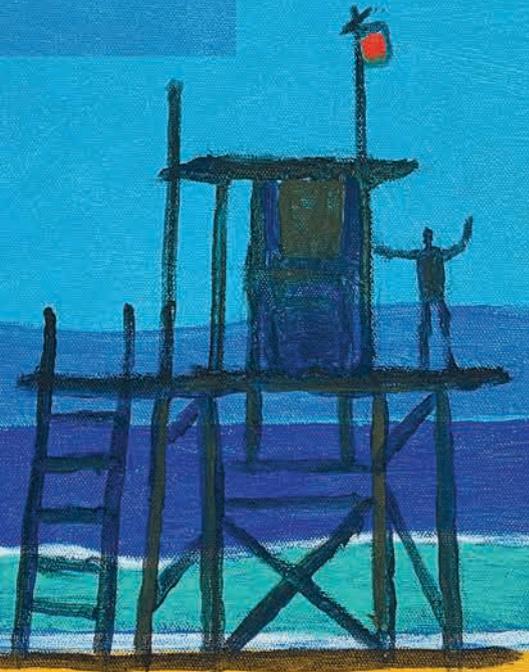


ORANGE COUNTY BUSINESS JOURNAL

2021

500

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A portrait of Adam Townsend, a man with a beard and short hair, wearing a dark suit jacket over a light blue button-down shirt. He is smiling and has his arms crossed. The background is dark and out of focus.

VIZIO CFO

Adam Townsend

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# A Complete Game Changer for High Value Life Insurance

## From “Big Macs to Big Clients”: An Idea that Transformed an Industry

When the Orange County Business Journal first profiled Julian Movsesian’s 5th anniversary in 2000, little did they know that would just be the beginning. That headline referred to Julian as someone who went from “Big Macs to Big Clients.” Now celebrating his 25th anniversary, Julian has truly revolutionized life insurance for high-net-worth individuals and families.

In 2004, Julian entered a joint venture with a Fortune 20 company, which became the lending arm of newly established Succession Capital Alliance™ (SCA), with Julian assuming the role of CEO. An ever-increasing number of insurance companies rely on the evolving strategies of the company to service their high-net-worth clients.

## It Started with a Client Request

It all started with a client request, which forever changed the face of life insurance for high-net-worth clients, business owners, and insurance advisors. The client asked, “**What can be done to reduce my \$780,000 annual premium payments for my family’s life insurance?**”

This question became the genesis of what was to become known as life insurance premium financing or **Intelligent Leverage™**. It allows high-net-worth policy holders to reduce their out-of-pocket costs, liberating cash and capital for existing or emergent opportunities. Working with an extensive network of top lenders and insurance carriers, Julian created

**Premium Financing Loans** as a solution to help not just this client but future clients to come. These mega loans pay the insurance policy premiums in full with the policy holder only responsible for the loan interest, saving hundreds of thousands of dollars annually. And, it delivers the tax-free payout of the insurance policy upon the death of the insured.

## What Those in the Know have to Say

Dawn Trautman, Executive Vice President of Pacific Life has been working with Julian for decades. She states, “Premium Financing is a complicated business and it needs to be done the right way. SCA has proven this for over 20-years.”

Due to his secure and long-term relationships with lenders, Julian’s personal clients and the clients of advisors nationwide fared well during and after the

“ Julian is the industry leader in Premium Financing. We respect his process and have a complete comfort level working with SCA.”

- Dave O'Malley, President & CEO, Penn Mutual

2008 great financial recession. Every client was able to successfully renew their loans as needed, unlike many other bank clients who had their loans called. The stability and longevity of SCA is a hallmark of its brand promise. Dave O'Malley, President and CEO of Penn Mutual told us: "Julian is the industry leader in Premium Financing. We respect his process and have a complete comfort level working with SCA."

For Movsesian's clients, there is a \$5 million minimum net worth required to qualify for Premium Financing Life Insurance. As he reports, "We are the longest running and most respected premium financing program in the industry. We are advisors to advisors placing more than \$52 billion of death benefit protection and \$5.1 billion of financed insurance premiums."

#### **Making a Difference in Many Ways**

Julian was honored by **Childhelp**, an organization which meets the physical, emotional, educational and spiritual needs of abused, neglected and at-risk children by bestowing Julian with their Philanthropic Award. **Big Brothers Big Sisters**, which makes a difference by creating one-to-one matches to decrease the number of disconnected youths, selected Julian to receive their Man of the Year award for his years of support and leadership.

#### **Celebrating 25 Years of Success**

After twenty-five years since developing the concept of Premium Financing Life Insurance, Julian Movsesian's leadership of Succession Capital Alliance continues to refine its offerings and strategies. The company assists affluent individuals and families in lightening the heavy load of large annual life insurance premiums.

Caring for the community, as much as he does for his clients, is a life-long pursuit for Julian. He is all about making sustained changes in lives. And his vision continues.



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“ Premium Financing is complicated business and it needs to be the right way. SCA has proven it for over 20-years. ”

- Dawn Trautman, EVP Pacific Life

“ We are confident when we work with Julian and SCA because his process has stood the test of time and things are always done the right way. ”

- Brooks Tingle, President & CEO, John Hancock

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## A YEAR OF RESILIENCE

**Editor's Note:** *The Business Journal asked OC500 members what struck them the most about OC's business community, given what they experienced over the past year. A common theme emerged among their responses. Here and on page 12 are a sampling of some notable responses, lightly edited.*

**Annette Walker, City of Hope:** We are resilient and strong. There are many acts, big and small, that showed we could overcome a very tough year. I have never been so proud to be part of the healthcare industry. All providers did whatever we could to help patients, protect the community and beat COVID-19.

**Dave Wilson, Wilson Automotive:** The resilience and resourcefulness of so many small businesses to 'find a way.'

**Brad Hall, MGO:** The sheer resiliency of businesses in OC was very powerful to witness. Most of our clients worked straight through the pandemic and never let its challenges negatively impact their outlook or their drive to continuously serve our OC community

and our country.

**Peter Yu, CHOC:** I very much admire the resilience, adaptability, and resourcefulness of OC's business community. We very much exemplify the American ethos with our strong, independent, can-do attitude.

**Howard Gillman, UCI:** What struck me most about the business community is what struck me about the community at large: our resilience, our commitment to meeting needs and moving forward, our outreach to those who were most hard hit and needed a helping hand.

**Bobby Azamian, Tarsus:** Staying connected and resilient, and keeping the work force safe. Easier to do here in OC than almost anywhere.

**Jim Madden, Carrick Capital:** Resiliency! Everyone I come across shares the same positive attitude.

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## A YEAR OF RESILIENCE

**Scott Connella, Union Bank:** I think the OC business community stands out for its resiliency and resourcefulness. When faced with a once in a lifetime pandemic people found ways to not only survive but in many instances flourish.

**Mark Frazier, Rutan & Tucker:** Two words: resilient optimism.

**Doug Corbin:** The resiliency of this community and their continued support for **CHOC** and the work we do to help the children in Orange County and beyond.

**Steve Milner, Baker Tilly:** We are smart, creative and resilient. I have always been proud to be part of our OC community which truly is one of the best in the US.

**Dan Walker, Farmers & Merchants:** It was wonderful to see the resilience of the OC business community, and how they pivoted to adapt in the most difficult of situations.

**Reza Jahangiri, AAG:** OC's resilience, and how the entire business community came together during the past year.

**Keith Kobata, Wells Fargo:** What has struck me most about OC's business community has been their resiliency. I've come across business owners who have had to make deep, personal sacrifices and tough decisions to keep their business open. Many have had to get creative and shift their business model or completely reinvent themselves.

**Floyd Amuchie, Virgin Galactic:** The resilience of companies and employees to power through the pandemic and continue business operations.

**Kenneth Chang, UCI:** Resilience, flexibility, compassion, and solidarity.

**Lindsay Lawrence, First Foundation:** Resilience. I think our community has done an incredible job of being agile and resilient. There have been and continue to be many curve balls, but I am proud of how we have come together and persevered.

**Shane Criqui, Stuart Kane:** Orange County has a strong, vibrant, resilient business and legal community. What has struck me most is how people are committed to keep going.



# CONGRATULATIONS

Julie

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## 2021 REFLECTIONS

**Kevin Manemann, Providence SoCal:** The business community really supported one another during the pandemic. There has been such great collaboration in Orange County, which has helped keep businesses strong. It is great to see the community come together.

**Alan Davenport, Interior Logic:** I feel the OC business community is a far more tight-knit community than many others. People here genuinely care for one another and look out for one another and the net impact of that has been favorable compared to many other places.

**Kate Duchene, RGP:** What has struck me the most about OC business community is our willingness to help each other—to listen, support and strategize. It has been inspiring to see so many people come together throughout such a challenging time.

**Heidi Zuckerman, OCMA:** I have been really taken by the sense of camaraderie and familiarity in the OC business community. I've found it to be very welcoming and supportive of me personally and of the museum as well.

**Nicole Suydam, OC Goodwill:** The business community really stepped up and went above and beyond to help our neighbors in need. Things that would have been dubbed too hard or unthinkable before the pandemic, became challenges that were addressed quickly, creatively and head-on.

**Sharrell Jackson, Lendistry:** It is such a blessing to be a member of the OC business community. What has struck me most is the abil-

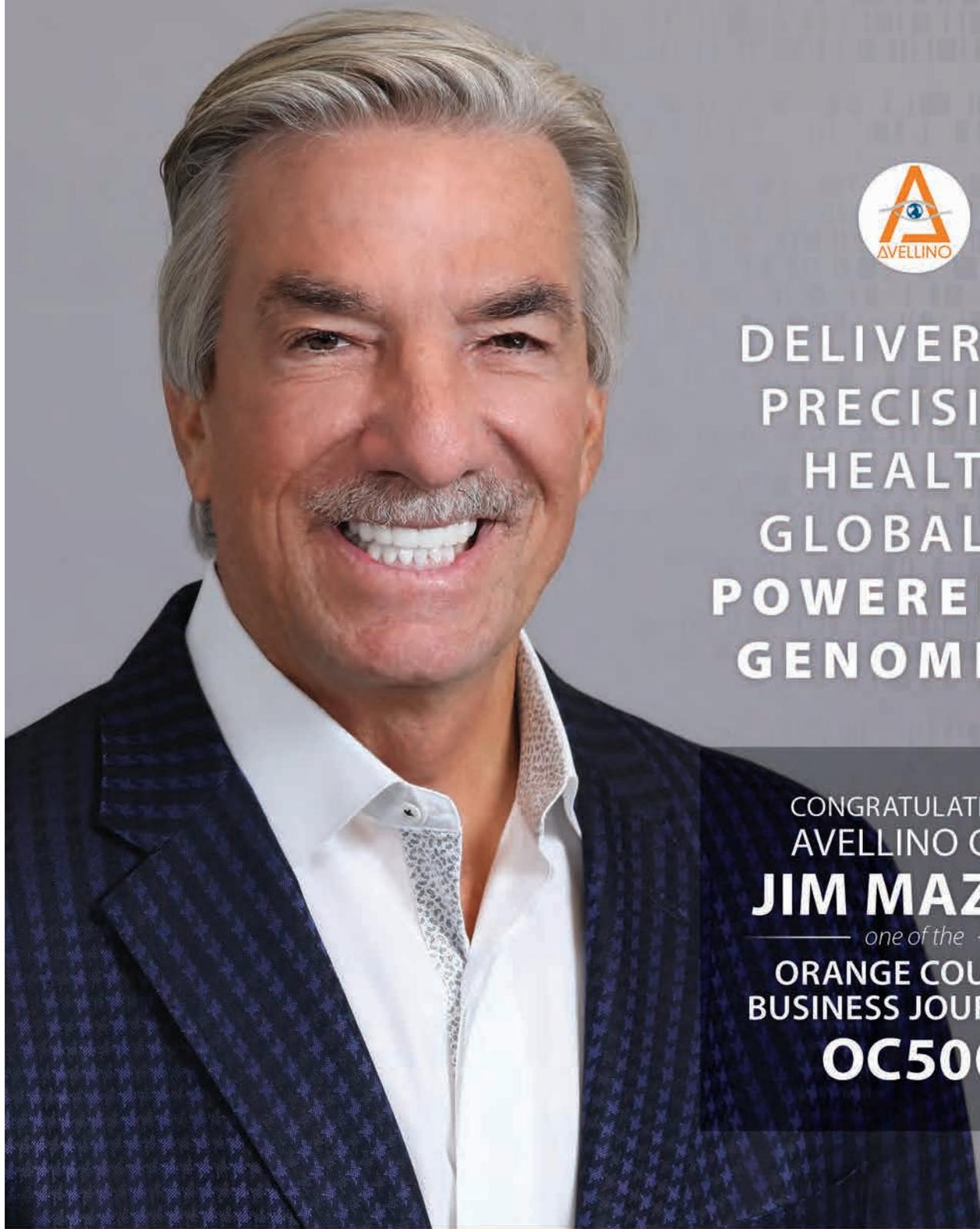
ity to learn, connect and grow from other leaders. I have had the pleasure of networking with some amazing leaders and contribute to their success and benefit from the success of others.

**Jeff Margolis, Welltok:** OC business community is comprised of leaders and workers who stepped up big time during the pandemic. From my board position at **Hoag**, I have witnessed both clinicians and administrators unfailingly address any and all challenges to address the health of our community.

**Bernadette Boden-Albala, UCI:** I have been most impressed by the sense of community throughout OC business leaders. I have been on several pandemic-related task force groups, and I was struck by how quickly everyone wanted to pitch in and do extra work coming up with strategies to get OC healthy and safe. I am proud to be part of this community.

**Tammy Tumbling, OC Community Foundation:** I was impressed by the willingness and ability of the business community to roll up their sleeves and get involved. Over the past two years, there has been such a groundswell of support to help address emergent issues associated with the pandemic and racial justice and equity in communities of color.

**Chad Lefteris, UCI Health:** One of the reasons our entire OC community has not just survived but thrived during the past year (and beyond) was due to the constant collaboration, and communication across industries that transcended traditional competitive landscaped, and allowed all to remain focused on the crisis at hand.



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# LETTER FROM THE PUBLISHER

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RICHARD REISMAN



This marks the sixth edition of the Business Journal's OC500, our annual inventory Directory of Influence. We believe this edition is our best, most diverse, and most relevant.

Inside you will find the names, bios, recent news and inside details of the area executives, educators and other community leaders who made headlines in the pages of the Business Journal over the course of the past year.

Newsmakers, job creators, and breakout business leaders are well-represented in these pages.

Winners of the Business Journal's signature awards programs over the past year—which are back to being in-person events—are profiled, as are contributors to our popular OC Leader Board page. Lawyers, bankers, accountants and other notable service providers are also included in the listing.

As was the case last year, we've included profiles from our latest OC 50 edition of the paper, which ran in May, as part of the directory.

Those entries—highlighting 50 who are shaping the future of OC and its economy—have been slightly reworked and updated to include new information.

While most OC500 individual entries are loosely grouped into industry sectors, the longer OC 50 entries are scattered throughout the book.

This year's OC500 also includes entries from our most popular listing of the year, the OC's Wealthiest, which ran in July. Those bios have too been updated to include new information, though our wealth estimates for the entries have not changed from their original publication.

