influencer marketing. Always committed to supporting the advancement of PR, Daher is an active member of the Orange County Public Relations Society of America and enjoys frequent partnerships and mentoring opportunities with California State University, Fullerton. Current clients include Juice It Up!, Philly's Best, SOCIAL Costa Mesa, Hawaiian Host Inc. and Mauna Loa Macadamia Nuts.



### **Ladan Davia, CEO/Founder Beeya, Laguna Beach**

The idea of finding a job online is not a new idea, nor is the idea of connecting people in a professional network. What is a new and innovative idea is what Ladan Davia has created in Beeya. Beeya is a platform that automatically matches employers and employees together using a matching algorithm based off of specific requirements selected by the user. The website brings the online job hunt, social network and professional network ideas all onto one platform. Beeya allows the user to look for exactly the job or candidate they desire, while filtering out results they don't want.



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**Laura Davick, Founder/VP  
Crystal Cove Alliance, Newport Coast**

When Laura Davick discovered a luxury resort was planning to take over Crystal Cove in 1999, she spearheaded a campaign to protect the area. The nonprofit she founded has become one of the top public-private partnership models within California State Parks; and the citizens of Orange County, and beyond, are benefitting from her vision and passion. Davick served as president of Crystal Cove Alliance (CCA) during its early growth, and today continues her integral leadership role supporting CCA's mission of education, conservation and restoration. CCA has renovated 29 historic rental cottages offering affordable beachfront vacation access and brought innovative environmental education programming to the community. Recent California Coastal Commission approval has led to CCA's next campaign: restoration of the final 17 cottages.



**Brittany Davis, Real Estate Agent  
Surterre Properties, Dana Point**

As the president and founder of Davis Group, Brittany Davis has quickly shot to the top of the luxury realtor scene as one of the most ambitious realtors working in Southern California. In addition to starting her own real estate group, nonprofit organization, design company and managing her investment portfolio, this 30-year-old has also consistently sold more than \$30 million in local real estate annually for the past several years. Her luxury Davis Group brings together a group of realtors with specific niche backgrounds to offer clients a one-stop-shop for all their needs. Her nonprofit organization, Deaf Hearts United, offers rhythm dance classes to deaf and hard of hearing individuals. Recently, Davis started a design company, Miss Davis Designs, that does full remodeling and modernizing of properties. Surterre Properties is Orange County's leading luxury real estate brokerage.



**Sara D'Elia, CEO  
The REMM Group, Tustin**

Sara D'Elia and her partners acquired The REMM Group three years ago, and since that time, D'Elia has shepherded the company through a period of remarkable growth and transformation. The REMM Group provides commercial property management for multi-family, retail, office and industrial real estate in Southern California. In 2014, she led the team in transitioning 19 multi-family properties to

The REMM Group. Dramatic growth continued in 2015, including movement to a new corporate office in Tustin. Leadership, team-building and exceeding expectations have been the hallmarks of D'Elia's management accomplishments throughout her 25-year career. She has had responsibility for more than 3 million square feet of commercial space and 12,000+ multi-family units. Prior to acquiring The REMM Group, D'Elia served as president of Mesa Management. At The REMM Group, she continues to develop a high-performance boutique management team tailored to the Southern California market.



**Carol DeNembo, VP of Business Development  
Juice It Up!, Irvine**

Carol DeNembo joined Juice It Up!'s parent company, Balboa Brands Inc., in 2006 at a time when Juice It Up! was primarily known as a smoothie bar. Currently, DeNembo manages the brand's Business Development Team that works continually to support sales initiatives and sign on new franchise partners, ensuring the success of nearly 90 Juice It Up! locations nationwide. Within the past year alone, Juice It Up! has been included on *Franchise Times*' "Next 300 Franchise Chains" List for a third year in a row, named a 2017 Best for Vets Franchise by *Military Times* and ranked #270 on *Entrepreneur* magazine's 2017 "Annual Franchise 500®" List. Despite restaurant industry declines overall, Juice It Up! continues to report substantial increases in both same-store sales and average unit volumes with each new quarter.



**Laura DeSoto, SVP  
Experian, Costa Mesa**

Since joining Experian in 1997, Laura DeSoto has held a variety of senior management roles in marketing, innovation, product management, strategy and sales, most recently serving as senior vice president of sales and strategic initiatives for Experian's Credit Services and Decision Analytics business. In her role, she was responsible for leading Experian's West Region Preferred Sales Organization and supporting strategic sales initiatives, and was named Experian's North America Salesperson of the Year in 2012. Experian is a global leader in consumer and business credit reporting and marketing services, and a constituent of the United Kingdom's FTSE 100 index, with total revenue for the year ended March 31, 2016 of \$4.6 billion.




Renita Mollman is constructing a platform for all to succeed.

Renita's drive and passion are inspiring to all. Committed to mentoring women engineers and advocating for Science, Technology, Engineering and Math (STEM) education, Renita's leadership has produced successful projects and capable leaders. With Renita at the helm, the future looks bright in California.

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### **Tamara Devitt, Partner** **Haynes and Boone LLP, Costa Mesa**

Tamara Devitt joined Haynes and Boone LLP from a national labor and employment boutique, where she exclusively represented management and also served as a regional managing partner. In her four years with the firm, Devitt has represented numerous companies in wage and hour class actions, obtained partial decertification in a meal and rest period case, obtained summary judgment on behalf of a retail company in a disability discrimination and failure to accommodate case, and has advised and counseled employers on compliance, including hiring, leaves of absence and employee agreements. In addition, Devitt has been recognized as a Best Lawyer in America in Labor and Employment for the past three years, an annual referral guide listing outstanding attorneys throughout the United States. Haynes and Boone LLP is one of the American Lawyer top 100 law firms, with more than 575 lawyers in 15 offices and 40 major legal practices.



### **Deborah Dickson, President** **Smith Dickson, An Accountancy Corp., Irvine**

In 2016, Deborah Dickson, CPA, CFF, MAFF received the Lifetime Achievement Award from the National Association of Women Business Owners – Orange County. From her beginnings as one of the few women in the accounting profession, Dickson founded Smith Dickson, An Accountancy Corp. in 1982 and remains one of a small number of women to own and manage a Top Accounting Firm in Orange County (as ranked by the OCBJ). In the process, Dickson has carved out a niche specialty Forensic Litigation Support practice in a competitive field. She has shaped this into one of the most well-known forensic litigation support and expert witness accounting teams in Southern California. Dickson has her CFF (Certified in Financial Forensics) and Master Analyst in Financial Forensics (MAFF) designations, which are important qualifications for leaders in the forensic litigation support field and are earned by a small minority of California CPAs.



### **Kate Duchene, CEO** **RGP, Irvine**

Since joining RGP in 1999 as the company's first corporate counsel, Kate Duchene has operated in numerous executive roles – Legal, Corporate Secretary, Human Resources, Marketing and RGP Legal. Now, as chief executive officer and president, she leads the organization through transformation, growth and renewal. Duchene is focused on business strategy, capital structure and resource allocation, executive management, shareholder management, enterprise risk management and employee productivity and engagement. She is committed to setting up the structure, processes and practices that will enable the company to execute strategies effectively and drive desired outcomes. Having worked deeply in the RGP Legal business, positioning, scoping and working closely with clients, Duchene has a deep understanding of what needs to be done to move the business forward and evolve as a company. RGP, the operating subsidiary of Resources Connection Inc. (NASDAQ: RECN), is a multinational professional services firm that helps businesses execute internal initiatives.



### **Rhonda Ducote, President** **Apriem Advisors, Irvine**

Rhonda Ducote has been passionately serving as a wealth manager for more than two decades. She has been with Apriem Advisors since 2000 and currently serves as president of the growing investment advisory firm. This past year, Apriem Advisors surpassed \$500 million in assets under management, largely due to Ducote's leadership and spearheading of an innovative program to attract female investors in Orange County. The Women of Wisdom initiative is dedicated to serving the unique financial needs of women and increasing female client engagement. She is also one of a select few leaders to join the Charles Schwab Executive Leadership Program, an elite training program that focuses on developing leadership, innovation, talent management, and strategic marketing and entrepreneurship skills.



### **Christa Duggan, Owner/CEO** **Portola Coffee Lab, Costa Mesa**

Christa Duggan, along with her husband Jeff, own the award-winning Portola Coffee Lab. Portola was created in 2011 with the goal to create a quality-centric coffeehouse that re-focused on the most important ingredient – coffee. Within a year of bringing a never-before-seen concept and style of coffee to Orange County, Portola Coffee Lab began creating a distinct brand that revolves around producing an artisanal culinary product, craft coffee. Portola Coffee Lab prides itself on having access to some of the highest-quality coffee beans in the world. While it usually takes a coffee company several years to establish direct trade relationships to start sourcing coffee at origin, Portola was able to do it within two years. Jeff and Christa currently own and operate six locations within Orange County, with two new locations on the horizon.



### **Jamie Duran, President of the Orange County, San Diego & Desert Companies of Coldwell Banker Residential Brokerage** **Coldwell Banker Residential Brokerage, Irvine**

Under Jamie Duran's management, Coldwell Banker Residential Brokerage acquired five companies in the last two years. Four of those were within the last year and included 170 agents. The brokerage consistently exceeds numerous metrics, including relocation performance nationally, attracting agents to the brokerage and improvement of revenue year over year. Duran has been a real estate professional in Southern California for over 25 years. She oversees 43 offices and 2,100+ independent sales associates serving clients throughout the Orange County, Desert, San Diego and Riverside County regions. Duran holds a bachelor of science degree in real estate and finance, as well as certifications in both real estate appraisal and real estate law. Duran is known as a leader who guides her agents and their clients through any obstacles that may arise during the buying or selling process. Her first-hand knowledge of the regional marketplace and her big-picture understanding of industry trends have earned her gratitude and respect among Coldwell Banker clients and her professional colleagues.



### **Jodi Duva, VP, Orange Coast** **Cox Business, Foothill Ranch**

Managing a \$150-million-revenue business in one of the nation's most competitive telecommunications markets requires a leader that exudes confidence, builds trust and methodically influences decision-makers to drive results. Jodi Duva is this leader. She is a high-performing, woman in business at Cox Business and within the Orange County business-scape and community. Duva leads a team encompassing Orange County, Palos Verdes and Santa Barbara that focuses on delivering customized communications solutions to local business communities. She has united a diverse team toward consistent overachievement while maintaining excellent stewardship of company interests. For example, Cox Business set a national goal of \$2 billion in revenue in 2016; Duva's team in Orange County was instrumental in reaching that goal. Her team successfully launched new WiFi and security products and services aimed at advancing Cox's technology leadership while helping businesses in Orange County maintain competitiveness and protect assets. Cox Business offers internet, phone, TV, networking services and more for small to large businesses.



### **Laurie Eastman, Real Estate Agent** **Surterre Properties, Newport Beach**

Laurie Eastman is a top-selling agent in Newport Beach with more than \$160 million in sales of luxury homes in the past seven years. She has been recognized as an expert in her field and has been a main panelist speaker at the International Real Estate Summit for three years. She was singled out for this honor due to her wealth of industry knowledge and expertise. A lifelong Newport Beach native, Eastman became a Realtor® in 2009 and used her insider knowledge of Southern California's coastal communities, uncanny skills in negotiations, online marketing, customer service and fiscal knowledge to make her a nationally acclaimed power player. Surterre Properties is Orange County's leading luxury real estate brokerage.



### **Neda Eaton, President/CEO** **Irvine Public Schools Foundation, Irvine**

Neda Eaton is a visionary leader with a passion for serving the community. As president and chief executive officer of the Irvine Public Schools Foundation (IPSF), one of the leading educational foundations in the nation, she is entrusted with ensuring that high-quality enrichment programs in critical areas such as the arts, music, sciences, health and wellness, and math are sustained in public schools. In her role, she is responsible for guiding the strategic visioning and direction of the foundation, program and social enterprise development, day-to-day operations and implementation of various fundraising campaigns and initiatives. Under Eaton's leadership, IPSF has achieved tremendous success by strategically uniting the business, parents and resident community to earn the reputation of the premier educational foundation in California. Since she joined the foundation, IPSF's total annual amount raised has increased by 183%, raising more than \$6.5 million annually with an operating budget of over \$8 million.



### **Barbara Eidson, Community Relations Manager** **Island Hotel Newport Beach, Newport Beach**

Barbara Eidson has been a pillar in the Newport Beach community for more than 20 years. She is currently the community relations manager for Island Hotel Newport Beach, where she directs all community outreach for the luxury property, monitoring community activities and maintaining crucial relationships with the local nonprofit, social and civic leaders. Outside of her professional duties, philanthropy is an important part of Eidson's life. Over the years, Eidson has been associated with countless organizations, including Women of Chapman President, Pediatric Cancer Research Foundation



2017 Women in Business Nominees

Board of Directors and Advisory Board, Irvine Chamber Board of Directors, Children's Bureau OC Board of Directors and Girls Inc. Guild Board.

**Jami Eidsvold, CEO  
Smarty Social Media, Santa Ana**

Jami Eidsvold has continuously grown Smarty Social Media since its founding in 2013. Today, the firm has reached revenues of \$2.8 million in less than three years of business. She has also won nominations and awards for her work with partner agencies. Recently, Eidsvold joined forces with nonprofit, Glow Girls, to raise funds for women. Smarty Social Media is a boutique interactive marketing agency that has gathered the best and brightest in the business.



**Lauren Ellermeyer, Co-Founder/President  
Beyond Fifteen Communications Inc., Newport Beach**

Lauren Ellermeyer has been a dynamic co-leader of Beyond Fifteen since its boutique origins in 2009. Combining her progressive business style, keen eye for new talent and mature public relations and social media expertise, Ellermeyer has led Beyond Fifteen to tremendous fiscal and operational growth. Once a home-based startup, Beyond Fifteen is now a nationally acclaimed communications powerhouse dedicated to surpassing and innovating the industry standard at every step. Ellermeyer's creative vision and commitment to excellence as a leader inspire her team to transcend the norms of traditional PR. Beyond Fifteen brings the highest level of media and market attention to every client's brand propositions. By binding entrepreneurial ideas to results-driven strategies, Beyond Fifteen is at the forefront of redefining the agency/client relationship.



**Kelli Ellis, Celebrity Lifestyle Designer/Business Mentor  
Kelli Ellis Interiors LLC, Rancho Santa Margarita**

Kelli Ellis is an internationally recognized designer, artist, licensee, speaker, a founding partner of Design Campus, and author of the bestselling design psychology coaching book, *Do I Look Skinny in This House?* She has been highlighted in national publications showcasing her design and collections in outdoor, furniture, fabric, lighting, rugs, tile and art. Ellis has been featured in numerous media outlets across the globe, including BBC, SKY, *Elle Décor*, *Modern Luxury*, *Dwell*, *O*



magazine and *Traditional Home* magazine, among many others. Ellis began her career on TLC's *Clean Sweep* and was featured on HGTV's *Takeover My Makeover*, *Move or Improve*, *Celebrity Holiday Homes* and *House Hunters Renovation*. Ellis has worked as a lifestyle expert with many top household names such as, HARPO, Dr. Oz, HGTV, TLC, Bravo, NBC, Clorox, AT&T, Ziploc, 3M and many others.

