

Excellence in **ENTREPRENEURSHIP** Awards

AWARD CEREMONY AT IRVINE MARRIOTT | MARCH 20, 2024

**ACQUISITIONS, EXPANSION & NEW ROLES
FOR 2023 EIE WINNERS**

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2024 NOMINEES

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OC Entrepreneurs See Growth, New Ventures

It's been a year of change, and growth, for winners of the Business Journal's 2023 **Excellence in Entrepreneurship Awards**.

One retail exec stepped down from the CEO role to become executive chairman of the company he co-founded nearly 20 years ago.

One exec in the scrap metal business saw his firm become one of the fastest-growing private firms in Orange County.

One real estate-focused exec invested heavily in a waste management business. Another real estate-focused exec bought a professional soccer team.

The Business Journal caught up with the 2023 EIE Award

Winners to see what's changed since their awards; profiles run below and on page 22.

The next Excellence in Entrepreneurship Award ceremony is scheduled for March 20 at the **Irvine Marriott**, and keynoted by one of 2023's winners, **SA Recycling CEO George Adams**. Bios of nominees for the upcoming event begin on page 46.

George Adams Jr.: \$3B+ in Sales, and Growing

■ By KEVIN COSTELLOE

It's loud, it's rough, it's not for the faint of heart.

SA Recycling Chief Executive **George Adams Jr.** has another way to describe handling millions of tons of scrap metal bound for recycling each year: fun.

The company operates at more than 140 sites, ranging across the country from Georgia to California, with a major outpost on **Terminal Island** in the **Port of Los Angeles**.

"I began driving tow trucks when I was 17. Later, I started working alongside my father for 40 something years. My two brothers also work in the company and are my partners, and after all these years we're still really close," Adams told *Recycling Magazine* in an article published last month.

He added: "Then, my sons came into the business after they finished college. So, I guess that's what makes it the most fun. It's working with my sons."

The Business Journal honored Adams almost a year ago at the **Irvine Marriott** with an **Excellence in Entrepreneurship Award** for leading the growth of Orange-based SA Recycling.

The privately held firm ranked No. 8 on the Business Journal's fastest-growing OC large private companies last year, with revenue of



George Adams Jr.
CEO
SA Recycling

\$3.2 billion for the 12 months ended last June 30.

By sales, SA Recycling last year ranked No. 6 among all privately held companies in OC.

Electric Crane

Among the company's innovations at Terminal Island is an electric-powered mobile crane that's far more environmentally friendly than old-fashioned diesel models.

"This is definitely the finest scrap crane in the world," Adams said at an event last summer, as he congratulated the port for its efforts to make the busy area "carbon-free."

SA Recycling also uses electric vehicles there.

The Terminal Island plant shreds 500 to 600 cars each day, *NPR* member station **KCRW** said in a report last month.

"SA Recycling makes about \$350 per car

by selling the bits and pieces to companies in Asia: Korea, Vietnam, India," according to **KCRW**. "China used to buy most of this material, but it's not taking much anymore."

1970s Start

George Adams Sr. in the 1970s started Anaheim-based scrap metal firm Orange County Steel Salvage, which eventually became SA Recycling.

The current CEO took over the company from his father in the mid-1980s.

As of last year, SA Recycling processed over 5 million tons of recycled metal every year with about 3,100 employees and 25 metal shredders companywide.

The company recycles both iron-based metals such as steel and non-ferrous metals including copper and aluminum. ■

SA Recycling



- **FOUNDED:** 2007
- **CEO:** George Adams Jr.
- **HEADQUARTERS:** Orange
- **BUSINESS:** recycling scrap metal
- **OC EMPLOYEES:** 405
- **NOTABLE:** aims to be environmentally friendly

Alex Bhathal: Expands Investments in Sports, Real Estate

■ By PETER J. BRENNAN

Alex Bhathal has several highlights to point to since winning a Business Journal **Excellence in Entrepreneurship** award last March.

His Newport Beach-based **RAJ Sports**, which he leads with his sister **Lisa Bhathal Merage**, bought control of the **Portland Thorns FC** of the **National Women's Soccer League**. The team was valued at around \$65 million by a trade publication.

"That's definitely a highlight," Alex Bhathal told the Business Journal. "We believe strongly in the growth potential of the league. It has a tremendous fan base and a history of success on and off the pitch."

The acquisition represents the latest in a growing portfolio of sports team ownership positions held by the Bhathal family, including the **NBA's Sacramento Kings**, **Sacramento RiverCats** AAA baseball club, **Stockton Kings** NBA-G League club, and **Kings Guard NBA 2K** e-sports team.

Additionally, Lisa and Alex are co-founders and managing partners of **Revitate**, an investment firm specializing in sports, real estate, and consumer brands. Thus far, it manages about 10 different funds in real estate such as opportunity zones and workforce housing.

Alex helped convince three heavyweights to join Revitate's board of directors, including **Chris Cox**, former chairman of the Securities and Exchange Commission; **Jeremi Gor-**



Alex Bhathal
Co-Managing Partner
Revitate

man, a former top executive at **Netflix**, **Snap** and **Amazon**; and **Bill Cvengros**, a former chief executive at **Pacific Investment Management**.

Revitate in September said it is raising \$150 million for its second real estate investment fund for workforce housing. Its first fund, Revitate Cherry Tree Fund I, raised \$110 million that was invested in six apart-

ment complexes in the Midwest. **Revitate Cherry Tree** is a multifamily investment fund headed by former **Irvine Co.** alum **Chris Marsh** (see story, page 1).

Revitate has also led or co-led four opportunity zone funds with investment into 15 projects with an estimated total project value of \$1.5 billion. Revitate executives are particularly proud of a project in Charleston,

S.C., called Morrison Yard Residences, or "NoMo," where a former storage yard for a nearby port was transformed into a complex with 380 upgraded multifamily rental units.

In November, Revitate broke ground on a 344-home **Bedrock** at the Trails in Albuquerque, N.M. The project was called "Best Land Deal of the Year" by **Informational Management Network**.

"We're excited about that project," Bhathal said. "This beautiful project will help address the area's significant housing shortfall by providing 344 new rental homes."

Revitate this year is also launching a vehicle where outsiders can invest in **RX3 Growth Partners**, a consumer growth equity fund where he is senior operating partner; RX3's founders include **NFL** quarterback **Aaron Rodgers** as well as **Byron Roth** and **Nate Raabe**.

"We're definitely staying busy," Bhathal said. ■

Revitate



- **BUSINESS:** investment firm specializing in sports, real estate, and consumer brands
- **CO-FOUNDERS:** Alex Bhathal, Lisa Bhathal Merage
- **HEADQUARTERS:** Newport Beach
- **NOTABLE:** real estate project in Albuquerque called "Best Land Deal of the Year"



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Ivo A. Tjan
Founder & CEO

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Francisco Morales: New Journey at 5.11

By EMILY SANTIAGO-MOLINA

Francisco Morales in 2023 wrapped up over five years as chief executive of **5.11 Inc.**, the tactical apparel and gear firm he co-founded with **Dan Costa** 20 years ago.

On the first day of 2024, Morales transitioned to executive chair of the company's board of directors while another board member, **Troy Brown**, stepped in as CEO.

Morales is said to continue working with the 5.11 team on corporate and product strategy and will remain "a significant shareholder" in the company.

"This transition period has been both busy and immensely enjoyable, offering me the unique opportunity to view our operations from a different vantage point and to envision the future of 5.11 with fresh eyes," Morales told the Business Journal.

Morales was appointed CEO after **Compass Diversified** (NYSE: CODI) acquired the apparel company for \$401 million in 2017.

5.11, now the largest of the seven subsidiaries under locally run **Compass**—which also owns Newport Beach's **Lugano Diamonds**—reported sales climbed 9.3% in 2022 to \$486 mil-



Francisco Morales
Co-Founder, Executive Chair
5.11

lion.

Since 2018, Morales has led the retailer through a major brick-and-mortar expansion going from 40 stores to its current 124 company-owned locations.

The "purpose-built" and versatile clothes 5.11 designs and manufactures, mainly for military and first responders, are also sold across more than 1,114 wholesale partners globally. Apparel, including some pieces that

Morales designed himself, has been worn by both international leaders and fictional action heroes.

Morales was one of five honorees at the Business Journal's **Excellence in Entrepreneurship Awards** last March.

"In my new role, I will be focusing more on long-term strategic growth, brand stewardship, and ensuring that 5.11 continues to lead and innovate in the apparel, footwear and

5.11 Inc.

5.11

- **FOUNDED:** 2003
- **HEADQUARTERS:** Costa Mesa
- **BUSINESS:** tactical gear, apparel manufacturer
- **PARENT:** Compass Diversified Holdings (NYSE: CODI)
- **CO-FOUNDER/CHAIR:** Francisco Morales
- **CEO:** Troy Brown
- **2022 NET SALES:** \$486M
- **NOTABLE:** Morales moved up to chair and was succeeded by Troy Brown

gear industry," Morales said.

Incoming executive Brown has been on the 5.11 board since 2019, and most recently ended 15 years with retailer **Zumiez** as president of its North American division.

"What Francisco has done over the last five years to 'Serve those who Serve' has been nothing short of exceptional and I am honored to partner with him and the fantastic team at 5.11," Brown said. ■

Shannon Eusey: Athletes Know What It Takes to Win

By PETER J. BRENNAN

Sports taught **Shannon Eusey** to enjoy "a little bit of combat" from those with different viewpoints.

"Offering the freedom and the capacity to be able to step in and offer a little bit of combat ... that's the kind of challenge an athlete loves to have," Eusey recently told a podcaster.

Eusey, a marathoner who was a scholarship volleyball player at **University of California, Irvine**, used her sports mentality to build Newport Beach's **Beacon Pointe Advisors** into the largest female-led registered investment advisory in the nation.

Since she won the Business Journal's **Excellence in Entrepreneurship** award last year, her firm has boosted assets under advisement by \$5 billion to \$30 billion, added nine new offices for a total of 55 nationwide and increased employment to 487, up from 429 a year ago.

In 2017, the Business Journal honored Eusey with a **Women in Business** award. Then she attracted a 50% stake in 2021 from one of Wall



Shannon Eusey
CEO
Beacon Pointe Advisors

Street's best-known firms, **KKR & Co.** (NYSE: KKR). She co-wrote a bestselling book, "**Your Dollars, Our Sense: A Fun & Simple Guide to Money Matters**," which has ranked No. 1 in six different business and finance categories.

In the past year, Beacon Pointe has

launched healthcare planning and 401(k) management. It's expanded into helping college students navigate name, image and likeness issues by advising them on matters from endorsement agreements to strategic partnerships to tax strategy.

Eusey spoke last July on a podcast hosted

Beacon Pointe Advisors

BEACON POINTE

- **BUSINESS:** wealth manager
- **CO-FOUNDERS:** Shannon Eusey, Garth Flint
- **ASSETS UNDER ADVISEMENT:** \$30B
- **HEADQUARTERS:** Newport Beach
- **NOTABLE:** Eusey adds \$5B in assets under advisement in past year

by **Don Yaeger**, a longtime associate editor for **Sports Illustrated**.

"I think athletes know what it takes to win," Eusey said in the podcast. "I think the reason they know what it takes to win is because they've experienced what it takes to lose."

"This builds a resiliency ... a little bit of a thick skin. I mean, it's pretty easy after you lose—or don't get a deal or aren't growing like you're supposed to be growing—to walk away and quit. But the athlete just knows that she has to get back to work the next day." ■

Bill Shopoff: On the Lookout for More Buys

By KAITLIN AQUINO

Shopoff Realty Investments is gearing up for another busy year, after a record-setting 2023.

This year, Chief Executive **Bill Shopoff** expects to oversee more acquisitions, a side of the company's business that slowed last year due to historically high interest rates. Shopoff Realty Investments only made one acquisition last year: an 8.7-acre lot formerly home to a **Nordstrom** in Pleasanton, which it bought for \$16 million.

The company remained active on the sell side in 2023; its high sales and financing volume last year raked in \$477 million, Shopoff said. By comparison, in the year prior, the company generated \$160 million through six sales and financing deals.

Last year's activity in a turbulent market earned Shopoff the nod as the Business Journal's **Businessperson of the Year**, in the real estate sector.



Bill Shopoff
CEO
Shopoff Realty Investments

"The market has a long way to go before it can fully recover, though it's seeing a little more life than it did last year," Shopoff told the Business Journal.

Only a month into the new year, Shopoff Realty Investments closed a \$15 million refi-

ancing deal on a pair of office buildings totaling more than 122,000 square feet in Goleta, near the border of Santa Barbara.

The buildings, at 70 and 90 Castilian Drive, are below market rents, according to officials. Proptech company **AppFolio Inc.** (Nasdaq:

Shopoff Realty Investments

SHOPOFF

- **FOUNDED:** 1992
- **HEADQUARTERS:** Irvine
- **CEO:** Bill Shopoff
- **BUSINESS:** real estate investor
- **NOTABLE:** secured \$15M in financing for AppFolio offices, invested \$19M in waste management company GMHR

APPF) fully leases both offices and lists its headquarters as 70 Castilian Drive. Shopoff Realty Investments obtained a loan that offers "good value and protection for the lender and ourselves," Shopoff said.

The recent deal represents a rare win for office buildings amidst a troubled sector wrought by slow return to work, Shopoff noted.

"It's an anomaly, considering the rest of the market, so we're happy with that," he said. ■



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Building a Legacy for the Next Generation of Black Women Entrepreneurs

WELLS
FARGO

By Manishi Parikh

Black/African American women are one of the fastest growing demographics of entrepreneurs in America and are key to driving small business growth. In fact, according to the Wells Fargo 2024 Impact of Women-Owned Businesses Report, between 2019 and 2023, Black/African American women-owned businesses saw average revenues increase 32.7%, compared to 12.1% for all women-owned businesses.

To offer perspective, after the 2008 financial crisis, women-owned businesses had not only recovered but had surpassed average revenue levels from before the crisis to 2008: \$172,000 in 2019 compared to \$151,700 before the crisis. However, this was not the case for Black/African American women-owned businesses, whose average revenue was \$35,600 in 2019 compared to \$40,400 prior to the crisis. Fast forward to the COVID-19 pandemic, Black/African American women-owned businesses came out stronger and now, Black/African American women business owners have outpaced growth between 2022 and 2023 in terms of employment and revenue compared to all women-owned businesses.¹

Whether starting, stabilizing, or growing businesses, Black/African American women-owned small businesses are expanding. Today more than ever, it is crucial to build wealth for the next wave of Black/African American women entrepreneurs. Supporting the future of Black/African American women-owned businesses requires focusing on key areas, such as addressing gaps in funding, growing access to capital, and providing robust mentorship opportunities.

Filling the gaps in funding

Despite starting new businesses at high proportions, many Black women and women of color obtain funding at lower rates. Research shows that women of color receive less than 0.2% of venture-capital funding.² Black women also encounter similar barriers in accessing capital, with about 61% self-funding their business and exhibiting a higher level of debt.³ For example, during the COVID-19 pandemic, many Black/African American businesses experienced difficulty attaining Federal stimulus payments.¹ Furthermore, in 2020, there was a decline in Black/African American owned businesses.¹

Building wealth for the next generation of Black/African American women entrepreneurs starts with building resources and growing capital for the entrepreneurs of today.

Improving access to capital

It's important to acknowledge that access to capital remains a challenge for Black/African American women-owned businesses, even in the face of increasing revenue. According to the Wells Fargo 2024 Impact of Women-Owned Businesses Report, Black/African American women-owned businesses employ approximately 9.4 workers and generate \$1,037,900 compared to all women-owned businesses, which employ approximately 8.5 workers and generate \$1,602,500.¹

While barriers to funding persist for many Black/African American women-owned small businesses, new bank and philanthropic programs are now being

built to address this gap and help Black women identify capital opportunities to build sustainable small businesses. In addition to traditional lending, working with Community Development Financial Institutions (CDFIs) and Minority Depository Institutions (MDIs) can create an ecosystem of support that provides additional avenues to accessing capital. These institutions specifically work with underserved entrepreneurs including those in low-to-moderate income areas and minority populations.

Supporting these organizations and their mission was at the heart of the creation of Wells Fargo's Open for Business Fund, an industry-leading effort that has donated roughly \$420 million to support nonprofits who serve small businesses; the Small Business Resource Navigator (bizresourcenavigator.com), an online portal helping connect small business owners to potential financing options and technical assistance through CDFIs; the Capital Pathways Workbook, a free resource that helps entrepreneurs map their capital needs to business goals and objectives; and a \$70 million fund in partnership with Hello Alice to improve access to credit and capital for underserved entrepreneurs.

By empowering Black/African American women-owned businesses with the financial resources they need, we enable businesses to scale, grow, and build for the future. Fostering the growth of Black/African American women-owned small businesses through improved access to capital is an investment in the long-term success of the business. By dismantling financial barriers and building an environment where businesses can thrive, generational wealth can be an attainable goal for all.

Harnessing mentorship

Investing in education and mentorship programs specifically designed for Black/African American women entrepreneurs can provide valuable resources and guidance. By addressing systemic barriers and supporting equitable opportunities, we can contribute to the sustainable growth of Black/African American women-owned small businesses, ultimately playing a part in building lasting generational wealth.