The OC's Wealthiest entries are towards the end of the book; for the handful of entries who were on both this year's OC 50 and OC's Wealthiest listings, we've included the latter.

All told, more than half of the OC500 entries are new to this year's edition.

Let us know who we've missed. Our editorial staff has already begun the planning for next year's edition.

Lastly, please remember that print media can only serve its readers if sponsors and advertisers provide support. Thank you to those who have done so during another year when our editorial team has gone above and beyond to provide our community the best possible business coverage.

Happy Reading!

A handwritten signature in black ink that reads "Richard Reisman". The signature is written in a cursive, slightly slanted style.

Richard Reisman  
Publisher



# LET'S GO!

**Let's make an impact.** In collaboration with other innovators, FivePoint is taking on some of California's most urgent challenges. With Great Park Neighborhoods as our blueprint, we're working to create jobs, protect the environment, and ease our housing shortage with new homes for all incomes. We applaud the OC500 and your accomplishments. And we share your passion for improving the quality of life in Orange County.

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# REOPENING AND RESILIENCE

MARK MUELLER



My family's main hobby for 2020—hiking—carried over into 2021.

We encountered an owl, lizards, snakes, hawks, roadrunners, quail, and, perhaps most unexpectedly, a herd of goats in our walks through various parts of OC over the course of the year.

We ran into fewer people on our hikes, as normalcy returned and other local attractions opened up again.

Whatever health benefits we gained from our hiking were largely lost as we returned, often and hungrily, to our favorite restaurants, which we missed in 2020.

You'll read about the 2021 hobbies, favorite places to dine, and local spots worth revisiting from our latest collection of OC500 entries.

You'll also read about one of the most dynamic (and resilient, a word you'll see a lot this edition) years for local business on record.

Over the past year, the editorial staff of the Business Journal published close to 2,000 stories in our weekly print edition. Over a thousand more breaking news stories were written for the ocbj.com website.

Consider our sixth annual OC500 a cheat sheet of sorts, highlighting the local newsmakers we covered over the course of the past year—a year in which news was never in short supply.

Thanks again to my hiking partners, Angelina and Isabella, and thanks to our readers. See you on the trails.



*Mark Mueller*

Mark Mueller  
Editor-in-Chief  
mueller@ocbj.com

## “California’s Beaches: Natural Wonders and Coastal Characters”

### OC 500 Artwork – Courtesy of The Hilbert Museum

This is the fourth edition of the OC500 to feature artwork generously provided by the Hilbert Museum of California Art at Chapman University.

From beachgoers and surfers to the natural beauty of the beaches and our stunning coastal cities, this selection of watercolors, oil paintings and prints tells the story of our Golden State's popular shorelines and the many different types of people who enjoy them.

Many thanks to Hilbert Museum founders Mark and Janet Hilbert and to museum director Mary Platt, who compiled the images.

Cover – James Strombotne, “Lifeguard Stand,” c. 2000, oil, 30 x 30”. The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.

## OC500

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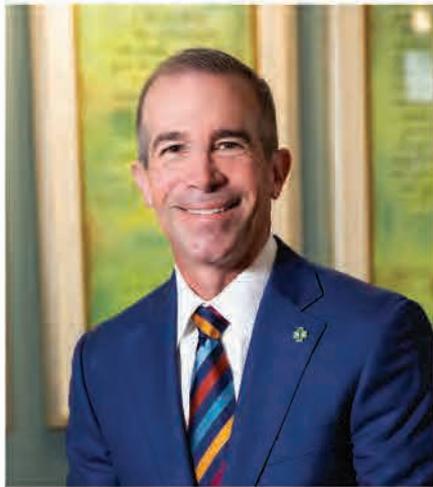
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PROVIDENCE CONGRATULATES

# Erik Wexler and Kevin Manemann

AS ORANGE COUNTY BUSINESS JOURNAL  
OC 500 INFLUENCERS



**Erik G. Wexler**

*President, Operations and Strategy  
Providence South*



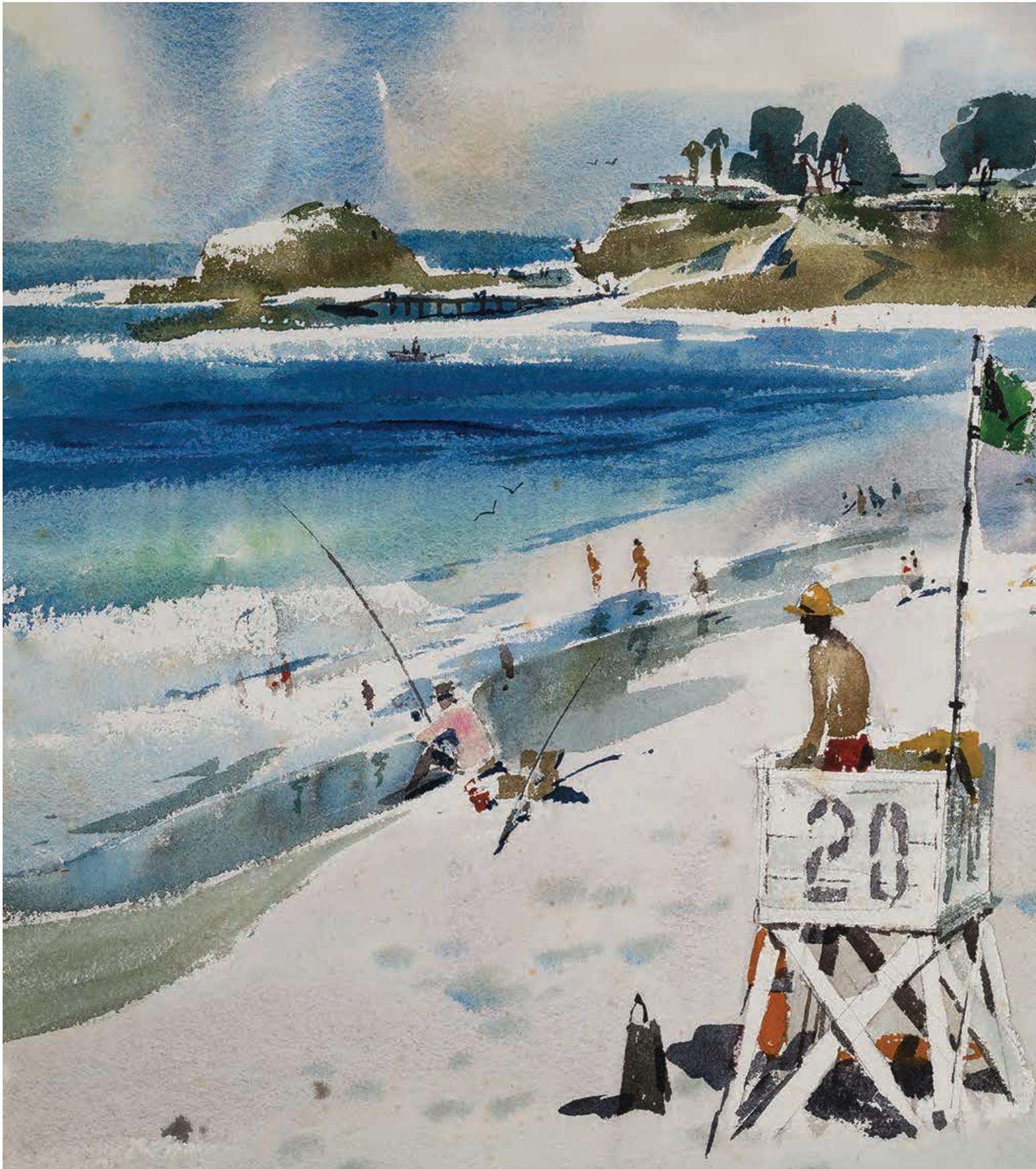
**Kevin P. Manemann**

*Chief Executive  
Providence Southern California*

Providence congratulates Erik Wexler and Kevin Manemann for their outstanding leadership during COVID-19 and for their unwavering commitment to caring for the health needs of Orange County.

From standing up COVID-19 vaccination clinics with community partners to purposeful outreach to the poor and vulnerable among us, they deliver on the Providence Promise by knowing, caring for and easing the way of the community they are dedicated to serving.

Thank you Erik and Kevin for caring so deeply about the health of Orange County and congratulations on being named among Orange County Business Journal OC 500 influencers.



Arthur Riley, "Lifeguard Tower 20, Treasure Island," c. 1960, watercolor, 22 x 30". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.



COMMUNITY

**FLYNN ANDRIZZI**

PRESIDENT  
HOAG HOSPITAL FOUNDATION

**WHY:** Leads fundraising for prominent hospital group: flagship Newport Beach location, orthopedic institute; previously in academia fundraising in Utah, Iowa, and Pennsylvania.

**NOTABLE:** Has spearheaded the “Hoag Promise Campaign” over the past several years, raising more than \$600M. **RECENT:** Foundation received \$31M on nine gifts \$1M or larger in 2020. **QUOTABLE:** “With COVID, when we turned to our donors again, their generosity was breathtaking and many made outright cash gifts knowing the resources were needed immediately.”



**RICK MUTH**

CEO, PRESIDENT  
ORCO BLOCK & HARDSCAPE

**WHY:** One of largest SoCal concrete masonry makers with seven factories. Rick’s father, Pete, began firm in 1946; fourth generation now in business. Prominent philanthropist, including recent leadership roles at the Segerstrom Center for the Arts.

**RECENT:** Implemented safety protocols in March 2020, including asking customers and sales staff to limit in-person visits. **QUOTABLE:** “In these unprecedented times, we need to work even closer together to get the job done, as well as help protect all,” Muth wrote in letter to customers and friends in March 2020.



**GREGORY C. SCOTT**

CEO, PRESIDENT,  
COMMUNITY  
ACTION PARTNERSHIP OF  
ORANGE COUNTY

**WHY:** Runs nonprofit which dates to 1965 when Lyndon Johnson started the War on Poverty. Typically delivers 25M pounds of food annually. It has 300 partners that send food to 200,000 individuals every month, including 24,000 seniors. **RECENT:** Linked up with Second Harvest Food Bank of OC, Orange-based Waste Not OC, forming OC Hunger Alliance in November 2020. **QUOTABLE:** “What we’re bringing to the table is the big picture aspect,” he said of alliance. “We are the biggest food banks in the county.”



**GARY FUDGE**

FOUNDER  
AUTOMOTIVE.COM

**WHY:** Major benefactor to Hoag Hospital, other causes.

**RECENT:** Hoag unveiled the Fudge Family Birthing Suites at Hoag Hospital Irvine. The 31,600-square-foot facility, financed in part by a reported \$4M gift from its namesake donor, introduces labor and delivery services for the first time to the Irvine campus. Features 12 birthing suites, two C-section operating rooms and a Level 2 neonatal intensive care unit, and spa-like amenities. **QUOTABLE:** “From the outset, we didn’t just want to add a new location for the sake of convenience alone,” said Marcy Brown, chief hospital operations officer at Hoag. “We also wanted to address the changing desires and expectations of this generation of new families.”



**REV. RALPH WILLIAMSON**

CEO, PRESIDENT  
COR COMMUNITY DEVELOPMENT CORP.  
IRVINE



**BIO:** Public face for business development offshoot of Irvine’s Christ Our Redeemer AME Church, the largest African Methodist Episcopal church in OC, where he is the pastor. The Spectrum-area group is a frequent partner with Irvine’s Avanath Capital; COR and Avanath count more than 600 affordable housing units in the state, and have made several deals together in the past year, including in OC.



**NOTABLE:** COR sees real estate deals as a way to expand the church’s presence in disenfranchised communities. “Rev. Ralph and his predecessor, Rev. Mark Whitlock, have been tremendous partners for us,” says Avanath CEO Daryl Carter. “The organization supports our effort to create upward mobility and support in the communities we invest in by providing strong resident services and after-school programming.”

**QUOTABLE:** “Just like Avanath, we take a holistic approach when looking at real estate, providing social services and resources for members of our communities,” Williamson told the Business Journal in February. One way COR is doing that is by preparing to become a vaccine center for Orange County residents and “providing new opportunities for members of the community to visit African American churches,” he said.



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**JANE FUJISHIGE YADA**

CHAIRWOMAN, SEGERSTROM CENTER FOR THE ARTS

**WHY:** Influential businesswoman, philanthropist and patron of the arts. Helps run family business Harbor Field Holdings LLC, which includes multiple agricultural, residential, industrial and hospitality properties as well as farms in OC, Ventura and Santa Cruz counties. **RECENT:** Served on board of OC's most prominent arts institution starting in 2001. In July, began serving as chairwoman. Only the second woman to chair the exec-laden board. **QUOTABLE:** On taking over during the pandemic, says, "I cannot wait to open that front door (of the Segerstrom Center) and welcome everyone back in. Our goal is not just to be open—our goal is to be one of the best in the country."

**JOHN FORSYTE**

CEO, PRESIDENT PACIFIC SYMPHONY

**WHY:** Has built world-class symphony that annually performs 100 concerts a year, including abroad and on national TV. **RECENT:** Pandemic forced major pivot. Symphony created content as part of its Pacific-Symphony+ series on YouTube and Facebook. Programs won international fans. Streamed Verdi's opera "La Traviata" and hosted a "Fandango" gala outdoors at a Mission Viejo park. **QUOTABLE:** "Our feeling is the safest venues start outdoors," Forsyte said in May. "As COVID continues to abate, we can safely return. Gradually we'll move indoors by mid-to-late September. The key word is gradual. We have to understand that people will have to acclimate to large gatherings."

**CHARLIE ZHANG**

FOUNDER ZION ENTERPRISES

**WHY:** Businessman, longtime area philanthropist who created well-known Chinese fast-food chain, Pick Up Stix, which he built to 85 stores before selling it in 2001. "I came to America with \$20 and they gave me \$50 million!" he told the Business Journal. A second food and beverage business he started after Pick Up Stix with his wife, Ling, Aseptic Solutions, would end up selling for even more. **RECENT:** Serious musician as youth, now backs OC Music & Dance arts school, and Pacific Symphony. He and his wife donated \$6.2M building that houses symphony's headquarters. **QUOTABLE:** "The orchestra has meant so much to the both of us."

**SHELLEY HOSS**

CEO, PRESIDENT, ORANGE COUNTY COMMUNITY FOUNDATION

**WHY:** Runs one of largest foundations in Orange County with \$198.3M in revenue for the year ended June 30, 2021. **RECENT:** Innovation focus. Launched in 2019, OCCF's Social Innovation Fund has supported 11 projects "addressing our community's most complex challenges." The fund provided \$411,000 for five organizations in 2019 and an additional \$237,395 to six organizations in 2020. **OC LEADER BOARD, JULY 26:** "We are committed to strengthening the nonprofit sector by providing a runway for innovation. This work has been advanced through a collaborative investment pool for social sector innovation, with promising early outcomes."

**NICOLE SUYDAM**

CEO, PRESIDENT GOODWILL OF ORANGE COUNTY SANTA ANA

**BIO:** Oversees OC's largest nonprofit, with \$126.3M in local revenue for the 12 months ended June 30. Counts two dozen Orange County stores, which pre-pandemic brought in roughly \$5M a month. Group's mission is to help those with disabilities and other challenges to obtain work via education and workforce development programs, among other services.