**Kianna Estenson, VP/Chief Communications Officer  
Health 2 Humanity, Irvine**

Health 2 Humanity is a nonprofit that empowers those in developing countries to have the skills and resources available to create lasting hygienic solutions within their communities. The nonprofit's goal is to eradicate preventable diseases and bring an end to global health inequality. Kianna Estenson is a proven networking specialist focused on creating lasting partnerships and leveraging core competencies of like-minded organizations, companies and individuals. Serving as the nonprofit's chief communications officer and vice president, she has worked to pair domestic and international efforts through collaborating with compatible products, integrating with educational efforts and interfacing with government agendas.



**Shannon Eusey, President/Founder  
Beacon Pointe Wealth Advisors, Newport Beach**

Starting at the ground floor in the financial services industry, Shannon Eusey's hard work, persistence and emphasis on putting her clients first catapulted her through the ranks in a heavily male-dominated industry. Eusey pictured a firm with a clear objective, prompting her to found Beacon Pointe Advisors. Fifteen years, 10 affiliate offices, 110+ employees, 70+ institutions, thousands of high-net-worth families and more than \$9 billion in assets later, Beacon Pointe is consistently ranked as one of the largest independent advisory firms in the nation. Beacon Pointe has become a model firm in both its gender diversity and its mission of empowering female financial independence. Under Eusey's guidance, Beacon Pointe is now more than 45% female, with women holding senior or executive positions in every department of the firm. Eusey is also currently one of the top-ranked female advisors in the country according to Barron's "Top 100 Independent Wealth Advisors" List for 2016, and Beacon Pointe is ranked in the Top 20 overall in California according to Barron's 2016 "Top Advisor Rankings: California."



With Orangewood's help, they're reaching their greatest potential!

For over 36 years, Orangewood Foundation has helped foster and community youth reach their greatest potential. Our education programs span high school, college and graduate school. Our Samueli Academy public charter high school introduces young women like Ivanery, Irydian, and Gwen (front row) to engineering and design. Our college scholarships help students like Brianna, Kathryn, and April (back row) with books and other expenses. We even have advanced studies scholarships that supported Jennifer (back right) through law school. Learn more at [www.orangewoodfoundation.org](http://www.orangewoodfoundation.org).



This ad was generously underwritten by UnionBank

## 2017 Women in Business Nominees

### Amanda Ferrari, VP, Estate & Gift Planning St. Joseph Health, Irvine

Amanda J. Ferrari, JD, is vice president, estate and gift planning for Irvine-based St. Joseph Health. In the six years she has held the position, the hospitals raised \$250 million and more than \$75 million in estate and charitable planned gifts. These contributions, which have experienced 7% to 10% increases year-over-year, are essential for funding life-saving programs, services and technology that have touched thousands of lives throughout the communities served by the health system. Ferrari is known for a special blend of technical expertise and her remarkable skill for bringing people together. She counsels her donors/philanthropists on a broad range of charitable giving, including charitable gift annuities, charitable remainder trusts, charitable lead trusts, life estates, bargain sales, complex estate gifts, and gifts of real estate and privately held stock. But most importantly, she easily earns the trust of others and develops win-win situations for everyone.



### Amanda Ferris, Marketing Communications Hart, Anaheim

Since joining Hart, a health care technology company, in June 2016, Amanda Ferris has leveraged her background in talent recruitment to quickly establish powerful relationships with local media and influencers. Ferris has spearheaded Hart's initiative to become more involved in the local technology, design and health communities. Ferris started her career at age 19 as a sales assistant with Marriott, supporting one of the most successful sales teams in the Southern California market. It wasn't long before her sales skills carried her beyond the world of hospitality and into recruitment. While sourcing talent for a staffing company in Los Angeles, Ferris discovered her passion — connecting with people, and connecting people with opportunities. Following a few years in the staffing industry, Ferris was invited by Costa Mesa startup Payoff to lead talent acquisition. In fewer than 12 months, Ferris helped grow Payoff from 38 to 130 employees and had a hand in Payoff earning the distinction of being one of the Best Places to Work in Orange County two years in a row.



### Janelle File, Real Estate Agent Surterre Properties, Newport Beach

After starting her own successful real estate appraisal company in 2002, Janelle File decided to expand her reach in the real estate market by getting her license and joining Surterre Properties in the spring of 2014. Over the past few years, she has worked tirelessly to create a niche for herself, relying on her appraising expertise to earn the respect of local investors and builders alike. She recently launched The File Group, a luxury real estate group that has quickly dominated sales in Corona del Mar. File and her partner leverage their relationships with local businesses to market and promote homes in cutting-edge ways, from facilitating luxury home stagings to high-end open house parties. With \$45 million in listings already on the books, File is set to dominate the local real estate market. Surterre Properties is Orange County's leading luxury real estate brokerage.



### Lara Fisher, Executive Director South County Outreach, Irvine

In her role at South County Outreach, Lara Fisher is responsible for the operation and management of South County Outreach's five business centers, with a focus on rebranding, increased visibility and increased financial stability. In partnership with the board of directors, she developed a five-year strategic plan to ensure the successful achievement of \$2 million in fundraising and \$1 million of donated food to support 9,500 clients throughout south Orange County. She leads and manages the advancement of major gifts, corporate and board development, while directing and managing all resources — including 10 staff members, a board of directors of 15 and 1,600 volunteers. Fisher increased the agency's investment fund from \$93,204 in 2012 to \$459,976. Grant income increased from \$352,000 to \$414,000. She worked to secure a five-year lease for increased office and warehouse space, developed board-level committees and expanded the agency's board of directors from 12 to 15 members with 100% financial participation.



### Trina Fleming, COO WHW, Santa Ana

In 2010, Trina Fleming made a daring move and transitioned from the for-profit sector to the nonprofit world. With no real nonprofit experience, but a mind for business, a host of talents and a lot of passion, the move paid off. Today, as WHW's chief operating officer, Fleming oversees all administrative and back office operations of WHW, helping the organization to deliver measurable and cost-effective results. Her wide range of responsibilities include HR; the shaping of WHW's brand message; development and implementation of WHW's strategic marketing and communication activities; purchasing; organizational policies; the management of WHW's retail store, Déjà New; and management of WHW's technology infrastructure and facilities; as well as special



projects designed to increase the organization's capacity, efficiency and awareness in the community.

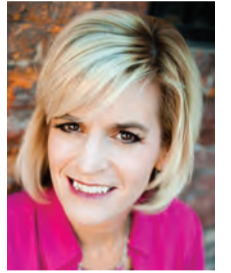
### Rebecca Flood, CEO New Directions For Women, Costa Mesa

In her four decades of experience in the health care industry, Rebecca Flood, MHS, LCADA, NCAC II, CADC, CIP has demonstrated expertise in program development, implementation, evaluation, fundraising, marketing and board relations. In addition to her current role of 12 years as CEO of women's rehab center New Directions for Women, Flood donates much of her time to providing training for nonprofits at national conferences as a Commission on Accreditation of Rehabilitation Facilities Surveyor. She also serves on multiple international, national and local boards with a mission of serving their communities.



### Suzette Ford-Duffus, Executive Director American Heart Association, Irvine

Suzette Ford-Duffus accepted the executive director role at the Orange County American Heart Association (AHA) last year. In this role, Ford-Duffus will drive revenue growth, oversee the Orange County board of directors, as well as staff. Ford-Duffus worked for the American Heart Association in the late 1990s and is returning after exploring other opportunities over the past two decades. In addition to her previous work with AHA, Ford-Duffus has a personal connection to the mission of the American Heart Association; her daughter, Kara, was born with a congenital heart defect called Atrial Septal Defect. Kara underwent a catheter lab procedure in lieu of open heart surgery to repair her heart in January 2006, with a new device that had only been FDA approved for a year. The procedure was successful and Kara is now a healthy teenager. The American Heart Association is the nation's oldest and largest voluntary organization dedicated to fighting heart disease and stroke.



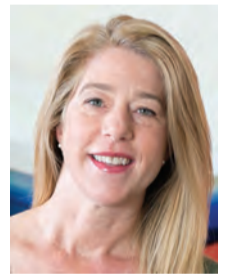
### Shirin Forootan, Attorney at Law Call & Jensen, Newport Beach

Shirin Forootan's legal practice focuses exclusively on employment litigation defense and counseling. Her dedicated commitment to her clients has yielded excellent results both inside and outside of court. She has had class actions dismissed, individual actions dismissed and class certification denied. Outside of court, she has negotiated favorable settlements for employers and has convinced the Labor Commissioner to dismiss wage claims. Forootan routinely speaks and is a published author on a variety of labor and employment topics. Because she has demonstrated an excellence in the practice of law, Forootan has been selected to *Super Lawyers'* Southern California "Rising Stars" List for the past three years, which is a distinction reserved for just 2.5% of attorneys in California. She currently serves as on the board of directors of the Orange County Bar Association and on the Community Impact Cabinet of Orange County United Way. Call & Jensen has become the law firm of choice for many companies in high stakes litigation.



### Jennifer Friend, CEO Project Hope Alliance, Costa Mesa

Project Hope Alliance (PHA), a Costa Mesa-based nonprofit organization, is committed to ending the cycle of homelessness, one child at a time. Jennifer Friend first joined PHA as the president and secretary of its board of directors while she continued her successful career as a partner at a large law firm. Friend's past as a former Orange County "motel kid" and extraordinary passion for helping families experiencing these same hardships motivated her to turn her avocation into her vocation. Under Friend's leadership since 2012, PHA has moved more than 800 children and parents out of homelessness. In 2016 alone, PHA ended homelessness for 18 families — which included 47 children and 34 adults. 88% of families achieved financial stability within 12 months of ending homelessness — a number that continues to increase every year. PHA also launched two new education programs in 2016, serving youth from kindergarten through age 24.



### Carla Furuno, SVP/Manager of Private Client Services Orange Co. City National Bank, Irvine

Carla Furuno oversees City National's Private Client Services in the San Diego and Orange County region, leading a team of highly skilled professionals who provide holistic wealth management and banking solutions to high-net-worth individuals and their families, professional firms, real estate investors and nonprofit organizations. Furuno has more than 31 years of experience in the financial services industry. Prior to joining City National in 2000, she spent 20 years with Union Bank of California in San Francisco as a private banking relationship manager and a commercial loan officer. She is an advisory board member with the University of California Irvine's Center for Investment and Wealth Management. She is also a member of the Investment Management Consultants Association, as well as the Financial Planning Association of Orange County.



2017 Women in Business Nominees

**Dr. Zena Gabriel, Founder  
ZENA Medical, Newport Beach**

Dr. Zena Gabriel is the founder of ZENA Medical, a dermatology practice. She oversees all aspects of company operations and business development. Over the two years since she's opened her practice, she has developed a unique approach to skincare that has pushed her practice to the cutting-edge of medical and aesthetic dermatology. ZENA Medical has continually expanded its service profile to ensure that the practice always offers the best and latest in skincare. The practice now offers the latest in general dermatology, lasers, aesthetics services and Mohs micrographic skin cancer surgery. Due to Gabriel's commitment to creating a culture of genuine compassion, personalized service and a unique approach to focusing cosmetic treatments on a truly natural look, ZENA Medical has grown rapidly. The fundamentals of quality people providing quality service is the hallmark of Gabriel's business success.



**Donna Gallup, President/CEO  
American Family Housing, Midway City**

Since becoming president and CEO of American Family Housing (AFH) in 2014, Donna Gallup has taken a relatively obscure nonprofit and brought it into the spotlight by, most recently, identifying the need for affordable housing for homeless veterans. The newly developed Potter's Lane community – the nation's first permanent housing for the homeless built using shipping containers – which was launched in February to overwhelming accolades, not only fills a critical need, but also significantly increases awareness of the troubling predicament of housing homeless veterans in Southern California. With a goal to elevate AFH's essential mission on a national scale, Gallup has dramatically increased AFH's media attention with the launch of Potter's Lane. More than 300 people attended its ribbon-cutting and stories about the project were featured in the *Los Angeles Times*, *Orange County Register* and *KTLA*. Gallup has also played an essential role in securing major donations and, in 2016, the *OC Register* named her one of the Most Influential People in our county.



**Erin Gargan, Founder  
Socialite Agency, Laguna Beach**

Erin Gargan founded Socialite Agency, a social media marketing agency specializing in corporate trade shows, conferences and global events, in 2010.

Since then, clients like The Oscars, ABC/Disney Television, Nelson Mandela's Legacy of Hope, VISA, Hitachi, Mercedes-Benz Fashion Week, Hitachi Healthcare, Siemens, Abbott Laboratories and others have hired Socialite to head their social media communications for their largest conferences and global live events. Socialite has been named Best Event Social Media by the Professional Conventions and Meetings Association and Best Facebook Application by the Stevie Awards.



**Eulynn Gargano, Head of Test Prep & Tutoring  
FutureWise Consulting, Irvine**

Eulynn Gargano is one of the top test preparation tutors in Orange County, and has been featured in such publications as *CafeMom* and *Teen Vogue*. Gargano's mission has always been to empower students to achieve their dreams. Gargano began her tutoring career in 2006 and has worked with hundreds of students to identify their best path to college. Her dedication to her students and to personalized strategies has resulted in tremendous short- and long-term success for the individuals she serves. Gargano finds time to give back continuously to her community, serving on the board of directors for the CHOC Glass Slipper Guild and advocating for human trafficking awareness through the Junior League of Orange County. In 2015, she created the Junior League Juniors program, designed to create a generation of compassionate children and future philanthropists. FutureWise Consulting remains Orange County's premier source of college counseling, test prep and tutoring services.



**Dr. Leslie Gargiulo, CEO  
California Intercontinental University, Irvine**

Dr. Leslie Gargiulo was recruited to join California Intercontinental University (CIU) in 2015 as the chief operations/chief academic officer and was promoted to the position of chief executive officer shortly thereafter. She performed a thorough audit of university operations to identify areas of opportunity and strategic growth. Gargiulo quickly gained the trust of the board of directors as a recognized academic leader, with the ability to move the university to the next level. Throughout her tenure as CEO, Gargiulo has increased student enrollment, expanded international partnerships, revised curriculum, introduced new programs and developed world-





Reaching Our Bold Goal Takes Bold Leadership.

Every child has big dreams. Shayla dreams of becoming a leader in business. But for her, and for one in five children in Orange County, those dreams are hard to reach because they're going to bed hungry. That's why our goal is to make sure no one goes hungry in Orange County. Ever. It's a bold goal, and we need your help to make sure we meet it, so all our children can reach their dreams. Find out more at [FeedOC.org](http://FeedOC.org).



**SECOND HARVEST FOOD BANK**  
ORANGE COUNTY  
FEEDING AMERICA

Congratulations to our CEO, Nicole Suydam, and Board member Cindy Goss, for their *Women in Business* nominations. They are two of the leaders who are helping us reach those goals.



*Nicole Suydam, CEO  
Second Harvest Food Bank of Orange County*



*Cindy Goss, President  
Propel Business Solutions, Inc.*



BOLD GOAL  
BIG DREAMS

See Shayla's story, and others, at [FeedOC.org](http://FeedOC.org).