This level of support is at the heart of Milestone Circles, a mentoring program for women entrepreneurs offered by the Nasdaq Entrepreneurial Center and funded by the Wells Fargo Foundation. The majority of the participants, (86%), have been Black, African American, and/or Afro-Caribbean, and have learned to improve their business alongside a circle of fellow entrepreneurs.⁴ Building strong business and community networks can significantly enhance the success and sustainability of all women-owned small businesses.

As Black/African American women continue taking the lead in business ownership, we all must continue taking steps to maintain and support their momentum. By addressing both systemic barriers and promoting proactive support, including improving access to capital and mentorship opportunities for Black/African American women-owned businesses, we can pave the way for sustained growth and build pathways for the next generation.

For resources visit thecenter.nasdaq.org.



Manishi Parikh is Wells Fargo's Orange County Commercial Banking market executive. She has 25 years of experience in the financial services industry in Southern California. Manishi is actively involved in the OC community as a member of the University of California, Irvine CEO Roundtable and Second Harvest Food Bank board member.

¹ 2024 Impact of Women-Owned Businesses Report, <https://www.wippeducationinstitute.org/research>

² "The Comprehensive Case for Investing More VC Money in Women-Led Startups," Harvard Business Review, September 18, 2017. <https://hbr.org/2017/09/the-comprehensive-case-for-investing-more-vc-money-in-women-led-startups>

³ "Who is driving Black business growth? Insights from the latest data on Black-owned businesses," Brookings, May 24, 2023. <https://www.brookings.edu/articles/who-is-driving-black-business-growth-insights-from-the-latest-data-on-black-owned-businesses/>

⁴ "Supporting the Wave of New Black Women Entrepreneurs," Wells Fargo Stories, August 30, 2023. <https://stories.wf.com/supporting-the-wave-of-new-black-women-entrepreneurs/>

A BRIEF HISTORY OF DIVORCE: ANCIENT EGYPT

By Paul Nelson, Esq



Introduction

Divorce, as a legal concept, dates back almost as far as marriage itself. It's a natural development that when people formalize their unions, they also create a legal way to dissolve them. Let's delve into the early history of divorce, starting with Ancient Egypt.

Divorce in Ancient Egypt

The oldest recorded divorce document comes from the reign of Amasis II, an Ancient Egyptian Pharaoh who ruled from 570 to 526 BC.

Reasons for Divorce

In Ancient Egypt, divorce could be requested by either spouse for several reasons:

- 1. Adultery:** Committing adultery by either party was grounds for divorce.
- 2. Infertility:** Infertility, often blamed on the wife, could lead to divorce.
- 3. "Irreconcilable Differences":** Couples who couldn't stand each other could choose to divorce.

The Divorce Process

To initiate a divorce, the husband had to verbally declare, "I am leaving you." He then provided a written document signed by four witnesses, confirming the end of the marriage. This document allowed both parties to remarry if they wished.

Financial Support

An interesting aspect of Ancient Egyptian divorce law was the husband's obligation to provide financial support to his divorced wife. Failure to do so could result in penalties for the husband.

Conclusion

Ancient Egypt provides a glimpse into the early history of divorce as a regulated process. Divorce could be initiated by both spouses, with various grounds for separation. The process involved verbal declarations, written documents, and financial support for the divorced wife. This historical example sheds light on how societies have dealt with marriage and separation over time.

*Read more in Paul Nelson's new book,
The Dissolution Solution, out now!*

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Transactional or Consultative: What Kind of Bank Will Help Your Privately-Held Business Reach its Goals?



John Meek, MBA

John Meek is Executive Vice President and Director of Commercial Banking for Enterprise Bank & Trust for Orange and Los Angeles Counties. John champions the culture and entrepreneurial spirit of a regional bank while serving the needs of privately owned businesses, developers and other success-minded individuals who value a high-touch, consultative banking relationship. John serves on the Junior Achievement of Orange County Board of Directors.

The decisions you make about cash and capital have never been more critical. Now, more than ever, selecting a bank is one of the most important decisions a business makes. Why? Because your choice in a financial partner can significantly impact your financial strategy, cash flow, ability to fund expansion and ultimately your long-term success.

With many different types of financial institutions available to you, selecting a bank is seemingly complicated by the many free services and low rate offers advertised particularly by online-only banks.

One of the best places to start when making your banking decision is understanding the difference between a transactional bank and one that has a reputation for providing a consultative approach and long-term partnership.

Both Types Exist for a Reason

Transactional banks can be thought of as offering basic banking services for free or at discounted rates. This business model focuses on delivering limited and repetitive banking products at a low cost. Many large banks or online-only banking service providers fall into this category.

By contrast, a consultative bank provides advice, guidance and enhanced services designed to maximize a client's long-term financial and business success. This difference is key.

Providing a higher level of service, consultative bankers get to know their clients in a way online-only banks and some large financial institutions simply cannot. Offering much more than online statements and an occasional satisfaction survey, truly consultative banks are designed to be an integral part of a business's financial team. Choosing a bank that offers clients financial guidance gives business owners access to strategic advice and financing options that may not be available from other types of banks.

A consultative banking relationship proves particularly valuable when a creative financing solution instead of a traditional loan may be in the best interest of a business. Only with an understanding of the nuances of a business and knowledge of a wide array of financial products can a banking advisor recommend and assist with nontraditional financing products.

Whether you're seeking a more efficient solution to even out your cash flow cycle, or you're exploring expansion capital, nontraditional financing with favorable terms may include operating lines of credit, equipment loans, SBA loans, asset-based loans, or tax credit loans to name a few.

Enterprise Bank & Trust clients can benefit from customized banking services, including specializations in professional practice financing, sponsor financing, property management banking, community association banking, customized life insurance financing, aircraft financing, and escrow and legal services.

The technical expertise that a consultative banker brings to the relationship can result in many benefits, including access to favorable interest rates, low fees and flexible terms.

Look for Added Value

Additionally, a consultative bank should provide value-added extras such as educational opportunities and research reports on topics critical to small and midsize businesses. A great example is Enterprise's signature no-cost business training program, Enterprise University[®].

The program has provided skill development courses for business professionals for more than 20 years — at no cost to attendees. Enterprise University offers live, 90-minute webinars every spring and fall, led by subject matter experts who work in the field and live what they teach. Attendees leave each course with valuable insights and actionable strategies they can implement right away to better their business or their career.

These classes also serve as a resource to leaders to offer professional development opportunities to their teams, covering leadership and management, finance and operations, human resources, marketing and sales and other trending topics.

Because expertise in these key functions is critical to operating any business, these courses are designed to quickly build critical skills and equip organizations for the future, all at no cost to participants.

And, because comparing notes with and speaking to other business owners can be very helpful, Enterprise provides access to events, webinars and other networking opportunities where company leaders can make connections with peers in the local business community.

Growing businesses can benefit greatly from expert insights and added-value resources. Opportunities for professional development help you gain perspective, sharpen your business acumen, and could be the difference between confidently setting your course for the future or just getting by.

Seek Expert Guidance

In addition to the benefits of tailored financial solutions and additional resources for growing businesses, a dedicated advocate within the bank could help guide you toward long-term success.

A consultative banking relationship is a key part of your business's advisory team. A team of experts — including a banker, accountant and lawyer — can guide you through financial and strategic decisions, from developing a strategic business plan to a fraud prevention plan to a long-term succession plan. If you don't already have trustworthy experts you can turn to, now is the time to start to build these relationships. The stronger these relationships, the better the opportunity your team will have to learn the unique aspects of your business and understand your long-term financial and business goals.

Consider Financial Strength and Stability in a Banking Partner

Through any economic climate, geopolitical event or changes in your industry, the benefits of having a strong banking partner shine through. Amid these headwinds, the reassurance of knowing you have partnered with a bank that takes a consistent approach in assisting businesses like yours can certainly make the difference.

Enterprise has a five-star rating (superior, the highest rating an institution can receive) from BauerFinancial, which reports and analyzes the performance of banks and credit unions.¹ Our investment grade Kroll rating is A-, an indication of financial strength and a standard of excellence and integrity.² Forbes also recognized Enterprise as #3 in the nation on its America's Best Banks 2023 list, which looks at growth credit quality and profitability.³ These are just a few accolades that reflect our dedication to financial wellbeing, to in turn best serve our clients.

Visit www.enterprisebank.com/LA-OC to connect with one of our bankers and learn how a responsible banking partner like Enterprise can make a critical difference to your business.

Astrologie California: A Fusion of Excellence, Family Values, and Expansion

In the dynamic Los Angeles fashion scene, Astrologie California stands as a testament to visionary leadership, family values, and a strong commitment to sustainability. Founded by Angelo Ghailian, the brand fuses academic prowess, familial legacy, and a dedication to positive impact.



Angelo Ghailian, a graduate of USC's Marshall School of Business, brings a unique blend of academic insight and entrepreneurial spirit. With a focus on Entrepreneurship during his undergraduate years and an MBA from USC, Ghailian solidified his strategic vision and leadership skills.

Complementing his vision is a team whose collaborative spirit echoes the brand's commitment to excellence. Astrologie California's success extends beyond fashion trends to customer satisfaction, earning trust from retail partners like Nordstrom, Lane Bryant, Cracker Barrel, Altr'd State, LLR, and Anthropologie. A recent milestone includes the launch of shopastrologie.com, inviting enthusiasts to engage with its distinctive blend of innovation and style.

Looking beyond Los Angeles, Ghailian envisions extending Astrologie California's reach into the tranquil landscapes of South Orange County. This strategic move aims to align the brand with the coastal ambiance, resonating with the community's lifestyle. Embracing this vision, the Ghailian family anticipates integrating with the community.

Ghailian shares, "Our aspiration to expand to South Orange County is more than a business strategy; it's about integrating with the community, resonating with the lifestyle of our discerning customers."

This move reflects a commitment to harmonizing with the community's ethos while propelling the brand. The coastal elegance provides a canvas for Astrologie California to weave its narrative, embodying a blend of style, family values, and sustainability.

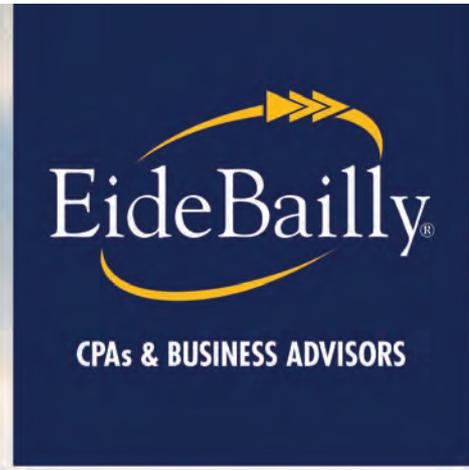
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By Ivo A. Tjan, CEO
CommerceWest Bank

CommerceWest Bank is determined to redefine banking for small and mid-sized businesses in California. Many businesses do not realize they qualify for a customized loan, treasury management product and/or checking account that is tailor made to meet their specific needs. Our Bankers provide flexibility, servicing owners and catering to their particular business and individual banking needs. We work to accommodate our clients, rather than force our clients to accommodate to us by providing high-quality, low-stress, and personally tailored banking and financial services. As a full-service business bank, we offer a wide range of commercial banking services, remote deposit solutions, online banking, mobile banking, lines of credit, working capital loans, commercial real estate loans, SBA loans, and treasury management services. By employing a strategically selected team of experienced professionals, we carefully shepherd the assets with which we are entrusted. In the process of doing so, we maximize the financial potential of our clients, ensure the stability of our institution, and deliver on the promise to our clients and employees.

"All Banks are not created equal and bigger is not always better."

Our forward-thinking approach to business, navigated our company to be recognized by Newsweek as one of **"America's Best Regional Banks and Credit Unions 2024"**, named to the 2023 **Best 50 List** (an annual ranking of the top 50 U.S and international companies trades on the OTCQX market), to be awarded the 2022 **Top 200 Publicly Traded Community Banks** by American Banker, the 2020 **Community Bank of the Year**.

2023 was another record year for the company amidst a period of great economic uncertainty. And we continue this well into 2024 by actively managing credit risk, expanding our client base, and bringing on new talented employees to our team. Our fortress balance sheet approach and business model continue to be sources of economic strength for our business community, entrepreneurs, business owners, employees, and shareholders.

About the Bank

"Bank on the Difference"

It is prudent for businesses to have a long-term banking partnership that is safe and secure. CommerceWest Bank is FDIC insured and operates with a Fortress Balance Sheet, Strong Liquidity and Strong Capital Ratios that well exceed regulatory required levels. The Bank is simply built to last!

CommerceWest Bank services our clients by providing them advanced and convenient banking tools to free up their time. Our goal is to promote a partnership where we cater to our clients' needs by providing exceptional service, whether it be in person, via phone, zoom, email, online or through mobile banking. We take pride in knowing that our team can and has accomplished this while providing a tailored and personalized experience for each client-without them physically coming into an office. It is clear this is the future of Banking.

About our Culture

Our Bank embodies a culture of Bankers whose only objective is to deliver unparalleled service to the business community versus being all things to all people like most banks today. By being all things to some people, CommerceWest Bank can provide customized and personally tailored banking services to businesses and their owners throughout California.



Our Bankers are experienced market leaders with a proven track record advising business owners and C-Suite Executives. Their passion for banking-and commitment to being stewards of the funds they are entrusted-has built a solid and stable foundation. Business owners trust our knowledge in evaluating their financial service needs and advising them on ways to save time, increase operational efficiencies and enhance their cash flow by providing them with the credit facilities and treasury management services they need to help them grow their companies and protect their assets. Our Bankers take a deep approach to understanding financial conditions and trends to create a long-term customized solution.

Committed to our Community

In 2023, the Bank celebrated 22 years of service. While some Banks are leaving the California marketplace or closing their doors for good, CommerceWest Bank remains fully committed to our community. With the 2021 move to a larger Corporate Headquarters in Irvine, it has accommodated our unprecedented growth. This larger footprint enables us to continue growing for many years to come.

We are committed to making a difference supporting the community. In the spirit of service, tens of thousands are raised annually for Southern California nonprofits, primarily focusing on children and individuals with disabilities, those experiencing a hardship in their life, and those battling life threatening diseases. As a result, CommerceWest Bank is named a **"Company That Cares"** by the Orange County Business Journal year after year.

These are exciting times for our company, our team, and our clients. Our future is bright. Our goals are clear. We know that it is more important than ever to be able to count on your banking partnership and we plan to continue to prove to the business community who the Best Bankers are in California.

Ivo A. Tjan, Chairman & CEO

Ivo A. Tjan is Chairman, President and CEO of CommerceWest Bank. He has been recognized by the Los Angeles Times as a 2023 & 2022 Orange County Visionary and named in the OC500 Directory of Influence by the Orange County Business Journal. The Bank is headquartered in Irvine, California and serves businesses throughout California. He can be reached at itjan@cwbk.com or (949) 474-5278.



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Starting with the End in Mind: A Serial Entrepreneur's Guide to Profitable Exits

The most successful serial entrepreneurs don't merely start businesses; they strategically build each venture with a profitable exit in mind. It's not just about having vision and innovation but also involves choosing the right growth partner that can provide legal and structural guidance essential for the future sale of the business. Adams Corporate Law offers tailored legal expertise that paves the way for your continued success and profitable exits. This begins with:

Starting with the End in Mind: As a serial entrepreneur, every business you create should be aligned with an exit strategy. Understanding market demands and potential buyers from the outset can guide your decisions, ensuring that each venture is developed to maximize its value and appeal, making it a lucrative target for future acquisition.

Smart Entity Selection: The structure of your business significantly impacts your future exit. The right entity choice can significantly minimize your tax burden upon sale, enhance asset protection, reduce liability concerns, and prevent the complexities and expenses associated with restructuring in the future. We emphasize the importance of this decision and can guide you through the process of entity selection.

Strategic Building Blocks: Ensure your ventures are not just businesses, but marketable assets. This involves maintaining meticulous financial records, air-tight contracts, safeguarding your intellectual property, and establishing strong operational frameworks. These factors not only streamline your day-to-day operations but also increase the marketability and value of your business to potential buyers.

Mastering Growth or Sale - Your Strategic Advantage: Our team is known as the lawyers who close deals. When you're ready to grow through acquisition, or sell your business, we'll see to it that your growth and exit strategy is not just a plan, but a well-executed transaction that maximizes your return. We provide comprehensive services in overseeing due diligence, negotiating terms, and structuring deals to align with your strategic goals.

Ensure that your business journey is not just a series of starts but a continuum of profitable exits. **Connect with Adams Corporate Law, at (714) 619-9360** to secure the success of your ventures from inception to close.

Business law attorney Addison Adams is the lawyer who closes deals. He is a full-service lawyer for businesses across all industries and acts as outside general counsel for many companies in Southern California.



PatientFi Revolutionizes Elective Healthcare Affordability Through Cutting-Edge Payment Solutions

Since its founding in 2017, Irvine-based PatientFi has grown into a leading point of care payments platform now used by thousands of medical practices nationwide to help their patients pay for elective medical procedures. In 2023, PatientFi was ranked by Deloitte as the 54th fastest-growing technology company in North America.