**NOTABLE:** Santa Ana nonprofit also built and operates the increasingly valuable shopgoodwill.com online store, which is the e-commerce platform for most local Goodwills across the country. The online site saw cumulative sales recently top \$1B. Half of those sales were generated in the past three years, with 2020 site sales totaling \$171.3M, up 22% from 2019.

**QUOTABLE:** In March, told the Business Journal that "so many of the Goodwills were impacted by the pandemic and all of us had to shut our stores down, depending on local communities and now some are dealing with continued restrictions. For many, it accelerated their journey to e-commerce."



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Carter



Debra



Jorge



Salvador



Noemi

Goodwill of Orange County helps people who are facing barriers find and keep jobs. People like Carter, Debra, Jorge, Salvador and Noemi. Your support makes this core mission work possible.

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**SUSAN LEW**OFFICER  
HSU HWA CHAO FOUNDATION

**WHY:** Hsu Hwa Chao Foundation counts 25-year history in Orange County philanthropy. Also a public health professional, health and science writer, musician, and community activist. Board co-chair, National Asian American Community Foundation. **RECENT:** Says the “pandemic and subsequent vaccine rollout has shown us that the most vulnerable in our communities get left behind when well-intentioned systems are designed by teams lacking diversity.” **OC LEADER BOARD, MARCH 22:** “It’s clear that the systems for vaccine appointments were designed by teams that lacked experience with older adults and non-native English speakers.”

**HEIDI ZUCKERMAN**CEO, ORANGE COUNTY  
MUSEUM OF THE ARTS

**WHY:** Took over top post in February; previously managed the Aspen Art Museum from 2005-2019. Hosted podcast Conversations with Artists and is the author of the Conversations About Art book series. Has curated more than 200 exhibitions. **RECENT:** New \$93M facility at Segerstrom Center for Arts campus to open in October 2022; building has been described as Orange County’s “most significant piece of architecture.” Free admission for museum’s first 10 years. **QUOTABLE:** Planning a gala full of events to attract the public to its first day, including yoga and movies in the middle of the night for insomniacs. “When we open to the public, we’ll do a 24-hour opening. We will be collaborating with as many organizations as possible.”

**BOBBY MCDONALD**CEO, PRESIDENT  
BLACK CHAMBER OF COMMERCE  
OF ORANGE COUNTY

**WHY:** Black Chamber has 130 members, from which 99% work at corporations. It has a database of 5,000 Black professionals, and has given heavily to scholarships for locals. **NOTABLE:** McDonald developed the chamber’s educational outreach programs and established the chamber’s veteran’s business network programs. Through a partnership with Explorer Studios, two award-winning educational films have been produced, “Building the Dream” and “History of the Buffalo Soldiers.” **QUOTABLE:** Chamber has four goals: create access to capital and procurement opportunities; to support disseminating relevant information; to strengthen the organization; and economic development. “Our main theme is access to information by making sure you have the right information to improve, enhance and grow your business,” he says.

**CASEY REITZ**PRESIDENT, SEGERSTROM CENTER  
FOR THE ARTS

**WHY:** Oversees OC’s most prominent arts facility with an annual budget typically around \$50M-\$60M. **RECENT:** Tested indoor concerts in April with performance by American Ballet Theater where seating was limited to 300 per show, or 10% of capacity. **QUOTABLE:** Said Segerstrom Center was like a “ghost town” during pandemic. On first indoor show since start of pandemic: “We were giddy and relieved ... 90 seconds after the curtain rose and the performance started, it felt normal.”

**LUCY DUNN**CEO, PRESIDENT, ORANGE COUNTY  
BUSINESS COUNCIL

**WHY:** For 16 years, championing local business and job-creation initiatives. Helped secure funding for infrastructure improvements, facilitate the completion of key water and transportation projects, advance workforce and affordable housing initiatives and narrow gaps in skills and education among the local workforce. **RECENT:** Plans to retire at the end of this year. **QUOTABLE:** “It has been an honor to help shape and champion the policies and initiatives that have been instrumental in making this one of the great places to do business.”

**VIJAY MANTHRIPRAGADA**CEO, PRESIDENT  
MONTROSE ENVIRONMENTAL  
GROUP

**BIO:** Runs fast-growing environmental-focused firm with exec offices in Irvine that has about 4,500 clients that range from governments to gas companies to utilities. Provides services such as treating contaminated water, permitting work for large infrastructure projects, finding ways to reduce the carbon intensity of operations and converting waste to renewable energy. Went public in 2020 at \$15 a share; company’s stock now tops \$60, with a nearly \$1.6B valuation.

**NOTABLE:** Formed in 2012, Montrose has made more than 50 acquisitions over its history.

**QUOTABLE:** At time of IPO, Manthripragada said Montrose will continue to look “smartly” for acquisitions involving new technologies or expansion into new geographies. “It’s a \$1.2 trillion industry and there’s no brand that dominates it.”





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**MICHAEL J. BEALS, PHD  
PRESIDENT**

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**CHIP ESPINOZA, PHD**

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As interim Provost and dean of Strategy & Innovation, Dr. Chip Espinoza has strengthened academic excellence at Vanguard University. His work, like that of our faculty, extends well beyond the classroom—where Dr. Espinoza serves globally as a leading authority on the subject of generational diversity in the workplace.



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**CONGRATULATIONS TO DR. MICHAEL BEALS  
& DR. CHIP ESPINOZA**

**GADDI VASQUEZ**

SVP, GOVERNMENT AFFAIRS (RET.)  
EDISON INTERNATIONAL

**WHY:** Longtime OC notable who was head of SoCal Edison government relations, OC Supervisor, director of U.S. Peace Corps. Awarded five honorary doctorates; won Ellis Island Medal of Honor 2014.

**RECENT:** As chairman of Ad Hoc Re-Opening Committee for the Segerstrom Center, guided popular arts center’s response that included safety protocols for staff and visitors, performance guidelines, enhancement to air systems and heightened cleaning protocols. **NOTABLE:** In late April, before most other theaters opened, Segerstrom Center held its first indoor performance in 14 months with a show by American Ballet Theater. The audience was limited to 300 per show, or about 10% of capacity.



**SLOANE KEANE**

CEO  
BIG BROTHERS, BIG SISTERS OF  
ORANGE COUNTY AND THE  
INLAND EMPIRE

**WHY:** Runs nonprofit’s second biggest agency out of 250 nationwide. Held position for nearly three years, and after previously holding senior development roles at the nonprofit. Came to group from the advertising world. **RECENT:** Some 3,159 volunteers helped mentor 4,405 youngsters in fiscal 2020. **OC LEADER BOARD, APRIL 26:** “Our work in OC has focused on mentoring in thriving regional sectors such as financial services with Pimco, STEM fields with Edwards Lifesciences and hospitality with Disneyland Resorts. We must continue creating these mentoring matches because it’s a model that works well.”



**ALLEN CHAO**

CO-FOUNDER  
CHAO FAMILY FOUNDATION

**WHY:** Launched Corona’s Watson Pharmaceuticals, with brother-in-law David Hsia, in the 1980s and grew it to a value of \$3B by retirement in 2008. Watson went on to acquire and change its name to Actavis Group; Actavis would later buy Irvine’s Allergan. **RECENT:** Gifted \$20M to UCI for the cancer center at its forthcoming UCI Medical Center Irvine on Jamboree Road. The donation brings the Chao family’s total contributions to the university to over \$50M since 1995. **QUOTABLE:** “We encourage others to do good in their community in whatever way they can. Philanthropy can take many forms and is not limited to financial support.”



**JOHN MOORLACH**

FORMER STATE SENATOR  
37TH DISTRICT

**WHY:** Long the fiscal conscience of the California Legislature, presciently warned of Orange County’s risky investments before it declared bankruptcy in 1994. Orange County official served as the Treasurer-Tax Collector from 1995 to 2006.

**RECENT:** Lost 2021 bid for county supervisor seat. **OC LEADER BOARD, APRIL 12:** On the exodus of businesses and business leaders leaving the state, says, “wealthy individuals are mobile. And they are smart. They can see what portends in the Golden State’s financial future and it is not pretty.”



**ELLEN RICHARD**

EXECUTIVE DIRECTOR  
LAGUNA PLAYHOUSE

**WHY:** Longtime Broadway exec who has won six Tonys in her prior jobs. **RECENT:** The Playhouse is in “good financial shape” as it was able to obtain a federal payroll protection program loan and its donors “really stepped up and helped us,” according to Richard. During the pandemic-forced closure, the theater underwent renovations.

**QUOTABLE:** Told Business Journal in May: “Who thought it’d last this long? ... We cannot wait to see people coming up to the Playhouse.”



**EMILE HADDAD**

FOUNDER, CHAIRMAN EMERITUS  
FIVEPOINT HOLDINGS  
IRVINE



**BIO:** Developed homes, communities and commercial space at Great Park Neighborhoods, at former El Toro Marine base in Irvine. California’s largest master-planned developer, with additional projects at L.A.’s Valencia development and pair of sites in Bay Area.

**NOTABLE:** Reimagining uses of land and buildings in and around company’s FivePoint Gateway office campus to be SoCal’s next big medical and healthcare hub. Expects collaborative effort, with new City of Hope campus acting as area’s first big anchor. The company envisions communities such as the Great Park Neighborhoods to be the way of the future, with residential components mixing with healthcare, entertainment and education to create a cohesive, live-work-play hub.

**QUOTABLE:** “If we can set an example to encourage others to join in this (City of Hope) collaboration, Orange County has a real chance of being one of the great places in the world in terms of innovation, life sciences and healthcare.”





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**JERRI ROSEN**FOUNDER, CEO  
WORKING WARDROBES

**WHY:** Started, runs organization that provides skills training, clothing and other resources aimed at helping others enter the workforce. Set to retire end of this year. **RECENT:** Shepherded organization through trying 2020 that saw a fire destroy its 22,000-square-foot Irvine office, donation center and career center forcing organization to shelter temporarily at Goodwill of Orange County Santa Ana offices. That was followed by the pandemic. **NOTABLE:** Organization is now fully staffed and in new HQ in Santa Ana and Irvine donation center. **QUOTABLE:** “I come from the business world. I don’t come from a background in social work and I do think that’s one of the needs is to welcome more people from the business world into the nonprofit industry cluster.”

**VIKKI SHEPP**CEO  
GIRL SCOUTS OF ORANGE COUNTY

**WHY:** Nonprofit leader who has spent over a decade in numerous leadership positions, including volunteer management and mission operations. **RECENT:** Girl Scouts’ local division reported \$10.9M in revenue for the year ended June 30, 2020. **NOTABLE:** Has 25,000 members, including 15,000 girls, and 10,000 volunteers and adult members. **OC LEADER BOARD, AUG. 23:** “We know that women’s leadership brings many important economic and societal benefits, and that is why we’re doing everything we can at Girl Scouts to fuel the pipeline for tomorrow’s change-makers, cure-finders, and beacons of inspiration.”

**ADELINE YEN MAH**FOUNDER, PRESIDENT  
FALLING LEAVES FOUNDATION

**WHY:** Started foundation with UCLA Prof. Robert A. Mah in 2007 to promote medical science advances. **RECENT:** Foundation provided \$30M gift to UCI that will help fund 200,000-square-foot Falling Leaves Foundation Medical Innovation Building on campus. **NOTABLE:** Wrote memoir about life growing up in China, called “Falling Leaves.” Book sold more than a million copies. **QUOTABLE:** “The future of medicine is being advanced at an unbelievable rate. Twenty-first century medical innovation is a collaborative process derived from brilliant minds working together rather than flashes of insight from solitary scientists working alone in his or her lab.”

**JOANNA KONG**DIRECTOR OF PROGRAMS  
SUN FAMILY FOUNDATION

**WHY:** Oversees private charitable foundation backed by co-founder of Kingston Technology, whose mission is to advance educational opportunities and the well-being of the underserved. **RECENT:** 2021 membership chair, Orange County Grantmakers. Also founding board member of National Asian American Community Foundation. **NOTABLE:** Previously worked as a corporate attorney at various law firms, including Akin Gump Strauss Hauer & Feld. Specialized in counseling business owners from formation through various stages of corporate growth, including exits. J.D. from UCLA School of Law and B.A. in Criminology, Law and Society from UCI.

**TAMMY TUMBLING**COO  
ORANGE COUNTY  
COMMUNITY FOUNDATION

**WHY:** Local nonprofit executive, who’s well-versed in helping some of Orange County’s wealthiest people donate money to causes they support. No. 2 exec at OCCF, second largest nonprofit in Orange County when ranked by revenue. **NOTABLE:** Took \$25,000 of her money last year to start a new fund, the African American Alliance Fund. Fund well past \$300,000 as of early 2020. Money will be given to various organizations with missions related to the Black community. **QUOTABLE:** “All of the work I’m doing now only works because we have a great deal of allies,” Tumbling said. “We’re all in this together.”

**SUE PARKS**CEO, PRESIDENT  
ORANGE COUNTY UNITED WAY

**WHY:** Runs one of OC’s largest nonprofits, with a focus on homelessness and other critical challenges facing local children and families. **RECENT:** United Way’s Pandemic Relief Fund has raised more than \$5M, with funds used to help prevent homelessness, support front-line workers and organizations, and help low-income students and their families. **OC LEADER BOARD, FEB. 8:** “Together, we can help our students succeed, our struggling families find financial security, and our neighbors experiencing homelessness find a place to call home. We will build a better and brighter future for all of Orange County.”





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Ardeje Ogunfalu, french horn  
Pacific Symphony

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**—Carl St.Clair, Music Director**

Pacific Symphony is widely regarded as a **global leader** for the sheer scope of engagement activities we provide. **Symphony on the Go!**, the orchestra's new mobile concert stage, toured Orange County this year, presenting live music performances from San Clemente to Stanton. Our **education and community engagement team** has devoted hundreds of hours to serve thousands of students through live and digital partnerships, hands-on music education, and training in classrooms, communities and virtual settings. **Your support is vital to helping us continue to serve the community. Please consider donating as generously as you are able.**



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**TRACY BRANSON**

CFO  
ORANGE COUNTY  
COMMUNITY FOUNDATION

**WHY:** Oversees finance for nonprofit with more than \$500M in assets and over \$120M in annual revenue. OCCF works with individuals, families, foundations, and businesses to fulfill their philanthropic and financial objectives while supporting the causes they care about most. Home to more than 600 charitable funds benefiting a wide range of causes. **RECENT:** Honored by Business Journal at CFO of the Year Award event in September, in nonprofit sector. **QUOTABLE:** She enjoys accounting because “everything has to work. It has to balance. It seems logical. It produces data that is useful for everyone around you.”

**DOUGLAS CORBIN**

SVP, CHIEF DEVELOPMENT OFFICER  
CHOC CHILDREN'S FOUNDATION

**WHY:** Longtime fundraising exec, tapped with fundraising for OC's main children's hospital. Went full-time at CHOC February 2018 to head independent 60-employee foundation as chief development officer and SVP. Former president of Paragon Charitable Services Group serving clients including The Ronald Reagan Presidential Foundation and The Motion Picture & Television Fund. **RECENT:** Trio of 2020 gifts topping \$1M, for total of \$12.2M. **QUOTABLE:** “For a time, we said we're only going to ask our donors to contribute to our COVID relief fund,” Corbin said in February, noting most of those funds went to families struggling to pay for care. “We felt it was the right thing to do, and it was part of our design to be proactive on the COVID front.”