## 2017 Women in Business Nominees

class student services. Under her leadership, the institution secured Title IV Funding and was approved to participate in the federal financial aid program. Gargiulo is a strong supporter of online learning and has implemented additional technologies and services to support CIU students. Gargiulo was recently appointed to the CIU Board of Directors, further enhancing the scope of her influence in shaping the institution to meet its intended vision.

### Erin Giglia, Co-Owner/Founder Montage Legal Group, Irvine

Montage Legal Group was co-founded by Laurie Rowen and Erin Giglia in early 2009. Rowen and Giglia met at Snell & Wilmer LLP, where they worked together as associates in the Orange County office. After their daughters were born three weeks apart, the two litigators decided to go out on their own as freelance/contract attorneys. Rowen and Giglia worked for several Southern California law firms on a contract basis for a year, and in early 2010, the litigators began to add similarly situated attorneys to their group. Montage Legal Group has grown to include more than 150 freelance attorneys, all of whom have left law firms in search of balance between career and family. Montage Legal Group has a unique business model, and can best be described as a network of experienced contract/freelance attorneys who have left law firms to achieve work-life balance. Montage Legal Group's attorneys are at the top of the contract attorney market, with impressive credentials from prestigious law schools and experience at top national firms.



### Loreen Gilbert, President WealthWise Financial Services, Irvine

Loreen Gilbert is celebrating her 20th year in business and is in the top 2% in gross revenue out of 15,000 advisors clearing through LPL Financial. In 2017, because of the firm's fast growth trajectory and Gilbert being ranked as a top producer, WealthWise Financial was selected to be one of 50 offices to pilot a Robo-investing platform focused on Millennials. She holds the credentials of CIMA, AIF, CRC and CLTC and is a five-time Five Star Award winner as seen in the *Wall Street Journal*. Gilbert specializes in working with business owners and high-net-worth families and is frequently asked to speak on panels. For example, in March 2017, on behalf of International Women's Day, she conducted an interview at Facebook headquarters in Menlo Park, which streamed live globally. In the past year, she has also been covered in *Orange County Business Journal*, *Investor's Business Daily*, *Money Magazine*, *Yahoo Finance*, *Reuters*, *Wall Street Journal Radio Network*, *Los Angeles Times*, *Modern Luxury*, *Laguna Beach Magazine*, and *Financial Advisor*, to name a few.



### Estelle Toby Goldstein, MD, Board Certified Psychiatrist New Day Psychotherapy Group, Brea

Estelle Toby Goldstein, MD has established herself in male-dominated fields starting with neurosurgery in the early 1980s, and continuing through leading drug research in the 1990s and into entrepreneurship in the 2000s. Her private research has won prizes with major companies such as Westinghouse, and contracts with companies such as Eli Lilly. Goldstein joined New Day Psychotherapy Group in 2016 – bringing more than 35 years of medical experience in the fields of general and orthopedic surgery, neurological surgery and psychiatry. Goldstein's practice is known for her passion for solving the hard problems for patients who have not been able to find answers, and in some cases, a correct diagnosis. Her methods include standard, as well as complementary and alternative treatments. She studied in Boston, France, Canada and is a veteran of the U.S. Army Medical Corps. She has also written extensively for newspapers and the internet, published two books and is a prolific blogger on health issues.



### Liz Goodgold, Founder RedFire Branding, Newport Beach

Since she created RedFire Branding, a marketing and management consulting agency, almost 20 years ago, Liz Goodgold has focused on getting executives and entrepreneurs to brand better and "speak gooder" through keynote speaking, training, coaching and consulting. Goodgold fires up employees at Warner Bros, Abbott Labs, Pfizer, Qualcomm and Meals on Wheels to brand out and stand out. Further, she's authored three books, including *How to Speak Gooder*, *RedFire Branding* and *Duh! Marketing*. Goodgold is also frequently on TV as she deciphers the news, appears on *Hollywood Scandals*, and provides color commentary on *The Kennedy Files*. Goodgold has delivered more than 387 presentations from Boston to Beijing.



### Cindy Goss, President Propel Business Solutions Inc., Mission Viejo

Cindy Goss is president of Propel Business Solutions Inc., a full-service branding and marketing firm, she founded in 2009. After a successful, executive-level career in the technology, staffing and nonprofit sectors, Goss's vision was to form a leading-edge for-profit firm, with the "heart" of a nonprofit



organization. In just over nine years, the firm now operates throughout California and specializes in branding and marketing for both for-profit and nonprofit organizations. Outside of a visible client base and year-over-year profitability and growth, Goss considers her greatest achievement to be her ability to influence others in the Orange County business community to share their profits, time and talents to help those in need. Propel Business Solutions is regarded as a leading-edge branding and marketing firm that creates greater visibility and market share for their clients.

### Anne Grey, Executive Director Alzheimer's Association Orange County Chapter, Orange

After raising more than \$53 million and creating innovative programs across several philanthropic organizations, Anne Grey took the helm of the Alzheimer's Association Orange County Chapter in July 2017. She is spearheading the development of a new Orange County Chapter within the Alzheimer's Association, ensuring that those facing Alzheimer's and their caregivers in Orange County have access to care and support 24/7. She has already secured \$1 million in research funding that has stayed locally in Orange County – that's in addition to the care and support services she's grown in this area. This past January, Grey launched a public policy forum, bringing local and national researchers and policy advisors together to discuss women and Alzheimer's disease. In less than nine months, she has built and mentors an exceptional team, a board of directors and continues to develop new avenues of growth and teams to serve the community.



### Jill Griffin, President Advantage Marketing Partners, Irvine

Jill Griffin joined Advantage Solutions in 2008 to lead a then \$30-million division within the emerging marketing services group. Since that time, she has evolved with the enterprise to build and lead Advantage Marketing Partners, a nearly \$600-million agency with a suite of services in brand development, consumer and shopper marketing, digital marketing and media, experiential marketing, multicultural marketing and culinary marketing. With national reach, the agency employs 2,000+ full-time and 22,000 part-time associates across North America and is honored to be agency of record for many of today's most-recognized brands across retail, packaged goods, technology, apparel, automotive, travel, entertainment, education and health care. Griffin has led the development of new products and services which have been transformational to shopper engagement in the retail sector. In addition, she has led the M&A efforts to diversify the agency's capabilities, as well as the industries it serves.



### Jamie Gwen, President/Chef Tastebud Entertainment Inc., Aliso Viejo

Jamie Gwen is a celebrity chef, certified sommelier, lifestyle expert and seven-time cookbook author who can be seen stirring up something delicious on television, on the radio and in print from coast to coast. She brings the best to radio with her weekly syndicated radio show on 75 stations across the country and in SoCal on Talk Radio 790 KABC. Gwen can also be seen on KTLA, HSN and on national television shows sharing her seasonal lifestyle approach and her passion for food. *Entertaining In Style*, Gwen's newest cookbook, co-written by Lana Sills, was recently released and her previous books are also in print nationwide.



### Holly Hagler, President/CEO SeniorServ, Anaheim

Holly Hagler is president and CEO of SeniorServ, one of California's largest safety-net nonprofit agencies providing social, nutrition and health services to older adults and their families. Under Hagler's leadership, SeniorServ is the county's largest Meals on Wheels provider, serving 1.2 million meals annually to Orange County seniors in need through Meals on Wheels and Senior Center Lunch programs. SeniorServ marks its 50th year of service to the community in 2017. Hagler is also president of Meals on Wheels California, co-chair of the Orange County Aging Services Collaborative, co-chair of Partners at Home Network and a board member for the National Association of Aging & Nutrition & Service Providers. Following 20 years in senior business positions, Hagler transitioned to the nonprofit sector where she's applied her business expertise to strengthening SeniorServ and caring for one of our county's most vulnerable populations.



### Carol Halesworth, Advertising Account Executive Stampington & Co. Publishing, Laguna Hills

Founding and operating her own auto glass business for 10 years, Carol Halesworth returned to her advertising roots, selling advertising for Stampington & Co. in 30+ crafting and hobby enthusiast niche publications. Stampington & Co. publishes 30+ luxury artful living, mixed-media and craft magazines made to inspire creativity in every facet of life. She continues to build relationships that have consistently made her sales over and above target numbers. She leads the



## 2017 Women in Business Nominees

Advertising Department in the new applications online and web platforms, along with print placements. A cancer survivor, Halesworth raised her son by herself and is proud of his amazing accomplishments as a corporate executive. Juggling the continuous deadlines and multiple publications has proven to be a challenge that Halesworth relishes every day.

### **Kaaren Hall, CEO/President uDirect IRA Services, Irvine**

After 20+ years of experience at Bank of America, Indymac Bank and her own mortgage brokerage experience, Kaaren Hall saw the recession take hold and the mortgage market collapse. Rather than folding up her tent, Hall took her real estate and finance knowledge in a promising new direction – self-directed IRAs. Hall has helped thousands of Americans invest their IRA into real estate, notes and other assets outside of the stock market to improve their financial future. Now, Hall is a passionate educator and facilitator for better retirement through highly diversified and individually controlled IRAs. She has taught tens of thousands of people through live events, podcasts and webinars. Presently, she is working on her first book to be released next year. She is recognized as an expert in her field and serves on the board of directors for the Retirement Industry Trust Association.



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

Rebecca Hall is a proven trailblazer. In 2003, she founded an integrated PR/marketing agency at a time when each discipline was highly siloed. This vision proved to be the catalyst for the cutting-edge force that Idea Hall is today. Hall demonstrated unwavering leadership as she shepherded her agency – built on commercial real estate and financial services clientele – through the 2008 Great Recession. She remains one of the first female heads of an agency, and one of the most successful female PR and marketing entrepreneurs in Orange County. She attributes her success to staying three steps ahead of the industry and boardroom demographics. Today, Idea Hall is one of the fastest-growing marketing agencies in Orange County, ranked No. 2 by the *Orange County Business Journal's* "Public Relations Firms" List in 2015 and 2016. Idea Hall's clients include Irvine Co., Visit Anaheim, Swinerton, Bixby Land, StorQuest, Buchanan Street Partners, R.D. Olson and more.



### **Kristin Halton, Founder/Broker The Halton Group, Newport Beach**

As a resident of Newport Beach and a seasonal real estate leader within the community, Kristin Halton lends more than 17 years of award-winning expertise and attention to detail to buyers and sellers alike throughout the prestigious coastal communities of Orange County. She is ranked among the top-producing agents nationwide and is in the top 1% of agents in Orange County. Her proactive back-to-basics approach, combined with her genuine passion for real estate, has garnered her an impressive portfolio of clients that appreciate her outside-of-the-box strategy. In the last 18 months alone, The Halton Group has sold more than \$100 million in real estate sales.



### **Heidi Hendy, Managing Principal H. Hendy Associates, Newport Beach**

Heidi Hendy launched H. Hendy Associates in 1979 to drive innovation in the field of interior architecture and planning. Nearly four decades later, the company has established itself as a leading force in the industry as one of *Interior Design Magazine's* Top 200 Architecture Firms for 26 consecutive years. Hendy and her team help clients seamlessly relocate or remodel, with services spanning strategic facilities programming, employee satisfaction analysis, change management and space planning. While each project astounds visually, efficiency and functionality are driving forces behind every design. The company's roster of workplaces includes TRI Pointe Group, Monster Energy, Squar Milner, Mark IV, Yokohama Tires Corp., Kawasaki and OluKai. In addition to the many LEED certified professionals at the firm, the WELL accreditation sets H. Hendy Associates apart from its competitors. The firm's ability to incorporate wellness concepts into every design not only delights clients and their employees, it reduces absenteeism and increases productivity.



### **Susan Hensey, Partner/CAFM & Occupancy Strategies Studio Principal Little, Newport Beach**

Over the past 32 years, Susan Hensey has influenced Little's traditional architectural practice to adopt service models that reach beyond the profession's conventional realms of design to include data-driven occupancy planning solutions. With Hensey's insight, Little developed a technology service offering years before the advent of internet space management tools. This technology allowed clients to connect to their facility information through an online portfolio – aiding in



Congratulations to **Kaaren Hall,**  
CEO/Founder of uDirect IRA  
Services, on this year's Women In  
Business nomination

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## 2017 Women in Business Nominees

productivity and informed decision-making. Hensey also authored a service model to articulate the services best fulfilled by architects to support corporate real estate executives and facility managers beyond the project process. Hensey started her career at Little in Charlotte, NC and transferred to Little's Orange County office in 2011. With the goal to grow and diversify the Orange County office, Hensey incubated Little's Workplace Interiors Studio in 18 months and notably won the IIDA-OC Haute Couture Fashion Show charitable event two consecutive years.



### **Alix Hobbs, CEO/President Crystal Cove Alliance, Newport Coast**

When Alix Hobbs joined Crystal Cove Alliance (CCA) in 2016, she brought more than 20 years of environmental nonprofit experience spanning fundraising, advocacy, education and community relations. Previously president and CEO of the acclaimed Heal the Bay environmental organization in Santa Monica, Hobbs was the ideal person to steer the dynamic organization, founded by Laura Davick, at a pivotal time in CCA history. Working with Davick, the staff and board of directors, Hobbs is moving critical initiatives forward, most notably the restoration of the final 17 cottages and expansion of the environmental education programs. Hobbs immediately fell in love with Crystal Cove the moment she stepped foot on the sandy shores and saw the potential of the outdoor classroom with a backdrop of the historic cottages.



### **Danielle Horton, Director of Marketing Urban Produce, Irvine**

Danielle Horton is a founding shareholder in Urban Produce, a 16-acre vertical organic farm. Serving as her company's director of marketing and food safety, Horton helped launch the company with her family in 2013. She played a key role in leading Urban Produce to reach its major company milestones, including helping her farm obtain its USDA organic certification, facilitating placement in major retailers and supermarkets along the West Coast, securing major contracts with two publicly traded juice companies, and helped launch an e-commerce program. Her efforts have helped Urban Produce increase its production three-fold, allowing the company to triple in revenue.



### **Stacy Hubbard, Principal, Client Services Director Marsh & McLennan Agency, Aliso Viejo**

Stacy Hubbard is a principal at Marsh & McLennan Insurance Agency LLC. Hubbard is responsible for directing client services for the employee benefits division. She joined the firm in 2011, and has been one of the key drivers behind the Orange County location's meteoric growth. When she arrived, the office had only four employee benefits service members and annual revenue of \$3.5 million. Today, under Hubbard's care, the firm has added an additional 36 employees to the division with revenue now at \$17 million a year. Hubbard and her team serve more than 300 Orange County businesses, helping them thrive through strong benefit programs. With the unpredictable nature of medical insurance regulation, these businesses look to Hubbard with confidence, knowing she will be there with them to weather any changes ahead.



### **Jo-E Immel, VP, Business Development Snyder Langston, Irvine**

Jo-E Immel is vice president, business development for Snyder Langston, a trusted real estate and construction advisor to Fortune 500, mid-size and startup companies. Immel was selected by Snyder Langston's leadership to participate in its succession planning to become one of the organization's next owners. This makes her the first woman outside of field operations to hold that role. Immel was selected based on her years of service, industry expertise and forward-looking skill sets that will best serve the firm, its employees, and clients now and well into the future. Over the course of her 10 years at Snyder Langston, Immel's greatest impact has been in elevating the firm's approach to servicing its clients, focused on being a true partner in achieving client goals. This has moved well beyond a traditional business relationship to identify additional areas where Snyder Langston can add value.