Whether it is a cosmetic treatment, IVF or LASIK, patients struggle to afford the high price tags that come with many out-of-pocket healthcare expenses not covered by insurance. Medical practices use PatientFi's technology platform to seamlessly offer their patients more affordable payment alternatives such as financing plans and monthly subscriptions. With PatientFi, in less than two minutes at a medical practice, patients scan a QR code with their mobile device, get approved via an on-line application, choose a payment plan and checkout.

While the process is very easy for practices and their patients, behind the scenes PatientFi uses its propriety algorithm, comprised of over 175 unique financial data points, to evaluate each applicant's credit worthiness and render an immediate approval decision. Each patient is then instantaneously matched to one of PatientFi's lending partners and the transaction is processed.

Plastic surgeons and dermatologists use PatientFi's membership platform, PRIVI, to build personalized treatment plans for their patients comprised of neurotoxin, filler, skincare, body treatments and more—all on a convenient monthly membership plan that can only be used at their practices. Instead of facing large bills each time they visit their aesthetic provider, patients pay monthly for an annual treatment plan and earn rewards at the practice along the way.

PatientFi CEO and Co-Founder Todd Watts said, "By removing the barriers of affordability, PatientFi is giving more patients access to elective healthcare while helping medical practices grow their business."

Closing Multi-Million Dollar Transactions



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For over a century, serving businesses defines Mechanics Bank

One of California's oldest and strongest banks

Founded in 1905 to help businesses, families and communities prosper, Mechanics Bank is one of the largest banks based in California today, and remains one of the strongest, safest and most resilient banks across the nation. With approximately \$18 billion in assets, a best-in-class deposit franchise and 112 branches around the Golden State, the Bank takes immense pride in its longstanding independence and full-service capabilities.



Mechanics Bank got its name from its first clients—hard-working mechanics and laborers in Northern California.

"Our financial strength has never been more evident, despite lingering inflation and higher interest rates," says John DeCero, President & CEO of Mechanics Bank. "We remain extremely well-capitalized relative to other banks, so we can absorb the inevitable ebbs and flows of business and economic cycles without compromising our balance sheet. Our key to success is staying on our own course no matter what might happen on Wall Street, in Washington or at another financial institution."

In fact, the Bank has weathered every economic storm for 119 years, never accepting government assistance—not even TARP circa 2008. Through the Great Depression, two World Wars, the Great Financial Recession and other economic headwinds, the Bank has uniformly maintained an uncomplicated and straight-forward balance sheet, ensuring that clients' funds are safe and sound.

"NO TARP"

Mechanics Bank was one of the first banks in the nation to turn down the Treasury Department's "Troubled Asset Relief Program" assistance during the 2008 financial crisis.

Full-service business banking with experienced, local professionals

As evidenced by generations of longtime clients, including successful entrepreneurs whose dreams have outweighed their fears, Mechanics Bank has a demonstrable record of reliably providing a highly personalized, relationship-banking experience, and a wide range of products and resources in business banking, commercial lending, cash management, consumer and private banking, and comprehensive wealth management and trust services.

Here in Orange County, the Bank has a dedicated team of business and commercial banking professionals. Responsive and resourceful, they are accustomed to working with owners of both emerging and well-established businesses—always appreciating the fact that no two clients' banking, lending and cash management needs are the same.

Says DeCero, "We deploy flexible, locally based teams for our business clients, understanding that the demands on their businesses change as cycles in their industries change. We work alongside them to ensure they have the tailored products and services they need succeed in the short term and over the long haul."

Around the turn of the 20th Century, banking was not all that different, at least according to Mechanics Bank founder E.M. Downer. He understood that building lasting relationships required attentive and accountable client service dedicated to helping build and grow successful businesses.

Throughout the Bank's growth and expansion here in California, it has maintained its core values and a culture that places a premium on partnerships and relationships that support, sustain and encourage innovative stewardship and economic prosperity.

18400 Von Karman Avenue, Suite 1100
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800.797.6324
www.MechanicsBank.com



1) FDIC, FFIEC Consolidated Reports of Conditions and Income, 12/31/23

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Superior

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"WELL CAPITALIZED"

FDIC Capital Classification
Veribanc, September 30, 2023
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GREEN

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Super Premier

Performing Banks –
The Findley Reports, 2023

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A \$13.6 Million Opportunity Slipping Through Your Fingers

Picture this: Debbie and David are a middle-aged couple, living quite comfortably—a vacation home, a nice nest egg set aside, and a passive income interest in the family business which their children now operate. All in all, their net worth is in the neighborhood of \$25 million, and they expect their portfolio to continue to grow in the next few years. When their attorney suggested some estate tax planning techniques, they shook their heads: They aren't close enough to the current estate tax threshold (currently \$27.22 million for a married couple), and they have a lot of life left to live! This sounds like a problem for future Debbie and David.

Unexpectedly, Debbie and David both pass away in February of 2026. Collectively, their estates are liable for roughly \$4.5 million in federal estate tax. How did that happen?

The answer lies in the Tax Cuts and Jobs Act ("TCJA"). Prior

to the TCJA, a person's estate incurred an estate tax only if its net value exceeded \$5 million, adjusted for inflation. Any estate worth less than this moving threshold was "exempt" from estate tax.

Once Congress enacted the TCJA, the estate tax exemptions were doubled and steadily increased with inflation each year. In 2024, the exemption stands at \$13.61 million for individuals and \$27.22 million for married couples. However, the increased exemption is slated to "sunset" on January 1, 2026. If Congress takes no action, the exemption will revert to \$5 million plus inflation (which in 2026 is expected to be about \$7 million, or \$14 million for a couple).

Estates are generally taxed at 40%. This means that people like Debbie and David missed out on the opportunity to take advantage of the elevated exemption during their lifetimes, leaving money on the table

that could have otherwise been passed to their children tax-free. Instead, Debbie and David's children now must figure out how to pay the tax bill. This is no easy task, especially for those with illiquid assets. The children may have to sell the family business, their family vacation home, or liquidate other investments. Relatively simple planning could have saved Debbie and David's children \$4.5 million.

While the estate tax exemptions will still increase with inflation each year, they will not reach today's proportions again unless Congress enacts another statute like the TCJA. This means that even if Debbie

and David died in 2036 or 2046, their estate tax liability may still be more than it would be at this moment in history.

For individuals with assets above \$7 million, we suggest taking this next year to engage in tax-efficient planning. If you are looking for a tax planning attorney to help you navigate this area of law, our office can find an appropriate path forward for you using a variety of strategies. We at Falcon Rappaport & Berkman LLP can help you make sure your money ends up in the right place – with your family, not the government.



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“I never saw myself doing anything else.”

- Kelsie Whitmore

CSUF ALUMNA CHANGING THE GAME

Many professional baseball players launched their careers at Cal State Fullerton. Kelsie Whitmore is no exception. The former Titan softball standout made history when she became the first woman to play in the Atlantic League, one of four Major League Baseball partner leagues. The Class of 2020 and 2022 grad was empowered by her CSUF coaches, teammates, and professional development opportunities. “Their support helped me open up about my hopes for the future.”

Kelsie and Alexis are just two examples of graduates who experienced Cal State Fullerton’s commitment to advancing student success. This empowered them to pursue their passions and career paths.

From admissions through commencement, CSUF works to empower all Titan students to reach their fullest potential.

Learn more at <https://campaign.fullerton.edu/empowerment>



“She believed in me. She looked at me, heard my life story, saw my academic history, and said, ‘You made it to CSUF... you can be a doctor.’”

- Alexis Ruiz

FUTURE PEDIATRICIAN EXCEEDS HER OWN EXPECTATIONS

Alexis Ruiz always knew she would graduate from college, but she never imagined she could attend medical school. It was the words of an assistant dean at Cal State Fullerton that ultimately changed the first-generation college student’s path for the better. “You made it to CSUF. If you can make it here, you can be a doctor.” Empowered by the support that she received, Ruiz graduated with a bachelor’s degree in Childhood Adolescence and Development. Ruiz plans to pursue her goal of becoming a doctor in pediatric oncology.



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We believe that at the heart of each entrepreneurial endeavor is a blend of passion and unwavering commitment. This amalgamation drives entrepreneurs to invest in their goals and explore innovative approaches.

Lugano Diamonds was established with a profound dedication for crafting exquisite, one-of-a-kind jewelry. Moti Ferder, CEO of Lugano Diamonds, emphasizes the devotion of their skilled craftspeople to produce bespoke pieces of exceptional quality. Ferder states, "Our passion is evident in every aspect of our work, from sourcing the rarest gemstones to the meticulous attention to detail applied in creating unparalleled wearable works of art."

In line with this steadfast dedication to excellence, Lugano Diamonds proudly presents these extraordinary pieces—each meticulously crafted with the same unwavering commitment demonstrated by the esteemed honorees.



Diamond Pear Shape Necklace

Sophistication with a unique twist, this rose gold necklace boasts a 3-carat pear-shaped pink diamond accompanied by an additional 2.28 carats of round pink diamonds.



Cushion Cut Diamond Earrings

These captivating diamond earrings feature center stones with a combined weight of 17 carats, enhanced by nearly 7 carats of collection VS diamonds.



Pink Oval & Ceramic Ring

A nearly 6-carat pink diamond center stone highlights this one-of-a-kind ring accented by another 6 carats of baguette shape collection VS diamonds.



Pink Pear Shape Diamond Bracelet

Stunning from all angles, this elegant bracelet showcases over 4 carats of pink pear shape VS diamonds, complemented by nearly 4 carats of pink brilliant round VS diamonds.

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Argyros College of Business and Economics

Chapman Offers Paths to the C-Suite

For someone aiming to rise to the level of chief financial officer (CFO), Chapman University's Argyros College of Business and Economics can equip them with degrees in several programs that offer the skills required to lead companies to strategic financial success.

Making it to the C-suite can be a climb, but education is a key ingredient.

"My degree in accounting gave me a very strong financial foundation that has served me throughout my entire career," says Mike Feher, CFO of biotech company CathWorks and a 2006 Chapman graduate who started his career at Deloitte. "It paved the way for me to be at Deloitte and taught me how to create value for an organization."

Degree options

For those interested in a graduate degree, Chapman's Burra School of Accounting and Finance in the Argyros College of Business and Economics offers:

- **MS in Accounting:** preparing college graduates for careers in public accounting, industrial accounting, government and nonprofit. The program offers prep for the California CPA exam and credits necessary for CPA licensure. Participants can take advantage of evening classes, career services, distinguished research centers, conferences, case competitions, leadership opportunities and networking with top executives.
- **MBA:** Chapman's top ranked MBA (#3 private program on the west coast according to *US News and World Report*) offers several options, including part time and executive tracks. Curriculum includes financial accounting and management. Participants have access to career services, industry networks, and leadership development.

For those who haven't yet earned a bachelor's degree, Chapman offers:

- **BS in Accounting:** the foundation to becoming a CFO in any industry. Learn to solve business problems and help organizations meet their financial goals. Students have the chance to intern at major firms.

Soft skills

In addition to education, aspiring CFOs would do well to develop their soft skills. These include critical thinking, professional ethics, building and managing teams, and leadership, according to a CPA Journal article, "The Many Skills of the CFO."

"Chapman is paying attention to teaching those skills, in addition to accounting and finance," says Argyros College Dean Henrik Cronqvist.

"If you're going to be a business leader, a lot of it has to do with relating to, working with, and leading people," he says. Chapman's business education meets industry and leadership demands of the next decade and beyond.

For more information about Chapman business programs, please visit Chapman.edu/business or call (714) 997-6684.





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Meet the Judges:



Julie Beckley, Wells Fargo

Julie Beckley is a tenured SVP - director of business development on the Southern California Commercial Banking team at Wells Fargo. She is responsible for the business development of new middle market relationships, targeting companies with sales in the range of \$25 million to \$5 billion in revenues with a focus on developing business in Orange County. Beckley's primary responsibilities include working closely with prospective clients to thoroughly understand their short- and long-term financial and strategic objectives and to provide appropriate thought leadership. Beckley provides an insightful understanding of the full range of credit and non-credit suite of products and services at Wells Fargo and her client centric approach is an asset to help meet the financial needs of OC companies across various industries. She has held multiple positions in her 35-year banking career, including over 23 years in the OC market.



Margita Blattner, Orange County Community Foundation

Margita Blattner is a forward-thinking, strategic leader with over 20 years of experience in organizational growth, business development, digital transformation and philanthropy. Her achievements have spanned developing market strategies, developing new products and services, launching new business models and technologies, enhancing business value and services, diversifying revenue streams, increasing profitability, and improving internal business systems and operations for Fortune 500 businesses and non-profits. As sr. director of philanthropic strategy, Blattner partners with individuals, families, corporations, nonprofits, and the professional advisor community to craft strategies for amplified charitable giving in Orange County. She leads a development team who provide guidance on current and planned giving options, handling of illiquid assets such as real estate and private business holdings, and support the establishment of charitable funds for enduring philanthropic impact.



Ben Buskey, Enterprise Bank & Trust

Ben Buskey leads a commercial banking team focused on helping guide middle-market companies to reach their financial goals at Enterprise Bank & Trust. In his role as senior vice president, relationship manager team lead, he leverages the bank's highly successful commercial banking model to build and execute team strategies to ensure team and regional growth. An industry veteran with a banking career spanning more than 20 years, his vast experience in commercial banking and in building long-term relationships is what allows Buskey and his team to deliver tailored financial solutions to help their clients reach their next financial milestone. Buskey is native to and based in Orange County, California.



Tony Kallingal, Mechanics Bank

Tony Kallingal is the executive vice president and chief banking officer at Mechanics Bank, an independent, full-service bank with approximately \$18 billion in assets, a best-in-class deposit franchise and 112 branches across California. An accomplished banking executive with more than 20 years of leadership experience, Mr. Kallingal has led numerous client-focused, value-added initiatives in retail banking, private banking, commercial banking, small-business banking and treasury management. Active in his community, he serves on a number of non-profit boards. He holds an undergraduate degree from Saint Mary's College and is a graduate of the Pacific Coast Banking School. He was named "Banker of the Year" by the Western Bankers Association in 2018.



Gordon S. MacLean, CPA, RJI CPAs

Gordon S. MacLean, CPA is an audit partner and the director of audit services at RJI CPAs. Gordon joined RJI in 2011 and specializes in audits of publicly traded and privately held businesses in the manufacturing, technology, medical device, real estate, distribution and professional services industries. MacLean has been in public accounting for over 37 years and spent 20 years at KPMG LLP's Orange County office, including seven years as an audit partner. In addition, he spent five years as an audit partner for a large regional accounting firm located in Irvine, CA. MacLean's extensive experience includes interaction with corporate BOD's and Audit Committees. He has been involved in numerous SEC public offerings and filings, including initial public offerings, secondary offerings, spin-off transactions, public debt offerings, and private placements. He has navigated various clients through business acquisitions and divestitures and has performed due diligence for both buy-side and sell-side transactions, including quality of earnings. MacLean's background includes performing audit services for companies ranging from start-up to international, multi-billion-dollar corporations.



Ivo A. Tjan, CommerceWest Bank

Ivo A. Tjan is the founder of CommerceWest Bank. He is currently the chairman, president and CEO of CW Bancorp and CommerceWest Bank. Founded in 2001 and headquartered in Irvine, CA, the Bank caters to businesses throughout the state of California with our digital banking platform. The Bank offers a wide range of commercial banking services, including remote deposit solutions, online & mobile banking, M&A / working capital loans, commercial real estate loans, SBA loans and treasury management services. Mr. Tjan previously held a wide range of management roles at Eldorado Bank, Home Savings of America and Great Western Bank. He was named among Orange County's Most Influential Business Leaders on the "OC500" List and as both a 2023 and 2022 Orange County Visionary by the Los Angeles Times. He was honored as the Robert Ross Founders Award Recipient from the MDA. Mr. Tjan was recognized as one of Vivid Magazine's Annual Top 10 Asian American Entrepreneurs and was also named one of OC Metro's Hottest 25 People of Orange County, California. Mr. Tjan holds a Bachelor of Arts Degree in Business Administration from California State Fullerton University.



Jeffrey M. Verdon, Rappaport & Berkman

Rappaport & Berkman, Jeffrey M. Verdon is Chair of the Asset Protection Practice Group, headquartered in Newport Beach, CA. For over 30 years, Verdon and his team have provided specialized taxation and estate planning services to Orange County's wealthy families and business owners, pioneering the integration of risk mitigation with advanced estate planning. Verdon authored "Estate Planning for Women Only", numerous business articles on Kiplinger's Wealth Creation column, and is a sought-after speaker at financial conferences worldwide.

2024 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Albright, Yee & Schmit, APC, Newport Beach*Clifton W. Albright, President & Founding Partner*

Clifton W. Albright is the president of Albright, Yee & Schmit, APC (AY&S), a California-based law firm formed in 1982. AY&S specializes in providing legal representation for employment, labor and tort defense to governmental and private entities. Mr. Albright was appointed to the Industry Trade Advisory Committee on Small and Minority Business (ITAC11) by former President Obama and former President Trump. Mr. Albright travels to Washington, D.C. to meet with government officials on international trade and trade relations. Among his many accolades, Mr. Albright was selected by his peers for Inclusion in The Best Lawyers in America (2023 and 2024) in the area of Litigation - Labor and Employment.