**RANDY BARTH**

FOUNDER, CEO  
THINK TOGETHER

**WHY:** Runs California's largest nonprofit provider of afterschool and expanded learning programs. Founded in 1997 with a single afterschool learning center in Costa Mesa, has since scaled organization to serve nearly 250,000 students. **RECENT:** During pandemic, worked “to provide all students with a premium education in an uncertain environment.” **NOTABLE:** Started Think Together in 1997 after a gang shooting in Costa Mesa. Co-author of “Think Together, How You Can Play a Role in Improving Education in America.” Serves on various boards and as a senior fellow at UCLA's Luskin School of Public Affairs.

**PAULA TOMEI**

MANAGING DIRECTOR  
SOUTH COAST REPERTORY

**WHY:** Oversees nationally known playhouse that often offers new works and student productions. **RECENT:** During pandemic, performed plays that were streamed online. Offered online professionally filmed play, “Red Riding Hood.” Entirely new initiative to perform outdoors at the Mission San Juan Capistrano with two plays: “American Mariachi” and “You're a Good Man Charlie Brown.” **QUOTABLE:** On reopening, says, “We'll have to meet the audiences at their comfort levels. We need to understand what their appetite is for in-person theatre and that we'll be studying this question for some time. We hope we won't have to socially distance once we can perform inside but will plan accordingly as more information becomes available.”

**DAVID PERRY**

PRESIDENT  
PAGEANT OF THE MASTERS

**WHY:** Oversees Laguna Beach's internationally famous show that annually attracts 225,000 visitors and employs 400 seasonal employees, 30-piece orchestra and more than 100 contractors. **RECENT:** Many online programs during pandemic: #MeetThe Artist highlighted festival exhibitors and their art careers; #TourDePageant featured past pageant re-creations of famous works of art; and foaVirtual, a 3D immersive online gallery experience to explore and purchase artwork from over 120 Festival of Arts exhibitors from the comfort of home. Restarted pageant in July to full crowds at outdoor venue. **QUOTABLE:** “Our hope is to create an enjoyable experience for our guests to reconnect with the art and each other.”

**PAUL FOLINO**

FORMER CHAIRMAN  
EMULEX

**WHY:** Prominent area business executive and philanthropist. Former chairman and CEO of Emulex; current chairman emeritus at the provider of networking solutions for data centers. Former chairman of CoreLogic. **RECENT:** CoreLogic bought for \$6B by Stone Point Capital and Insight Partners, after very public bidding war including CoStar Group. **QUOTABLE:** “The [CoreLogic] transaction is the culmination of our board's extensive review of strategic alternatives, which included engaging with numerous potential buyers.”





# THE FUTURE IS BRIGHT. OUR PEOPLE MAKE IT BRILLIANT.

The University of California, Irvine celebrates this year's OC 500 honorees, especially those who share a connection to our campus. Their talent and commitment have helped make UCI one of the top 10 public universities in the nation — and UCI Health one of the top health systems in California.

Together, we are fiercely dedicated to transforming healthcare and wellness, advancing the American dream, accelerating world-changing research and exploring the human experience.

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**UCI** University of  
California, Irvine

**BRILLIANT FUTURE**  
THE CAMPAIGN FOR UCI



David DeFelice, "Perfect Conditions, California Coast,"  
c. 2019, mixed media, 50 x 40". The Hilbert  
Collection. Courtesy of the Hilbert Museum of  
California Art at Chapman University.

CONSUMER

**MIGUEL GONZÁLEZ**

CO-PRESIDENT, CEO  
NORTHGATE GONZÁLEZ

**WHY:** Son of founders who launched Latin-American focused grocery chain in 1980; now employs nearly 6,000.

**RECENT:** Ranked No. 18 on Business Journal’s annual list of largest private companies with an estimated \$1B in 2020 revenue. Opened 42nd location in June, in South Gate. Includes taqueria, “botica” section for homeopathic remedies and a medical clinic inside the store.

**QUOTABLE:** “Our supermarkets are portals for health and wellness, not only in terms of access to fresh and organic foods, but also in terms of education and providing comprehensive information within our stores,” said brother Oscar González, who serves as co-CEO of the grocer.



**ERIN ADAMS**

CO-FOUNDER, PRESIDENT  
UNICORN TRIBE

**WHY:** Runs fast-growing e-tailer representing a new generation of home shopping networks with its livestream selling via a shoppable app. Also has multiple Facebook groups to maintain its online community, in addition to a web store. Sales in excess of \$10M this year with team of more than 20.

**RECENT:** Started business in 2016 with husband, Chris Adams, who serves as CEO. Couple says they’re in the business of social selling. **NOTABLE:** The Adams originally worked in tech as a hard drive distributor for Western Digital. **QUOTABLE:** “We’re just relatable and we make people feel good about themselves.”



**LORAIN DOWDY**

FOUNDER, OWNER  
COLOURED RAINE

**WHY:** Runs growing cosmetics firm whose playfully vivid shades work well on various skin tones and ages. Brand has co-signs from celebrities such as Rihanna, Gabrielle Union, and Nicki Minaj.

**RECENT:** Sales on upswing during pandemic, and with increased interest in Black-owned businesses. Company is predominantly direct-to-consumer online and is sold at German perfume and cosmetics retailer Douglas GmbH. Currently in talks with a major big-box retailer to bring Coloured Raine to its store shelves. **QUOTABLE:** “We are known for our nontraditional lipsticks and pride ourselves on quality color cosmetics that you can get access to at affordable pricing. That was something that was very important to me.”



**MANDY FRY**

PRESIDENT  
Z SUPPLY

**WHY:** Leads one of OC’s fastest-growing contemporary apparel makers with a portfolio that includes its namesake line, in addition to Z Supply Girls and Z Lounge. **RECENT:** Stopped producing White Crow, Others Follow and Rag Poets lines after the Fall 2020 collections to focus on growing Z Supply business. **NOTABLE:**

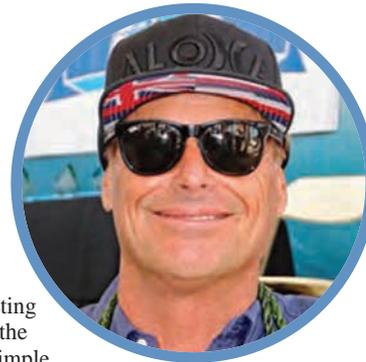
Surfwear vet with résumé that includes founder/president of Amuse Society, Quiksilver/Roxy swim designer and Billabong global creative director.



**BOB HURLEY**

FOUNDER  
HURLEY, KANDUI HOLDINGS

**WHY:** Founded one of OC’s heritage action sports brands in Hurley International. **RECENT:** Co-founded Kandui Holdings last year with CEO Jeff Hurley, Ryan Hurley and Chance King as a platform to buy brands or work with them on design, sales, marketing and other services. Kandui out of the gate bought the IP and assets of Simple footwear and also launched last year technical apparel line Florence Marine X in partnership with two-time world surf champion John John Florence. **NOTABLE:** Started Hurley in 1998 after serving as Billabong USA president. Sold company to Nike in 2002 and was CEO up until 2007 when he stepped down and became chairman of the surfwear brand.



**ANTHONY GEISLER**

FOUNDER, CEO  
XPONENTIAL FITNESS  
IRVINE

**BIO:** Built a buff boutique fitness growth machine. Counts portfolio of 10 cycling, rowing, stretching and other increasingly popular exercise brands, including Club Pilates, CycleBar, StretchLab, Row House. Xponential has grown to more than 1,750 locations in four years, with 2020 systemwide sales topping \$435M through a combination of franchising and acquisitions.

**NOTABLE:** IPO this July, raised \$120M, plus another \$200M in sales of preferred stock to Michael Dell.

**QUOTABLE:** Rapid expansion of fitness brands it buys is “what Xponential does well and that’s what we’ve been able to prove is we can take these brands and scale them across the U.S.”



**SHAWN BUCKLEY**FOUNDER  
JUST FOOD FOR DOGS

**WHY:** Started Irvine firm that's among OC's fastest-growing private companies. Makes food for pets with ingredients fit for human consumption. Aimed to sell 100M meals last year, with more in store for 2021. Saw big pickup in business amid pandemic.

**RECENT:** With Dr. Oscar Chavez, wrote "Big Kibble, the Hidden Dangers of the Pet Food Industry and How to Do Better by Our Dogs." **OC LEADER BOARD, JAN. 11:** "Big Kibble is big business: \$75 billion globally. A handful of multinational corporations dominate the industry and together own as many as 80% of all brands. What's even more shocking is how lax the regulations and guidelines are around these products."

**TYLER WHITEHEAD**CEO  
ARBONNE PBC

**WHY:** Heads Irvine beauty and wellness company, part of Groupe Rocher. Added to portfolio of 10 health, beauty brands following Groupe Rocher's acquisition of Arbonne three years ago. **RECENT:** Succeeded Jean-David Schwartz in top spot earlier this spring after serving as president of Nu Skin Enterprises Inc.'s west region. Has big plans for the business on the digital, international front. **NOTABLE:** Juris doctorate from Willamette University. Bachelor's in political science from Idaho State. **QUOTABLE:** "I see great opportunity to lead the company into new frontiers. I am looking forward to that challenge and see enormous potential today with Arbonne and an incredible future ahead."

**DOUG PALLADINI**GLOBAL BRAND PRESIDENT  
VANS

**WHY:** Action sports industry vet counting more than 30 years in the industry, more than 17 at Vans. Named global brand president in 2016, a position he's now held for five years at a company that is one of OC's largest in the apparel and footwear space.

**RECENT:** Led company through proactive initiatives in 2020 and 2021 that supported diversity and inclusion and support for small businesses. **QUOTABLE:** "We have humbly and sincerely embraced inclusion, diversity and equity, and sought a better understanding of what must be done, internally, in our community, among our fans and globally."

**QUENTIN CARUANA**FOUNDER, PRESIDENT  
MARQUE LUXURY

**WHY:** Leads Irvine firm nabbing a piece of the growing fashion resale market. Business, which launched in 2017, focuses on supplying pre-owned designer goods to retailers. **RECENT:** Growing at a rapid clip via the opening of physical showrooms in the U.S. and overseas, an educational program for buyers and acquisitions.

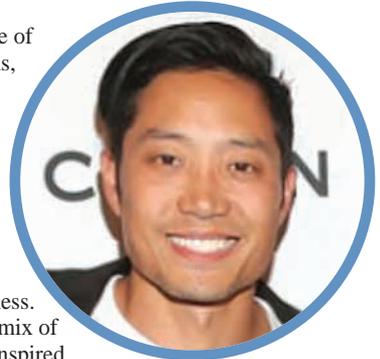
**NOTABLE:** Former president of Irvine's Sage Credit Co., formed in 2003 and which at one point employed more than 600 and grossed over \$100M annually. **QUOTABLE:** "This particular industry, the retail business has been growing at a very rapid pace and it's projected to grow 25 times the rate of retail in the next five years."

**ALFRED CHANG**CO-CEO  
PACIFIC SUNWEAR OF CALIFORNIA  
ANAHEIM

**BIO:** Led reinvention of one of OC's best-known retail firms, and one of OC's largest fashion retailers with a workforce of about 7,400, and some 375 stores. Turned PacSun into one of country's largest "cool kid" brands. Served as president since 2018, with a focus on rebuilding, refocusing business. Shift to a more fashionable mix of streetwear rather than surf-inspired gear, such as in collaborations with much sought after contemporary streetwear label Fear of God. Promotion to co-CEO this year. Has over 20 years of experience in the retail industry, including serving in multiple senior positions since joining the company in 2006.

**NOTABLE:** PacSun generated over \$700M in sales in 2020, representing growth over 2019, despite the pandemic. Digital sales more than doubled in 2020, now representing 50% of the brand's sales.

**QUOTABLE:** Of key trend in industry, says there's "a higher base of authenticity, what a brand means to a consumer and how important it is in terms of your positioning and what you represent."





GREENBERG GROSS LLP



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*-Los Angeles and San Francisco Daily Journals*

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## PIERRE-ANDRÉ SENIZERGUES

FOUNDER, CEO  
SOLE TECHNOLOGY



**WHY:** Former pro skater who founded and owns Sole Technology, the parent of the Etnies, eS, Emerica, Altamont and ThirtyTwo brands. Company maintains standing as OC's largest privately held and still founder-led skate shoe company, also touts biomechanics skate lab Sole Technology Institute. Sole Technology counts about 100 workers and \$50M in revenue. **RECENT:** Largest brand Etnies celebrated 35 in 2021. **QUOTABLE:** "My mind is into skateboarding day and night. There's never a day off thinking about it. I don't know what I would do if I wasn't doing this. I don't have any interest in selling [the company]. I'd rather keep it authentic and real and serve our skateboarding community the best I can with my team."

## ABDUL RASHID

CO-FOUNDER, COO  
AST SPORTSWEAR



**WHY:** Largest vertical apparel manufacturer domestically, handling knitting, cutting, sewing in its Brea facility. Counts 450 workers companywide and 250 locally. Business includes the Bayside, Bayside's Best and Union Made brands. Also makes face masks. **RECENT:** Ramped efforts last year to produce masks early on in the pandemic. Only local company tapped to be part of a consortium of companies around the country last year working with the federal government to produce face masks for front-line workers. **NOTABLE:** Some 500 hands in the U.S. touch one of its finished garments, from the cotton farmer to final consumer wearing one of its completed products.

## KEVIN WULFF

CEO  
MITCHELL & NESS NOSTALGIA CO.



**WHY:** Sportswear industry executive currently leading apparel licensing firm known for its vintage jerseys and other sportswear. Went in with Juggernaut Capital Partners in 2016 to buy Philadelphia-based Mitchell & Ness. Runs company out of Irvine. **RECENT:** Company celebrated 115 years in 2019. Spent career building big business, most recently with Asics America Corp. Credited with taking company from \$680M to over \$1B in 2014. **QUOTABLE:** Volleyball and basketball player. "I can't understate that the key to success wherever I've been, whether I was at Nike or Asics or hopefully now at Mitchell & Ness, is great teams. Great teams in this industry are how you win."

## CAROL DOBBS

FOUNDER, OWNER  
C DOBBS



**WHY:** Runs the specialty boutique C Dobbs in Newport Beach's Corona del Mar Plaza. Price points at retailer ranging from \$60 to \$1,000, with focus on European and local designers across men's and women's apparel, jewelry, accessories and footwear. **RECENT:** Amid downtime from pandemic, started her own apparel line, with plans now to ramp in-store customization services. Also helped start an organization, Bleed the Same, to speak out against racial injustice. **QUOTABLE:** "When COVID hit and we had to close almost three months, I was pondering what do I do? I have this background of creativity and I'd always wanted to get into my own [apparel] line but I've always been so busy. Being at home, eating everything out of the refrigerator, I thought, 'Do something constructive' and I started buying fabric and changing things up."