### **Karen Inman, President/COO Antis Roofing & Waterproofing, Irvine**

In August 2016, Karen Inman joined Antis Roofing and Waterproofing as president and chief operating officer, where she provides overall leadership of the company, including all areas of operations, employee engagement and customer service. In this key executive role, she also supports the company's longstanding history of charitable giving and mission to give back to the community. With more than 25 years of professional experience, Inman started her career with one of the best engineering and construction firms in the industry, with positions in construction project management, and technology development and implementation. She then moved into the HOA



industry, holding positions in IT, system development and implementation, and ultimately branch operations. Inman's strong track record of operational success and strategic management uniquely equip her to lead and grow Antis. She is committed to providing exceptional service to every client, establishing sound operational practices and creating a high-performance culture among employees. Founded in 1989, Antis Roofing & Waterproofing Inc. provides contracting services to Los Angeles, Orange, Riverside and San Bernardino counties.

### **Michele Johnson, Partner Latham & Watkins, Costa Mesa**

With more than 5,000 lawyers and personnel and 31 offices around the world, Michele Johnson is one of nine members of the Latham & Watkins' executive committee – the highest decision-making body of the firm. She previously served as the Orange County office's managing partner and was amongst the youngest partners to hold that title. Johnson is an accomplished securities and trial lawyer, and has received prolific recognition for her successes in and out of the courtroom. She was recently acknowledged by *Law360* as one of The 25 Most Influential Women in Securities Law and *Profiles in Diversity Journal* named Johnson to its 14th annual "Women Worth Watching" List. This list recognizes women in leadership from law firms, corporations, nonprofits and government agencies in Europe and North America who are "blazing a trail for others to follow."



### **Patty Juarez, National Diverse Segments Director Wells Fargo, Irvine**

Patty Juarez has an impressive 22+ year career at Wells Fargo. She joined the company right out of college and was accepted to their highly regarded Credit Management Training Program. Upon graduation, she joined the Santa Clara Valley office, which focused on doing business with technology companies in the Silicon Valley. After four years of being the top new business generator for several years, she was promoted to credit manager of her office which was over \$1.2 billion in commitments. She was then promoted again to run a new Commercial Banking office in Anaheim. She staffed and grew that office at unseen rates in the industry. Juarez is a very successful senior banker and an admired manager, but she does not stop there. She also promotes and celebrates diversity in her workplace by ensuring her office environment is inclusive and welcoming of the many contributions of each member of her team.



### **Natalie Julien, Executive Director Thomas House Shelter, Garden Grove**

Natalie Julien has been with Thomas House Shelter since April 2015. Since Julien joined the nonprofit, her efforts have led to a growth in Thomas House's corporate and personal sponsorship numbers, higher revenues for all fundraisers and an increase in new board members. Julien has also helped to increase communication efforts, raising more awareness for Thomas House in the public and amongst corporate partners. The mission of Thomas House is to provide a safe, supportive environment and the resources necessary for homeless families with children to remain together while empowering them to become independent and self-sufficient.



### **Pamela Jung, CEO Healthcare Talent and Workforce Solutions Group, Foothill Ranch**

Pamela Jung created Workforce Solutions Group (WSG) in 2001 with a primary focus on direct hire placement across all business sectors. A few years later, in response to the high demand for health care employees, she created HealthCare (HCT) as a separate brand dedicated exclusively to the health care market. HCT operates as its own entity under the WSG group of companies. Jung's story has been filled with challenges ranging from workforce reductions and revenue loss; to successes, such as making a fastest-growing company list; to personal triumphs of creating a scholarship. Healthcare Talent and Workforce Solutions Group experienced tremendous growth from 2001 to 2007. Then, the economy took a downturn. Jung cut operating expenses, re-organized loans with banks and was forced to survive on a cash-only basis. In order to turn the company around, Jung focused primarily in the health care market as she felt it was recession proof. Her strategy worked as the company has grown to over \$30.5 million with 60+ employees and offices in OC, LA and Northern California.



### **Manna Kadar, CEO/Founder Manna Kadar Cosmetics, Irvine**

Hailing from what is arguably the most fashionable city in the world, cosmetics guru Manna Kadar was born in Paris, France. Surrounded by the very best that fashion and beauty has to offer, Kadar developed a passion at a very young age for not only the finest beauty products on earth, but for the business behind the most cutting-edge brands. After years of careful research and development, in January 2012, Manna Kadar Cosmetics was finally born. A prestigious line of luxury products with the most cutting-edge color trends and the finest



## 2017 Women in Business Nominees

ingredients, Manna Kadar Cosmetics are long-wearing and multifunctional. Adhering to the philosophy that less is more, Kadar created the Three-Step System to keep beauty simplified by achieving your look in seven minutes or less.

### Dee Cohen Katz, Partner Walsworth, Orange

Dee Cohen Katz joined the law firm, Walsworth, in 1995 as an associate in its Orange, Calif. headquarters. In the 22 years since, Katz is now a partner and an integral part of the firm's core structure serving on various management committees and a mentor to many associates and partners, alike. As a partner, Katz has also been a key part of leading the firm's growth and shaping its future in a way that is unique to law firms and underscores its longstanding commitment to diversity. In 2016, Walsworth was recognized as a certified Women's Business Enterprise by the Women's Business Enterprise National Council and by the California Public Utilities Commission. Walsworth is also a National Association of Minority and Women Owned Law Firms member, the largest in California and third largest nationwide.



### Hilary Kaye, President

#### HKA Inc. Marketing Communications, Tustin

HKA Marketing Communications, celebrating 33 years of award-winning work, provides integrated communications strategies that elevate visibility, heighten awareness and promote business growth. Hilary Kaye spearheads HKA's business development and works with staff developing strategies that enable clients to reach their business objectives with measurable results. An author and former journalist, Kaye has built an agency known for excellence and service. HKA is composed of professionals pulled from diverse backgrounds, areas of expertise and generations. Kaye serves on the boards of Crystal Cove Alliance and Laura's House, is a founding member of NAWBO's Women's Business Institute, a member of Women Presidents' Organization, and an ardent supporter of many nonprofit causes. For the past 17 years, Kaye has fielded "Ruby's Raiders" at the MS Walk in memory of her mother.



### Shannon Kennedy, President, U.S. Markets – Southwest BNY Mellon Wealth Management, Newport Beach

Shannon Kennedy oversees 103 employees with assets under management approaching \$10 billion. Kennedy grows brand awareness by encouraging and supporting personal and staff community involvement. She nominates her portfolio managers for local not-for-profit investment committees, supports client and staff giving back to the community and serves as a brand ambassador for the firm. She sits on the boards of South Coast Repertory, UCI-CEO Roundtable, was involved in starting the UCI-CEO Women's subsection, Girl Scouts of Orange County, Women's Philanthropy Fund and is a member of The Belizian Grove. Kennedy joined BNY Mellon in 2013, and since that time, she has hired more than 57 people and added 127 new client relationships. BNY Mellon has been managing wealth since America began creating it, providing an unparalleled level of service to private clients, family offices, institutions and endowments alike.



### Julie Kidd, CEO

#### FunnyMom Productions aka Funniest Housewives, Placentia

Funny Mom Productions aka Funniest Housewives brings together the strongest, funniest and most sought-after female comedians in the country. Julie Kidd was crowned the Hilarious Housewife on ABC's *The View* and has appeared on the program multiple times. In addition to performing with the other Funniest Housewives, she is currently starring alongside one of Nickelodeon's Funniest Moms in *Single Mom The Musical*, which she wrote and produces. In addition, her jokes have been featured in *Good Housekeeping*, *Reader's Digest* and *Modern Mom* magazine. They've helped raised money for various organizations and causes, including, but not limited to Susan Samueli Center for Integrative Medicine, Conner's Cause, Women Helping Women, Pediatric Cancer Research and CHOC. These ladies have also been seen on programs such as *The Tonight Show*, *America's Got Talent*, *Girls Behaving Badly* and *Last Comic Standing*.



### Cathi Killian, VP, Communications

#### Disneyland Resort, Anaheim

Cathi Killian began her Disney career in 1987 as a hostess in Fantasyland restaurants at the Disneyland Resort. Since then, she has held a variety of roles with increasing responsibilities within guest services, special events, attractions, corporate citizenship, and internal and external communications. In her current role as vice president, communications, Killian is responsible for integrated communications strategies that protect and enhance the reputation of the Disneyland Resort. Her responsibilities include external, internal and executive communications, crisis communication and issue management. As an executive, Killian led the team responsible for



creating the strategy and implementing internal communication for the 2001 expansion of the Disneyland Resort, including the opening of Disney California Adventure Park, Disney's Grand Californian Hotel & Spa, and Downtown Disney. She also directed communication for the 50th Anniversary Celebration of Disneyland Park and the 60th Anniversary Diamond Celebration. Currently, Killian oversees the overall communication plan for the expansion project that includes a 14-acre Star Wars-themed land at Disneyland Park and proposals for a new parking structure and luxury hotel.

### Robin King, SVP, Media & Account Strategy Zip2Media, Irvine

Robin King has been managing the Zip2Media offices in Orange County since 2015. Zip2Media is a women-owned marketing and advertising agency headquartered in the San Francisco Bay Area and Orange County. King's commitment to leadership includes fostering a culture of excellence in the workplace, while overseeing all aspects of revenue growth, client management, and negotiating and creating targeted advertising campaigns that generate the highest return-on-investment for Zip2Media clients. She is a perpetual learner and applies a "can do," "can learn" attitude both inside and outside of the office. Her mastery of marketing and advertising platforms which include digital, SEO, Google AdWords, broadcast, print and other lead generating tools, have resulted in a 42% increase in new client business in 2016.



### Stacie Kitts, Tax Partner Haskell & White LLP, Irvine

A strategic tax professional, Stacie Kitts has more than 25 years of experience working in both industry and public accounting. A founding member of Katherman Kitts & Co., a CPA firm focused on reducing their clients' income tax through effective planning, Kitts was instrumental this year in combining Katherman Kitts & Co. with Haskell & White, one of the largest independently owned accounting, auditing and tax consulting firms in Southern California. As a tax partner at Haskell & White, Kitts uses her expertise in tax planning and consulting, business consulting, and IRS and state audit representation to ensure clients retain the wealth they have worked so hard to build. Her high-net-worth clients and their businesses span industries, including construction, distribution, entertainment/media, manufacturing, professional services, oil and gas, retail, technology, health care, real estate, restaurant and transportation.







# CONGRATULATIONS

to our own **Karen Inman** on her nomination  
for the **Women in Business Award**.

As a strong female role model, Karen leads our  
team and company with skill and compassion.  
Every employee, partner, and the community  
benefits from her professionalism and  
commitment to lifting others to be their best.

THANKS KAREN, FOR ALL YOU DO FOR ANTIS  
AND THE COMMUNITIES WE SERVE!

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## 2017 Women in Business Nominees

### Stacey Kumagai, President

#### Media Monster Communications Inc./Linkronicity, Irvine

After three decades of communications work for corporations, small businesses, nonprofits and entrepreneurial creative artists, Stacey Kumagai is branching out with her mission for information, education, inspiration and motivation through communications excavation work. Some of the organizations Kumagai has worked with include Susan G. Komen, Amnesty International, ACLU, Alzheimer's Association, Boys and Girls Club. She has expanded her reach from under the Media Monster Communications umbrella to create a coaching business called Linkronicity™, which is the art of LINKING mind, body and soul communications together for personal, career and life GPS navigation. With one-on-one coaching sessions for individuals, as well as group workshops, her work in communications is focused on creating a bridge of conversations in how we communicate with ourselves and each other.



### Josephine Lee, President

#### The Pointe Shop, Santa Ana

Josephine Lee opened a dance retail store, Dancer's Choice Dance Supply, in 2011. After recognizing a need for more accessible and knowledgeable pointe shoe fittings, she started the first professional pointe shoe fitting company called The Pointe Shop in January 2014. The Pointe Shop offers professional fittings inside ballet studios, as well as individual fittings at the flagship store in Santa Ana. Convenience and expertise helped The Pointe Shop rise to become one of the top pointe shoe retailers in the country. The Pointe Shop has been featured in numerous publications and was most recently was highlighted by a spot on *Project Runway: Fashion Startup*. Since its start, the company has expanded to three states – California, Arizona and Nevada.



### Julie Leffler, President/Creative Director

#### Big Hype Marketing, Costa Mesa

Julie Leffler started Big Hype Marketing & PR in 2015. In less than two years, she has built the company to where it is today, with almost \$1 million in revenue last year and six employees. Leffler's 15 years of experience in marketing and public relations has provided her with the ability and skills to work with clients as a comprehensive strategist, developing great ideas for them that are executed into full-blown marketing strategies. Her background provides guidance to clients in a wide range of areas, ranging from photo shoot design to content writing, media pitching, and social media, website design to back-end operations. She and her team create marketing and public relations campaigns both regionally and nationally with results that positively impact the client's bottom line. Leffler has also added a variety of marketing products to the scope of work that the company offers to help other businesses accomplish their individual marketing initiatives and increase sales.



### Adriana Leite, Real Estate Agent

#### Century 21 Masters, Irvine

Adriana Leite is a licensed Realtor® in Orange County and has a deep love for its diverse communities. As a professional realtor, people rely on Leite and her market knowledge to make sure their home is buyer-ready. Leite makes it a policy to only list homes she knows she can manage. Her keen eye for detail is unsurpassed when preparing clients' properties to sell or finding them the perfect home to buy. By being exclusive to a few clients, she is able to be on call for them 24/7. Century 21 Masters is an Irvine-based real estate agency.



### Susan Levinstein, Partner

#### HMWC CPAs & Business Advisors, Tustin

After being in a leadership position in her university's accounting honor fraternity, Beta Alpha Psi, Susan Levinstein was persuaded to join the Tax Department at PricewaterhouseCoopers (PwC) in Los Angeles. After meeting her husband, she relocated to South Florida and continued to work for PwC. In 1993, Levinstein moved back to California and joined HMWC CPAs & Business Advisors, as the department manager of accounting and audit. In 2010, she formed the Complete Financial Office Solutions (CFOS) Department, which has grown to 10 employees. In 2011, Levinstein was promoted to partner at the accounting firm. She has helped grow HMWC from a company with only 12 employees to the nearly 70-employee firm it is today, driving it to rank as the #16 accounting firm in Orange County. HMWC CPAs & Business Advisors specializes in serving the financial and tax needs of privately held businesses and their owners.



### Jeannie Lorin, CEO

#### Beauty Society, Huntington Beach

In 2004, when Beauty Society was established, Founder Jeannie Lorin made a vow that Beauty Society would always be a company with a conscience. Not only to provide the best possible beauty products in quality, effectiveness and safety, but also to have an "everyone-wins" business model. A model

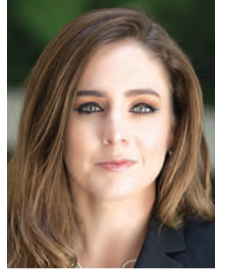


where the consumer would receive the highest-performing products at prices the everyday family could afford. A company where corporate profits were not the focus, but rather, the success of the consumer and families – as families also benefit financially as the company's sales force. Beauty Society's eco-friendly initiative is also like no other corporation in the country. The organization strives to be the benchmark of green consciousness.