**Alignment Health, Orange***John Kao, Founder & CEO*

Alignment Health is empowering members to age well and live their most vibrant lives. A consumer brand name of Alignment Healthcare (NASDAQ: ALHC), Alignment Health offers more than 50 benefit-rich, value-driven Medicare Advantage plans (MA) that serve more than 155,000 members across 53 counties in six states. The company partners with nationally recognized and trusted local providers to deliver coordinated care, powered by its customized care model, 24/7 concierge care team and purpose-built technology, AVA®. Based in Orange, California, the mission-driven company makes high-quality, low-cost care a reality for members every day. In 2023, Alignment celebrated its 10-year anniversary and capped a decade in business on a high. In January 2024, Alignment's membership jumped 44% to more than 155,000 members (compared to 17% from the year prior). This marked the company's highest membership percentage growth since its IPO in March 2021 and is a testament to Alignment's approach to "Medicare Advantage done right."

**American Lending Center, Irvine***John Shen, CEO*

As the founder and current chief executive officer of American Lending Center (ALC), headquartered in Irvine, California, John Shen has successfully turned a small startup into one of the most successful nonbank small business lending institutions in the country over the past decade. Since 2015, Shen has successfully founded multiple other dynamic businesses including diversified private capital firm Sunstone Management (SMI) and virtual kitchen/food hall developer and operator in Partake Collective (Partake). His entrepreneurial vision and leadership has sent all his companies on the fast track to success. As a grassroots entrepreneur himself, Shen possesses a great passion for startups and small businesses.

**Ankona Capital, Newport Beach***Newth Morris, Managing Director*

Newth Morris started his career as an electronic systems designer for Electronic Design Associates (EDA) where he worked on then-early technologies such as audio encoding, text-to-speech, voice recognition, GPS and wireless data. In 2000, Morris co-founded Telogis - a pioneer in the fleet vehicle tracking market that came to be known as "telematics." The company innovated in all of key areas required to bring the system to market including hardware, SAAS, digital mapping and parallel computing. The company grew from a boot-strapped startup to over \$100 million in revenue. In 2016, Verizon acquired Telogis where Morris then served as senior vice president of Strategy for connected car and IoT. After a brief retirement, Morris co-founded Ankona Capital - a growth stage VC firm.

**Ardius, Brea***Joshua Lee, Founder & CEO*

Prior to founding Ardius, Joshua Lee worked at Ernst & Young (EY) and helped pioneer the very industry he set out to disrupt: (R&D) tax credits. Having worked with the actual authors of the Tax Regulations (and indirectly the IRS/FTB), he was better able to understand how to automate/scale software to help companies claim these credits. After EY, Lee started a venture studio that invested/created early-stage start-ups; start-ups that were often too small to be serviced by any accountant (or accounting firm) and were left wondering how they could claim/discover these credits when they didn't have the resources or knowledge to do so. On average, there are still over 70-75%+ of eligible companies that don't know they qualify for these credits. Even if a company had claimed these credits, automating these processes with (Ardius) software often led to finding 4x+ more in credits. These results and successes led to Ardius being acquired by Gusto just 18 months after inception, and already helping thousands of businesses claim over \$100 million+ in credits.

**Astrologie California, Laguna Niguel***Angelo Ghailian, President*

Angelo Ghailian, the visionary founder of Astrologie California, has pioneered a dynamic fusion of style, family values, and sustainability within the Los Angeles fashion scene. With a stellar academic background, including an Entrepreneurship emphasis from the University of Southern California's Marshall School of Business and an MBA, Ghailian has steered Astrologie California towards unparalleled success. Under his leadership, Astrologie California has become synonymous with excellence, boasting esteemed retail partnerships with Nordstrom, Lane Bryant, Cracker Barrel, Altr'd State, LLR, and Anthropologie. A strategic milestone in the brand's evolution was the launch of the exclusive label, Ruby and Wren, at Nordstrom-a testament to Ghailian's commitment to innovation and style. Notably, Astrologie California marked its 20th anniversary in September 2023, celebrating a journey woven with familial values and environmental stewardship. Ghailian's dedication also extends to community initiatives within the Armenian community of Los Angeles.

**AURA, Newport Beach***Brandon Kordower, Founder & CEO*

AURA was founded by Brandon Kordower in January 2017 to provide local small businesses with month-end accrual financials well beyond the quality they're accustomed to receiving. Accrual accounting requires knowledge of properly matching revenues and expenses in the same period to accurately analyze business performance. AURA translates financial data into a meaningful executive summary that drives profitability, as well as addresses areas of concern. Third party recipients of the financial statements, such as banks, have peace of mind that the information they're receiving is clean and accurate, making it a much smoother exercise to receive loans or credit lines, outside investment, or successfully exit the business through a due diligence process. While AURA provides significant strategic value, it also comes at a considerable cost savings relative to a complementary qualified employee. AURA currently has 15 employees and serves over 75 clients nationwide, most based in Orange County.

**Austin Taylor, Irvine***Ron Viggiano, President*

With over 34 years of experience, Ron Viggiano has become the area's premier clothier by asking the right questions and understanding the clients wants and needs to help guide them into creating distinctive and personalized wardrobes. Using creativity and contemporary styling details he has built a loyal following of successful business leaders in Orange County.

**Beyond Fifteen Communications Inc., Irvine***Lauren Ellermeyer, Co-Founder & President*

As the co-founder and president of Beyond Fifteen Communications, a dynamic marketing agency, Lauren Ellermeyer, is renowned for her prowess in cultivating and expanding robust agency partnerships. Serving as the driving force behind the agency's groundbreaking new business ventures, Ellermeyer seamlessly merges strategic vision with hands-on leadership. Ellermeyer's approach to agency partnerships, coupled with a keen eye for emerging talent and expertise in public relations and social media, has been instrumental in propelling Beyond Fifteen from its startup roots to a nationally acclaimed powerhouse. Her visionary implementation of entrepreneurial ideas, combined with results-driven strategies, has redefined the traditional agency-client relationship, setting a new standard for excellence in the industry. Today, Beyond Fifteen boasts a team spanning the U.S. and caters to a diverse range of clients, encompassing healthcare, technology, consumer packaged goods, energy, education, and more.

**Blue C - Creative Marketing Agency, Costa Mesa***Eric Morley, Co-Founder*

Eric Morley stands as the co-founder of Blue C, an innovative California-based agency specializing in brand strategy and creative marketing. Since 1998, Morley has been a driving force in the industry, showcasing an unwavering passion for shaping compelling brand narratives. His expertise spans the realms of both B2B and B2C sectors, covering brand strategy development, campaign orchestration, strategic design, content creation, and cutting-edge digital marketing media strategies. Blue C, under Morley's leadership, is committed to fostering brand clarity and community development for its clients, utilizing the Blue C BrandPWR marketing framework to help brands connect with their ideal customers. At the core of Blue C's mission is the goal to propel clients to success by conveying their stories in a meaningful way through a defined brand vision, clear messaging, and powerful creative.

**Branded Group Inc., Anaheim***Michael Kurland, Author, CEO, & Co-Founder*

Michael Kurland is an accomplished CEO of a national facilities management company, devoted to leading with purpose, making a positive impact in his community, and living a healthy lifestyle. With a wealth of experience in sales and marketing, Kurland launched Branded Group in 2014 and has since overseen its exponential growth, cultural transformation, and the development of an exceptional team of industry professionals. His mission to #BeBetter has resulted in long-term client and partner relationships, inventive facility maintenance programs that enhance customer satisfaction, and a highly esteemed position in the industry. Kurland is the author of his first book, "Broken to Better: 13 Ways Not to Fail at Life and Leadership," as well as an industry thought leader having multiple published articles on Forbes.com, Inc.com, Thrive Global, and Huffington Post. Kurland and his team's strong dedication to BeBetter has led to Branded Group receiving several industry and humanitarian awards. These include being certified as a Great Place to Work® and appearing on the Inc. 5000 list for consecutive years.

**Braver Players Musical Theater Foundation, Costa Mesa***Chelsea Braverman, Artistic Director & President*

Braver Players started as a place to house aspiring teen artists who loved performing. Being from an educational background, Chelsea Braverman felt there was a need to form a place where teens could escape from their lives and work on team building, intra personal growth, and confidence while learning theater skills. They eventually grew not only into a musical theater space but also a short film school and a place for dance and acting classes. They also service six elementary schools in Orange County by mounting their school plays. What sets Braverman apart from others who are in the field of directing and producing for teens and kids theater is her educational background. She has a master's in education so all productions are structured like a class. They delve into story, character, background, and are constantly reflecting on what they are learning.





Great leaders inspire us

Leaders engage us, allow us to take chances, unite our voices, and focus our ideas into action.

We congratulate this year's nominees of the 2024 Orange County Business Journal's Excellence in Entrepreneurship award and we salute their determination and commitment to excellence.

Wells Fargo Commercial Banking

Manishi Parikh

Relationship Management Head

manishi.g.parikh@wellsfargo.com

2024 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Butcher's House Brasserie, Costa Mesa*Jeffrey Offer, Chef-Owner*

Chef Jeffrey Offer opened his first restaurant Butcher's House at Costa Mesa's SoCo Collection in December 2021. Offer's menu is centered around dry-aged meats and rustic brasserie-style dishes representative of his hometown Toulouse in the south of France. In the weeks following its opening, the restaurant has already garnered critical acclaim. Born and raised in the South of France, Offer discovered his culinary inspiration at a young age and has kept a laser-focused vision of creating a life for himself in America. His storied culinary career spans over a decade across three continents. As a classically trained French chef, Offer brings more than 12 years of experience in cooking, kitchen logistics, and operations management to the opening of his first restaurant, Butcher's House. For Offer, Butcher's House is more than an homage to his culinary roots; it is the fulfillment of his lifelong American dream.

**Caribou Industries, Santa Ana***Mike Harrah, Founder & President*

Founded in 1977, Caribou Industries owns and operates 40 subsidiary companies known for premier real estate, executive aviation, five-star restaurants, hotels, resorts, and entertainment venues. Since its inception, Caribou Industries, led by Founder and President Michael F. Harrah, has acquired, developed or completely renovated over seven million square feet of commercial office, retail, and residential properties in Santa Ana, California, Arizona, Nevada and Hawaii. In Santa Ana, Caribou is responsible for several projects that have transformed the city, including recently pulling \$5.6 million in building permits to begin construction on 3rd & Broadway Promenade, a mixed-use development project in downtown Santa Ana which will include a 16-story multifamily property; a three-star, 10-story hotel; and an event center. Additionally, Caribou and Mr. Harrah are responsible for restoring and preserving many Orange County landmarks, including the Santa Ana Performing Arts & Event Center, the OC Performing Arts Pavilion, and the Orange County School of the Arts, one of the country's most prestigious professional arts high schools.

**CD Video Manufacturing Inc., Santa Ana***Minh Nguyen, President & CEO*

Minh Nguyen arrived in the United States as a Vietnamese refugee in 1978. He was sixteen years old and spoke no English. His sponsoring family lived in San Diego, California. With their help Nguyen completed his high school education and graduated the next year. Nguyen received an Associate of Arts degree in Electronics from Mesa College. He worked for Sony in their San Diego television manufacturing plant for ten years where he became the Plant Leader. Nguyen realized that manufacturers generated large amounts of waste from production rejects. Nguyen saw an opportunity to recycle these tapes and in doing so became the first tape recycler in the United States. Within a short time Nguyen invested in video duplication equipment and started loading and duplicating VHS tapes. In 1994 Nguyen moved his business from San Diego to Garden Grove, California in order to be closer to the Los Angeles area marketplace. Recognizing that to remain successful he must keep up with technology advances, Nguyen formed CD Video Manufacturing, Inc. He bought a used CD manufacturing machine and started producing discs. A short time later he upgraded to new equipment and added DVD manufacturing. CD Video has grown to be the largest independently owned optical disc manufacturing plant in North America.

**CityGreen Consulting LLC, San Juan Capistrano***Susan Silvestri, Managing Partner*

With a career spanning since 1998, Susan Silvestri is a steadfast figure in the waste and recycling industry, serving almost two decades as a senior business manager. In April 2023, she joined Michael Ballet Consulting, LLC, which transformed under her leadership into CityGreen Consulting, LLC at the beginning of this year. Silvestri is at the forefront of the company's commitment to Solid Waste System Management and Compliance, offering services such as system development, compliance consulting, audits, and complete SB 1383 solutions. Notably, Silvestri has creatively designed CityGreen Connect, a software platform for municipalities to oversee solid waste contracts and ensure SB 1383 compliance. Beyond her professional endeavors, Silvestri serves as a planning commissioner for the City of Placentia and holds roles in various community organizations. She also holds titles as Ms. Southern California Cities 2020 and 2021, and Ms. Elite West Coast 2022, showcasing her multifaceted contributions to both her professional and civic spheres.

**CPA Club Inc., Irvine***Chris Vanover, Founder & President*

Chris Vanover is truly on a mission to revolutionize the world of accounting. Vanover is a highly dedicated CPA with more than two decades of unique public accounting experience in auditing, regulatory, and educational roles with Big 4 and regional firms, the Public Company Accounting Oversight Board, and various universities in Southern California. With his visionary leadership and unwavering commitment, Vanover has introduced groundbreaking innovations that are reshaping the landscape of the profession. Recognizing the critical shortage of qualified accounting talent in CPA firms and companies and the challenges they face in attracting and retaining personnel, Vanover embarked on a quest to find a better way. He analyzed the operational models of CPA firms and companies and ingeniously devised the professionals-as-a-service model, which has given CPA firms and companies critical access to top-notch talent and unparalleled flexibility. Launched as AuditClub in 2022 and rebranded to CPAClub in November 2023, this pioneering professional services solutions center has swiftly gained traction, extending its support to dozens of top 10, regional, and local CPA firms and organizations across the United States and even garnered interest from abroad.

**CSUF Center For Entrepreneurship, Fullerton***John Bradley Jackson, Director*

John Bradley Jackson, affectionately known as "Professor JJ," is the director of the Center

for Entrepreneurship at California State University, Fullerton. His journey, marked by Silicon Valley innovation and Wall Street wisdom, has shaped the Center into a beacon of excellence. In 2016, Jackson founded the CSUF Startup Incubator, a groundbreaking venture that has launched over 100 startups, demonstrating his commitment to nurturing entrepreneurial talent. The incubator guides startups as they test and launch their business concepts. Jackson recently received a \$550,000 grant from the state of California to support the center's social entrepreneurship services in Orange County, focusing on expanding the CSUF Startup Incubator to include more social enterprise startups, online education, and curriculum to embrace social impact. In 2016 Jackson founded Titan Angels, LLC, a seed investment fund that focuses on scalable ventures in the Southern California region. Jackson serves as fund manager. He later founded Titan Angels II, LLC which also invests in scalable startups. In 2022 Jackson founded The Youth Development Fund, LLC which is devoted to global EdTech investments.

**David Meltzer Enterprises, Ladera Ranch***David Meltzer, Founder*

As part of David Meltzer's mission to empower over 1 billion people to be happy, the team at DME works tirelessly to create content that provides people with tools to pursue their potential. They've launched three business-focused television shows for Apple TV, a pitch show called "2 Minute Drill" and the first late-night entrepreneurial show "Office Hours", and a new investment and collectibles-focused show called "Money Talks" launched in 2023. In addition to Meltzer's content & distribution deal with Apple TV as a featured influencer, he launched a digital show with legendary tennis coach Rick Macci entitled "Game, Set, Life", currently in its second season, as well as new digital show called "Executive Football Talk" with former NFL executive Mike Tannenbaum. With recording locations at the Blue Wire studio in the Wynn Las Vegas, SoFi Stadium, home of the NFL's Los Angeles Rams and Chargers, and another new studio in Orange County already, the team will also be announcing a new location at another famed NFL stadium in the coming months, expanding their footprint to the Midwest.

**Dr. Kerry Burnight, Dana Point***Kerry Burnight, PhD, Owner*

Dr. Kerry Burnight is a gerontologist on a mission to make older better. She served as a professor of Geriatric Medicine and Gerontology at the University of California, Irvine for 17 years. Dr. Burnight is the co-founder of the nation's first Elder Abuse Forensic Center, where her team of law enforcement officers, physicians, attorneys, and social workers have served over 2000 older adults. Her research focuses on the two ends of the spectrum of the aging experience: wellness, purpose, dignity, connection, and joy in longevity at the one end and loneliness, elder abuse, neglect, and exploitation at the other end. As a society, and as individuals, there is so much we can do to improve older lives. Burnight founded the national non-profit Ageless Alliance and serves on executive advisory boards for companies innovating in the aging space. She is currently writing a book on "making older better." Dr. Burnight was recognized for her work by the U.S. Department of Justice and has appeared on the Dr. Phil Show, The Doctors, Money Matters, and Headline News.

**Ducere Global Business School, Newport Beach***Mathew Jacobson, President*

Mat Jacobson is the founder of Ducere Global Business School, a university group operating in North America, Europe, Australia and Africa. Ducere is a disruptor and pioneer in higher education, where students learn from hundreds of real world leaders, including Presidents, prime Ministers, heads of the CIA, UN, founders and humanitarians. In addition degrees are affordable, and all assignments are tailored to the strategic career goals of students. Jacobson is focused on making Ducere the most career focussed, applied and accessible university opportunity. Ducere degree tuition, also funds the important work of the Ducere Foundation, self funding education improvements in 27 African nations.