## MANNA KADAR

FOUNDER, CEO  
MANNA KADAR COSMETICS  
IRVINE



**WHY:** Beauty guru who founded multi-brand business in 2011. One of OC's fastest-growing private companies several years running. Adding 20K new doors with focus on affordable luxury at Five Below, Big Lots. Created line of antibacterial face washes, toners and hand sanitizers last year. Other product lines include Manna Kadar Bath & Beauty, Haute Dog, Mason Man Skincare and Beauty & the Bump, which are sold at retailers including Ulta and Urban Outfitters, as well as beauty box subscription companies and home shopping networks.

**NOTABLE:** Part of Amazon's Influencer Program, allowing Kadar to livestream products to a wide audience. Recent livestreams focused on Amazon products she used to organize her kitchen. The hour-long stream went through her kitchen pantry, drawers and cupboards. Other livestreams have focused on plenty of hair and beauty tutorials, mixed in with more personal streams such as charcuterie boards and Easter décor.

**QUOTABLE:** "One of our mantras to the brand has [always] been affordable luxury and we have various lines of business that funnel into that."



# Tocqueville

ALEXIS DE TOCQUEVILLE SOCIETY

ORANGE COUNTY UNITED WAY

Setting the standard for charitable giving, Orange County United Way's Alexis de Tocqueville Society members are at the forefront of improving lives through generous financial gifts, volunteerism, and advocacy.

Special gratitude goes to our President's Circle members for their support in leading the fight for equity and improving lives in our community.

These visionaries share a profound commitment in helping our students succeed, our families gain financial security, and our homeless neighbors find a place to call home.

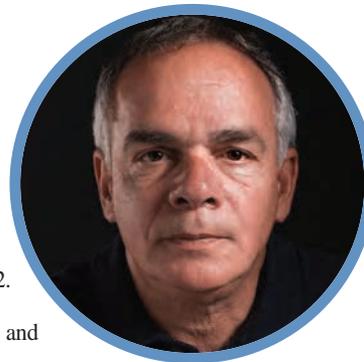


Thomas and Bonnie Abate	Delia Delgado	Lisa and Mark Locklear	Bill Rooklidge
Alexandra and Alan Airth	Patrick and Hon. Diane B. Dixon	The Masson-Shaffer Family Foundation	Steve and Kimberly Roush
Kristen Allison	Kevin Dorse	Paula Mattson	Jim Scheinkman and Cindy Eden
Steve and Kristy Allison	Laurie and Scott Dubchansky	Gene and Rose Mergelmeyer	Donna and Ernest Schroeder
Ben and Charmaine Alvarado	Kari and Chris Durham	Norman and Suzanne Metcalfe	Denise Schuler
Greg Amparano	Bruce and Anne Fettel	Michael L. and Nancy B. Meyer	Erin Schwarz
Dawn and Charles Antis	Vito and Mary Francone	Michele Miller	Mitchell Shenkin
Lawrence R. and Sandra C. Armstrong	Artyn and Max Gardner*	Ann and Jim Morrison	Karen and Scott Sherman
Greg and Cathleen Backley	Adrian and Kristen Griggs	Susan D. Morrison	Katherine Sieck
Shirin Behzadi and Perzan Irani	The William, Jeff and Jennifer Gross Family Foundation	Linda and Mike Mussallem	John and Renee Simonis
Dennis and Carol Berryman	Hee-Won and Craig Grosvenor	The Myers Family Foundation	Brenda Springer
Fred A. and Diane F. Blum	Casey and Leah Hannegan	Peter and Gail Ochs	The Nancy and Geoffrey Stack Family Foundation
Sherrri Bovino	Donna Hansen	Kevin O'Grady and Nella Webster O'Grady	Linda and Randall Takahashi
John and Tasia Boyle	Mark and Laurie Henigan	The Stephen G. Oswald and Regina Oswald Foundation	Peter and Mary Tennyson
Marlo Brooke	Peter and Susan Hitch	Kenneth Parker and Carol Normandin	Jeffrey Thomas
Gregory Burden	Sinan Kanatsiz	Susan B. and Dennis Parks	Shelley Thunen
Darryl and Karla Button	John and Melinda Kehl	Maya Patel	Dawn Trautman
Nicole Carrillo Hall	Rick and Anne Keller	Peggy Penjoyan	John Valenta
Antonella Castro and Bradley Schumacher	Jackie and Steve Kelley*	The Podlich Family Fund	Rao and Rani Varanasi
Kathy and Joe Celentano	Robert and Anne Kent	Tony and Colleen Premer	Megan and John Waldeck
Steve and Cinda Churm	Nandakumar and Mrudula Jyothi Cheruvatath	Shirley and Steve Quackenbush	Gary Wescombe
Timothy and Madeleine Clyde	Sarah and Randy Lake	Michael Ray	Larry Wood
Victoria and David Collins	Marc and Tina Ley	Win Rhodes	Richard and Lisa Yates
Roger and Marjorie Davisson	Kenneth and JoAnn Lickel	Tom Rogers and Sally Anderson	Peter and Cindy Zofrea

\*President's Circle Co-Chairs

Listing as of October 2021. 7 President's Circle members have elected to remain anonymous.

To learn more and to join the President's Circle, contact  
Tami R. Thompson | Vice President, Development | [TamiT@UnitedWayOC.org](mailto:TamiT@UnitedWayOC.org) | 949.263.6163

**JOHNNY SCHILLEREFF**FOUNDER  
THE HEART SUPPLY**WHY:** Started The Heart Supply with wife, Kori Schillereff, after leaving Element Skateboards, which he also founded.**RECENT:** Struck deal with Target to get The Heart Supply collection into all Target stores nationally and online. Had two riders compete in the Olympics; Jagger Eaton medaled. **NOTABLE:** Started Element in 1992, growing the business to about \$40M in sales before selling it to Australia-based Billabong International Ltd. Sales continued to grow to more than about \$200M annually. The Billabong group sold to Boardriders in 2018. **QUOTABLE:** "I left [Element] knowing I wanted to build a company that encompassed the true goodness of skateboarding."**SARAH LUNA**PRESIDENT  
XPONENTIAL FITNESS**WHY:** Helping lead one of the largest fitness chains in the country, whose parent company oversees a variety of cycling, rowing, stretching other increasingly popular exercise brands. **RECENT:** Named to post in January. Tapped to ensure Xponential, which went public in July, enlists the right franchise partners to help grow business, and to assist franchisees with reopening and being in compliance with local health and safety regulations. **NOTABLE:** Got start in the fitness industry as a Pilates instructor in Chicago. **QUOTABLE:** "We were one of the first in the fitness industry to go virtual. So one day we were operating brick-and-mortar and the next day we were virtual. We didn't skip a beat."**STEVE SCHULZE**CO-FOUNDER, CEO  
NÉKTER JUICE BAR**WHY:** Next-generation juice concept aiming to be the Starbucks of their category. Firm in the midst of an aggressive growth strategy through franchising that has it tracking to end the year with over \$111M in systemwide sales, just under 200 locations and a new product line readying for launch. **RECENT:** HQ move from Santa Ana to Costa Mesa in June. **QUOTABLE:** "There's been a seismic shift in how people view health and wellness. Fast forward to today and I think that health and wellness is top of mind for almost anybody, and I don't think that idea of being healthy is ever going to go out of style."**CLAUDIA MARQUEZ**COO  
GENESIS MOTOR NORTH AMERICA**WHY:** Currently leads Genesis Motor North America as luxury automaker's COO and top ranking official. Responsible for sales, marketing and growth of Genesis brand. Succeeded Mark Del Rosso. **RECENT:** Appointed COO Oct. 1. Came to Genesis from Hyundai Motor Mexico, where she was CEO since 2019. **QUOTABLE:** "Genesis is an ambitious brand, putting the customer at the forefront of everything we do. With our growing product lineup, our foray into electrification, and a growing network of retailers and standalone facilities in communities across the region, there is no better time to be joining the Genesis brand."**ED THOMAS**CEO, PRESIDENT  
TILLY'S**WHY:** Runs nearly 250-store apparel chain, one of OC's largest, rooted in the action sports and streetwear space. **RECENT:** Notched record August quarter above anything the company's reported since going public in 2012. Thomas attributes gains to pent-up customer demand, stimulus checks and stores' merchandise assortments.**QUOTABLE:** "We feel that e-commerce will continue to grow in a good way and at a decent pace, even with the stores fully operating. This still remains a pretty significant opportunity for that business to become bigger."**JAMES CONROY**CEO, PRESIDENT  
BOOT BARN HOLDINGS**WHY:** Runs western-inspired, work wear retailer that's defied industry trends and continues to expand. Company, which started in 1978 with a 2,000-square-foot store in Huntington Beach, now publicly traded behemoth worth about \$2B. Sales largely from in-person shopping, not digital. Typical Boot Barn customer likes coming into the store two or three times a year to feel the different skins on a pair of boots or try on their jeans, he says.**NOTABLE:** New flagship store unveiled in Orange; design bears elements that will be rolled into new and remodeled stores moving forward, as the 271-store chain looks to open around 30 stores annually, with an average size of roughly 11,000 to 12,000 square feet.**QUOTABLE:** "We have four pieces of the strategy, four pillars. Our focus is to just execute relentlessly on building new stores, developing our own exclusive brands, continuing to add omnichannel capabilities and drive same-store sales growth."



**TILLYS**

# Congratulations on being selected in the OC 500, you two deserve it!



**Ed Thomas**

*President and  
Chief Executive Officer, Tillys*



**Mike Henry**

*Chief Financial Officer, Tillys*

All of us at Tilly's Life Center are beyond proud that Ed and Mike have received this well-deserved recognition. Their tireless effort, boundless positivity, and unshakeable commitment to our mission continue to be an inspiration to us all.

At Tilly's Life Center, we're dedicated to making a difference in the lives of today's teens. Our proactive approach teaches social and emotional skills that empower adolescents to overcome obstacles, navigate daily challenges, and unlock their true potential.

**For more information about our program, visit [tillyslifecenter.org](https://tillyslifecenter.org).**



**JEFFREY GUYTON**

CEO, PRESIDENT  
MAZDA NORTH AMERICAN  
OPERATIONS

**WHY:** Oversees Mazda's North American Operations in Irvine, Mazda Canada in Toronto, Mazda Colombia in Bogotá and Mazda Motors de Mexico in Mexico City. Duties include oversight of production facilities in Mexico and Alabama. **RECENT:** Named to top spot in June. Mazda ended 2020 with sales growth. Market share in the U.S. grew to 2.7%. In midst of updating design of dealerships and readying for fall launch in California of the MX-30 electric crossover—Mazda's first EV in the U.S. **NOTABLE:** CEO and president of Mazda Motor Europe before joining Mazda North American Operations in 2019 as president.

**DAVID WILSON**

OWNER, CEO  
WILSON AUTOMOTIVE

**WHY:** Owns one of the largest auto groups in the United States. Owns 17 dealerships, employing more than 2,000 people. First local dealership he worked at was Toyota of Orange in early 1980s. Bought 25% of company and became general manager, boosting annual sales from 2,500 vehicles to 8,000 within two years. **RECENT:** 2020 sales rose 10% to \$2.5B. **NOTABLE:** Supports Chapman University, Orangewood Foundation, SchoolPower in Laguna Beach, and Boys & Girls Clubs. Horatio Alger Award winner in 2005. Family of seven didn't have indoor plumbing until he was 14.

**JULIAN MACK**

CEO  
JUST FOOD FOR DOGS

**WHY:** Laguna Beach resident who this year stepped away from his position at Greenwich, Conn.-based L Catterton, the largest consumer-focused private equity firm in the world, to take top spot at one of Orange County's faster-growing retail companies. **RECENT:** A new funding deal—either in the public or private markets—should soon take place, Mack told the Business Journal in July. "All options are on the table," he said. **NOTABLE:** In 2018, he and his wife started work on a sanctuary in their hometown for senior and disabled dogs in need of homes. Called Unconditional, Laguna Canyon Road site set to open next year.

**MOTI FERDER**

CO-FOUNDER, CEO  
LUGANO DIAMONDS & JEWELRY

**WHY:** Started, runs Newport Beach fine jewelry brand. Has boutiques in Newport Center, Aspen and two locations in Florida. Big on the social and charitable scene with Lugano typically hosting/sponsoring more than 70 events annually. **RECENT:** Westport, Conn.-based Compass Diversified this summer bought a 60% stake in the business. Expected to bring expansion into new markets, more stores locations and sponsorship deals. **QUOTABLE:** "We want to stay in, and capture that upper-end market," he said of investment's impact. "We want to redefine that space, as a very high-end jeweler."

**SHARIE HENDRICKS**

OWNER  
LAGUNA CANDLES

**WHY:** Launched her family-run company from her home in 2003, and later opened her retail and manufacturing space on Laguna Canyon Road. Black-owned business offers a variety of homemade candles, which are hand-poured and handcrafted, plus fragrances and room sprays. **NOTABLE:** Some candle collections offered by the company are poured in unique glass containers made by local artists; the Heirloom Artisan candles, currently running \$150 each, have proved to be among its best-known offerings. **QUOTABLE:** "Turmoil of 2020 helped company's sales, visibility. "Many consumers have wanted to make more conscious decisions in the types of businesses they support."

**CHARLOTTE KATONA**

COO  
WOODEN WICK CO.

**WHY:** Public face of fast-growing candlemaker. One of several candle companies calling Orange County home; industry saw record growth amid stay-at-home orders. **RECENT:** Sales for the retailer, which describes itself as a do-it-yourself candle company, jumped 500% in 2020, prompting the firm to secure a much larger manufacturing facility and move its headquarters from Laguna Hills to 43,400-square-foot spot in Irvine. **QUOTABLE:** "The candle industry as a whole was up about 30% last year, and we definitely saw that with our sales growth," she said. "We attribute part of that to people staying home and picking up new hobbies."



# A global pandemic, nationwide closures, remote learning... and that was month one.



**Dr. Michael Thomas**  
*President, Concordia University Irvine*  
*OC 500 Influencer*

Inaugurated in February 2020, our fifth president of Concordia University Irvine, Dr. Michael Thomas, leads by keeping students and their families at the forefront. He succeeded in increasing undergraduate enrollment year over year even in the face of the COVID-19 pandemic. With a deep commitment to the Lutheran tradition, along with extensive experience across multiple disciplines, including curriculum, faculty and staff development, governance, enrollment, and student life, Dr. Thomas is enhancing student engagement as he leads Concordia into a new era.



Check out the podcast President Thomas co-hosted with CUI's student body president at [cui.edu/podcast](http://cui.edu/podcast).

**LAUREEN ASSEO**FOUNDER, CO-CEO  
FRESH N' LEAN

**WHY:** Started, bootstrapped organic meal delivery company out of her one-bedroom apartment. Now runs \$100M business with brother Thomas Asseo as it eyes \$1B status.

**RECENT:** Opening 170,000-square-foot warehouse in Las Vegas, set to be up and running in early 2022 with some 650 new jobs added to area.

