



Meet the Judges:



Julie Beckley - Senior Vice President, Wells Fargo Commercial Banking

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.



Matthew Brahm - Business Development Manager, Southwest, Synoptek

Matthew Brahm is a business development manager for Synoptek's Southwest region. With over 10 years of experience, Brahm has developed expertise in ITIL, Customer Service, Data Warehouse Management, and much more. In the past, Brahm has held various positions like consultant, account executive, sales associate, acquisitional integration, and operations support executive. From conception to deployment, he has directed cross-functional project teams and led complex infrastructure projects.



Erika Coniglio - Director, Business Development, RSM US LLP

Erika Coniglio is a seasoned professional with over 25 years of experience in the consulting and professional services industry, contributing 14 years of dedicated service to RSM. During her career, Coniglio excelled in profit and loss management, notably steering an Orange County location to secure the #1 ranking on Inc. magazine's fastest-growing list in 2000. Her expertise revolves around C-level relationship management, spanning telecommunications, information technology, and finance industries. Coniglio spearheads the growth of the Southern California practice. She plays a key role in onboarding new clients and collaborates with the Irvine office to enhance support for existing clients. Her dedication and strategic vision make her an invaluable asset to RSM and a true leader in her field.



Devin Dickson - Managing Director, BMO

Devin Dickson leads a team of middle market bankers in Orange County and San Diego, specializing in providing comprehensive banking solutions for companies with revenues ranging from \$20 million to \$500 million. As a native of Orange County, Dickson is passionate about providing local businesses with tailored financial solutions to help fuel their growth and success. Dickson holds a B.S. in International Business Management from Brigham Young University - Hawaii, and an MBA from Pepperdine Graziadio Business School. He resides in San Clemente with his wife and three children.



Joseph Gendreau - Relationship Manager, PNC Bank

Joseph Gendreau is a relationship manager for PNC Corporate Banking. His responsibilities include delivering strategic financial guidance and solutions to help local companies grow, improve cash flow, manage payments and invest for the future. Gendreau and his team fulfill this mission by focusing on credit and lending, deposits and cash management solutions for privately held and public companies with annual revenues of \$50 million and higher. He has 15 years of banking experience.



Stacy Hubbard - Managing Director, Orange County Office, Marsh & McLennan Agency

Stacy Hubbard is a principal and managing director for the Orange County office the associate managing director for the Los Angeles office. She specializes in employee benefits for both public and private industry sectors. Hubbard has been in the health care industry for over 28 years and has experience with fully insured and self-funded health plans. Her responsibilities include client consulting and management, compliance, strategic planning, and project management. Prior to joining MMA, Hubbard managed the client services department in Orange County at Gallagher Benefit Services for eight years. Prior to moving to the broker side of the industry, Hubbard worked for seven years at Beech Street, a national PPO network for self-funded employer groups. Hubbard earned a bachelor's degree in organizational learning and a master's degree in healthcare administration (MHA) from Chapman University.



Justin Jessee - Founder and CEO, Impactful Resources

Justin Jessee is a hands-on human capital executive with 20+ years of experience in finance, accounting, and IT. As founder & CEO at Impactful Resources, Justin has spent the last 12 years supporting the Office of the CFO on consulting, interim, and executive search engagements with clients ranging from start-ups to Fortune 100 companies in Orange County. Jessee's pragmatic approach and steadfast integrity has earned him a reputation as a trusted advisor to clients. Prior to starting Impactful Resources, Jessee was a director of client services at Tatum and DLC. Early in his career, Jessee spent five years at the Boeing Company in various roles of increasing responsibility. Jessee holds an MBA from the University of Southern California and a BA in Economics from Rowan University.



Mary King - Senior Vice President, Team Leader, Fifth Third Bank

Mary King is senior vice president and team leader of the Orange County Commercial Banking Office of Fifth Third Bank, based in Newport Beach. She manages a large, middle market portfolio and leads a team focused on serving middle market businesses with the credit, treasury management support and consultative advice they need. King has been with Fifth Third for over five years, helping to establish its middle market banking presence in California. She was a recipient of Fifth Third Bank's President's Circle in 2022 and 2023, an honor reserved for the Bank's top performers. She previously worked at Bank of the West for 20 years. King earned a bachelor's in business economics from the University of California, Santa Barbara.



Meet the Judges:



Steve Krenik - Senior Vice President, Relationship Manager, U.S. Bank

Steve Krenik is a senior vice president / relationship manager in the Orange County Commercial Banking office of US Bank. He has been with US Bank since April 2005. Mr. Krenik has more than 30 years financial services experience in commercial lending, commercial real estate, consumer lending, mortgage lending, merger/acquisition financing, and ESOP transactions. Prior to joining US Bank, he held similar positions with Mellon 1st Business Bank, City National Bank, Home Savings of America and Household Bank. His focus is working with companies with revenues between \$25 million and \$1 billion and providing a wide array of solutions those companies will require from their bank. Mr. Krenik earned his Bachelor of Science in Finance from California State University Northridge.