**Endologix LLC, Irvine***Matt Thompson, MD, CEO*

Dr. Matt Thompson is the president and chief executive officer of Endologix LLC. Prior to his CEO appointment in November 2021, he served as the company's chief medical officer from 2016, overseeing business development, medical affairs, regulatory, clinical, and R&D departments. Among his notable contributions as CMO was to lead the acquisition and integration of PQ Bypass in April 2021. Previously he was the professor of Vascular Surgery at St George's, University of London and a staff Surgeon in the Department of Vascular Surgery at the Heart, Vascular and Thoracic Institute, Cleveland Clinic Foundation, Ohio. Dr. Thompson trained at Cambridge, St Bartholomew's Hospital, the University of Leicester and Adelaide. He studied corporate innovation at Stanford University, Graduate School of Business.

**EPD Solutions Inc., Irvine***Jeremy Krout, CEO & Founder*

Jeremy Krout is the founder of EPD Solutions Inc., and has over 20 years of experience in urban, environmental and policy planning; project management; and real estate entitlement and development, in both the public and private sectors. Over this period, he has successfully managed many regionally significant and complex projects in these fields, which drew on his knowledge of federal, state and local government regulations, natural interpersonal and negotiation skills, public presentation strengths, detail-oriented approach to project design oversight, and team leadership abilities. His wide-ranging and multifaceted experience on infill residential, master-planned communities, affordable hous-



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ing, education, public and private redevelopment, transportation, mining, solar, recreation, hospitality and industrial projects has developed and honed his skills in entitlement strategy and implementation and environmental compliance. It is because of his successes and dedication that he has earned the conviction and reliance of project proponents and opponents, stakeholders and his clients.

e-PlanSoft, Irvine

Michael Chegini, President & CEO

Dr. Michael Chegini founded Owen Group Inc., an award-winning architectural, engineering, and Plan Review service firm based in Los Angeles, California, which he then sold to Bureau Veritas, a multinational company specializing in testing, inspection, and certification services. Michael Chegini also founded e-PlanSoft, a software company specializing in plan review. He and his team, along with other industry experts including building and planning officials, began the development of software and other electronic products that streamline plan check processes.

**Equilibrio, Irvine**

Svetla Alexandrov, Co-Founder & Chief Strategy Officer

Svetla Alexandrov is an entrepreneur at heart, who started her first company at 13 in her parent's living room back in her native Bulgaria. Alexandrov has an undergraduate degree from Harvard and received her MBA from Stanford. She is currently the co-founder and chief strategy officer of Equilibrio, a metabolic health AI company spun out of Caltech and funded by leading Silicon Valley investors. Prior to that, she worked at McKinsey and served as vice president of Next Generation Merchandising at Walmart Labs.

**Events by Jamie Lyn, Laguna Hills**

Jamie Lyn Byerlee, Founder

Jamie Lyn Byerlee, the founder of Events by Jamie Lyn, has been a luminary in the event planning industry for over 23 years. Based in Orange County, California, her company has earned a stellar reputation for orchestrating unforgettable events, both locally and globally. Byerlee's expertise extends to a diverse range of occasions, from intimate gatherings to grand corporate events, showcasing her versatility and dedication to crafting bespoke experiences. Under her leadership, Events by Jamie Lyn has become synonymous with elegance, innovation, and meticulous attention to detail. The company's portfolio boasts numerous high-profile events, which stand as testaments to their creativity and organizational excellence. They have successfully managed everything from enchanting weddings to large-scale corporate functions, each event tailored to reflect the unique vision and aspirations of their clients.

**EZ Kebab, Costa Mesa**

Roland Karam, Founder & Owner

Founded in 2020 by Roland Karam, EZ Kebab's offerings are inspired by the street food he enjoyed during his childhood in Lebanon. While EZ Kebab is his first restaurant, Karam is an entrepreneur with years of experience in launching and scaling several multi-unit businesses throughout Southern California. The pandemic created a unique opportunity for Karam; when restaurants were closed, and intimate at-home gatherings rose in popularity, EZ Kebab's catering business began to thrive. And while Karam's catering side of EZ Kebab has maintained its fame, EZ Kebab's brick and mortar has steadily increased its popularity over the past year, becoming a go-to for Costa Mesa locals and visitors to grab a quick bite to eat and enjoy their new dining patio. In addition to EZ Kebab, Karam has also unveiled the opening of a new restaurant, BEI, a full-service Lebanese restaurant open nightly for dinner.

**Fairstream / 360 Venture Collective, Costa Mesa**

Kelly O'Connell, CEO & Managing Partner

Kelly O'Connell is a renowned entrepreneur and business leader, currently serving as the CEO of Fairstream. Under her guidance, Fairstream has achieved remarkable success, serving Fortune 500 and Main Street businesses, Fairstream is connecting employees to talent they don't normally reach, helping numerous clients to achieve hiring goals, strong online presence and drive significant growth. In addition to her role at Fairstream, O'Connell is also the managing partner of 360 Venture Collective, a venture capital and consulting firm that provides strategic guidance and investment opportunities for startups and emerging businesses. Through her expertise and experience, O'Connell has successfully partnered with various entrepreneurs, assisting them in achieving their business goals and realizing their full potential.

**FutureStitch, San Clemente**

Taylor Shupe, Founder & CEO

Taylor Shupe is a visionary entrepreneur and CEO, renowned for his transformative contributions to the knitwear industry. Serving as the co-founder and chief product officer at Stance Inc from 2009 to 2018, he played a pivotal role in bringing life to a commoditized market, driving Stance to its position as the leader of the sock industry. In 2017, Shupe embraced a new venture, founding FutureStitch, where he currently serves as CEO. This innovative knitwear manufacturer operates in Southern California and China, creating premium, eco-conscious socks, sleeves, and knit footwear. What distinguishes FutureStitch is both its unwavering commitment to sustainability and its meaningful impact on the justice-impacted population, a testament to Shupe's unwavering commitment to creating positive change in both the fashion industry and in society's most vulnerable communities. Shupe's leadership continues to propel FutureStitch toward success, setting milestones in product, social, and ecological innovation.

**GiGO Clean, Santa Ana**

Bitia Safari, CEO

Bitia Safari is an Iranian-American philanthropist and entrepreneur. Serving as president for Simply Crystal Clean, a successful OC-based commercial cleaning company, Safari has gained a deep knowledge within the cleaning industry which has propelled her to launch a new technology platform bringing high quality cleaning to the masses. GiGO Clean is a technology company offering on-demand cleaning services utilizing an easy-to-use phone application to connect customers to cleaners directly. GiGO Clean began servicing the Orange County region in 2023, and has since expanded their reach to Los Angeles and San Diego. The company plans to expand their service statewide and beyond in 2024. Outside of work, Safari is a dedicated board advisor to Moms Against Poverty, a global non-profit organization with the mission to nurture and educate underprivileged children to their fullest potential, so that one day they can contribute and lead within their own communities and break the cycle of poverty.

**High School Inc. Academies Foundation, Irvine**

Felix Lugo, Executive Director

A visionary leader, Felix Lugo has a sterling track record of more than 15 years in both public and private middle and high school education. With a dynamic background encompassing such diverse domains as student life, community service, internships, enrollment, marketing, fundraising, and residential programs. Throughout his career, Lugo has not only led various administrative departments but has also been a driving force in establishing entire educational institutions from the ground up. His innovative contributions have extended far beyond individual schools, as he has played a crucial role in enhancing staff development and significantly boosting student enrollment in high schools across the United States. He holds a master's degree in management from Warner University and a bachelor's degree in health services administration from Monroe College. Eager to stay at the forefront of educational innovation, Lugo has pursued additional training at esteemed institutions including Rockhurst University, Love & Logic Institute, The Association of Boarding Schools and Cross-Country Education.

**Idea Hall, Costa Mesa**

Rebecca Hall, President & CEO

Having celebrated 20 years in business in 2023, Idea Hall is a nationally recognized creative communications agency committed to championing good both at home in Orange County & beyond through an integrated marketing model that brings marketing, branding, public relations and advertising services together under one roof. Rebecca Hall and her team have worked with some of OC's most established commercial real estate businesses, as well as nonprofits taking on some of the county's biggest issues - including workforce development and mental health. The agency has also attracted top local talent through its strong corporate culture where people come first. Over the past two decades, Hall has earned the reputation of being one of the first and most successful female entrepreneurs in the county. She attributes her success to staying ahead, constantly innovating and maintaining strong relationships.

**Impact Grove Impact Grove | Sustainability & Impact Consulting, Executives, & Advisors, Irvine**

Mike Brown, Founder & CEO

Mike Brown is a 2006 graduate in Business Administration with an emphasis in Entrepreneurship and Marketing from Chapman University. That year, he competed in and won the Global Student Entrepreneur Awards, international business plan competition. (GSEA). With a passion for automotive customization, he founded Modbargain, pioneering e-commerce for automotive upgrades, accessories, and performance modifications. Under his leadership for 12 years, Modbargain achieved remarkable milestones, reaching \$50+ million in revenue, employing over 200 individuals, and shipping products to 177 countries. His entrepreneurial excellence earned global recognition as the Student Entrepreneur of the Year and various accolades from esteemed publications and associations, including OC Metro Magazine, SEMA, and the California Senate. Transitioning from the automotive industry, Brown established Impact Grove, driven by a newfound dedication to impactful entrepreneurship. The journey began with an eye-opening experience during an EPA inspection, which sparked his commitment to sustainability and social responsibility. Impact Grove aims to guide forward-thinking businesses in embracing a triple bottom line-people, planet, and profit-to solve global challenges while fostering financial success.

**Irvine Technology Corporation, Santa Ana**

Nicole McMackin, President & CEO

Nicole McMackin is CEO and president of Irvine Technology Corporation, a national diversity, equity and inclusion technology solutions and staffing firm headquartered in Orange County California. McMackin is a well-known speaker and most notably recognized for her Women in Leadership program over the past four years. McMackin is the 2021 Los Angeles Times Business to Business Leadership award winner, the 2020 Women in Technology Hollywood Woman of the Year, 2020 Bronze Stevie Award winner for Female Executive of the Year, The 2019 Top 30 Most Dynamic Leader Award from Boston Publishing and is a contributing opinion writer for the New York Daily News. McMackin has been recently featured in articles as a contributing writer in AG Professional, Light Reading, Windows IT PRO, CPA Practice Advisor and Donn Tennant's recent blog on how to broaden, elevate the STEM conversation. McMackin is a champion of women's rights and equal treatment in the workplace.

**JMAC Lending, Costa Mesa**

Christina Pham, President

Christina Pham is JMAC Lending's founder and president. Pham es-



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established JMAC Lending in 1997 in Huntington Beach, CA. A Woman-and Minority-Owned Business, JMAC has grown into one of the nation's leading TPO mortgage lenders. Serving as an industry leader and influencer and a true role model for the organization, Pham leads with forward-thinking emphasis on creating an empowered, knowledgeable and inclusive workforce. People are Pham's top priority.

Kapture Vision, Irvine

Nilo G. Low, CEO

In 2003, at just 19 years old, Nilo Low gathered friends together in her parent's backyard to raise funds for her best friend's mom, who was going through breast cancer at the time. What was intended to be a one-time cocktail party for a good cause became an annual affair and ignited a passion within Low - she knew she wanted to bring people together and create connection through experiences. A few years later in 2009, she launched Kapture Vision, a full-service event agency that does just that - brings people together, expands partnerships and delivers high-level hospitality. The agency has produced events for high-profile celebrities, global leaders and major sport and entertainment companies, as well as top nonprofit organizations, ranging in size from 100-5000 attendees. The way in which she has led her agency's growth, from the early days of working from her kitchen table to what the agency is today, mostly through word-of-mouth, speaks to her unmatched leadership, determination and dynamic team. Today, Low continues to lead her growing agency while encouraging her team to find their own intersection between passion and purpose.

**KEI Concepts, Fountain Valley**

Viet Nguyen, CEO & Executive Chef

Helmed by Viet Nguyen, Kei Concepts is a trailblazing culinary group based in Little Saigon, Orange County, recognized for restaurants such as Súp Noodle Bar, Vox Kitchen, Nep Café, Kin Izakaya, INI Ristorante, and ROL Hand Roll Bar, among others. These unique eateries combine technology and artistry to craft unparalleled dining experiences. With a mission that extends beyond culinary excellence, Kei Concepts fosters a vibrant community, champions startups, and promotes arts, all through the unifying power of pan-Asian cuisine. As the group's founder, CEO, and executive chef, Nguyen is passionate about connecting diverse communities through the universal language of food - an ethos evident across all his concepts. Nguyen sees each restaurant as a canvas for this mission, where the culinary creations are not just dishes but cultural ambassadors.

**Leisure Capital Management Inc., Costa Mesa**

Gideon Bernstein, Principal & Financial Advisor

Gideon Bernstein focuses on helping affluent families grow & protect their wealth. He is credited for helping his firm reach the Forbes list of America's Top RIA Firms. While he serves in all areas of wealth management, philanthropy is one of his core philosophies, and his passion is working with non-profit boards, families, and private foundations to help them achieve their philanthropic missions. As part of this mission, he published his first book on charitable giving, *Giving: A Handbook to Happiness for the Modern Philanthropist*, in 2021 which was noted as one of the hottest sellers in its category on Amazon when it was released. In 2022, Bernstein was named a 'Distinguished Leader' in Wealth Management by the Orange County Business Journal in recognition of his commitment to helping clients grow and protect their assets-as well as give their assets away. Bernstein has earned both the Chartered Financial Analyst and Chartered Advisor in Philanthropy designations and helped his firm to grow to over \$700,000,000 in assets under management.

**Lionheart Health Inc., Irvine**

Howard Leonhardt, CEO

Howard Leonhardt is an inventor and serial entrepreneur. He has 21 U.S. patents with over 100 patent claims for products for treating cardiovascular disease and has over 40 new patent claims pending. His TALENT (Taheri-Leonhardt) stent graft developed in the early 1990's holds a leading world market share for repairing aortic aneurysms without surgery. His inventions have treated over 500,000 patients in 60 countries. In early 1999 Leonhardt founded Bioheart, Inc. www.bioheartinc.com a leader in applying adult muscle stem cells to treat heart failure. His latest start-up, LionHeart Health, is the only provider offering a full lineup of products with patented bioelectric signaling sequences for skin and hair regeneration, breast augmentation, erectile dysfunction treatment, muscle regeneration, building, and body toning and sculpting. Precise bioelectric arrangements for specific regenerative protein expressions such as SDF1 and PDGF for stem cell homing, COL17A, COL1, COL2 for collagen regeneration, klotho, follistatin, IGF1 and LIM for muscle regeneration, sonic hedgehog, GDF10, GDF11, IGF1, LIM for nerve and brain regeneration. Tropoelastin for increasing elasticity of the skin and other organs.

**Managed Direct Response, Irvine**

Pat Mercuri, President & Founder

Pat Mercuri is founder and president of Managed Direct Response based in Irvine CA. Mercuri is recognized in the industry for having introduced a number of innovative marketing programs for the mortgage, solar and automotive industries. The company has mailed over a billion direct mail pieces. Mercuri is recognized as a pioneering force in direct response marketing renowned for his client-centric approach. Mercuri is committed to revolutionize direct response marketing and set new industry benchmarks.

**Matregenix, Irvine**

Kevin Guo, COO

Dr. Kevin Guo brings a wealth of expertise from his PhD in Chemical Engineering, enhancing Matregenix's innovative edge in electrospun nanofiber technology. His academic background has been instrumental in advancing applications across technology sectors. As the chief operating officer and R&D Leader at Matregenix, he has spearheaded groundbreaking

advancements in electrospun nanofiber technology, significantly impacting various sectors including filtration, smart textiles, and battery applications. His leadership has been pivotal in conceptualizing and executing research projects, leading to the development of innovative products and technologies. Matregenix has flourished, acquiring over 15 R&D projects and generating over \$3.9 million in revenue. They have successfully managed and delivered eight major projects to diverse stakeholders, including the US Department of Defense, ensuring they meet stringent objectives, budgets, and timelines. The efforts have resulted in the development of five new nanofiber products and the completion of two crucial technology transfer contracts. They have established a nanofiber manufacturing facility from the ground up, scaling production to meet large-scale customer demands. The commitment to compliance and standards, coupled with market validation skills honed through NIH I-CORP program training, has been instrumental in driving Matregenix's growth and innovation.

**Miguel's Restaurants, Corona**

Javier Vasquez, CEO & President

Javier Vasquez has served as the president and chief executive officer of Miguel's Restaurants for over 20 years. He started his career working alongside his parents and siblings at their first restaurant which opened in Corona, California in 1974. Vasquez guided Miguel's explosive growth over the last two + decades. He is the lead visionary that oversees operations, growth, real estate development and acquisitions. Calculated risk-taking and entrepreneurship are ingrained in Vasquez's family's DNA and have fueled Miguel's growth which includes five Miguel's Jr. locations in Orange County, and 17 Miguel's Jr. locations and one full-service Miguel's California Mexican Cocina restaurant in the Inland Empire. Vasquez keeps a pulse on the customer experience by regularly working alongside management and staff in the restaurants. Vasquez earned his bachelor's degree in business administration from the University of Southern California, Marshall School of Business and was voted into California Restaurant Association's Orange County Board of Directors in 2023.