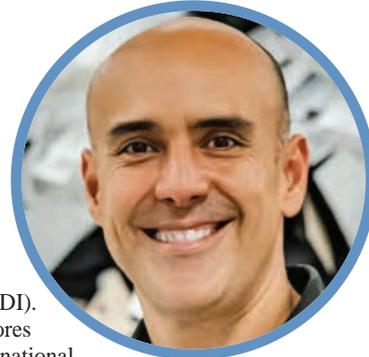
Company said new facility could produce more than 3M meals weekly with annual sales of \$1.5B possible. **NOTABLE:** Company's marketing has relied on partnerships with athletes to help position the brand in a unique way. Recently partnered with Los Angeles Dodgers World Series Champion Justin Turner. Also works with professional tennis player Sloane Stephens, race car driver Danica Patrick, pro surfer Billy Kemper.

**FRANCISCO MORALES**CO-FOUNDER, CEO  
5.11 TACTICAL

**WHY:** Leads one of the largest local apparel companies with an employee count of 1,000 companywide (100 in OC) and more than 70 stores. Co-founded in 2003 with Dan Costa. Owned by Connecticut-based Compass Diversified Holdings (NYSE: CODI).

**RECENT:** Company eyes 350 stores domestically in the long run, international opportunity. Parent company mulling spin-off, IPO for Irvine firm.

**QUOTABLE:** "We think the days of you just have to go to a store to pick something up, that model is in trouble. If you are a retailer that provides education, provides an experience, I think there is a big void in the market for that."

**MICHAEL HENRY**EVP, CFO  
TILLY'S

**WHY:** Longtime OC CFO who got his local start at Deloitte & Touche before going in-house to PacSun. Later Quiksilver and now Tilly's. Has balanced the books and navigated tough times at companies undergoing layoffs and other cost-cutting measures to stave off bankruptcy to, most recently, a global pandemic. **RECENT:** Helped guide

Tilly's through COVID to record-breaking quarters. Honored with the CFO Lifetime Achievement Award by the Business Journal for his work.

**QUOTABLE:** "It's just constant learning. You're never done learning. Even today, I learn from examples and the comments of our board members who are more experienced than myself, or our CEO [Ed Thomas] and other colleagues within Tilly's or former places I've been. You never stop learning. You never stop growing."

**DON DICOSTANZO**CO-FOUNDER, CEO  
PEDEGO ELECTRIC BIKES

**WHY:** Runs William Shatner-approved electric bike company. No. 1 electric bike company in the U.S. seeing sales gains amid the pandemic. **RECENT:** Ranked No. 5 among mid-sized companies in this year's Business Journal list of the fastest-growing private companies with growth for the year ended June 30 of 180% to about \$58.4M.

Seeing big successes in retail with goal to open 1,000 stores, eyeing IPO.

**QUOTABLE:** "We have discovered that the secret to our growth is to open new retail locations. It's like a shoe store where you cannot try them online. You have to go into the store to see if the shoes fit. We want to make sure customers have a place to try electric bikes before buying them."

**TRAVIS OLIVER**CEO  
FIGPIN COLLECT AWESOME

**WHY:** Co-founded and heads fast-growing collectible pin company, which saw sales jump 233% in the 12 months through June to \$14.7M. Holds 30 licenses, including Disney and Warner Bros. Company's pins are larger than average—at about 3 inches tall—to accommodate the details of many characters. **RECENT:** Released first NBA lineup in November. MLB slated for first-quarter 2022.

Company has sights set on international growth. **NOTABLE:** Invested \$700,000 to start company, didn't take a salary for several years. Company became profitable in 2019.

**CLAUDE TELLIS**CEO  
NATURADE

**WHY:** Leads affordable, plant-based nutrition company aimed at underserved demographics.

**RECENT:** Joined Costco shelves in February to become big box's first Black-owned nutrition vendor. Honored by the Business Journal with an Innovator of the Year Award in September. Company set to be featured in "Hungry for Justice"

documentary. **QUOTABLE:** "A burger and fries at McDonald's is \$5.50. The incentive for fast-food companies is to prey on the poor and uneducated. We have a cleaner, cheaper product on Amazon."



# HILBERT MUSEUM

OF CALIFORNIA ART

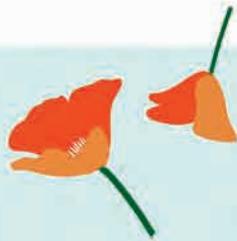
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CHAPMAN UNIVERSITY

**MICHAEL CANNAVO**CO-FOUNDER  
SUPER73

**WHY:** With Aaron Wong, LeGrand Crews, in 2016 started Irvine-based company whose entry-level bike is priced at about \$1,400. Built an ultra-loyal following around its bikes, which are an eco-friendly mashup of a dirt bike and motorcycle. **RECENT:** Closed on a \$20M round of funding. Entered the pandemic with 26 employees and now has more than 100. Moving to larger HQ in Irvine. **NOTABLE:** Got social media fame by making Star Wars speeder bikes, taken for a ride through Manhattan by costumed riders. **QUOTABLE:** “It’s cliché, but connecting with your community is one of the most important things we’ve done out of everything we’ve accomplished.”

**ARNE ARENS**CEO  
BOARDRIDERS

**WHY:** Oversees the largest portfolio of action sports brands in the world with sales estimated to be in excess of \$1.9B and a workforce of about 10,000 globally. Brands include Quiksilver, Roxy, DC Shoes, Billabong, RVCA, Element and VonZipper. **RECENT:** Tapped to head the business in March, succeeding Dave Tanner who had been leading the company since 2015. **NOTABLE:** Sportswear vet. Came to Boardriders from VF Corp.’s (NYSE: VFC) The North Face brand where he served as global brand president. Worked at Nike for nearly eight years as sportswear sales director, football general manager and other positions in different parts of Europe.

**JONI ROGERS-KANTE**FOUNDER, CEO  
SENEGENCE INTERNATIONAL

**WHY:** Started beauty and skincare company that counts a network of more than 500,000 sellers based out of nearly 20 countries. Company is Orange County’s largest woman-owned business with an estimated \$1B in annual revenue. **RECENT:** Ranked No. 18 by 2020 sales on OC’s list of the largest private companies locally. **NOTABLE:** Moved to California at 15. Worked at Mary Kay. Rogers-Kante started SeneGence in 1999, linking with chemist to create LipSense liquid lipstick. Company has gone from startup in a Newport Beach mobile home to 200,000-square-foot Foothill Ranch campus. Company also has a 255,000-square-foot Corona plant and 744,448-square-foot corporate camps in Sapulpa, Okla.

**JOHN RIDDLE**CEO, PRESIDENT  
HOWARD’S

**WHY:** Leads growing La Habra appliances retailer. **RECENT:** Bought Midway Home Solutions of Victorville in June in the retailer’s first acquisition, opening up the High Desert market to Howard’s and adding 41 employees, a 45,000-square-foot showroom and 50,000-square-foot distribution center. More store openings, NorCal expansion possible before growing out of state. May consider outside investment or IPO to scale business faster in the future. **NOTABLE:** Industry vet who retired from LG Electronics in 2018 as senior vice president of home appliances. A year later came out of retirement to lead Howard’s. **QUOTABLE:** “Howard’s, for me, is full circle having grown up in the industry and grown up in a family business. It’s a really nice way for me at the end of my career to have this chapter.”

**INTERMISSION OVER**

OC’s arts patrons are eager for the return of indoor productions; many OC500 entries cited Costa Mesa’s arts hub as the place they were most looking forward to returning to this year.

“I am looking forward to sitting in the **Segerstrom Center for the Arts** surrounded by the music of the **Pacific Symphony**,” said **Reveille’s Brenda Springer**. “The arts are so important to me to stay inspired—it reignites my creativity.”

“I’m excited to revisit **South Coast Rep**,” said **Keller Anderle’s Jennifer Keller**. “I’ve had season tickets to both stages for over 30 years. The hardest part of COVID for me has been missing the arts: SCR, The Broadway Series at SCFTA, **L.A. Opera**.”

“Having been on the board at the Performing Arts Center for more than 25 years, I am especially excited to see it start to reopen,” added **Woodside Credit’s Roger Kirwan**.

Similar comments were echoed by **Latham & Watkins’ Michele Johnson**, **First Foundation’s Rick Keller**, and **MGO’s Brad Hall**, among many others.

Expect a good time upon your return, says Segerstrom Center for the Arts Chairwoman **Jane Yada**.

“In September, we held our breath as we opened our **Renee and Henry Segerstrom Concert Hall** for the first time, with a full Pacific Symphony Orchestra and to a full crowd,” Yada said.

“It was emotional for the artists, musicians, staff, board, and audience members. And we had a blast!”

Some OC500’ers can’t wait until next year.

**Joe Duran** said he’s most looking forward to the new **Orange County Museum of Art**, which opens in October 2022.

“It’s absolutely beautiful and immersive architecturally and elevates all of Orange County,” the **Goldman Sachs** exec says.



Phil Dike, "Shore Pageant," c. 1970, watercolor, 27 x 22". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.

EDUCATION

**MICHAEL BEALS**PRESIDENT  
VANGUARD UNIVERSITY

**WHY:** 10th president of Costa Mesa school. Since coming aboard in 2013, overseeing 12-building project near OC fairgrounds campus as part of the school's master plan to increase enrollment. Counts about 2,100 students; 30,000 alumni. **RECENT:** Imagine Campaign raised \$13M and counting. First phase included Waugh Student Center. Current work will build a brand new athletics and academic facility. **QUOTABLE:** "As a university, we build into people's lives, and the Imagine Campaign is a way to invest in our students today and for years to come," he said of the campaign and campus expansion.

**ANTHONY LEE**CEO, PRESIDENT  
WESTCLIFF UNIVERSITY

**WHY:** Private institution in Irvine counts more than 3,000 students, on rapid expansion push. **RECENT:** Completed acquisition of Western State College of Law, paving the way for the law school to rebuild its student population after several years of uncertainty. Added new preparatory school for high-school students. **NOTABLE:** Western State has produced more than 150 California judges and about 15% of Orange County's public defenders and district attorneys. **QUOTABLE:** "Western State has the richest history in law in Orange County. It's the county's oldest law school with more than 11,000 graduates, the majority of whom work and live in Southern California. Its footprint is instilled in the fabric of the community."

**MICHAEL THOMAS**PRESIDENT  
CONCORDIA UNIVERSITY IRVINE

**WHY:** Named fifth president of the private Lutheran institution. Took over for former president Kurt Krueger on Jan. 1. Spent 15 years at sister school Concordia University Portland. **RECENT:** Completed its "Forward in Faith" campaign in February, which exceeded \$100M, making it the largest fundraising event in CUI history. The university will apply the funding toward building new facilities, scholarships, academic programs and endowment. **QUOTABLE:** "To witness donors place their confidence in our academic tradition and in our Concordia family in this way is both remarkable and historic," he said. "While some of our students and their families face [pandemic-related] difficulties, it's our hope that this campaign will strengthen our ability to support them."

**TOM TURK**DEAN, ARGYROS SCHOOL  
OF BUSINESS AND ECONOMICS  
CHAPMAN UNIVERSITY

**WHY:** Oversees one of the top business schools in the county, which celebrated its 20th anniversary of Argyros backing in fall 2019. Named dean in 2017, after working as a Chapman instructor since 1992. Authored numerous published papers on mergers, corporate governance and compensation. **RECENT:** Launched a Masters of Science in Real Estate (MSRE) program in July. **QUOTABLE:** "There has never been a more important time, or a more opportune time, to become a part of the real estate industry in Southern California," Turk said. "We designed this program for people who want to make a real impact on the economy and how people live their lives."

**HOWARD GILLMAN**CHANCELLOR  
UNIVERSITY OF CALIFORNIA, IRVINE  
IRVINE

**BIO:** Oversees 56-year-old public university with more than 37,600 students, over 25,800 employees including medical center staff. "We are essentially a city of 50,000 or 60,000 people," Gillman told the Business Journal in December, when he was named an executive of the year, in the educational sector. UCI contributes about \$5B to the Orange County economy every year.



**NOTABLE:** Oversaw back-to-campus plan for new school year.

**QUOTABLE:** On UCI's relevance during the pandemic, said "you understand in the abstract the value of great universities. But sometimes moments occur when you realize the entire country is depending on a specialized group of people to respond. That, of course, includes our health system, but also our researchers who are part of the process of understanding this virus, and everyone else that had reliable knowledge to bring to bear."



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Cal State Fullerton

**CHIP ESPINOZA**

INTERIM PROVOST  
DEAN OF STRATEGY & INNOVATION  
VANGUARD UNIVERSITY

**WHY:** Expert of generational diversity in the workplace. Author on books about managing millennials. Named top 15 Global Thought Leader on the Future of Work by the Economic Times.

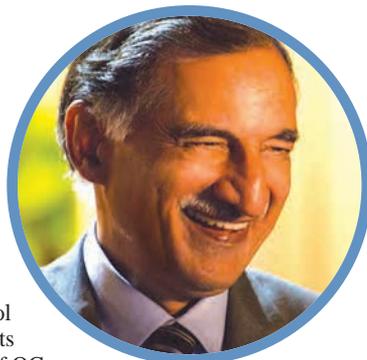
**RECENT:** Named interim provost.  
**OC LEADER BOARD, JUNE 21:**

“Less than a third of all family businesses successfully transition from the first generation to the second generation and a mere 13% survive from the second to third generation ... only 15% of family-owned businesses had a formal succession plan in place. It is important to identify where the reluctance comes from and address it with the next generation because demographic metabolism is real.”

**ANIL PURI**

DIRECTOR  
CSUF WOODS CENTER FOR  
ECONOMIC ANALYSIS AND  
FORECASTING

**WHY:** 40+ years a Titan, including dean of business school from 1998-2016. Spearheaded \$50M capital campaign that led to Mihaylo College of Business and Economics, biggest in state. School now renamed. **RECENT:** Conducts quarterly review of expectations of OC executives, results posted in Business Journal. Recent surveys suggest optimism on rebound after pandemic-driven recession, though job growth lagging. **QUOTABLE:** Said at end of March that it “appears that more than a third of the businesses are already operating at or above the pre-pandemic level,” with many others expected to reach that point later this year.

**SRIDHAR SUNDARAM**

DEAN, COLLEGE OF BUSINESS  
AND ECONOMICS  
CSUF

**WHY:** New dean at the largest business school in California, and fifth largest in the United States. It offers a range of business classes to some 9,000 students.

**RECENT:** Began position in July, took over from Morteza Rahmatian, who had served in the role, initially on an interim basis, since 2016. **NOTABLE:** Served as the Tiedemann-Cotton Dean of the Kate Tiedemann School of Business and Finance and campus dean for the Muma College of Business, both at the University of South Florida. **QUOTABLE:** “I see the impact we can have on this large and diverse student body and it’s life-changing.”

**JIM DOTI**

PRESIDENT EMERITUS  
CHAPMAN UNIVERSITY

**WHY:** Noted economist; biannually issues economic forecasts, which are among the nation’s most accurate predictors of gross domestic product, with colleague Raymond Sfeir. Former president of OC’s largest private university. **RECENT:** He and fellow Chapman economists questioning state’s research indicating that high home costs are driving residents out of California. Argues high taxes are more to blame. **OC LEADER BOARD, AUG. 30:** “If California’s recent domestic migration annual outflow of 261,000 people to other states is a result of high taxes and regulation, then that suggests the state needs to give careful scrutiny to reducing taxes and regulation.”

