



Meet the Judges:



Victor Guerrero - President & Chief Operating Officer, Infinity Bank

Victor Guerrero has dedicated over 35 years to serving the Los Angeles/Orange County communities in banking. Starting out as a teller at Bank of America in 1988, he's worked in many roles in the industry, from operations to sales, credit, and finance. Since 2018, Guerrero has been the founding executive at Infinity Bank, where he serves as president and chief operating officer, and previously served as the founding CFO of Orange County Business Bank. Guerrero finds his greatest joy in helping people achieve their dreams and goals as a banker, advisor, and partner. With 33 years of marriage and two adult sons, Guerrero's family keeps him humble and generally grounded, but never quiet!



Thomas Lerner - Senior Vice President, Relationship Manager, U.S. Bank

Thomas Lerner is a senior vice president / relationship manager on the Orange County Commercial Banking team. The Commercial Banking team provides customized banking products and services to middle market companies with annual sales ranging between \$25 million and \$1 billion. Lerner is a seasoned banking professional with experience in diverse markets, including corporate, middle market, and small business, working with both public and private companies. He has experience working for domestic as well as foreign banks. He's been with U.S. Bank for five years. Prior to joining U.S. Bank, he worked 20+ years for large international banks, such as Svenska Handelsbanken, HSBC, and KBC Bank, all based in New York City. At KBC Bank, he worked as Director – Corporate Banking, responsible for the western US. Lerner earned his BA Economics & Business from Lafayette College in Easton, PA and his Masters in International Business (IMBA) from the University of San Diego.



Anne Pacht - Business Development Executive, Withum

Based out of our Southern California office, Anne Pacht leads Withum's West Coast business development initiatives. Withum is a forward-thinking, technology-driven advisory and accounting firm that supports clients with an innovative and adaptive approach to service. At Withum, Pacht collaborates with new and prospective clients within a variety of industries to customize accounting solutions to support their business objectives. With a career that started at Arthur Andersen over 20 years ago, Pacht made her way to Allergan and then Rockwell, serving as an international and domestic tax executive, implementing tax strategies to support a favorable corporate tax structure. Pacht then transitioned to tax technology at Andersen TTE and Vertex. She spent the next fifteen years providing enterprise-level domestic and international and provision tax software and consulting services to Fortune 500 companies. Her breadth of experience offers a unique, hybrid approach to identifying and supporting Withum's clients' business objectives, big and small.



Ivo Tjan - Chairman, President & Chief Executive Officer, 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. 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. 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. Tjan holds a Bachelor of Arts Degree in Business Administration from California State Fullerton University.



Jeffrey M. Verdon - Partner & Chair of Asset Protection, Falcon Rappaport & Berkman LLP

As a partner at Falcon 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.



David Warren - Co-Founder & Chairman of the Board, Bridgeford Trust Company

David Warren is president and CEO of Bridgeford Advisors and co-founder and chairman of Bridgeford Trust Company, a sister company. He is an attorney with over 20 years of professional experience practicing law and working in the financial services industry serving the trust and wealth management needs of high and ultra-high net worth families across the globe. Warren leads all planning and business development activities and brand development, working directly with families, family offices, and financial services professionals on sophisticated trust planning solutions including powerful asset protection, privacy, and state tax planning strategies. Prior to establishing Bridgeford Trust Company, Warren was recruited out of a prestigious law firm, to join the Wealth Management/Trust Department of a large regional bank as a vice president/senior trust administrator. Warren subsequently transitioned his career to Bank of New York Mellon where he worked exclusively with ultra-high net worth families on various wealth management issues.