**Mortenson Taggart Adams, Irvine**

Michael Mortenson, Managing Partner

Michael Mortenson is a founding partner of Mortenson Taggart Adams LLP. He is an experienced trial lawyer who represents and advises Fortune 500 companies, innovative startups, emerging middle-market companies, and high-profile individuals, as both plaintiffs and defendants, in complex, high-stakes matters in federal and state courts throughout the country. Mortenson's trial practice focuses primarily on business litigation, consumer litigation and employment litigation. He regularly handles matters involving fraud, breach of contract, breach of warranty, breach of fiduciary duty, misappropriation of trade secrets, products liability, whistleblower actions, discrimination, and retaliation for clients in various industries including automotive, technology, manufacturing, alternative energy, private equity and sports and entertainment. Mortenson's work has been featured in various media outlets including The Washington Post, ABC News, Los Angeles Times, Orange County Register, Daily Journal, Associated Press, Law360, and others. Mortenson was previously the Chair of Consumer Litigation at Stradling, Yocca, Carlson & Rauth, and a partner at Baker Hostetler LLP. Mortenson was named to the Best Lawyers in America (2024 Edition) and as a Southern California Super Lawyer since 2022.

**Moxxe PR Inc., Santa Ana**

Mona Shah, Founder

Led by Mona Shah, Moxxe PR specializes in public relations and marketing for the region's most distinguished chefs and independent restaurants. Over the past two decades, Moxxe has built a name for itself by focusing on creativity, experience, compassion, authenticity and integrity when representing local culinary leaders. Clients currently include one of only three restaurants in the county to receive a Michelin Star, one of the most prestigious, globally recognized designations. Most recently, Shah was selected as one of Forbes' "Next 1000" for redefining what it means to build and run a business today, and being proof positive that American entrepreneurship remains resilient, vibrant and ever-changing.

**MVS Inc., Newport Beach**

Eric Goodman, President & CEO

MVS Inc. was established in 1986 and opened their doors in 1988, as a leading supplier of groceries, medical supplies, janitorial supplies, nutritional supplements, incontinent supplies, durable medical equipment, OTCs, personal supplies, safety and facility supplies, linens, and office supplies to healthcare facilities in Southern California. The company's target market is six bed or fewer residential care facilities, homeless shelters, battered women facilities and children displacement facilities from Santa Barbara County down to the Mexican border. Another smaller arm of the company provides medical supplies to individuals nationally through e-commerce. "Our mission is to provide healthcare facilities with the products and services of the highest quality, so they can provide care to the residents they serve."

**Northwestern Mutual-Orange County, Irvine**

Alex Fadi, Managing Director

Alex Fadi began his career with Northwestern Mutual in Downtown Los Angeles as a college intern in 2011 while pursuing his undergraduate education at the University of Southern California. After graduating with dual degrees in International Relations and Business Administration, Fadi converted in 2012 to a full-time advisor. In 2014, he took on his first leadership role, helping facilitate training and development to drive growth and productivity for new financial advisors. Later, in 2016, as a field director, Fadi led the company as the #1 pro-



“Effective philanthropy requires a lot of time and creativity – the same kind of focus and skills that building a business requires.”

- Bill Gates



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ducing field director that fiscal year. Fadil went on to lead the firm's college internship program as internship development officer, ranking #1 companywide in 2019. He then moved to Orange County in 2020 as the Irvine firm's development officer and growth and development director. In February 2023, Fadil was appointed managing director for the Gordon Network Office in Orange County.

OC World, Mission Viejo

Scott Hays, Founder & Executive Producer

Scott Hays has a passion for bringing awareness to communities, causes, and people that may otherwise go unnoticed. With a love of music and video production, he's written, produced, and directed numerous projects for nonprofits and formerly co-produced the PBS SoCal public affairs program Inside OC with Pulitzer Prize-winning journalist Rick Reiff. A 25-year journalism veteran (print and broadcast media), he's an accomplished producer of radio, television, and short documentaries. Hays is an author and popular college instructor at multiple Orange County university campuses. In 2022, he embarked on a major multi-media public affairs program entitled OC World. Fiscally sponsored by Charitable Ventures, OC World is the only broadcast venture dedicated solely to Orange County news. With a diverse background of community-based hosts, the 30-minute televised public affairs program broadcasts on KLCS-PBS covering significant social issues providing residents with critical information to inform their decisions and enhance their lives. Hays donates his time in leading operations, producing the weekly segments, and securing strategic partners.

**ON ITS AXIS, Costa Mesa**

Shelley Iocona, Founder

Shelley Iocona is the quintessential "woman in tech." She is an innovator, mentor and advocate for the under-voiced. After an early career in engineering and product for several global tech leaders, Iocona transitioned into consulting where she has scaled a leading award winning innovation firm that celebrates inclusive entrepreneurship.

**Orange County Rescue Mission, Tustin**

Bryan Crain, President

Bryan Crain is president of Orange County Rescue Mission, a faith-based nonprofit offering basic needs and comprehensive services that transition homeless men, women, children, and veterans to self-sufficiency. Its programs have earned the organization numerous recognitions including Charity Navigator's highest rating of four stars. Crain's entrepreneurial career began 28 years ago as an undergraduate at the University of Southern California. He co-founded what became the largest independent radio show prep company in the nation, serving over 2,000 radio morning shows with daily written and audio content. After selling the company in 2014, Crain was hired as the chief operating officer at Orange County Rescue Mission. In his role as COO, Crain led the development of diverse programs and facilities such as Tustin Veterans Outpost, Restoration Roasters, Double R Ranch, and emergency housing for human trafficking survivors. In 2023, Crain was named president of Orange County Rescue Mission, where he leads the organization in developing innovative programs to equip the people they serve through counseling, sobriety coaching, education, job training, legal assistance, and personal financial management.

**Orange Label Marketing, Costa Mesa**

Rochelle Reiter, Creative Strategy & Innovation, President & Partner

With an MBA in International Business, Rochelle Reiter has spearheaded over 45 in-depth brand approaches for clients in the direct-to-consumer and business-to-business space, translating key insights into actionable plans that resonate with the marketplace. Throughout almost 30 years of experience in the marketing industry, notable client work includes Moulton Niguel Water District, Irvine Company, Chapman University, UC San Diego, UC Irvine, Greenwell Farms, Daughters of Charity Hospital System, Waste Not OC, OC Health Care Agency, Southland Credit Union and Vertos Medical. Among her various significant achievements, including several Orange County Women in Business Award nominations, Reiter has led Orange Label to receive a multitude of recognitions for excellence in marketing and communications: MarCom Awards, OC ADDY Awards from the American Advertising Federation, Service Industry Advertising Awards and Hermes Creative Awards. A natural-born leader and people person, Reiter has actively participated in executive coaching organization Vistage for over 20 years and is the host of The 19 Marketing Podcast, a monthly marketing podcast that covers response marketing insights in the wellness industry.

**Outshine Public Relations, Newport Beach**

Talia Samuels, Founder & CEO

Named one of the "Best PR Agencies in America" by Forbes, Outshine Public Relations specializes in restaurant, hospitality, and culinary public relations. Founded by Talia Samuels in 2015, her agency represents an all-star roster including James Beard Award-winning and Michelin-starred chefs, AAA Five Diamond-awarded properties, and new-to-market culinary brands. With deep roots in the hospitality industry, she has a passion for supporting hoteliers, restaurateurs, chefs, and food and beverage brands through her creative storytelling verticals. Recognized for her poise, tenacity, and integrity, Samuels is a force in her field. Her company, Outshine Public Relations, is a full-service agency providing public relations, social media management, photography, videography, and digital marketing.

**Pacific Hospitality Group, Irvine**

Garrett Busch, President

Garrett S. Busch, in his role as president of Pacific Hospitality Group, is responsible for driving the strategy and operations for the company's hospitality assets. In this role, Busch oversees all of PHG, as well as the growing portfolio's performance and footprint. Busch's

personal passion is to further grow the Meritage Collection 4-diamond brand. Busch also oversees Capital Markets, heading up the development, acquisition, investor relations, and debt financing. He leads the investment strategy for PHG, focusing on long-term cash flow of assets. Under his leadership will be all asset management, property operations, human resources, sales, marketing and revenue management. Busch received his undergraduate degree in business and his MBA from the University of Notre Dame where he majored in Entrepreneurship and Finance, respectively.

**Pacsun, Anaheim**

Brieane Olson, CEO

Serving as president of Pacsun, the popular youth retailer since 2021, and transitioning to her new role as CEO as of April 2023, Olson has played an instrumental role in building and strengthening Pacsun's brand through innovative strategies with a Gen Z focus. As an Innovative, tech-centric retail executive who consistently drives brand strength and revenue growth through game-changing merchandising and marketing initiatives, Olson leads with creativity, innovation, and a digital first mentality. During her tenure at PacSun, Olson spearheaded innovative collaborations for the LA based lifestyle brand, including working closely with Kanye West and Kendall and Kylie Jenner and launching both Men's and Women's shops at Selfridges in 2018 with launch parties hosted by PacSun partners Jerry Lorenzo. Olson graduated from the University of California, Berkeley with a Bachelor of Arts, Mass Communications & Business and attended Harvard Business School's Advanced Management Program, where she is currently an AMP Ambassador. She is a board member at Women In Retail Leadership, Shoptalk, Pacsun and Design Thinking for UC schools.

**PatientFi, Irvine**

Todd Watts, CEO

Todd Watts is the co-founder and chief executive officer of PatientFi, a point-of-sale platform used by healthcare providers to seamlessly offer their patients more affordable and flexible financing alternatives to pay for their out-of-pocket treatments and procedures. Founded in 2017, PatientFi has quickly established itself as leading patient financing in medical aesthetics and has since expanded rapidly into new specialties. Today, PatientFi serves a broad national network of 3,489 medical providers in plastic surgery, medspas, dentistry, fertility, audiology and ophthalmology. Since it was founded, PatientFi has almost doubled its revenue every year. In 2023, PatientFi added another 1,359 providers, growing 49.9%. PatientFi also expanded its product offering beyond patient financing with the launch of PRIVI, a first-of-its-kind aesthetic subscription-based membership platform. With PRIVI, patients can pay for a customized annual treatment plan on a monthly payment, earn loyalty rewards, and seamlessly schedule appointments with their medical provider. This past year the company also held a series B equity round, successfully raising \$28.6 million in venture capital.

**Port View Preparatory, Tustin**

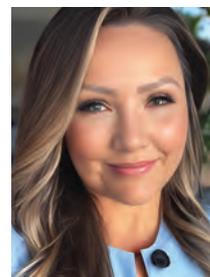
Edward Miguel, Co-President & CEO

Dr. Edward Miguel has worked the majority of his life serving individuals with disabilities. At the age of three, Dr. Miguel was diagnosed with spinal meningitis and after a long battle suffered severe hearing loss. It is his experience with coping with a disability that led him to see the potential in others with disabilities: their strength, resilience, and character. Dr. Miguel is driven to give individuals with disabilities the same opportunities as all students while ensuring access to quality instruction and supports that relies on the latest and greatest standards for educational care. This drive became the mission of Port View Preparatory and, along with his partner Dr. Melaura Erickson-Tomaino, he founded Port View Preparatory in 2014. Currently, Port View Preparatory is regarded as a premiere Special Education Institution that serves 200 students from over 50 different school districts and is the only school of its kind that does not use restraint or seclusion practices on our most vulnerable use. Port View Preparatory has been a trend setter in the field which has triggered the adoption of a number of State Laws aimed at better supporting and caring for students in Special Education. Dr. Miguel works with legislators at the state level as well as on cases as an expert witness in order to push for change in the field.

**Powerhouse+Co., Santa Ana**

Kristin Daher, Founder & CEO

Since founding Powerhouse+Co. in 2015, Kristin Daher has continually advanced its standing as one of Orange County's premier agencies. She has strategically reimagined the business' approach to PR, influencer and social media programs, leveraging innovation, thought leadership and entrepreneurship to allow client stories to shine. Beyond her role in growing the agency, Daher has fostered a transformative culture defined by creativity, development and achievement. In many ways, she has molded Powerhouse in her own likeness. It's an upbeat, innovative, high-energy workplace where brainstorming yield equal parts productivity and laughs, unique personalities are always welcome, and collaboration is ubiquitous. Recognized for her contributions to mentoring current and budding communications professionals at Powerhouse and beyond, Daher was honored with OCPRSA's prestigious Rick Miltenberger Mentorship Award in September 2023. In late 2022, Daher rebranded the company to Powerhouse+Co., with the "+Co." representing strength in numbers and the agency's core belief in the value of teamwork. With Kristin at the helm, Powerhouse+Co. is a dynamo organization that's greater and more impactful than the sum of its individual parts.

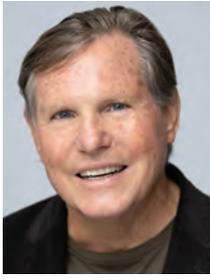
**Pretika MedTech Corporation, Irvine**

Thomas Nichols, President & CEO

Thom Nichols is the CEO and president of Pretika MedTech Corporation, a medical device

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innovator leveraging advanced technologies under two divisions - Pretika Corporation for consumer OTC aesthetics devices, and Pretika MedTech Corporation for connected wound care technology. Each division is focused on patented "connected AI" technology in the United States and other jurisdictions throughout the world. Nichols has assembled a global team of talent with proven expertise in FDA, clinical, science and device development, firmware/hardware, UX/UI, intellectual property, and digital healthcare cloud technology. With a focus on strategically building and managing strong consumer and medical devices combined with sustainable technology solutions. In his role, Nichols is responsible for all aspects of the business including overseeing strategic direction, financial performance, and the adherence to mission and values, and product initiatives including asset and business acquisitions. Nichols is a proven marketing and general management leader and entrepreneur with more than 20 years of experience in developing technology driven intellectual property, building brands, creating and delivering strategic growth plans, and developing strong and impactful teams. Pretika is a registered FDA Medical Device establishment.

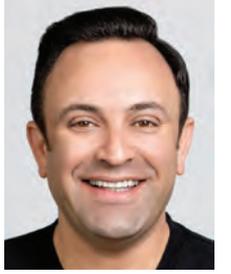


distinctive leadership philosophy positions the company as a key player in delivering high-level projects, particularly in the thriving Life Science, Healthcare, & Office sectors. Renowned for their client-centric focus, they adeptly cultivate relationships with prestigious clientele, solidifying RAM Construction's standing in a fiercely competitive market.

Revive Real Estate, Irvine

Michael Alladawi, CEO & Founder

Michael Alladawi is a Southern California real estate veteran with a proven track record as a builder, investor, and respected home flipper. He created Revive Real Estate to share his industry knowledge and help homeowners maximize their profits and sell their homes faster. Alladawi's venture into real estate grew out of the US financial crisis in 2008 when he leveraged his crisis and cash management skills to move his family's investments from banks into the safe haven of real estate. When single-family homes were being auctioned off on the courthouse steps, Alladawi saw an opportunity to begin fixing and flipping houses. He then created a real estate investment fund that targeted value-oriented real estate investments and development projects in Southern California. Soon, he also began building new homes. Partnering with tech wunderkind Dalip Jaggi to develop cutting-edge technology last year, Alladawi launched Revive Vision AI, the most advanced tech to help real estate agents with their pricing and listing strategy. Alladawi's overarching mission with Revive: help homeowners create life-changing generational wealth.



Quality Health Care Partners, Santa Ana

Gus and Teresa Alvarez, CEO/ Co-President

Gus and Teresa Alvarez started a medical insurance brokerage company in their garage, building it up to a nationwide FMO (field marketing organization) with over 400 agents. They innovated a multi-business platform in which insurance brokers operate synergistically with both a healthcare delivery and a marketing business to close the missing gaps in eldercare and well-child medical service delivery. A key feature is that senior and parents are given a voice to provide meaningfully feedback to ensure that they can maximize healthcare outcomes.



Revive Real Estate, Irvine

Dalip Jaggi, COO & Co-Founder

Entrepreneur, technologist, and passionate business leader sum up the core of Dalip Jaggi, co-founder of Revive Real Estate, a PropTech company with a goal to democratize house flipping. Since its 2019-inception, Revive has since become the smartest solution for homeowners to maximize their home's sales value across the nation. Jaggi's tie to real estate began when he served as the CTO for Rich Uncles, the first privately held real estate investment trust (REIT) for unaccredited investors. Rich Uncles enjoyed a successful exit in 2017 and went public in 2022 as Modiv (NYSE: MDV). Jaggi's career started early on during college when he started an engineering studio, Devise Interactive. This is where his passion for technology came from where he built technology for several startups. Devise Interactive had an exit in 2018 to Vincit, a publicly traded international engineering studio.