### Michele Marckesano, Associate Director, Commercial Division

#### Ten-X, Irvine

Founded in 2007, Ten-X (formerly Auction.com) is the nation's leading online real estate marketplace. Leveraging desktop and mobile technology, Ten-X allows people to safely and easily complete real estate transactions entirely online. Ten-X currently has sold more than 200,000 residential and commercial properties with Gross Monetary Value totaling \$37 billion. Michele Marckesano, a licensed real estate professional, is an indispensable part of the Commercial Division's Business Development Team. She has been involved in the successful trade of more than \$125 million in assets and is one of the few female business development executives. She has brought a commercial asset to the platform, closed, and brought in revenue faster than any other rookie business development executive to date. Marckesano continues to grow her business by fostering her relationships, and believes that business ethics are indispensable. She goes above and beyond to make sure that her clients are receiving the best service possible, and guides her deal team to do the same.



### Debra Marsteller, President/CEO

#### Project Independence, Costa Mesa

Advocate, trainer, mentor and enthusiastic supporter of people with developmental disabilities, Debra Marsteller has worked for 38 years with and for people with disabilities. A graduate of University of Northern Colorado with a teaching credential in special education, Marsteller continued on to get her Masters in Education from San Diego State. In 2007, after 26 years leading Vantage Foundation, Marsteller led the merger with Project Independence. Combining the positive behavioral support expertise of Vantage with the independent living and supported employment capacities of Project Independence, the two organizations look to make the community a better place for everyone to live and work. Project Independence helps people with developmental disabilities find jobs.



### Melissa Mauricio, Director, Human Resources, U.S. Human Resources

#### Cushman & Wakefield, Irvine

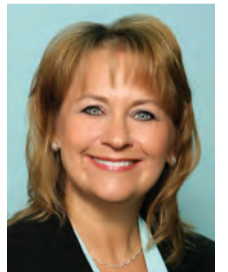
Melissa Mauricio works in a managerial leadership role with Cushman & Wakefield. In her role, she oversees human resources for the Western United States and Mexico, and manages four HR Business Partners. Mauricio was hired by Cushman & Wakefield in July 2015 to lead the West Region through the company's high-profile merger with DTZ in September 2015 from an HR perspective. The massive merger created one of the world's largest commercial real estate firms in Cushman & Wakefield. She also oversaw all HR for the merger and acquisition of the firm's Austin office (containing 35 employees and 20 brokers) in May 2016. In addition, she participates in Cushman & Wakefield's Women's Integrated Network (WIN). WIN focuses on training, networking and mentoring, as well as promoting and recruiting women leaders throughout the entire organization.



### Christine McCauley, Corporate Vice President, Human Resources

#### Edwards Lifesciences, Irvine

Since August 2012, Christine McCauley has served as the corporate vice president, human resources for Edwards Lifesciences Corp. (NYSE: EW), the global leader in patient-focused innovations for structural heart disease and critical care monitoring. McCauley leads the network of global human resources employees who provide human resources programs and services for more than 11,000 Edwards employees in over 40 countries; 4,000 of which are in Orange County. As the company grows and continues its pursuit of its focused innovation strategy to deliver breakthrough therapies to patients around the world, McCauley partners directly with Edwards' Chairman and CEO on the global talent strategy for Edwards. She also leads all activities related to executive and board acquisition, development and succession. McCauley is a member of the board of directors of the Edwards Lifesciences Foundation, which provides charitable grants of more than \$6 million per year as of 2017. She also serves as a board member of the Edwards Lifesciences Political Action Committee.



### Stephanie McCormick, President/CEO

#### Make-A-Wish OC & the Inland Empire, Irvine

Stephanie McCormick currently holds the position of president and CEO for Make-A-Wish Orange County and the Inland Empire. She assumed her role in September 2011. Her focus is revenue sustainability and wish growth for the \$5 million chapter. During the past five years, she has taken the organization to the next level by increasing revenue by nearly 19%, strengthened and grew the board



# CONGRATULATIONS!

*Kelly Roberts*

Owner, Vice Chairman and COO  
Entrepreneurial Corporate Group



*Nominated for the OCBJ 2017 Women In Business Award*



Kelly Roberts has been instrumental in the success and national recognition for the various business units within the family enterprise. She has been the driving force behind several ventures including The Historic Mission Inn Corporation, Kelly's Spa, KRR Enterprises, Casey's Cupcakes LLC and the Irvine & Roberts Family Vineyards.

Recipient of several recent awards including the 2017 Smart Meetings Most Inspiring Women Entrepreneurs, California Hotel & Lodging Association's 2016 Women in Leadership – Connect Leader of the Year, #1 Best Historic Hotel USA Today's 10Best.com, #1 Historic Hotel by Historic Hotels of America and Conde Nast Traveler's Top 25 Hotels in Southern California.

## 2017 Women in Business Nominees

by launching a strategic and comprehensive board development plan and granted a record number of wishes, 347 in 2016. The 34-year-old chapter was recently recognized by the national office by receiving both the 2015 Fundraising Achievement Award, as well as the Wish Achievement Award. The goal for 2017 is to grant 348 wishes and the chapter is on track to meet that goal. The vision is simple: to grant the wish of every eligible child in Orange County and the Inland Empire.

### Stacy McKellar, Real Estate Agent Surterre Properties, Irvine

Stacy McKellar has made a name for herself as an award-winning real estate agent in Orange County, building her portfolio and list of accomplishments, while also raising her two young sons. In 2004, McKellar obtained her real estate license, and soon after, had her first baby. McKellar hit the ground running, taking only three weeks off before returning to the field to hold open houses and tour properties. Her dedication has rewarded her with several awards, including two Business Achievement Awards from Coldwell Banker and a Sapphire Society Award for high sales. Year after year, McKellar continues to increase her real estate business, closing over \$17 million since she joined Surterre three years ago. Surterre Properties is Orange County's leading luxury real estate brokerage.



### Nicole McMackin, President Irvine Technology Corp., Irvine

Nicole McMackin is president of Irvine Technology Corp. (ITC), a national technology solutions and staffing firm with two local Orange County offices. McMackin is a partner in ITC and has led the company for the past 14 years. McMackin is attributed to making ITC one of the most successful firms, not only in Orange County, but in the country. When McMackin took over ITC, the company had 15 employees locally and now boasts more than 200 just in Orange County alone. ITC is proud to service accounts such as AT&T, Molina Healthcare, USC, Trader Joe's, CHOC, Xerox, Konica Minolta, Nike and many others throughout the country. McMackin oversees all internal operations, brand development, strategic planning and implementation. She currently holds total P&L responsibility for the company in the United States.



### Shachi Mehra, Executive Chef/Owner ADYA, Anaheim

Indian-born Executive Chef and Owner Shachi Mehra has a passion for creating innovative and thoughtful menus that tastefully balance a variety of flavors to create unique and inspired dishes. An ardent supporter of local farmers and sustainable practices, she takes great care in sourcing her ingredients. Her early family experiences helped to develop and shape her love of food and appreciation for balance, in flavors and in life. Mehra blends Western and Indian cultures to create artful dishes that successfully marry tradition with modernity. She has strengthened her skills in some of the most demanding kitchens in this country before opening ADYA locations in Anaheim and Irvine. With 15+ years of culinary experience, Mehra has set herself apart as a true contender in the restaurant industry.



### Cassandra Miller, COO See Jane Go Inc., Laguna Hills

Cassandra Miller began building strong internal organizational systems at the age of 12. Inspired by the *Babysitter's Club* books, she gathered her friends and constructed a customer-forward babysitting collaborative to enable parents to easily find a talented caregiver for their child. Miller's entrepreneurial spirit continued through the rest of her career. After working in diverse leadership positions within several successful businesses and startups, Miller went independent and developed a boutique consulting firm that she successfully owned and operated for more than 10 years. Through her consulting firm, Miller ultimately found her true calling as an entrepreneurial business architect. Miller joined See Jane Go at its inception. Miller has led the team in the development of a mobile application, business model, technology strategy, product innovations, key product and business model differentiators, financial modeling and budgeting, regulatory policies and strategies, and the overall customer experience. Her key achievements include garnering 15,000+ user sign-ups and 700 drivers on-boarded within the first 90 days of operation. See Jane Go is a women-driving-women ride hail option.



### Celin Miller, President GGG Demolition Inc., Orange

Celin Miller is the president of GGG Demolition Inc. She created a ground-up, woman-owned business that specializes in full-service demolition and hazardous waste remediation. Miller started in the construction industry 18 years ago, working in demolition and mechanical contracting. She has established a seasoned team of construction professionals that generate positive results in the demolition and



remediation industries. She manages day-to-day activities such as business development, bid schedules, sales, strategic planning, insurance and bonding. GGG Demolition Inc. was founded in 2014, and in its first year of operations, garnered \$15 million. Today, the company has 200 employees with offices in Orange County and San Diego.

### Alana Mitchell, CEO Alana Mitchell Skincare & Skincare By Alana, Dana Point

Alana Mitchell started Skincare By Alana, an e-commerce skincare company, on a laptop in a 70-square-foot room. Over the years, Skincare By Alana has blossomed into a \$6 million dollar/year business. Less than a year ago, Mitchell launched her own line of products, Alana Mitchell Skincare, in hopes of providing everything possible for her family. Another of Mitchell's most significant business accomplishments was becoming a verified retailer of more than 300 brands.



### Renita Mollman, VP/Southern California Office General Manager Burns & McDonnell, Brea

If you've flown in the U.S., you've probably landed in an airport Renita Mollman has helped improve. Mollman has spent most of her career in aviation engineering, managing civilian and military projects while mentoring countless engineers along the way. Today, she leads nearly 180 employees in Burns & McDonnell offices across California, supporting diverse clients in a variety of markets. Mollman joined Burns & McDonnell in 1988 as an assistant civil engineer. Mollman was promoted in 1997 to oversee the firm's Aviation and Federal Civil Department, which she grew from 15 to 35 employees in just 11 years. She was appointed office manager for the Southern California region in 2009, and named vice president in 2011. In California, she's led innovative projects at Naval Base Point Loma and Naval Air Station North Island. Her team is currently working with Southwest Airlines on a modernization project at LAX.



### Kelly Moore, CEO Moore Benefits, Irvine

Making sense of the Affordable Care Act is an achievement all its own, and Kelly Moore helps her clients navigate the confusing and frustrating waters of the ACA and other employee benefits like a seasoned sea captain. Moore has grown Moore Benefits, an employee benefits firm, since 2001 into a million-dollar-a-year business that turns health insurance confusion into common sense. Moore is recognized as an ACA and employee benefits expert, and was recently quoted in *USA Today*, *Orange County Register* and *KFMB* (Los Angeles). She and her team make sure California business owners stay in compliance and can focus their energy on running their companies.



### Susan Morehead, President/Co-Founder Optima Asset Management Services, Newport Beach

Optima Asset Management Services Inc. provides real estate brokerage, consulting, asset management, property management and receivership services. A majority of the company's employees have been with the organization 15-30 years. Optima believes in full-service property management and recognizes the power behind synergistic teamwork. With more than 30 years of diverse experience, Susan Morehead works closely with her team to ensure that efficient, quality and attentive care always exceeds expectations. Optima's commitment to its clientele is second to none, as evidenced by its inclusion on the *Orange County Business Journal's* "Commercial Property Managers" List for the past several years.



### Darlynn Morgan, Founding Partner Morgan Law Group, Newport Beach

Attorney Darlynn Morgan has been practicing law in Orange County since 1996. She founded the law firm of Morgan Law Group in 2005 with the dream of truly making a difference in her clients' lives, which meant changing the traditional model of estate planning into something that serves families by helping them make the best legal decisions possible throughout their lifetime, and guides them to leave the world a better place. Morgan graduated in the top 15% of her class from Loyola Law School in Los Angeles, where she was also a member of the Loyola Law Review and was awarded the American Jurisprudence Award for Community Property and Family Law. After graduation, Morgan served as a judicial law clerk to the Honorable John E. Ryan, a Ninth Circuit Federal Judge. She subsequently practiced at a premier business litigation firm in Orange County.



### Dr. Sandra Morgan, Director, Vanguard University's Global Center for Women & Justice; Professor, Women's Studies, Family Violence & Human Trafficking Vanguard University, Costa Mesa

Sandra Morgan is recognized globally for her expertise on combating human

2017 Women in Business Nominees

trafficking and working to end violence against women. She began her anti-trafficking work in Athens, Greece where she served on the board of the Athens International Nurses Association. She has also served as the administrator of the Orange County Human Trafficking Task Force before returning full-time to Vanguard in order to extend global impact and build capacity for research, education and advocacy directly related to the exploitation of women and children. She also produces the bimonthly *Ending Human Trafficking* podcast, which was recognized by The National Clearinghouse on Families & Youth, Dept. of Health and Human Services as a great way to “get up to speed on human trafficking.” As director of Vanguard University’s Global Center for Women and Justice (GCWJ), she oversees the Women’s Studies minor, as well as teaches Family Violence and Human Trafficking.



**Helen Norris, VP/Chief Information Officer  
Chapman University, Orange**

Helen Norris has transformed information technology at Chapman University in three short years since her arrival. Understanding that successful outcomes begin with a strong vision and a stronger organization, Norris began by transforming the 70-member Information, Systems & Technology (IS&T) group under her leadership to be more customer-focused and less inwardly focused. Norris also led the highly successful implementation of a university-wide enterprise management system installation that had been struggling when she took the helm. With this new platform in place, Norris was then able to launch several cutting-edge innovations; to include a new mobile application; and also a new business intelligence dashboard, supported by a new state-of-the-art data warehouse capability. Given these very early successes, Norris was quickly promoted to the most senior leadership team and to a direct reporting relationship with the president of Chapman, Daniele Struppa.



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

Anosheh Oskouian launched her pollution control business in the fall of 2000, when the opportunity arose for her to reinvent what had been a metal fabricating company. Since then, Oskouian’s company has developed a comprehensive array of engineering and manufacturing capabilities. With increasing market demand on businesses to reduce



operational costs as a driver, 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.