**MATT PARLOW**

DEAN  
FOWLER SCHOOL OF LAW  
CHAPMAN UNIVERSITY

**WHY:** Going on seven years as dean of school named after longtime Chapman benefactor Dale Fowler. Also serves as Donald P. Kennedy Chair in Law. **RECENT:** Keynote speaker at Business Journal’s General Counsel of the Year ceremony in November 2019. **NOTABLE:** Previously Associate Dean for Academic Affairs and a Professor of Law at Marquette University Law School, where he taught Property, Land Use, Legislation, Urban Redevelopment, and Professional Sports Law—with Major League Baseball Commissioner Emeritus Bud Selig. Holds a J.D. from Yale Law School, where he was an editor of the Yale Law and Policy Review.

**DANIELE STRUPPA**

PRESIDENT  
CHAPMAN UNIVERSITY  
ORANGE



**BIO:** Leads OC’s largest private university with nearly 10,000 students, more than 80% receive grants or scholarship aid. About \$400M endowment. Planning a full return to in-person instruction in the fall with no options for 100% virtual learning.

**NOTABLE:** At end of April, said students, faculty and staff coming to campus in the fall would be required to be fully vaccinated for COVID-19. Joined University of California, Irvine and California State University, Fullerton in the requirement.

**QUOTABLE:** “Our goal is to move toward a Chapman Experience that is closer to what we had before the pandemic, with only minimal social distancing, our facilities being open, the ability to move freely around campus, where guests are also welcome.”



#4

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CHAPMAN  
UNIVERSITY

Argyros School of  
Business and Economics

**BRIAN HERVEY**

VICE CHANCELLOR,  
UNIVERSITY ADVANCEMENT  
UCI

**WHY:** Tapped in 2016 to lead fundraising for the public school, with \$1B endowment. Manages more than 100 staff members; responsible for current \$2B funding push with nearly half of funds committed; 40K engaged alumni.

**RECENT:** \$66.7M on 24 gifts to UCI in 2020. School was OC's largest recipient of charitable giving last year. **NOTABLE:** Prior to joining UCI, led successful multimillion-dollar fundraising campaigns at Scott & White Healthcare Foundation as VP for philanthropy and communications.

**QUOTABLE:** "Our donors wanted to help people," Hervey said in February. "Things like student support, basic scientific research—there were a lot more gifts in those areas. People gave from the heart to support the community during a difficult time."

**STEVE GOLDSTEIN**

VICE CHANCELLOR OF HEALTH AFFAIRS  
UCI

**WHY:** Leading the development of several substantial healthcare projects for UCI, including Susan and Henry Samueli College of Health Sciences, formed in 2017 with a cornerstone gift of \$200M, largest in UCI's history. **RECENT:** Received green light for a long-awaited medical center on the north side of its Irvine campus. **NOTABLE:** The \$1B complex, UCI Medical Center Irvine, will hold specialty hospital with emergency and surgery departments and an outpatient center, and will join previously announced \$221M center for advanced care. **QUOTABLE:** "World-class care is going to happen now at one proximate site."

**JEAN GONZALEZ**

OWNER  
SOUTH COAST COLLEGE

**WHY:** Runs private, for-profit technical college in Orange. Offers certificates for career preparation in court reporting and medical assistant careers, and a paralegal Associate of Arts degree. Produces more court reporters than any other school in California. **RECENT:** School is a finalist to receive the Better Business Bureau's Torch Award for Ethics in the Pacific Southwest region. **OC LEADER BOARD, JULY 19:** "COVID-19 happened. South Coast College had one week to convert to an online school, and it still produces California court reporters. Life is never easy. Business is never easy."

**ED FEASEL**

PRESIDENT  
SOKA UNIVERSITY OF AMERICA

**WHY:** Leads Aliso Viejo-based private institution, with 103-acre campus just 2 miles from the Pacific Ocean. Close to half of its roughly 400-student undergrad population made up of international students. Served as COO and EVP prior to current role. **RECENT:** Named the second president of Soka in July 2020. Succeeded Daniel Habuki, who retired in June 2020 after 27 years of service. **NOTABLE:** Soka ranked No. 28 on U.S. News & World Report's 2021 Best Liberal Arts Colleges list.

**DAVID PYLE**

CEO, AMERICAN CAREER COLLEGE  
EXECUTIVE CHAIRMAN  
WEST COAST UNIVERSITY

**WHY:** Founder of a vocational college and a for-profit university that specialize in healthcare training programs. Has five SoCal campuses and some 5,000 students. Also has locations in Florida and Texas. Longtime area philanthropist.

**RECENT:** Family group taking over ownership of the Balboa Fun Zone in Newport Beach. Has pledged to restore the mixed-use entertainment property on the Balboa Peninsula waterfront to its former glory. **NOTABLE:** Pyle family made local headlines last year near the onset of the pandemic when they gifted more than \$1.6M to workers at some of their favorite area restaurants and other community members in need.

**FRAMROZE VIRJEE**

PRESIDENT  
CALIFORNIA STATE UNIVERSITY,  
FULLERTON

**BIO:** Largest CSU system institution with over 40,000 students, operating budget of nearly \$500M. Virjee oversees operations and its more than 3,500 educators.

**NOTABLE:** In March 2020, CSUF launched a new fundraising campaign to raise \$200M by 2025. Dubbed "It Takes a Titan," it marked the first-ever campus-wide campaign at the 64-year-old school. Received nearly \$50M earlier this year from sale of buildings it owned in the Irvine Spectrum. Another \$40M donation in June from MacKenzie Scott.

**QUOTABLE:** "There are countless Titans who I think of as heroes, and all of them—faculty, staff, students, and alumni—are, exactly that: Heroic in how they continually lift up others through education, inclusion, equity, and civic engagement."





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Congratulations to Westcliff President, Dr. Anthony Lee, for being recognized as a member of the OC500 Influencers, driving economic growth and innovation in Orange County.



**JEFF GOAD**

PROFESSOR AND CHAIR,  
DEPARTMENT OF PHARMACY,  
PRACTICE  
CHAPMAN UNIVERSITY SCHOOL  
OF PHARMACY

**WHY:** Inaugural chair of Chapman's pharmacy school, based at the Rinker Health Sciences Campus in Irvine and founded in 2013 to develop the next-generation of pharmacists. For over 20 years, has maintained a practice in travel health clinics and immunization services. **RECENT:** One of 16 health experts appointed to the California COVID-19 Vaccines Guidelines Drafting Workgroup in 2021. **QUOTABLE:** "During future pandemics, health systems must implement facility safety protocols rapidly and switch to billing for responsible manner. Technology will need to advance quickly to allow seamless at-home monitoring of everything from blood pressure to asthma."

**MARIO LEONE**

DIRECTOR  
RALPH W. LEATHERBY CENTER FOR  
ENTREPRENEURSHIP & BUSINESS  
ETHICS  
CHAPMAN UNIVERSITY

**WHY:** Past Fortune 200 executive well known as a catalyst for business transformation and focus on company profitability. Taught over 100 classes at Chapman University as an associate professor; former CIO of Fiat; exec role at Ingram Micro. **RECENT:** Revamped entrepreneurship program that includes non-business majors; new and improved curriculum coming in 2022. Has oversight for the school's Innovation labs. **QUOTABLE:** "We are setting our sights on Octane and Medtech. We want to be very engaged with that portion of the ecosystem."

**IAN WILLIAMSON**

DEAN  
UCI PAUL MERAGE SCHOOL  
OF BUSINESS

**WHY:** Top spot at UCI's business school, which counts more than 1,500 MBA students. Named to position last year, succeeded Eric Spangenberg, who returned full-time to the classroom. **NOTABLE:** Previously served as pro-vice chancellor and dean of the business school at Victoria University of Wellington in New Zealand, where he established an entrepreneurship program, launched an on-campus innovation hub and directed the commercialization branch of the university. **QUOTABLE:** "We know education works when we can provide it; we see tremendous positive outcomes. My No. 1 priority will be to expand access to world-class education at the Merage School."

**MARK HILBERT**

PHILANTHROPIST, FOUNDER  
HILBERT PROPERTY MANAGEMENT

**WHY:** Real estate owner, manager. With wife, Janet (an ex-community college professor), has given over \$3M, and provided several million dollars of California Scene painting to Chapman University's Hilbert Museum near Orange train depot and Chapman film school. **RECENT:** Opened several new exhibitions, including "Henriette Berk: Living Color," a retrospective of the California midcentury artist and "Our Golden State: Landscape Paintings from the Hilbert Collection." Also won the LA Times' "Best of the Southland" Orange County award in September. **QUOTABLE:** On LA Times recognition, said "the museum is only 5 years old—we're the new kid on the block in Southern California—so I'm very proud that we were selected."

**SHERYL BOURGEOIS**

PRESIDENT  
SIMON FOUNDATION FOR  
EDUCATION AND HOUSING

**WHY:** After heading fundraising, advancement and marketing for OC's top private university, Chapman, taking a new role with one of the school's largest backers. **RECENT:** Simon Foundation, which currently has around \$33M in assets, said in September it plans to increase its endowment to \$400M and more, much of it from Ron Simon himself. Hired Bourgeois to help raise funds and oversee its operations. **QUOTABLE:** "I'm excited for Ron [Simon's] vision on what he wants to accomplish," she said. "We can apply it locally and maybe across the nation."

**JOHN JJ JACKSON**

DIRECTOR  
CSUF CENTER FOR  
ENTREPRENEURSHIP

**WHY:** Runs startup incubator and entrepreneurial center for the AACSB-accredited College of Business and Economics at CSUF. Oversees Titan Fast Pitch competition, which draws over 1,000 attendees annually. Founder of Titan Angels fund and the Bird Dog Group. **RECENT:** Helped CSUF incubator startup Panhwar Jet receive \$10M in venture capital funding. They are building an electric-powered airplane. **QUOTABLE:** "Panhwar Jet showcases the CSUF Startup Incubator's ability to bring ideas to fruition," he said. "We have the necessary resources and guidance for aspiring entrepreneurs—you just need an idea and lots of persistence."



**ERROL ARKILIC**

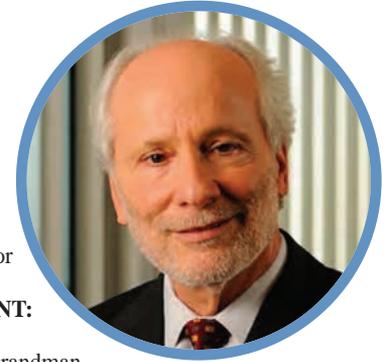
EXECUTIVE DIRECTOR  
UCI BEALL APPLIED INNOVATION  
CHIEF INNOVATION OFFICER  
UCI

**WHY:** New head of UCI's Beall Applied Innovation, the public research university's commercialization branch, a multifaceted platform that supports entrepreneurship. Its incubator, Wayfinder, has formed over 60 startups to date. **RECENT:** Took over role in October from BAI's founding executive director Richard Sudek. In his new role, Arkilic will oversee entrepreneurial engagement with partners, intellectual property stewardship, licensing and marketing, and outreach relations. **QUOTABLE:** "OC is really poised to take an enormous leap forward in innovation," Arkilic said. "With a bit of collaboration, we can do a world of wonders."

**GARY BRAHM**

CHANCELLOR, CEO  
UMASS GLOBAL

**WHY:** Founding chancellor of private, nonprofit institution, previously called Brandman University, that caters to working adults and service members. Had been with Chapman University for 13 years as EVP of finance and administration and COO. **RECENT:** Oversaw September's transfer of ownership and name change of Brandman University to UMass Global. Chapman University transferred the online institution to The University of Massachusetts for about \$130M. **QUOTABLE:** "UMass Global will create a formidable offering at a time when working adults and underserved communities need better options to complete their educations."

**BERNADETTE BODEN-ALBALA**

DEAN  
UCI PUBLIC HEALTH

**WHY:** Director and founding dean of public health school at UCI, one of four schools that make up the Susan and Henry Samueli College of Health Sciences, formed in 2017 with a gift of \$200M from the benefactors. Former chair of the New York University's department of epidemiology; known for work in helping to reduce health disparities. **RECENT:** Led UCI effort to track and research coronavirus spread in Orange County at onset of pandemic, among first to analyze socioeconomic factors that contributed to a rise in cases inland. **QUOTABLE:** "Coronavirus is not an equitable disease."

**IN A PICKLE**

Last year's crop of OC500 entries couldn't get enough of their **Peloton** indoor bikes.

Along with hiking, it was the most-cited new hobby during the onset of the pandemic.

This year, **pickleball** is the new Peloton, based on the number of OC500 entries citing the racket sport as a new hobby.

**Paul Johnson** says there was "an old tennis court near the **Rancho Mission Viejo** offices that has sat untouched for years. We used this time to convert it into two pickleball courts and I've really enjoyed learning how to play."

**Dave Harvey** cited pickleball and "my golf game" among the **Harvey & Co.** founder's top hobbies of 2021, while **Mark Peterson** of **O'Melveny & Myers** said he "started skiing again, and started to play pickleball."

Double's team, take notice: "My wife and I have been playing more and more pickleball," says **Stuart Kane's Bruce Stuart**.

Doctors, take notice: **Solis Capital's Dan Lubeck** tore his Achilles playing the game, and he's not the only one on the OC500 who has hurt themselves on the mini-courts.

**DUFFER'S DELIGHT**

**Mike McKee** isn't yet the next **Tiger Woods** on the links, though the former **Irvine Co.** exec chair's Woods' **TGR Foundation** in Irvine.

"I stubbornly just remain on my eternal quest to hone my golf game to take a few bucks from the folks on Saturday, a quest that consumes me and displaces any temptation to try another activity," says McKee of his main hobby.

He's not the only one who's been using 2021 to improve their game.

"During 2020, my initial plan was to really learn the game of golf and make it a part of my life going forward," said **Community Action Partnership's Gregory C. Scott**.

"Although COVID temporarily interrupted my plan, I am moving forward with my goal of playing more golf as a hobby so don't be surprised if a golf ball ends up in your backyard."

"Less travel has allowed for more time participating in outdoor activities like hiking with my children or playing golf," said **Chris**

**Burns of Duke Realty.**

"Unfortunately, it didn't improve my game."

Improvement is possible, says **Burnham Benefits' Kristen Allison** of her 2021 hobby. "My golf game got better!"