Gloria Lee - Client Relations Partner, Rutan & Tucker LLP

Gloria Lee is the firm's client relations partner and responsible for the strategic growth of business development opportunities for the Firm's attorneys and the implementation of client relationship initiatives for the Firm. Prior to becoming the firm's client relations partner, Lee focused on the financing and development of commercial, residential and resort properties. Her practice included representing lenders, developers, landlords and tenants in all aspects of real estate transactions, including real estate secured financings, acquisitions, dispositions, title review and due diligence analysis. She also has experience with the structuring, development and regulation of residential, commercial, condominium, timeshare, and fractional use planned developments and associations.



Tom Lowrey - Senior Relationship Manager, PNC Bank

Tom Lowrey is a senior relationship manager for PNC Corporate Banking. Lowrey is responsible for managing a book for corporate clients and driving new sales activity. He advises clients on solving complex problems in the areas of capital planning and structuring, investor relations, treasury operations, balance sheet and cash flow risk management, and liquidity/investments. Lowrey has over 20 years of banking experience.



Tim Meade - Director, PwC

Tim Meade is a director in PwC's Private Company Services practice and focuses on business development efforts and relationship management in Southern California. He specializes in the identification and development of new opportunities and is integral in building and leading winning PwC teams. He also serves as lead relationship executive to a number of our most important SoCal-based clients, collaborating with key service Partners to leverage his knowledge of the client and translate issues into impactful solutions. Meade is well versed in all of PwC's offerings across the firm and serves as the "voice of the client" within our network of subject matter experts and leadership. He is well known in the business community as a super-connector and has more than 30 years of business development experience, including 15 in professional services.



Matt Primeau - Partner and Founder, Conexus

Matt Primeau has over 16 years of executive staffing leadership and recruitment experience. Prior to Conexus, Primeau served as co-founder and partner for Citadel CFO, helping clients and candidates find the right match for their strategic business hiring needs and career path objectives. Having started his career placing interim and interim-to-hire CPAs and MBAs and degreed accounting and finance professionals, Primeau then shifted to placing direct hire finance and accounting professionals and passive candidates at the manager, director, VP, and C-Levels. Prior to co-founding Citadel, Primeau managed both direct hire and interim practices for large human capital companies where he served as branch manager, practice director and managing director all within the Finance and Accounting Staffing space.



Tom Spinogatti - Senior Vice President, Relationship Manager, Comerica Bank

Tom Spinogatti, senior vice president and relationship manager with Comerica Bank Middle Market Group (since 2012), covering Orange County and the Inland Empire. He has a robust 25+ year history as a seasoned Commercial Lender deeply rooted in the local markets, specializing in collaborating with Manufacturers and Distributors ("M&D"). A career specialty within M&D includes working within the Food & Beverage ("FNB") industry, having attended numerous annual FNB Industry events. He has also served as a CFO/COO/investor to a confection importer/distributor in the San Diego market. Target market encompasses companies with revenues ranging from \$20 million up to \$750 million, providing Senior Debt in the range of \$5.0 million up to \$100 million.



Lisa Westhafer - Senior Vice President, Middle Market Banking, Fifth Third Bank

In her role as senior vice president, Lisa Westhafer leads the marketing efforts for Fifth Third Bank's Commercial Banking office in Orange County, focusing on serving clients in the market with revenues between \$20 million to \$500 million. Westhafer assists privately run companies with their financing, treasury management and capital market needs. Lisa has been in the financial services industry for over 25 years. Prior to entering into the banking field, she worked for both the Walt Disney Company and Arthur Andersen. A Southern California native, Westhafer is married, has a 10-year-old son, and lives with her family in Nellie Gail. She earned her degree in business from the University of Washington and holds a CPA designation (currently inactive) and is Series 7 and 24 licensed. When not working or spending time with her family, Westhafer enjoys traveling, scuba diving, interior design and cooking.



John Yarter - Senior Vice President, Group Manager, Comerica Bank

John Yarter is the group manager for Comerica Bank's Orange County and Inland Empire Middle Market Commercial Banking Group. He has 25+ years' experience as a Middle Market Commercial Banker in Orange County. Prior to his role as group manager, he was a relationship manager for approximately 12 years, which was preceded by various Credit positions spanning 10+ years. Yarter earned a Bachelor of Arts degree in Business Administration from California State University, Fullerton.