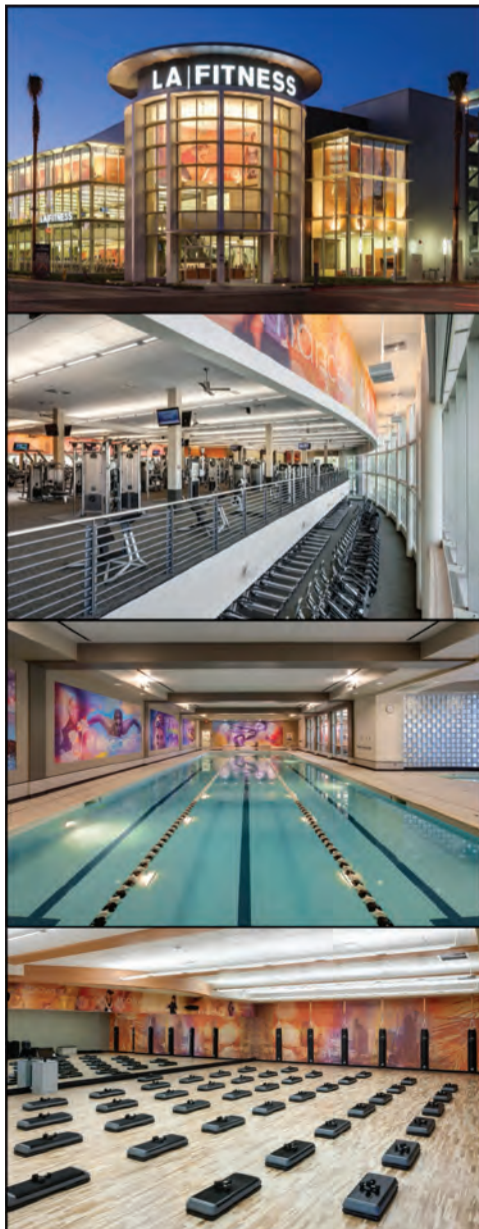
**Anya Ostry, Director  
Cushman & Wakefield, Irvine**

Anya Ostry is the Orange County Chapter Lead for Cushman & Wakefield’s Women’s Integrated Network (WIN). WIN focuses on training, networking and mentoring, as well as promoting and recruiting women leaders throughout the entire organization. The mission of this network is to develop and support the talents of the company’s women team members and have meaningful impact on the firm’s performance. Ostry is also recognized as one of the top-performing women brokers with Cushman & Wakefield in Southern California. In 2016, Ostry was involved in more than \$40 million in volume through a total of approximately 50 commercial real estate transactions. These deals, all of which were tenant representation assignments, involved many leading companies across a variety of industries and specializations. Cushman & Wakefield is a global real estate services firm that delivers integrated solutions to landlords, tenants and investors at each stage of the real estate and commercial property process.



**Neha Patel, VP of IT Operations  
DealerSocket, San Clemente**

Over the last 13 years, Neha Patel has built two departments from the ground up. She has helped to grow the Data Services Team from one person to 30 people and IT Operations Team from five people to 55. More importantly, Patel built teams that are efficient and self-sufficient, strategically structuring and organizing teams that could scale and absorb newly acquired companies, as well as enable team members to progress. In addition, Patel oversaw and was responsible for an IT budget that has grown from \$2.5 million to \$20 million over the last three years. DealerSocket provides dealerships with a single automotive platform containing marketing, sales, service, customer experience and data mining solutions.



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## 2017 Women in Business Nominees

### Danette Perkins, EVP – Acquisitions

#### **Allied Universal, Santa Ana**

Danette Perkins was hired to start and lead the M&A Department at Universal Services of America in 2010. At that time, Universal Services of America was a southwest regional security guard company with annual revenues of \$250 million. In six years, Perkins has led and closed more than 55 acquisitions, totaling more than \$1 billion. She has helped to expand the company from a regional player to the unequivocal leader in the security guarding industry in all of North America. With the recent merger between AlliedBarton Security Services and Universal Services of America to form Allied Universal, Perkins now leads a team focused on identifying new strategic business units to further grow the company's security and solutions service offerings and add value to its 10,000+ clients. Additionally, in her current role as executive vice president, Perkins has been instrumental in helping Allied Universal create increased value for three leading international private equity firms.



### Melissa Pollard, VP – Western Market

#### **Comerica Bank, Costa Mesa**

Melissa Pollard has been in middle market lending for 29 years, her first 10 years with Bank of America, and the last 19 years with Comerica Bank in Orange County. Pollard acts as the single point of contact for all her clients' banking needs. Her technical expertise is lending, and she has structured and delivered credit facilities ranging in size from \$1 million to \$100 million. Pollard works with companies across a variety of industries, including manufacturers, distributors, service providers and nonprofit organizations. She coordinates the bank's resources to deliver customized solutions to her clients in the four critical areas of their business: managing growth, managing cash, managing risk and managing wealth.



### Jenn Quader, Managing Director

#### **Brower, Miller & Cole, Newport Beach**

Jenn Quader leads one of Orange County's most prestigious PR and marketing agencies – Brower, Miller & Cole – which has been named on the *Orange County Business Journal's* "Public Relations Firms" List for more than a decade. In partnership with the firm's founder, Judy Brower Fancher, Quader spearheads the agency's innovative and industry-leading PR, content and marketing campaigns, delivering bottom line results to many of the most significant commercial real estate, finance and health care companies throughout the U.S. Quader has been instrumental in the agency's recent growth, guiding the account and creative teams toward new heights and earning national recognition, including distinctive awards from the Public Relations Society of America, the International Council of Shopping Centers (ICSC) and several Hermes Creative Awards.



### Sunny Rajab, CEO

#### **Business Communications Solutions, Irvine**

Sunny Rajab's career trajectory has been anything but devoid of difficulties. From the beginning, she has had the odds stacked against her. Rajab, being a young woman barely out of high school, started a business in a predominately male industry. Fast-forward to today, her steadfast nature has led her to become the CEO of one of Orange County's top VOIP and IT service providers, Business Communications Solutions (BCS). Her experience, passion and natural inclination to business has helped BCS become recognized at the forefront of the industry. The growth of BCS is a testament to this very sentiment. Her innate ability to strategically adopt innovative technology to suit the evolving needs of her client base, while concurrently practicing lean fiscal decision-making, has secured BCS's year-over-year increases. Through Rajab's humility and dedication to life-long learning, she has amassed a multitude of professional awards and achievements.



### Natalie Raney, Real Estate Salesperson

#### **Villa Real Estate, Newport Beach**

With more than \$85 million in sales in 2016 alone, Natalie Raney has represented discerning buyers and sellers of luxury residential real estate throughout Coastal Orange County since 2006. Well-versed in the high-end coastal market, she recently achieved a record-breaking sale of a \$29.5 million oceanfront property in the exclusive Irvine Cove. Raney's extensive roster of repeat and referral clients is a testament to her tireless work ethic and sterling client service, and to the well-honed marketing, negotiating, and closing skills that belie her years and make her stand out. Villa Real Estate was established in 2013 by the region's leading luxury residential real estate professionals to ensure that clients in Coastal Orange County receive the most strategic, innovative and effective representation available in today's market.



### Dawn Reese, CEO

#### **The Wooden Floor, Santa Ana**

Dawn S. Reese has leveraged more than 25 years of business and nonprofit

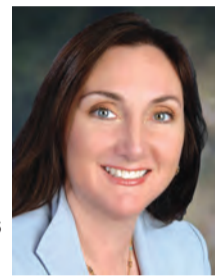
management experience to be a life-changer for low-income youth and help propel The Wooden Floor forward. During Reese's eight-year tenure, she was promoted from general manager and chief financial officer to executive director and co-CEO in 2012, and in 2016, she was promoted to chief executive officer. Reese led the efforts to take The Wooden Floor's model national and signed their first licensed partner in Washington, DC in November 2015. Under her leadership, The Wooden Floor also recently announced plans to open a second location in Santa Ana to serve 100 more students and their families by the end of 2017. Reese received the 2016 Center for Leadership Award for Innovation from California State University, Fullerton and the 2015 Difference Makers Award for Small Nonprofit Person of the Year from the Santa Ana Chamber of Commerce.



### Suzanne Richards, CEO of Healthcare Operations

#### **KPC Healthcare Inc., Santa Ana**

Suzanne Richards is the chief executive officer of healthcare operations for KPC Health's eight Southern California hospitals, serving some the region's most densely populated areas. As the CEO, Richards manages the operations of more than 1,900 inpatient beds, 2,700 active physicians and 5,000 hospital personnel. Richards is also the chief executive officer of Orange County Global Medical Center, where she directs the day-to-day hospital operations and business strategies. Under her leadership and expertise, several of these hospitals have been recognized by Healthgrades, a national organization that provides consumers with the information they need to make more informed health care decisions. Each of the four Orange County hospitals have received awards for a variety of services, including bypass surgery, coronary intervention, patient safety and total joint replacement.



### Maricela Rios-Faust, CEO

#### **Human Options, Irvine**

Maricela Rios-Faust's leadership has been a key driver in Human Options becoming the most comprehensive domestic violence service agency in Orange County. Her commitment comes from a desire to raise her daughter in a world where domestic violence isn't tolerated. Since 2006, she has capitalized on her 20 years of experience working with vulnerable populations. Recognized as a leader in the field, Rios-Faust is the past president of the board of directors for the California Partnership to End Domestic Violence. She also co-chairs the Orange County Domestic Violence Death Review Team, serves on the Orange County Women's Health Project Advisory Board and the WeCan Coalition Steering Committee. Rios-Faust was named one of Orange County's Most Influential of 2014 for her leadership on increasing awareness of health impacts of domestic violence.



### Jodi Ristrom, Partner

#### **HMWC CPAs & Business Advisors, Tustin**

Jodi Ristrom, CPA, is a trusted advisor for her clients. Her passion is to help her clients improve their financial reporting and internal controls so they can make better, timely decisions to improve their business. Ristrom is also actively involved in her community and is passionate about her favorite charitable organization, Family Promise of Orange County, a nonprofit that helps homeless families achieve housing stability by providing short-term shelter, meals and case management. On top of managing the firm's Audit Department and quality control, Ristrom spends quality time with her family and helps manage her elderly parents' affairs, which includes her mother who is in the advance stages of Alzheimer's disease. Ristrom grew up as a "military brat" and as a child moved every year and attended seven different schools. She is a first person in her family to obtain a college degree and profession certificate. HMWC CPAs & Business Advisors specializes in serving the financial and tax needs of privately held businesses and their owners.



### Kelly Roberts, Owner/Vice Chairman/COO

#### **Entrepreneurial Corporate Group, Newport Beach**

Kelly Roberts has been instrumental in the success and national recognition for the various business units within the family enterprise, Entrepreneurial Corporate Group. She has been the driving force behind several ventures, including The Historic Mission Inn Corp., KRR Enterprises, Casey's Cupcakes LLC and the Irvine & Roberts Family Vineyards. The Historic Mission Inn Corp. earned several awards, including 2016 #1 Best Historic Hotel by *USA Today's 10Best* and 2016 #1 Best Historic Hotel by *Historic Hotels of America*. As owner and president of KRR Enterprises, she has created high demand for her line of botanical anti-aging products and signature hotel amenities. Kelly's Spa earned Conde Nast's Top 10 Hotel Spa ranking thanks to her intrepid wellness vision. She also serves as president of Casey's Cupcakes LLC, an award-winning cupcakes boutique, where she has expanded the company's offerings to include macarons, cake pops, cookie dough, cotton candy and nationwide shipping.





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## 2017 Women in Business Nominees

### Laura Roche, Luxury Real Estate Professional *Villa Real Estate, Newport Beach*

Laura Roche began selling luxury real estate in Coastal Orange County 15 years ago. She has elevated in her field to become a multimillion dollar producer, closing more than \$50 million in transactions in 2016. She joined forces with Shana Spitzer in 2012, and together, their team joined Villa Real Estate in 2014. Known to work relentlessly for their clients and deliver the highest level of service, their partnership has continued to grow exponentially every year. Villa Real Estate was established in 2013 by the region's leading luxury residential real estate professionals to ensure that clients in Coastal Orange County receive the most strategic, innovative and effective representation available in today's market.



### Liz Ryan, Realtor *Surterre Properties, Irvine*

A New York native, Liz Ryan moved to Southern California 20 years ago and has made a name for herself as a top-producing real estate agent in the South Orange County area. Ryan is a dedicated and ambitious professional who works with both buyers and sellers, creating everlasting relationships. Always putting her clients' needs first and providing quality service has delivered her much success. Because of her outstanding work ethic, she has built her career on continual referrals and repeat business. Ryan partnered with Surterre Properties® to take her unique brand of customer service to the next level, offering the latest in industry technology. Along with being a dedicated Realtor®, Ryan is actively involved in her community, supporting local animal rescues and she currently holds a board position for Mary's Shelter. Surterre Properties is Orange County's leading luxury real estate brokerage.



### Talia Samuels, President *Outshine Public Relations, Newport Beach*

At 23 years old, Talia Samuels founded Outshine Public Relations in 2015 with the desire to shine awareness on Orange County's top culinary talent. Samuels is recognized in the PR industry for her poise, drive and integrity. She has achieved great success on behalf of her top-tier list of clients who entrust her to help their businesses succeed by increasing exposure through print, digital, television and radio opportunities complemented with social media and digital content strategies. Samuels has earned her clients national exposure in a variety of outlets, including *USA Today*, FOX News and *Food & Wine*. She has also generated buzz for her clients in the local media, with coverage in the *Orange County Business Journal*, KTLA, ABC7, CBS, the *Los Angeles Times*, *Orange County Register* and many more.



### Kathryn Seebold, CEO *CASA of Orange County, Santa Ana*

CASA of Orange County is a nonprofit that provides a powerful voice for youth in the child welfare system through unique one-on-one relationships with trained and supervised court appointed volunteer advocates. The organization works to ensure that these youth are safe, have a permanent home and an opportunity to thrive. CASA ended this past fiscal year with a surplus budget of over \$400,000 at the end of September 2016. In 2015, the nonprofit ended the year with a surplus of over \$50,000. Prior to that, and before Kathryn Seebold joined the agency as CEO, CASA was in deep financial distress and dipped very far into its reserves. Seebold has solidified the financials at CASA and given staff reassurance in making smart decisions for the agency, which in turn, helps the organization serve more children in the foster care system.



### Shelly Sennikoff, Director of Budget & Financial Reporting *THINK Together, Santa Ana*

Having joined THINK Together as an administrative assistant, Shelly Sennikoff's rise through the ranks to her role as THINK Together's director of budgeting and fiscal reporting is impressive. And given the particularly unique challenges of managing the budget of a nonprofit operating at scale statewide, Sennikoff's recent contributions and accomplishments are all the more noteworthy. THINK Together's recent and successful reorganization – necessitated by a shift in program funding – required incredibly detailed, accurate and timely fiscal planning for more than 50 departments and program grants covering over 2,500 employees and a \$62 million budget. The combination of Sennikoff's technical abilities, fiscal know-how, interpersonal skills, understanding of the business and passion for her work, allowed her to play a critical role in continuing to evolve the fiscal model that underpins the ability of THINK Together to bring high-quality educational programs every day to tens of thousands of underserved youth throughout the state.



### Guita Sharifi, CFO *AIDS Services Foundation Orange County, Irvine*

AIDS Services Foundation Orange County (ASF) is a nonprofit AIDS service organization that has helped more than 8,000 people living with HIV and AIDS in Orange County. As chief financial officer of the organization, Guita Sharifi consults

with ASF CEO and executive director, Philip Yaeger, to meet the vision and strategic goals of the organization by providing financial transparency, cost savings and improving efficiency through financial and operational oversight. Sharifi has more than 15 years of experience in the nonprofit industry, which has equipped her with extensive knowledge in navigating major changes in the nonprofit health care sector. Sharifi's responsibilities include diversifying funding, improving efficiency in revenue cycles, budgeting and supervising the Financial Department. Prior to joining ASF, Sharifi served as the chief operations and financial officer for Rose Garden Holistic Care and consulted with Acacia Adult Day Services, where she worked with principal owners to set up systems, licensures, policies and procedures, and developed financial projections.