RAM Construction, Irvine

Matt Renault & Spencer Moran, Principal

Matt Renault and Spencer Moran, co-founders and principals of RAM Construction, radiate as transformative leaders in the commercial real estate industry, seamlessly blending an open communication style with a hands-on approach. As finalists for the prestigious SDBJ CEO of the Year Awards in 2023 and Moran as a member of the YPO, their visionary leadership and unwavering commitment to employee support have propelled RAM Construction to the forefront of the competitive construction market. Since the establishment of RAM Construction in 2018, Renault and Moran's strategic approach steered their team to remarkable growth, tripling in size and founding four offices across the Southwest region. Renault and Moran's



RLH Equity Partners, Irvine

Murray Rudin, Managing Director

For the past 25 years, Murray Rudin has been a managing director of RLH Equity Partners, a private equity firm which partners with entrepreneurs who have built distinctive high-growth middle-market B2B professional services businesses. During that period of time, RLH has made over three dozen platform investments, completed numerous



S & A Management
 Congratulates **Ryan Chase**
 on his nomination for the
 2024 Entrepreneur
 of the Year Awards.



S&A Management

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add-on acquisitions, increased its assets under management by more than 15x, and, in the past decade alone, participated in exit transactions totaling over \$3.5 billion in value. He has served as a member of the board of directors of more than a dozen RLH portfolio companies across a range of sectors including IT consulting, recruiting services, federal services, and healthcare revenue cycle management. He has been active in all phases of the private equity process, including sourcing, evaluating, and structuring new investments as well as assisting portfolio companies with strategy development and key hiring decisions. He also previously served as the chief financial officer and chief compliance officer for RLH.

Roberts & Roberts Tax and Financial Services, Mission Viejo

Stefania Roberts, Owner

Stefania Roberts of Roberts and Roberts Tax and Financial Services was born in Los Angeles California to a family of Certified Public Accountants. Her parents established one of the first black-owned accounting firms. Continuing the family business established in 1946, she, with her husband Herman, expanded her clientele to reach both the Los Angeles and Orange County regions. Together they earned numerous accolades including a cover in Money Magazine. In 2001 Roberts' husband Herman passed suddenly, leaving her the sole proprietor of Roberts & Roberts and a single mother to two beautiful young children. Determined to maintain the success and quality of the business, Stefania Roberts individually managed accounts of over 1,000 high-net-worth individuals and their businesses within two locations. Using her knowledge and creativity, she has saved her clients thousands of dollars by reducing their tax liability through tax preparation and planning. Stefania Roberts continues to be a vital pillar of the community by sitting on the board of directors for the California Society of Tax Consultants, Orange County Chapter.

**ROKFORM, Irvine**

Jeff Whitten, CEO

Jeff Whitten, founder and CEO of ROKFORM, is a visionary leader guiding a small yet highly effective team creating premium handheld innovations for outdoor adventurers. Since 2010, ROKFORM has emerged as a frontrunner in the consumer electronics industry. The company's patented twist lock and magnetic phone cases, mounts, and magnetic accessories have redefined standards in functionality and reliability. Before founding ROKFORM, Whitten was the co-owner of a prominent Orange County exhaust manufacturing firm in the power sports sector. After more than 24 years, he exited in 2016 to fully commit to ROKFORM, drawing on over 30 years of product design and manufacturing experience, evidenced by his impressive portfolio of more than 14 patents and co-patents across both industries. A California native with a passion for creation, Whitten aligns his creative enthusiasm with ROKFORM's mission of enhancing users' mobile experiences. The company's magnetic phone cases span diverse customers, from golfers and cyclists to military personnel. ROKFORM's unwavering commitment to innovation and customer satisfaction, earning a large percentage of its business from repeat customers year after year.

**RX3 Growth Partners, San Juan Capistrano**

Nate Raabe, Co-Founder, Managing Partner

Nate Raabe co-founded RX3 Growth Partners, a consumer-focused growth equity fund alongside Aaron Rodgers and Byron Roth, where he currently serves as Managing Partner. RX3 invests in growth-stage consumer brands and provides value beyond capital through its influential investor base. RX3 is currently investing out of Fund II and has over \$200 million AUM. Over the last twenty years, Raabe has worked with some of the most prominent family offices and investors. Prior to RX3 Growth Partners, he was managing director of ROTH's private capital group, where he was responsible for deal sourcing, valuation analysis, and distribution for private companies. Raabe also acts as CIO for his family investments and is a managing partner for A&N Ventures. Raabe sits on the Board of Directors for Taxa Outdoors and is a Board Observer for Hydrow and Therabody. Raabe graduated from Santa Clara University with a BA in Finance.

**S&A Management, Costa Mesa**

Ryan Chase, Managing Partner

Ryan Chase is the third generation of his family business S&A Management and fourth generation tied to Downtown Santa Ana, where his great grandfather founded Eureka Shoes in 1918 and grandfather Allan Fainbarg founded the Wild West Stores, which he sold out to General Mills in 1981 to fully focus on real estate. Years later Chase's Father Irv Chase took over and shifted from management intensive shopping centers to credit tenants, industrial and out of state properties. Chase entered the business in 2005, and brought a more value oriented / below replacement cost approach, as well as a focus on targeting secondary/tertiary markets outside of CA. Since 2005, has led the acquisition of over 100 properties. Local assets include partial ownership of the ground of the Newport Beach Country Club, partial ownership of Newport Beach Golf Course, as well as being the largest property owner in Downtown Santa Ana, where Chase led the redevelopment and repositioning of Fiesta Marketplace to East End. The project included launching 4th St Market food hall, CollectiveZone9 retail hall, opening the first market rate apartments in the area in over 40 years, reopening the historic Yost Theater and OC's only independent film venue Frida Cinema, and attracting sought after destination tenants including Stussy Archive and Playground, among many others. Chase has also expanded the family into LP opportunities and venture capital, including minority interest in local hotels VEA and Pendry NB, as well as investment funds RX3 Growth Ventures, Humble Growth Partners and Andruil Industries, among many others.

**serviceMob, Irvine**

Anuj Bhalla, Founder & CEO

Anuj Bhalla is the founder & CEO of serviceMob, an analytics software company for the customer service industry powered by Artificial Intelligence and Machine Learning. Bhalla is an

entrepreneur, data scientist, and former blue-chip consultant with more than 15 years of experience in Management and Strategy Consulting. Bhalla led the Service Analytics practice at Accenture where he worked with some of the largest and most innovative companies in the world. Being a graduate of the University of California, Berkeley with a Bachelor's in Applied Mathematics, Bhalla is a data scientist and mathematician at heart. Before founding serviceMob, Bhalla graduated from the Massachusetts Institute of Technology with his MBA, with a concentration in Analytics and Innovation, and was honored as a Sloan Fellow. For his work and accomplishments, Bhalla was featured in Entrepreneur Magazine (Top 10 Entrepreneurs to Watch), Forbes (Next 1000), the Los Angeles Times (CEO Visionary), and was inducted into the 2023 MIT STEX25 as a Top 25 MIT startup company founder. Most recently, he was selected by Morgan Stanley for their prestigious Inclusive Venture Labs (23 winners out of over 7,900 applicants), recognizing a global cohort of founders making significant impact in their respective fields.

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

Anoosheh Oskouian, President & CEO

In its 23 years since inception, Ship & Shore Environmental has emerged as a prominent provider of cutting-edge clean air technologies dedicated to enhancing air quality and environmental well-being. Anoosheh Oskouian, serving as the president and CEO, guides the overall corporate strategy encompassing engineering, product development, sales, and fabrication. Anoosheh advocates for a harmonious coexistence between sustaining the manufacturing industry and preserving a clean air and environment. As a pioneering figure in the sector, she has trailblazed various professional milestones, establishing fresh benchmarks, introducing innovative concepts, and consistently exploring novel approaches to deliver inventive solutions for clean air. Ship & Shore's commitment to excellence has garnered numerous awards, recognizing its impactful contributions to clean air and sustainability initiatives.

**Shirin Behzadi LLC, Laguna Niguel**

Shirin Behzadi, CEO

Shirin Behzadi is a recognized leading entrepreneur in North America with leadership experience in growth strategy, franchising, business development, supply chain and logistics, DTC and digital marketing, systems and technology, finance, private equity, and Audit. She grew Home Franchise Concepts (HFC) to a billion dollars in sales with over 1700 franchises in 12,000 cities in North America. During her twenty-year tenure with HFC, Behzadi transformed the company into what is considered today the top-selling family of direct-to-consumer brands. To achieve that goal, she sought synergistic direct-to-consumer household brands that she helped build or acquire under the HFC umbrella, all leaders in their categories. With strong emphasis on creating a robust platform of multiple brands, Behzadi oversaw the development, deployment, and support of the Company's proprietary platform that incorporates technology, marketing and support. Shirin Behzadi is an immigrant from Iran and started her working career as an attendant at a gas station when she was 17 years old. She has garnered coverage in print and broadcast outlets for her achievements, most notably featured on Forbes.com.

**Smarty Social Media, Santa Ana**

Jami Eidsvold, Founder & CEO

Jami Eidsvold, founder and CEO of Smarty Social Media, is a 20-year marketing veteran who began her career in digital marketing at DGWB Advertising and Mindflood. She later transitioned to PR consulting for digital, tech, and healthcare brands. As social media began to emerge as a vibrant, new marketing channel, Eidsvold was among the early adopters who saw the potential and excitement in using social channels to build brands. Her passion for social media led her away from more traditional PR and digital marketing, to explore what she saw as the future - influencer and social media marketing. Smarty Social Media was born in 2013 and ten years later, this one-woman shop has evolved into a highly creative, results-driven team of 27. Driven by a passion for health innovations, Eidsvold positioned Smarty as a social-first healthcare marketing agency. From established healthcare companies to disruptive startups, Smarty excels in social media branding, strategy, influencer marketing, content creation, and community management. As a trusted partner, Smarty advocates for and executes innovative campaigns aligned with its core services.

**Solidus, Newport Beach**

Jeffrey Hall, Founder & CEO

Jeff Hall has over 25 years of experience in the construction industry. He possesses excellent problem solving skills and has hands-on experience in all phases of construction. He has successfully completed a variety of construction projects including resorts, healthcare, education, mixed use, multi-family, tenant improvement, warehouse/distribution centers and industrial projects. Hall's experience has allowed him the pleasure of managing multiple multi-million dollar projects, implementing the "Construction Interventionist" approach to completing at-risk projects, and provides him the opportunity to recruit the very best construction professionals. Hall aims to disrupt the construction industry and eliminate predatory lending that takes advantage of contractors/subs. As president of recent start-up Solidus, a transformative lending solution for the construction industry, Hall's role as the founder and CEO of the company is to grow its lending platform, providing liquidity to an underserved marketplace and assist subcontractors to get the financial support they need to succeed. Hall is also the owner of PARAGON Construction Consulting Inc. where he recognized a need for "turn-around" expertise to recover projects that were failing or at-risk with lenders and bonding companies. That success provided him the label as a "Construction Interventionist" and that success has provided for long-term relationships with major national brands where he continues to provide expertise and construction management services today.



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soul&beautyMEDx, Mission Viejo

Linda Rank, Founder

For over 20 years, Linda Rank has been highly sought after for her specialized care as a visionary in the aesthetic industry. As the founder of soul&beautyMEDx, Rank has set the standard for the new era of excellence within the med spa industry. Creating a destination featuring aesthetic solutions to meet her clientele's tailor-made needs, she is committed to helping her clients defy the hands of time through restorative and supportive aging treatments. The innovative location in Mission Viejo offers an unparalleled line-up of services, including laser, skin care and BOTOX® memberships at the hands of industry best practitioners. As an honorary speaker and national trainer for Allergan, Rank shares her keen aesthetic perspective and refined protocols with peers and professionals across the USA, in order to help elevate the industry. Prior to embarking on her endeavors in the aesthetic industry, Rank invested many years of care, heart and soul as a crisis hotline operator. She was recently recognized with the Angel on Earth Award for Leadership and Service from the Angel Light Academy.



one of the Top PR Firms in in the USA. Steurer's innovative vision, strategic approach, and forward-thinking philosophy have played a vital role in propelling the brands her firm represents into the spotlight. With a passion for building brand identities and her innate ability to connect, engage, and drive brands to the next level, Steurer has become a trusted authority among entrepreneurs and executives. Her refreshing perspective on the world of PR, Marketing, and Branding have positioned her as a keynote speaker and workshop leader for nationally recognized brands such as Mindbody, Vizio, and Oracle. Inspired to give back, Steurer has been involved extensively with organizations such as CASA of Orange County, The Drake Gives, The Literacy Project and Sherman Library & Gardens.

StrikeWorks Solutions, Irvine

Victor Villanueva, CEO

As the CEO of StrikeWorks Solutions based in Orange County, California, Victor Villanueva has been at the helm since October 2021, with his business partner and Chief Growth Officer Michael Campbell, spearheading the company's operations and overall performance. With a focus on strategic planning, day-to-day management, and ensuring customer satisfaction, He has played a pivotal role in the company's growth, profitability, and sustainability. His responsibilities also include financial management, budgeting, and fostering a culture of innovation. With a career spanning diverse IT roles, Villanueva has consistently demonstrated the ability to develop and implement effective IT strategies, manage teams, and drive innovation. Which has led to in July 2023, Villanueva serving as a Board Member for MOMS Orange County, MOMS Orange County is the region's largest nonprofit dedicated solely to newborn and pregnancy health and education. In this capacity, he brings his wealth of experience and leadership to contribute to shape MOMS Orange County's strategic direction, policies, and initiatives.



Spice Girl Sauces / ADYA, Anaheim

Shachi Mehra, Executive Chef & Founder

As executive chef and owner of award-winning ADYA restaurant in Anaheim, and Founder of Spice Girl Sauces, Shachi Mehra has brought a new Indian experience to the region. Born in India, Chef Mehra has spent her life straddling two very different cultures as an immigrant living in the states, and has made it her life's work to utilize her passion for the culinary arts to spread her Indian culture throughout Southern California, and beyond. In 2021, she launched Spice Girl Sauces, now available nationwide. These sauces are meant to be used on everyday foods, yet they possess an Indian soul - a continued celebration of her roots in India. In Orange County, where Indian cuisine has been overlooked and underrepresented, Chef Mehra has worked to spread it through cooking classes, local farmers markets, and large-scale gala events. She shined a light on Indian cuisine as a guest chef at Disney Food & Wine Festival and on Food Network's "Chopped," where she emerged as a national champion by presenting Indian-inspired dishes. For her, these opportunities have been such an honor and she is so proud to have the chance to use her voice to share her culture and roots through food with so many.



Sunday Brunch Agency, Huntington Beach

Rachel Svoboda, CEO

Rachel Svoboda, a trailblazing entrepreneur, philanthropist, and author, is the CEO of Sunday Brunch Agency, Orange County's first fully remote, female-owned marketing agency. Her agency specializes in tailored advertising and public relations services, helping local businesses and entrepreneurs achieve their goals. Svoboda also founded Lynxx Spirits, notable for being the first bourbon produced by an all-female team and a Gold winner at the World Spirits Competition. This unique bourbon is renowned for its rich, wine-like quality. Discover Lynxx Spirits at Lynxx Spirits. As a co-founder of The Young Entrepreneur Syndicate, Svoboda extends her expertise to an online platform that imparts entrepreneurial skills to a diverse audience. Additionally, Svoboda is the author of the best-selling book "Grit & Grace: A woman's ultimate guide to empowerment, personal development, business leadership & success." She also hosts The Brunch Club, a video podcast that



Sterling Public Relations, Corona del Mar

Paula Steurer, Founder & President

Paula Steurer founded Sterling Public Relations as a Publicity, Branding, and Marketing hybrid in 2008. Closing out 2023 with an exceptional award, Sterling Public Relations was recognized by Clutch as



Thomas Nichols, Founder & CEO

I am honored to be nominated for the Excellence in Entrepreneurship Awards and would like to recognize these firms as important assets to our success.



Orange County's only nonprofit multimedia public affairs program reaching 15+ million households.



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champions female talent and leadership, further showcasing her dedication to empowering others.

Sunstone Management, Irvine

John Keisler, CEO

John Keisler is currently the CEO & managing partner for Sunstone Management Inc., a diversified private capital located in Southern California. Sunstone invests in diverse early-stage technology startups and creates new economic growth and opportunities through innovative public-private-partnerships as a result of unique expertise across government, education, and private sectors.

**TailoredSpace, San Juan Capistrano**

Drew Sanden, Co-Founder

After more than 15 years as a highly successful commercial real estate broker, Drew Sanden and his business partner Scott Maples recognized an opportunity to create a better coworking solution and created TailoredSpace and SimplerSpace. What makes TailoredSpace unique is its suburban market focus, the quality of space, and partnership model with landlords. Looking ahead, Sanden notes that TailoredSpace plans to nearly double their portfolio in 2024 opening up to eight new coworking spaces in California as the demand for alternative work space increases.

**Tenant Inc., Newport Beach**

Lance Watkins, CEO

Lance Watkins is an energetic and visionary entrepreneur on the cutting edge of technology who founded, and currently serves as CEO, of Tenant Inc., a vertical SaaS platform built from the ground up to move the self storage industry forward. Prior to Tenant Inc., Watkins transformed the storage industry by founding Storelocal, a network of regional operators joining together in the form of a co-op. This co-op brought industry leaders together, which gave them the ability to remain competitive with the public storage companies in an era of where renters were demanding more online resources from storage companies. For more than 25 years he's owned and operated self storage properties and grown his portfolio to span three states. He leverages this experience to truly cater the software and services his company offers to the needs of self storage operators.