### Heather Marie Shelly, Owner/Director *About Senior Living, Newport Beach*

The senior industry has been a part of Heather Marie Shelly's life since she was a child. Some of her best and earliest memories were with her mother during their weekly visits to nursing homes and spending time with the elderly. Shelly credits those experiences for building the foundation of her love and respect for the senior population. As owner and director of About Senior Living, she's had made it her goal and relentless passion to become a valuable resource, as well as an advocate to families looking to place their loved in an assisted living community.



### Anna Shi, CEO *Ever-Pretty, Irvine*

Anna Shi founded Ever-Pretty in 2006. The company was first launched in the ever-changing European fashion market, and was later brought to the U.S. in 2011. Shi started with the dream of changing women's dress fashion on a global scale by creating superior women's dresses for affordable prices. All of Ever-Pretty's dresses retail for under \$100. The designs are meant to be timeless pieces to last for years. Ever-Pretty, an online shopping site, is the one-stop dress shop for all occasions, including prom, weddings, date night, vacations, etc. Ever-Pretty was created to make dress shopping easy and fun, with thousands of styles for customers to browse through.



### Gretchen Shoemaker, Chairwoman of the Board *Georgia's Restaurant, Anaheim*

Gretchen and George Shoemaker shared her dream of opening a restaurant. Eventually, they started a small catering business out of their kitchen, but after George passed, Gretchen closed up her catering business and retired from her job – there was no way she could open a restaurant without his presence at her side. That dream was passed on to her middle daughter, Nika and her husband, Marlon. When they decided to open their own business, Gretchen was ready to make her dream become a reality. In 2014, after a year of research and training, the family opened Georgia's Restaurant in the Anaheim Packing District. Today, they serve soul food dishes based on family recipes. Within a short time, Georgia's catering grew to include clients such as the city of Anaheim and Vans. Notable regulars of Georgia's Restaurant include Anaheim Mayor Tom Tait.



### Sandra Sholl, Chairman/CEO *MadaLuxe Group, Seal Beach*

In 1990, Sandra Sholl established Carlen Enterprises, which quickly became a groundbreaking innovator under her direction and remains focused on driving significant business value for influential fashion brands through the secondary market. Carlen Enterprises was at the forefront of the hip hop era and became the go-to supplier for the most renowned companies in the category, as well as the first to introduce premium denim to the off-price market. In 2009, Sholl strategically entered the luxury market, building strong business partnerships with the industry's most iconic European Maisons, whose names evoke true luxury. With this new timeless and sustainable business concept, MadaLuxe Group was born. MadaLuxe Group has become an innovative global leader in the luxury fashion space, as well as North America's largest distributor of luxury fashion and accessories for men and women.



### Maura Short, Real Estate Agent *Compass, Newport Beach*

Maura Short lives by three values: integrity, trust and tenacity. Short is an industry leader with a reputation for protecting her clients' interests. Her ability to serve clients with talented negotiation and state-of-the-art marketing strategies is a hallmark of her service. Short is respected amongst her peers and clients alike in Orange County for her professional track record and high ethical standards. After a record-breaking year in 2016, Short and her team have moved to a new, technology-driven real estate brokerage, Compass. By pairing the industry's top talent with technology, Short is a part of the Compass team making the search and sell experience intelligent and seamless.



2017 Women in Business Nominees

**Angela Sinickas, CEO**  
**Sinickas Communications Inc., Laguna Hills**

Angela Sinickas is one of the pioneers in the field of corporate communication measurement – showing the financial impact on organizations of strategic, two-way communication between executives and their internal/external publics. She has been invited to speak not only at communication conferences, but also at business conferences, ranging from the Management Leadership Network in Belfast to the World Lithuanian Economic Conference. Her work has been recognized with 21 international Gold Quill Awards. The international reputation of Sinickas Communications Inc. has brought in unsolicited work from governments, organizations and corporations on six continents, including more than 25% of the Fortune 100 largest global companies. CEO Angela Sinickas has trained communicators to work in a more outcomes-focused way rather than output-focused, making them better business partners for company executives. Her firm also conducts focus groups, surveys and other research to provide baselines against which to measure progress.



**Alexandra Spitz, Founder**  
**The New Mom School, Newport Beach**

Since the inception of The New Mom School (TNMS), formerly OC Mommy and Me, Founder Alexandra Spitz, has devoted her life to helping new moms in Orange County with OC's premier educational support program for new moms. As a Certified Parent Educator, Newborn Specialist, Certified Positive Discipline Parent Educator and mom of two, Spitz is always looking ahead and has a big vision for the community. Her programs provide moms with access to high-quality, in-person support and education during this very crucial time. In just four years, TNMS has welcomed more than 1,500 moms to classes. With numbers growing rapidly, Spitz is quickly realizing her goal of changing the culture of motherhood in Orange County to one where moms support and empower one another instead of tearing each other down. She is also an active philanthropist, helping many local charities.



**Shana Spitzer, Real Estate Agent**  
**Villa Real Estate, Newport Beach**

Coming from the interior design business, Shana Spitzer expanded to selling real estate in 2010 when the market was at an all-time low. With dedication, persistence and the will to make a name for herself in the field of luxury residential real estate, Spitzer represented more than \$50 million in transactions in 2016 alone. She joined forces with Laura Roche in 2012, and together, their team joined Villa Real Estate in 2014. Villa Real Estate was established in 2013 by the region's leading luxury residential real estate professionals to ensure that clients in Coastal Orange County receive the most strategic, innovative and effective representation available in today's market.



**Cristen Stapp, Partner**  
**Kitchen Table Marketing + PR, Newport Beach**

From the founding of Kitchen Table Marketing + PR, Cristen Stapp has been a key player in Orange County's public relations and marketing sector, generating media coverage and marketing success for clients ranging from local lifestyle centers to national children's toy product companies and five-star resorts. Stapp is well-respected for her professionalism and talents by colleagues, media and clients alike. Through her work with Kitchen Table Marketing + PR, Stapp has given her time to numerous causes, including Project Hope Alliance and The Foundation for the Undefeated/Irrelevant Week. In addition, she is an active member of the CHOC Glass Slipper Guild.



**Carolyn Stephens, Associate Director/Chief of Staff**  
**UCI Institute for Innovation, Irvine**

In 2013, UCI Chancellor Howard Gillman, together with benefactor Don Beall, established a vision for UCI as a model for university and industry engagement toward the creation of an "innovation district" in the heart of Orange County. UCI Applied Innovation opened in 2014 to spearhead this effort. Significant changes had to be made on campus to create a more collaborative culture, requiring an internal champion with the organizational and interpersonal skills to drive interdisciplinary partnerships. In January 2015, Carolyn Stephens accepted the herculean task of implementing these changes and joined the leadership of Applied Innovation. In two years, her leadership has led to increases in industry engagement with UCI and streamlined UCI's technology licensing process to move at the speed of business. Beyond being the driving force behind the build out of Applied Innovation, Stephens is taking up the challenge of addressing the needs of the regional innovation and entrepreneurial ecosystem in order for the county to attract, nurture and retain startups.



**Paula Steurer, Founder**  
**Sterling Public Relations, Corona del Mar**

Celebrating its ninth anniversary, Sterling Public Relations specializes in comprehensive public relations, marketing and branding services for companies

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



**Jennifer Stewart-Tai, Founder/President**  
**City Girl Prepper, Los Alamitos**

City Girl Prepper is changing the way women discuss preparedness. By offering emergency preparedness education and ready-made supplies in a home party setting, women are gathering together to learn how to handle any emergency like a boss. First responders recommend that everyone has at least 72 hours of supplies, and City Girl Prepper is helping women and families get prepared. Through Jennifer Stewart-Tai's commitment to the business, City Girl Prepper has more than doubled its sales revenue from last year and has added corporate accounts to the client list. City Girl Prepper was selected to showcase at the National CERT Conference with more than 600 emergency managers attending from across the nation. Stewart-Tai has also begun to add sales affiliates to feature City Girl Prepper in their stores and websites.



**Susie Storey, VP of Sales**  
**DealerSocket, San Clemente**

Susie Storey began her career at DealerSocket in 2009 as an executive sales manager, selling the company's integrated dealership technology. Although she works in a male-dominated industry, Storey's hard work led her to quickly outpace expectations, becoming the company's top sales representative and increasing DealerSocket sales in the Pacific Northwest by more than 40%. Her strategic contributions led to a promotion to sales director of the Central Region, where she continued to thrive. She soon advanced to managing the coveted East Coast Region, reaching 100% of DealerSocket's sales goals. Today, she is DealerSocket's vice president of sales, where she leads a Customer Success Department to help DealerSocket's customers better leverage



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the technology solutions. The department she leads has grown by 87 people in 2017, with the addition of the Customer Success Management Team. Storey guides her team to drive customer satisfaction and retention for all 11,000+ of DealerSocket's dealership customers. DealerSocket provides dealerships with a single automotive platform containing marketing, sales, service, customer experience and data mining solutions.

### **Eliisa Stowell, Real Estate Agent Surterre Properties, Newport Beach**

Eliisa Stowell is one of the most prolific agents selling homes in Orange County, and is continually recognized as one of the top producing agents at Surterre. Her production numbers, combined with her outgoing personality, landed her a role as part of a team shooting a real estate show for a major network that will be airing in 2017. Stowell is a familiar face in the small community of Corona del Mar. When she is not volunteering in many of the local functions and charity events, she is busy maintaining her title as one of the top three sales people in Corona del Mar, and has sold over \$400 million during her 14-year career. As the founder of Stowell and Associates, Stowell is able to assist even more buyers through her luxury group with speed and efficiency. Surterre Properties is Orange County's leading luxury real estate brokerage.



### **Mary-Christine "M.C." Sungaila, Partner Haynes and Boone LLP, Costa Mesa**

M.C. Sungaila joined Haynes and Boone LLP in June 2015 as the law firm's first appellate partner in California. She is a key contributor to the firm's women's initiatives; spearheaded numerous seminars; and has been involved in many speaking roles, publications and community activities. Sungaila will be recognized in late 2017 by the Orange County Women Lawyer's Association as the Attorney of the Year. From 2010 to 2016, *The Daily Journal* has named her one of California's Top Women Lawyers. In addition, she received the 2015 and 2016 California Lawyer Attorney of the Year (CLAY) Awards from *California Lawyer Magazine* and the 2015 Attorney of the Year Award from the OC Hispanic Bar Association for her longtime pro bono appellate work. Sungaila was recently named director-at-large for the Orange County Bar Association. She chairs the Appellate Law Section Task Force that helped found and currently staffs the civil appellate self-help clinic at the Orange County Court of Appeal.



### **Nicole Suydam, CEO Second Harvest Food Bank of OC, Irvine**

Nicole Suydam has dedicated her 20-year career to the nonprofit sector, working for local and national organizations helping people in need. As chief executive officer of Second Harvest Food Bank, the largest hunger-relief organization in Orange County, Suydam and her team are providing the equivalent of 20 million meals to 180 charitable organizations, feeding 200,000 people each month. Under her leadership, Suydam has expanded the number of meals provided from 14.9 million to 20.1 million, focusing on nutritious food and fresh produce. She has also been instrumental in increasing total organizational revenue, including the value of donated food, from \$35 million to \$49 million. Suydam led the creation of a new strategic plan last year, establishing the food bank's Bold Goal to grow to 30 million meals by 2021, putting them on pace to close the entire meal gap in Orange County by 2025.



### **Naz Tadjbakhsh, Director of Organization & Talent Development**

#### **Artemis Search Partners, Irvine**

Naz Tadjbakhsh started with Artemis, a recruiting agency, as an intern in 2012 while finishing her undergraduate degree at UCI. Even as an intern, Tadjbakhsh's entrepreneurial spirit and exceptional ability to spot opportunities for improving operations were beyond her years. She implemented operational workflows and processes, designed a hiring strategy with interview guides, and created an initial framework for employee career development. The impact Tadjbakhsh had as an intern allowed Artemis to grow to a point where the company was able to hire her on full-time basis after she completed her undergraduate degree. After working for a year and a half at Artemis, Tadjbakhsh made the decision to pursue her passion for learning by attending graduate school. Artemis was again able to bring Tadjbakhsh back full-time as a strategic growth partner for organization development, talent management and operations after she completed her master's degree. Since returning to Artemis, Tadjbakhsh has revamped every segment of the business, including operations, financials and HR.



### **Krista Thompson Talley, Owner Dolly's Cotton Candy, Seal Beach**

Dolly's Cotton Candy is an on-site cart catering service that was started in 2011 by former advertising design executive, Krista Talley. Dolly's Cotton Candy provides a unique food entertainment experience for all ages from a custom-designed cotton candy cart. By providing a detailed and professional service with the highest-quality ingredients available, Dolly's Cotton Candy has won the hearts of many clients, including A-list celebrities, international event planners, five-star resorts, Fortune



500 companies, families, schools and religious organizations. With the success of Dolly's, Talley is creating new business opportunities for other individuals who are looking to start their own cart catering business, as well as design carts for corporate companies, trade shows and resorts by expanding into licensing and custom cart manufacturing.

### **Betsy Thagard, Founder B. toffee LLC, Irvine**

Since B. toffee's inception in 2009, the treat has caused quite a stir in the candy confection world. With a dedicated following and growing customer base, Betsy Thagard has turned her passion into a profitable business. Solely by word of mouth, B. toffee has experienced consistent growth since the company was founded and is on track to continue the growth in 2017. Sales in 2016 continue to surpass years previous, with a 40% overall increase from 2015. An award-winning handcrafted toffee, B. toffee's "crunchy perfection of sweetness" offers the ultimate indulgence. Thagard spent years of experimenting to create the perfect toffee. B. toffee received top gold honors for Top Toffee and Best Packaging by the Taste Awards in San Francisco, and has also been awarded the Official Toffee honor at the Golden Foodie Awards. B. toffee can be found in many high-end specialty markets both locally and nationwide, including Dean & DeLuca; Whole Foods; Bristol Farms; and at several luxury resorts, like Bacara Resort & Spa in Santa Barbara.



### **Jacqueline Thompson, Real Estate Agent, Jacqueline Thompson Group Surterre Properties, Newport Beach**

Jacqueline Thompson arrived to the Newport Beach real estate field with no connections a little more than 10 years ago, and quickly established herself as a top-producing agent along the coast and in Shady Canyon, Irvine. Her first 10 years in the business consisted of pure determination and a strong work ethic – working 24 hours, 7 days a week to build her client base, doing open houses weekly and offering superior service over her competitors. She has consistently been the #1 agent for Irvine in sales volume, and ranked in the top echelon of agents in Orange County. Thompson continues to raise the bar for real estate services for all clients. Surterre Properties is Orange County's leading luxury real estate brokerage.



### **Jessica Thompson, President**

#### **Spaulding Thompson & Associates, Laguna Niguel**

Jessica Thompson remains a leader in delivering public relations strategy to the commercial real estate industry. She has earned a reputation for helping to elevate thought leadership and differentiate a location, company and individual to grow business and increase market share. Through Spaulding Thompson & Associates, she has worked to blend the best of media relations, marketing and digital tools to the benefit of her clients and the industry. Spaulding Thompson & Associates is a full-service public relations and marketing firm, with specific expertise in commercial real estate, economic development and public affairs.



### **Lori Torres, Founder/CEO**

#### **Parcel Pending, Irvine**

After coming up with a business plan, Lori Torres left her stable job at Irvine Co. as senior vice president and launched her own company, Parcel Pending, in 2013. Now with 80+ employees, the privately held company projects year-over-year revenue to grow 438%. Parcel Pending provides a comprehensive, automated solution to the growing package management problems facing multi-family housing communities. The company's electronic locker storage system eliminates the need for management to handle residents' packages and enables residents to pick up their packages 24/7 at their apartment community. More than 200 locker systems are installed in Orange County at Irvine Co., Shea Properties, UDR, Lennar, Wolff Co. and others, with hundreds more spread across 38 states and Canada.



### **Cheri Tree, Founder/CEO**

#### **BANKCODE, Laguna Beach**

With more than 20 years of experience in sales, Cheri Tree is a leading authority on sales and sales training systems. Using the B.A.N.K.® system, Tree took her annual income from \$72,000 to over \$500,000 in 12 months and over \$1 million within three years. A recipient of numerous awards, she is best known for her sales income record of \$8,000 to \$261,000 in 28 days. As a coveted speaker and trainer, Tree teaches the B.A.N.K.® system to top sales organizations worldwide. Tree has been a featured keynote speaker at the National Achievers Congress around the world. She has also been featured in *Your Business At Home* magazine, *Success From Home* magazine and other well-known international publications.



### **Mei Tsang, Firm Managing Partner**

#### **Fish & Tsang LLP, Irvine**

Mei Tsang, managing partner at intellectual property law firm Fish & Tsang LLP (F&T), is an accomplished attorney whose business success transcends her own career to include the success of her clients. An acclaimed IP attorney and name partner at Fish & Tsang, she works with inventors, innovators and business leaders to protect valuable intellectual property. Tsang has tried cases in national and federal

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courts, and works with law enforcement to combat counterfeiters. Overseeing the entire F&T operation, Tsang has led the firm to significant growth recently. She spearheaded 2015 expansion efforts, including the opening of F&T's second office in Silicon Valley – and with it, a robust litigation practice. Last year, Tsang was elected to the board of the Orange County Bar Association (OCBA) and is involved with OCBA's IP and Technology Section, International Trademark Association's Anti-Counterfeiting Committee, Women Presidents' Organization and OCBA's Charitable Fund. She is also president of W3 Women Inc.



significant value for her clients and investors. She manages a multitude of processes, including finding unique, off-market opportunities; syndicating properties; overseeing renovation; and ultimately, selling properties for a profit. With a solid design background from the Fashion Institute of Design & Merchandise, she converts her extensive fashion design skills into unique architecture and interior compositions, transforming distressed properties into contemporary, market-ready homes.

**Tracy Weintraub, Real Estate Agent  
Surterre Properties, Dana Point**

For years, Tracy Weintraub has dedicated her life to helping others. She volunteered in organizations all over Orange County, she was a constant fixture in spiritual care at Mission Hospital for eight years, and also assisted in senior health counseling. When Weintraub decided to enter the real estate industry in 2009, she applied that same level of dedication to her career, and it quickly took off. Thanks to an extensive network of contacts, an abundance of experience working with people and a drive to succeed, Weintraub has become one of the most successful agents working in Orange County. Her portfolio includes high-end luxury homes, several of which have been filmed for the BravoTV show, *Real Estate Wars*. Weintraub is able to work with local art galleries to host pop-up art shows in these luxury houses, which helps to find buyers and also raises money for charities. Surterre Properties is Orange County's leading luxury real estate brokerage.



**Dr. Betty Uribe, EVP, Greater Southern California Division  
California Bank & Trust, Irvine**

When Betty Uribe was recruited to California Bank & Trust in 2011 for the purpose of conducting a massive turnaround, not even she could imagine that just five years later, she would be presenting to 30 banking executives from around the world – detailing how she led a “best-in-class” turnaround. In 2016, the best year in the history of the bank, they had a 40% year-over-year, pre-tax profit increase while every major financial metric – ROE, ROA, Efficiency Ratio and Revenue Growth – all saw significant improvements. And, that is only half of the story. Uribe has just published *#Values: The Secret to Top Level Performance in Business and Life*, a book based on her dissertation study on Values. The book instantly became an international best-seller and has been presented to world leaders, while continuing Uribe's goal of raising funds to provide scholarships for 100 underserved high school kids to attend college on each continent. California Bank & Trust is a full-service bank specializing in business banking.



**Jamie Welsh, Managing Partner/Head of Marketing & Operations  
West of 5 Studios, San Clemente**

West of 5 Studios (WO5) is home to a team of forward-thinking creatives, partners and producers. From designing innovative websites to in-store retail displays, WO5 takes clients from ideation to execution, and are the bridge in retail from brand to build. With a focus on leading with design and brand-centric thinking, WO5 has core expertise in retail marketing, manufacturing, trade show environments, brand marketing, strategy and implementation, and customer experience. Jamie Welsh, with her co-founder, Shaun Busby, are an unlikely millennial and Gen X pairing of thought leaders, with an entrepreneurial spirit that work exceptionally in unison. Welsh's experience in marketing, coupled with Busby's expertise in display design provide for unique perspective in their industry. WO5 has experience in marketing attention-grabbing retail experiences for national and international brands. Founded in 2015, they are a small team based in San Clemente, but growing quickly with a new presence in both China and New York.



**Carla Vargas, COO  
Orange County United Way, Irvine**

Carla Vargas has served in various capacities at Orange County United Way since 1999. In her previous role as senior vice president of community impact – before her promotion to chief operating officer – Vargas spent 24 months working with the nonprofit's board of directors and community stakeholders on a strategic planning and community engagement process to develop 10-year, community-level change goals for Orange County in the areas of Education, Income, Health and Housing, and a 10-year strategic plan called “FACE 2024” based on the model of “Collective Impact.” She has realigned United Way's funding, created an advocacy and public policy plan, and has developed new key collaboration and public education strategies in support of the FACE 2024 goals. Most recently, she led the development and execution of the organization's first FACE 2024 “Community Report,” which will become the annual “scorecard” to demonstrate progress against the 10-year goals.



**Cathy Volpe, President  
HB Staffing, Huntington Beach**

Cathy Volpe has been in the staffing industry since 1976. In addition to founding and building three successful staffing firms, she spent 22 years consulting and training best practices to the industry. HB Staffing is a 100% woman-owned staffing company founded in 2000. Since its inception, the company has placed thousands of individuals with more than 1,000 various businesses and government organizations. Volpe's vision in founding HB Staffing was based upon providing personalized customer service, confidentiality and ethical standards that she would want if she were the client.



**Tusdi Vopat, VP, Events & Promotions  
Cylance, Irvine**

Tusdi Vopat is an accomplished executive, business owner, entrepreneur, wife, mother and educator. As part of Cylance's founding team, Vopat has built the entire demand/lead generation program for Cylance, from zero to more than \$500 million today. Even more remarkable, she built the team and its processes completely from scratch and all organically. She has mentored countless individuals and leaders inside the company to produce an extremely high-performing execution machine. Vopat is a strong and stabilizing force in the company, willing to reach out and help anyone at any time to reach their potential inside and outside the company. Cylance is a leading cybersecurity company with products and services that proactively prevent, rather than reactively detect the execution of advanced persistent threats and malware.



**Victoria Vu, Managing Partner  
VF Developments, Newport Beach**

A leader and trendsetter in the Halloween costume and lingerie industry, Victoria Vu has taken her passion and skills in fashion design and business and applied them to real estate. In 2016, she founded and is managing partner of VF Developments LLC. Within a year, she has amassed a portfolio of more than \$5 million worth of income properties ranging from condominiums to multi-family residences. As part of the Keller Williams Newport Estates team, Vu hunts for investment opportunities and creates



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## 2017 Women in Business Nominees

### Brenda West, President RAJ Swim/SwimSpot, Tustin

Brenda West serves as president of RAJ Swim, one of the largest women's swimwear companies in the United States. RAJ Swim designs, manufactures and sells swimwear under internationally recognized brand names, including ATHENA, NEXT, LUXE by Lisa Vogel, Basta Surf, Reef Swimwear, VYB Swim, Ella Moss and Splendid. West's recent appointment is part of RAJ Swim's long-term organizational strategy to align the business and continue to drive growth. This year marks RAJ Swim's 50th anniversary, and West will lead the company as the first person outside the swimwear maker's founding family to hold the position as president. West's big initiative is retiring older brands and pursuing new business initiatives. She brings new perspectives to the business and years of industry experience to execute RAJ Swim's ever-changing progressive strategies.



### Esther Wildenberg, President BANKCODE, Laguna Beach

In 2013, Esther Wildenberg became a licensed and certified trainer with BANKCODE, a U.S.-based sales training company that was expanding in Europe. By the end of that year, she had become the number one salesperson in the world and was offered the position of international sales director for Europe. Using her advanced skills in sales, networking and leadership, coupled together with the B.A.N.K.™ methodology, Wildenberg was able to open several regions throughout Europe; and later Asia, Africa, Australia and the U.S. In 2014, she was promoted to vice president of sales worldwide, and then ultimately to the position of president of the company.



### Carrie Williams, Principal Kitchen Table Marketing + PR, Newport Beach

Since the founding of Kitchen Table Marketing + PR, Carrie Williams and her team have continued to offer a unique marketing and PR solution to clients in Orange County – offering the experience and strategic approach of a big agency (through Williams's experience working on Fortune 100/500 accounts at multinational PR and advertising firms) to local and regional clients. As a result, Williams and her team have helped clients to successfully grow and enhance their businesses in the local marketplace and beyond.



### Robyn Williams, Chief Program Officer WHW, Santa Ana

Serving as the chief program officer at WHW, Robyn Williams goes above and beyond to ensure the unemployed and underemployed in Orange County receive the tools and resources they need to secure and retain viable jobs. Williams has played an instrumental role in growing the number of people served by nearly 40% since she stepped on board four years ago. Last year, WHW served nearly 10,000 men and women, and was able to help 75% of them successfully secure employment within four months. Overseeing the apparel, volunteer and education/employment readiness programs, Williams ensures the highest quality of service is extended to clients, corporate partners and the community. Harnessing a myriad of experiences in the entertainment, news and corporate arenas, Williams is on the forefront of creating, designing and implementing strategic growth plans to expand WHW's services to those in need.



### Genine Wilson, Territory VP, Southern California Kelly Services Inc., Orange

An experienced business leader and staffing executive, Genine Wilson oversees the staffing and business solutions operations for Kelly Services throughout Southern California, with a focus on engineering, information technology, science, and finance and accounting staffing. She also manages the company's administrative and light industrial recruiting businesses, as well as on-site staffing solutions and contact center staffing solutions in the region. Wilson creates and implements a seamless and integrated approach to talent supply chain management for clients with emphasis on developing client solutions and efficiencies, talent engagement and retention, and career development. Wilson oversees more than 80 full-time employees and more than 3,000 temporary employees. Her region generates more than \$100 million in sales and ranks as the company's top territory in revenues in the country. She has achieved strong regional growth year-over-year for the past five years, delivering between a 12% and 26% growth rate. During this time, her full-time employee headcount grew from 55 team members to 92, a 67% increase. Kelly Services is global leader in providing workforce solutions.



### Diane Wittenberg, Audit Partner Haskell & White LLP, Irvine

Diane Wittenberg has more than 30 years of experience in attest services, including 17 at a Big 5 firm. Now, she serves as a partner at Haskell & White LLP, one of the largest independently owned accounting, auditing and tax consulting firms in Southern California. The firm has grown to more than 75 employees this past year, and Wittenberg has been a leading force within its business model, working with public and private middle-market companies, as well as nonprofit organizations to

conduct audits and meet compliance requirements. Wittenberg has demonstrated her role as a leader within the financial services community since scoring in the Top 10 on the May 1985 California CPA exam. She goes beyond her management and accounting roles by being a mentor. The flexible work policy she developed ensures that colleagues have the freedom to manage their own time and prioritize both personal and professional endeavors. She also oversees the firm's training program, serving as an invaluable resource for colleagues.



### Yvonne Wonder, Founder/Managing Director Destination Sitters LLC, Laguna Beach

Yvonne Wonder started Destination Sitters because she saw a need for mothers to have high-quality babysitting choices, and for younger professional women to have a chance to earn money with part-time, flexible work. Destination Sitters refers fully vetted, high-quality sitters to hotels for visiting parents attending conventions, weddings and so on. The company also runs a number of hotel kids' programs. Parents have peace of mind because sitters are vetted and chosen for their love for children. Wonder has accomplished all this by working 12 hours a day, seven days a week for the past eight and a half years, while being a mom to two successful children.



### Dr. Tammy Wong, CEO Fostering Executive Leadership Inc., Irvine

Dr. Tammy Wong's professional career spans over three decades of sales, marketing and strategy experience in Fortune 500 companies. She is known for her demonstrated leadership abilities and her commitment in developing leadership in others. She is the chief executive officer of Fostering Executive Leadership Inc., an international business results executive coaching firm. The firm consists of more than 300 leadership coaches worldwide. The coaches work with leaders by improving leadership capability, capacity and have established a proven record with a ROI through the company's coaching engagements.



### Karen Wood, General Manager/UCI Liaison Irvine Barclay Theatre, Irvine

The role of general manager for the Irvine Barclay Theatre was re-imagined by President Jerry Mandel as Karen Wood was invited to join the organization's professional team. The typical managerial scope of responsibilities was expanded to also include pro-active relationship building with the Orange County business community, the city of Irvine and the UCI community. Wood is developing opportunities for new and deepening partnerships, and has also designed a path for corporate meetings, special events, lecture series and potential artistic co-productions with these diverse constituencies. As one of the newer members of the Irvine Barclay Theatre team, she is providing key leadership with these external constituents and stake holders, strengthening community access and participation, plus adding to the awareness of the nonprofit by presenting the organization as an important cultural resource throughout Orange County.



### Michelle Wulfestieg, Executive Director The Southern California Hospice Foundation, Costa Mesa

Michelle Wulfestieg is a two-time stroke survivor who understands just how precious life is and believes that as long as you are here, you have a purpose. Her own health struggles drew her to the field of hospice care, where she has dedicated her life's work for the last 10 years. She describes her experiences in her award-winning book, *All We Have Is Today: A Story of Discovering Purpose*. Since 2010, she has served as the executive director of the Southern California Hospice Foundation, a nonprofit organization committed to enhancing the lives of terminally ill patients and their families. Today, Wulfestieg hopes to be an inspiration to those who are struggling.



### Christina Zabat-Fran, VP/General Counsel/Corporate Secretary St. John Knits Inc., Irvine

Christina Zabat-Fran is vice president, general counsel and corporate secretary for St. John Knits, the American luxury house with global headquarters in Orange County. As a fast-rising executive for the brand, known for its signature innovative knits and over 50-year legacy dressing confident women, she leads legal affairs during a crucial era of the brand's evolution and global expansion. Zabat-Fran has been extremely committed to serving the community, having served as Orange County Bar Association Corporate Counsel section chair and she currently sits on the Bar's board of directors. She dedicates her entrepreneurial drive to champion the advancement of women and minorities within the legal profession in order to better serve the increasingly diverse business community. Beyond her pro bono service, charitable work and mentorship, she most recently founded the county's Filipino-American bar. She was named as the *Orange County Business Journal's* Rising Star Award winner at the 2016 General Counsel Awards.