**Tenant Inc., Newport Beach**

Brad Jarvis, President

Brad Jarvis is a strategic leader, architect, visionary and performer. As a senior global executive he is a consummate "builder" with a track record of accelerating growth through the innovation of products, brands, organizational design and market penetration. His is currently president of Tenant, Inc., a vertical SaaS platform built from the ground up to move the self storage industry forward. Jarvis successfully integrated & lead 3 start-up & early growth acquisitions, driving accelerated growth and profit through synergies. He has vast experience in developing and managing technology companies through both high-growth and turnaround, integration of acquisitions and successful liquidity events. Provides the unique ability to breakdown, analyze and restructure a company's marketing, engineering, sales and operations, propelling it to high performance. Past results include opening company doors to new channels, markets, partnerships, funding and acquisitions.

**The Conscious Publicist, Foothill Ranch**

Ashley Graham, Founder & Publicist

Ashley Graham, founder of The Conscious Publicist®, advocates for purpose-driven businesses, fervently promoting their potential for positive change. Driven by a deep belief in the transformative power of storytelling, Graham and her team at TCP are unwaveringly committed to assisting clients in forging meaningful connections and relationships. Recognizing the pivotal role of "people relations" in fostering a conscious and sustainable world, Graham endeavors to align client connections with their goals, shaping a future where mindful living prevails. The Conscious Publicist® caters to purpose-driven businesses, digital entrepreneurs, and visionaries by offering bespoke PR and media services that resonate with their values and objectives. Through strategic guidance, TCP empowers clients to create robust brand identities, enhance visibility, and amplify messages that resonate deeply with target audiences, enabling businesses and leaders to impact the world positively.

**The Literacy Project, Newport Beach**

Sue Grant, Founder & Volunteer CEO

Sue Grant curated an impactful career within the nonprofit industry. Founding The Literacy Project, the organization has served 10,500 underserved students from low-income families. Under her leadership, she helped raise over \$5.1 million to provide a reading program at "no cost" to both the child and school within four states. The nonprofit's 30-hour program significantly improves a child's ability to read, averaging skill increases from 76% to 129%. The agency has also donated \$1.96 million worth of reading games to 49,014 family members, promoting family literacy. Grant earned the California Congress of Parents, Teachers and Students Service Award, U.S. Congressional Service award, and a top five finish at the World Literacy Awards in 2021 and recently in 2023. Additionally, she's a co-founding director of the Coalition for Reading Excellence (Washington, D.C.). The Literacy Project's goal is to rise in service and scale to become a national charity addressing illiteracy nationwide.

**The Zandbergen Group, Laguna Beach**

Bart Zandbergen, Founder & CEO

Bart Zandbergen is an esteemed certified financial planner and the founder and CEO of The Zandbergen Group. Launching The Zandbergen Group during the pandemic, in the heart of

Laguna Beach where he has been a long-time resident, Zandbergen has over 30 years of dynamic experience in the wealth management industry. Leading his team of True Wealth advisors, he is inspired to be on the forefront of the next generation of wealth management - helping clients thrive with intentional, wellbeing focused financial strategies. Respected as an authority in financial planning and investment advising, Zandbergen's expertise was recently showcased in a special interview on RIA Channel. He holds his CFP designation as well as his Life/Health/Disability Insurance license and is a Certified Divorce Financial Analyst. Now in its sixth year of production, Zandbergen also leads The Zandbergen Report podcast. His podcast show features commentary on the world of finance and investments as well as interviews with some of Orange County's hottest entrepreneurs, philanthropic leaders, and industry innovators.

**The Zandbergen Group, Laguna Beach**

Letitia Berbaum, COO & Co-Founder

As partner and COO of The Zandbergen Group, Letitia Berbaum specializes in "True Wealth" strategies while paving the way for the next generation of female wealth advisors. Offering wealth management and asset transfer strategies for high-net-worth individuals and multi-generational families, and full-service strategic planning for business owners including exit planning, Berbaum has become a pivotal figure in the lives of her clientele who seek fulfillment beyond simply the monetary means. Berbaum has been recognized as an Orange County Five-Star Wealth Manager for seven consecutive years. She has earned the Accredited Investment Fiduciary® (AIF®) designation, Certified Exit Planning Advisor (CEPA®) designation, and holds a Series 66 securities registration, as well as Long Term Care Insurance and Life Insurance licenses. Additionally, her expertise has been featured by Forbes Business Council, and she is a part of the Brea Chamber of Commerce Women in Leadership Council, advocating for women overcoming barriers and advancing their careers. She was also recognized as a "Women of Achievement" by Senator Bob Archuleta's office for her outstanding contributions to the community.

**Tiggbee, Rancho Santa Margarita**

John Hall, President & CEO

John Hall is the founder and CEO of Tiggbee LLC. Tiggbee revolutionizes career exploration for students and schools, grades 4-12, by transcending social, economic and geographic barriers. The free interactive video-driven platform ignites students' passion for selecting a career path through presentations given by diverse speakers in various industries, including STEM and trade sectors. The program elevates English Language Arts education and boosts professional skills for limitless success. Tiggbee works with industry partners/businesses to create and schedule interactive custom 'events,' or videos, with follow-up Q&A with professionals. Businesses are able to grow in-person outreach programs while rooting their organization in a much wider community. Schools are able to further inspire, prioritize and empower students' futures by making career exploration an enjoyable, enlightening journey. Most importantly, with Tiggbee, students find the education and training needed to have a career that's motivating to them.

**Together We Rise (DBA Foster Love), Brea**

Danny Mendoza, CEO

Together We Rise (doing business as Foster Love) is a 501(c)(3) nonprofit organization dedicated to transforming the way youth navigate through the foster care system. Created in 2008 after Founder Danny Mendoza gained insight into the realities of the child welfare system through the eyes of his young cousin, Foster Love has since evolved to serve more than 155,000 children in foster care every year. The organization's success can be attributed to its steadfast dedication to addressing the gaps left behind in the child welfare system through innovation. Some of Foster Love's most notable programs include its famous Sweet Cases initiative, sibling reunification events, and the Family Fellowship program, which remains the nation's largest scholarship program for transition-age foster youth.

**Together We Rise (DBA Foster Love), Brea**

Gianna Mulkay, Executive Director

Together We Rise (doing business as Foster Love) is a 501(c)(3) nonprofit organization dedicated to transforming the way youth navigate through the foster care system. Created in 2008 after Founder Danny Mendoza gained insight into the realities of the child welfare system through the eyes of his young cousin, Foster Love has since evolved to serve more than 155,000 children in foster care every year. The organization's success can be attributed to its steadfast dedication to addressing the gaps left behind in the child welfare system through innovation. Some of Foster Love's most notable programs include its famous Sweet Cases initiative, sibling reunification events, and the Family Fellowship program, which remains the nation's largest scholarship program for transition-age foster youth.

**TraFFix Devices, San Clemente**

Brent Kulp, President

Brent Kulp started in the highway safety business in 1988 when he joined a very young, start-up company, called TraFFix Devices Inc. founded by Kulp's father, Jack in 1987. At that time Kulp worked as the western region sales manager for TraFFix covering everything from Texas up to North Dakota and all states west from there including Western Canada. In 1998, Kulp was promoted to VP sales and marketing where he managed a team of sales and marketing professionals covering the entire US while still having direct sales responsibility for the untapped international market. In 2020, Kulp assumed the role of president and CEO of TraFFix Devices which requires him to be involved in all aspects of



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the business including manufacturing, distribution, automation & expansion as well as new product development. With an objective of developing and utilizing more recycled materials in many of Traffix Devices products.

US Alliance Group Inc, Rancho Santa Margarita

Fadi Cheikha, CEO

Fadi Cheikha, CEO of US Alliance Group Inc. (USAG), Electronic Cash Systems (ECS), and many other successful businesses and nonprofits, has established himself as a man of many talents with a passion for building an empire that lacks comparison. Not only are the branches of USAG diverse, but Cheikha's many other companies are unique in themselves. From payment processing, non-profits, salons, equestrian, property investment, and youth ministry, Cheikha's brand is the definition of diversity in entrepreneurship. With the expansion of his brand across the US and its territories, Cheikha is proud of his achievements over the last 26+ years. USAG has had the honor of ranking eight times on the Inc. 500/5000 lists as one of the Fastest-Growing Companies in America and seven times as the top Fastest-Growing Private Companies by the Orange County Business Journal.

**VanSpeed, Westminster**

Duran Morley, CEO

Duran Morley, at the youthful age of 23, stands at the helm of VanSpeed, a pioneering venture that has reshaped the landscape of luxury travel and adventure. His ingenuity lies in the development and conversion of Mercedes Benz Sprinter Vans into bespoke living and adventure vehicles, creating a harmonious blend of comfort and functionality. Morley's entrepreneurial spirit extends beyond the workshop, as he owns and oversees the operations of VanSpeedPro, VanSpeed Parts, and TheVanMart.com. The latter stands out as one of the largest e-commerce platforms dedicated to Sprinter Van conversion parts and accessories. Under his guidance, VanSpeed has become synonymous with excellence in the realm of vehicle customization. Catering to a diverse clientele that includes executives, business owners, outdoor enthusiasts, athletes, and celebrities, Vanspeed's conversions reflect Duran Morley's commitment to delivering top-notch quality and innovation in every project. With a forward-thinking vision, Morley has established himself and his ventures as leaders in the industry, transforming the way people perceive and experience mobile living and adventure.

**VF Developments LLC, Costa Mesa**

Victoria Vu, Managing Partner

In 2015, VF Developments, LLC was founded by Victoria Vu, a female owned and run company that specializes in transforming distressed multifamily properties into contemporary market-ready homes and apartment communities. Vu's core strength derived from her passion in fashion design and business and applied them to real estate as she hunts for investment opportunities and creates significant value for her clients and investors. She manages a multitude of processes including finding unique, off-market, opportunities, syndicating properties and managing renovations. With a solid design background from the Fashion Institute of Design & Merchandise, she converts her extensive fashion design skills into transforming 1920's and 1960's era properties into modern living communities. VF Developments, LLC portfolio has over \$100 million in multifamily properties totaling 41 properties and 260 units in Los Angeles and Orange Counties. VF Developments strives to provide neighborhoods in gentrifying areas of Los Angeles and Orange County Class A building design finishes at affordable market rents to new residents.

**Wahoo's, Tustin**

Mingo Lee, COO

Mingo Lee is the dynamic chief operating officer of Wahoo's Fish Tacos, a visionary leader with a passion for culinary excellence and operational efficiency. With a proven track record in the fast-paced world of hospitality, Lee brings a wealth of experience to Wahoo's, driving the brand's success to new heights. Known for his strategic acumen and commitment to customer satisfaction, Lee oversees day-to-day operations, ensuring seamless execution of Wahoo's unique blend of fresh, flavorful food and a vibrant dining experience. His innovative approach and dedication to fostering a positive work culture make Mingo Lee an integral part of Wahoo's Fish Tacos' continued growth and success.

**Ware Malcomb, Irvine**

Lawrence Armstrong, Chairman

Mr. Armstrong is chairman of Ware Malcomb. Established in 1972, Ware Malcomb is an international design firm providing planning, architecture, interior design, branding, civil engineering, and building measurement services to commercial real estate and corporate clients. With office locations throughout the United States, Canada, Mexico, and Panama, the firm specializes in the design of commercial office, corporate, industrial, science & technology, healthcare, retail, auto, public/educational facilities, and renovation projects. Ware Malcomb is recognized as an Inc. 5000 fastest-growing private company and a Hot Firm and Best Firm to Work For by Zweig Group. The firm is also ranked among the top 15 architecture/engineering firms in Engineering News-Record's Top 500 Design Firms and the top 25 interior design firms in Interior Design magazine's Top 100 Giants. Mr. Armstrong is both an accomplished architect and a strong business leader. He is well known for his strategic, visionary approach to the company's management and growth, as well as his commitment to fiscal discipline to ensure the overall health of the firm. His strong design ability and focus on creativity and innovation greatly influence all aspects of the organization. His philosophy of embracing change and rewarding achievement and innovation has resulted in a highly successful, dynamic firm.

**Waterford Property Company, Newport Beach**

John Drachman & Sean Rawson, Co-Founders

Waterford Property Company was founded in 2019 by John Drachman and Sean Rawson

through a merger of Stillwater Investment Group and The Waterford Group. Waterford collectively acquired or managed over \$2.8 billion in real estate projects throughout California. The firm was created to plan/build/reposition unique real estate projects that meet or exceed the needs and desires of stakeholders while achieving high risk-adjusted returns for investors. Proving its business plan Waterford focused on innovative disruption within the housing market. Waterford is now the most active sponsor in the California Statewide Community Development Authority's middle income housing program. Waterford converted more than 4000 market rate apartment units across Southern California into workforce housing, a program that provides affordable housing to essential workers, many of whom struggle with the high cost of living in the communities where they work. For Waterford, being in the housing business is a noble profession. It provides an opportunity to create communities where people can thrive and work with community stakeholders to create consensus and develop projects that enhance communities.

**Wealth Coast Wealth Management & Insurance Solutions, Irvine**

Timothy Mulroy, Co-Owner & Private Wealth Advisor

Tim Mulroy has over 20 years of financial planning experience and began his career with Northwestern Mutual as a college intern while double majoring in marketing and management at Mansfield University of Pennsylvania. While in Pennsylvania, he started a scratch office as managing director and built the organization to employ over 40 people. He's held every leadership contract with Northwestern Mutual, including a recently concluded 10-year run as the managing partner of Northwestern Mutual's Orange County office. Mulroy is passionate about continuing to educate himself and maintains the Certified Financial Planner™ certification as well as the Chartered Financial Consultant (ChFC®), the Chartered Leadership Fellow (CLF®), and the Chartered Life Underwriter (CLU®) designations. He also holds the FINRA Series 7, 9, 10, and 66 registrations and life & health insurance licenses. With a passion for empowering financial advisors, Mulroy founded R10 Coaching in 2023. Through this initiative, he shares his innovative strategies and expertise, enabling fellow professionals to grow their impact on their communities exponentially. Mulroy works with financial advisors to develop their careers and impact lives throughout their communities. The advisors he develops deliver comprehensive financial planning to empower clients and communities to do everything that matters most with the people who matter most.

**Westcliff University, Irvine**

Dr. Anthony Lee, President & CEO

Dr. Anthony Lee became president and CEO of Westcliff University, which traces its history back 30 years, in 2012, starting with a small student body of 30. Under his leadership, Westcliff has grown significantly, with thousands of graduates from over 100 countries and multiple satellite campuses across the U.S. and abroad, with undergraduate and graduate programs in 21 fields, focusing on business, entrepreneurship and STEM. Dr. Lee recently opened Westcliff Preparatory Academy for high schoolers and Westcliff Early Learning Academy for primary school students, he also acquired Western State College of Law and plans to open a College of Nursing due to his dedication to expanding Westcliff's educational offerings to learners of all ages. Dr. Lee's commitment to holistic learning has made Westcliff a leading champion of diversity, ranking in six United Nations' Sustainability Development Goal categories, including the top 400 for Quality Education, and the top 200 for the Peace, Justice and Strong Institutions category. Westcliff was also recognized as a top 600 school in the 2022 Times Education Impact Ranking. He established Westcliff University as a California Benefit Corporation, and the school's exceptional athletics program, now totaling 27 varsity sports with several NAIA championship wins.

**Xperience Restaurant Group, Cypress**

Randy Sharpe, CEO

Randy Sharpe, CEO of XRG, brings extensive operational expertise to one of the nation's leading operators of casual, polished casual, and fine dining brands. Joining XRG in 2018, Sharpe's experience includes two decades of regional and national management experience at a variety of well known multi-concept restaurant chains. Prior to joining the XRG team, Sharpe served as SVP of operations at Romano's Macaroni Grill-overseeing the restaurant's operations and improvement of more than 80 company-owned and more than 20 franchised locations. Before that, he served as VP of Operations for Real Mex Restaurants, managing the operations of the company's largest casual dining concepts. In 2021, Sharpe led XRG to a prosperous record year of sales and went on to open XRG's brands in new markets like New York City, Chicago, and Las Vegas. In 2023, Sharpe and XRG expanded into Texas with the acquisition of Texas-based Rio Mambo Tex Mex y Mas and THE RIM scratch craft eats from RM Restaurant Group, growing the company to operate more than 60 restaurants.

**Zesty Olives, Irvine**

Dessi Sarabosing, Co-Founder

Dessi Sarabosing is a financial executive that excels in global business environments experiencing or preparing for significant growth and change in both publicly traded and private companies. Ms. Sarabosing is a strategic leader driving shareholder value creation through holistic business transformation founded on operational excellence, financial stability, portfolio optimization, sustainable sales growth, technology advancements & innovation. Ms. Sarabosing has held various financial leadership roles at Ernst & Young, Yum Brands!, Arbonne International, Geolinks and Mobilitie to name a few. She has successfully completed multiple capital raising, recapitalization, debt refinancing, securitization, pre-IPO transformation, IPO, M&A & exit transactions. Ms. Sarabosing has also taken on the entrepreneurial role of the Co-Founder of Mitrevi Restaurant Group dba Zesty Olives and Mitrevi Franchise Groups to feed people real, healthy and delicious food to restore, renew and energize body, mind and soul with genuine love and care for the community and the planet!.