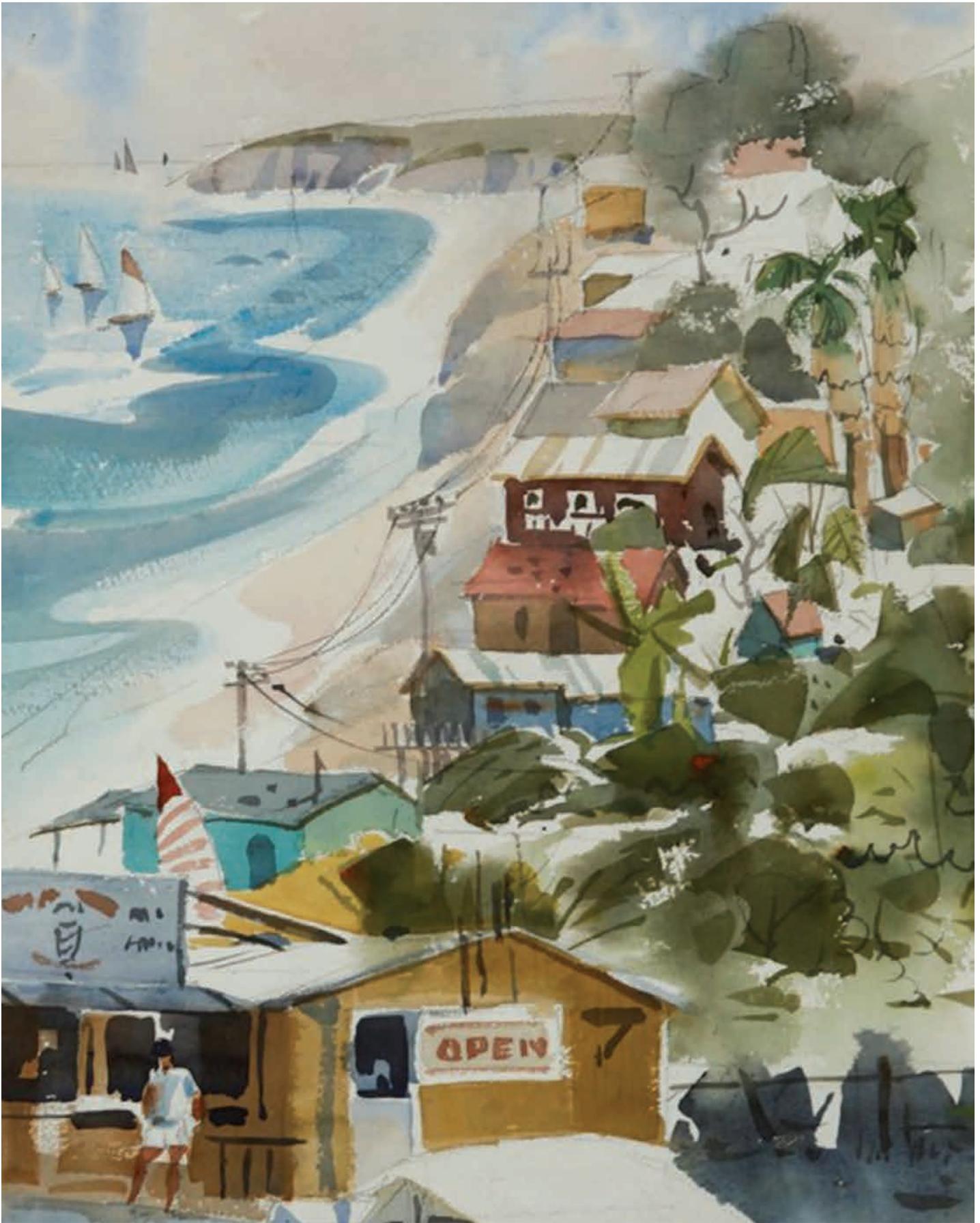
**Tim McElfish** uses the sport for family bonding, with the **Ferruzzo & Ferruzzo** senior partner saying he has a "strong passion" for golf.

"The passion for this game has allowed my family to grow together. My daughter began taking lessons at the age of 6, and shares this passion. Six year later, she has continued to develop her golfing skills which allows us to play golf together and travel to golf destinations."

Don't play **Callahan & Blaine's Edward Susolik** for money.

"I play competitive golf at the elite amateur level," said the **Newport Beach Country Club** member (+1 handicap).

"I play about 20 amateur tournaments a year on the state and national level, and have had significant success over the years."



Hugh Duncan, "Crystal Cove Cottages," early 1960s, watercolor, 22 x 14". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.

FINANCE / BANKING

**JOHN DECERO**CEO  
MECHANICS BANK

**WHY:** In 14 years, has gone from starting a bank with no assets—California Republic Bank—to overseeing \$19B at Mechanics Bank, state’s fifth largest. Often works at Irvine office; company’s name adorns Irvine Towers office building. **RECENT:** With help of acquisitions, has tripled revenue in last three years to \$648M in 2020. Mechanics Bank in July declared a \$165M special dividend, or about \$2.569 per share. **QUOTABLE:** Forbes ranked bank 43rd best among nation’s 100 largest publicly traded banks. “This independent recognition by Forbes points to our exceptional capital strength and commitment to consistently make prudent and responsible decisions that protect the best interests of our customers and shareholders.”

**DAVID ALTSHULER**SENIOR MANAGING DIRECTOR  
WEALTH AND INVESTMENT  
MANAGEMENT, SOUTH DIVISION  
WELLS FARGO

**WHY:** Oversees 1,400 employees generating \$1.4B by managing wealth of 161,143 households across southwestern U.S. **RECENT:** After Wells Fargo reorganized its wealth divisions, Altshuler named in March to head unit. **QUOTABLE:** “Growing up, I was really focused on athletics and coaching. I always thought my destiny was to be a coach and give people guidance and counsel. I wanted to make sure I could give back in that way. I realized that this job of advising families and corporations was really a lot of the same thing, but it also had my interests in the financial markets. It felt like a natural fit.”

**ALLAN DICKS**CFO  
MONTROSE ENVIRONMENTAL  
GROUP

**WHY:** Helped build an environmental consulting business that went public in late 2020, now counts market value approaching \$1.5B as of late summer. **RECENT:** Lengthy IPO process. “We were meant to go public in the first quarter [of 2020]. The week before filing our S-1, the markets crashed. We had to pull the filings back.” Firm moved HQ designation to Arkansas in summer, execs remain in Irvine. **NOTABLE:** In 2019, named Outstanding CFO of a Private Company at Business Journal’s annual CFO of the Year Awards. **QUOTABLE:** On virtual bell ringing on NYSE after IPO, said it “was a strange experience to go public and not go public. No trip to New York. No celebration at all. It felt like a monumental achievement but incredibly challenging.”

**PATRICK FLANAGAN**CFO  
LOANDEPOT

**WHY:** Took public in March the nation’s second-biggest nonbank mortgage lender, resulting in company with market cap topping \$4B at points this year. **RECENT:** Oversaw a company in 2020 where revenue jumped 222% to \$4.3B and net income surged 5,749% to \$2B+. **NOTABLE:** During his 30 years in the industry, has managed the origination, acquisition and servicing of more than \$400B in residential mortgage and residential real estate assets.

**DAVID BAHNSEN**FOUNDER, CHIEF INVESTMENT OFFICER  
THE BAHNSEN GROUP

**WHY:** Left Morgan Stanley in 2015 to start his own firm, which has boosted AUM fivefold to over \$3B. Often appears on business news channels like CNBC, Fox Business, Bloomberg. Outspoken conservative on board of National Review magazine. **RECENT:** In August, launched new family office service for its ultra-high-net-worth clients. The bundled offering will combine a flat fee for comprehensive services. **QUOTABLE:** “We want our family office clients to experience the integrated service many talk about but few deliver.”

**STEVE GARDNER**CHAIRMAN, CEO  
PACIFIC PREMIER BANCORP  
IRVINE

**BIO:** Runs one of the largest banks headquartered in Southern California, and the largest based in OC by assets. Gardner in 2000 took over a failing Riverside-based bank and moved it to Irvine. He grew the bank organically and through acquisitions, while avoiding disasters such as the subprime mortgage meltdown of 2007-08. One of best-performing stocks of any OC company over past decade.



**NOTABLE:** Busy 2020. Funded more than \$1.3B in new federal program for small businesses called PPP and it completed its largest acquisition ever, the \$744M purchase of crosstown rival Opus Bank. Bank valued around \$4B.

**QUOTABLE:** “We are seeing the benefit of scale as a \$20B institution in terms of our ability to attract full banking relationships with larger, more sophisticated middle market competence and stronger credit sponsors of commercial real estate projects.”

**ALEX BHATHAL**EXECUTIVE CHAIRMAN  
MANAGING PARTNER  
REVITATE

**WHY:** Runs asset management platform of the Bhathal family with sister Lisa Bhathal Merage. Co-owner and executive director of Sacramento Basketball Holdings, which has large stake in city's NBA team, as well as large real estate presence in city. **RECENT:** Investment partner with Green Bay Packer QB Aaron Rodgers on RX3, a \$50M influencer fund focused on consumer brands that have two companies already billion+ valuation. Along with sister, launching new initiative called Revitate, to turn family office into larger platform supporting private equity strategies in real estate, consumer products and sports. **QUOTABLE:** On why he's starting Revitate: "We're business builders. We love to work. We love to build businesses. We love competition."

**JOSEPH YUROSEK**CALIFORNIA MARKET PRESIDENT  
FIFTH THIRD BANK

**WHY:** Well-known OC banker for 25+ years, including Comerica. When Cincinnati-based Fifth Third, the country's 15th largest bank, decided to enter the California market, it picked Yurosek in 2017 to lead group. **NOTABLE:** Oversees strategic middle market expansion effort for bank in California. Leads team that provides resources in client coverage, credit, treasury management capital markets and regional sponsor coverage. **RECENT:** Fifth Third in 2020 was lead arranger and administrative agent of \$200M senior credit facility for Los Angeles Lakers. **FUN FACTS:** Varsity baseball; favorite book, "Freakonomics"; film, "Top Gun."

**KEITH KOBATA**REGION BANK PRESIDENT  
WELLS FARGO

**WHY:** Oversees \$14.3B in deposits, 1,100+ employees and 79 branches at OC's second-biggest bank, which has \$26.7B overall in deposits in the county. **RECENT:** Active in community events and nonprofits; serves on the board of directors for OC Business Council, Santa Ana Chamber of Commerce, and Wells Fargo's local Foundation Giving Council. **NOTABLE:** Came up through ranks, worked his way up from banker to assistant branch manager to branch manager to district manager. Before he took his current job, he managed Wells Fargo's North OC and Long Beach regions. **QUOTABLE:** "Even though customers think of Wells Fargo as a big bank, we are creating a feeling of a community bank."

**RICK KELLER**FOUNDER, CHAIRMAN  
FIRST FOUNDATION

**WHY:** Started as wealth manager in 1990; added bank in 2007. Has built bank to \$7.9B in assets, wealth manager to \$5.3B AUM. Has about 550 employees in 20 locations. **RECENT:** HQ earlier this year moved from Irvine to Dallas area; only executive leaving Irvine was CEO Scott Kavanaugh; market cap has almost doubled to over \$1B in past year. **NOTABLE:** Served as a trustee of the UCI Foundation, chair of the Foundation's Investment Committee, and is a current member of the Investment Committee. Selected as consultant to the Investment Advisory Committee of The Regents of the University of California.

**SCOTT CONNELLA**EVP, MANAGING PARTNER  
MUGF UNION BANK

**WHY:** Been with bank since 1987. Now oversees commercial banking group for SoCal. Fifth-largest commercial bank in OC with \$7.6B deposits, up 18% for year ended June 30, 2020. Union Bank was OC's top SBA lender to local borrowers last year. Is unit of Mitsubishi UFJ Financial Group. **RECENT:** Union Bank scheduled to be acquired by U.S. Bank in 2022. Connella slated to head Union Bank's Commercial Banking line for West Coast at the end of the year when the current exec retires. **NOTABLE:** Was broker in 1980s at Crow's Nest Yacht Brokerage in Newport Beach. UCI Chief Executive Roundtable member.

**JARED WOLFF**CEO  
BANC OF CALIFORNIA  
SANTA ANA

**BIO:** Heads the second-largest bank by assets in Orange County. Joined in 2019, and after two years of reorganization (including ending of naming rights deal for new downtown L.A. soccer stadium) put the bank back on growth track. In March, announced deal to buy Costa Mesa-based Pacific Mercantile Bancorp (Nasdaq: PMBC) in an all-stock transaction valued at \$235M.

**NOTABLE:** The acquisition of Pacific Mercantile resulting in a bank with nearly \$10B in assets. On a pro-forma basis, the combined banks will count \$7.5B in deposits and \$7.1B in loans. Bank valued around \$1B.

**QUOTABLE:** "This deal checked many boxes," he said in late March. "While the outlook isn't fully clear, people are feeling optimistic. Things are looking brighter. We're certainly in growth mode."



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**THOMAS  
FREEMAN**

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**TODD HOLLANDER**

HEAD OF BUSINESS BANKING  
AND SMALL BUSINESS BANKING  
MUFJ UNION BANK

**WHY:** Leads Business and Small Business banking group, whose work included supporting small businesses through pandemic. Union Bank helped more than 21,000 clients secure \$3B in PPP loans. **RECENT:** This year, began hosting a series of virtual panel discussions focused on the road to recovery for small business. **QUOTABLE:** “California small business owners were hit especially hard and adapted to complex restrictions for longer periods of time than those in other states. But despite the challenges, many small businesses remained resilient and optimistic for the future.”

**ETHAN MORGAN**

MANAGING DIRECTOR  
J.P. MORGAN PRIVATE BANK

**WHY:** Market manager of \$9.9B in assets for private bank’s ultra-high-net-worth individuals and businesses in Orange County and San Diego; previously spent decade at Wells Fargo’s Private Bank “serving as the team lead for many of Orange County’s most complex families.” **RECENT:** Writes weekly stock analysis for Business Journal’s Market Watch. **NOTABLE:** Serves on the governing boards of Segerstrom Center for the Arts and the United Way of OC. Chairs JPMorgan Chase Foundation’s Southern California Philanthropic Leadership Council. **QUOTABLE:** “There’s so much hidden wealth and new wealth being created” in Orange County.

**LINDSAY LAWRENCE**

EVP, COO  
FIRST FOUNDATION

**WHY:** Responsible for overseeing all deposit, treasury management and operational activities for the bank, whose main operations are in Irvine. Also heads designing and implementing service delivery frameworks for the company, and manages the enterprise delivery, business intelligence, and systems architect teams. Alongside her team, she helped develop and now manages First Foundation’s digital bank channel. **NOTABLE:** Formerly the SVP of Commercial and Specialty Deposits at Umpqua Bank, which merged with Sterling Savings Bank in 2014. **RECENT:** Serves as a board member on the Mater Dei High School’s Monarch Foundation and is the Juvenile Diabetes Research Foundation’s Orange County Fund-A-Need chair.

**TOM RONK**

CO-FOUNDER, CEO  
BUYINS.NET

**WHY:** Corona del Mar-based firm alerts publicly traded companies to short campaigns against them. Seeing increased attention amid well-publicized short squeezes involving GameStop and BlackBerry, the latter of which bought Irvine’s Cylance in 2018. **NOTABLE:** When Overstock.com founder Patrick Byrne was CEO, he used Ronk’s research to collect almost \$35M from Goldman Sachs and Bank of America’s Merrill Lynch for abusive short trading. **OC LEADER BOARD, MARCH 1:** “Leave it to a large group of ‘degenerates,’ as they are referred to on Reddit, to outsmart the smartest people in the room.”

**JIM MADDEN**

CO-FOUNDER, CO-CEO  
CARRICK CAPITAL MANAGEMENT

**WHY:** Successfully co-founded, exited human resources firm Exult in 2004 with \$50M+ payday; co-founder of PE firm now with \$1B assets under management. **RECENT:** Busiest year ever with four new investments as of late summer. Carrick led a \$30M investment in 2013 in Accolade Co., which went public in 2020, doubling its shares; Carrick exited this year with 5.6 times return. **QUOTABLE:** About its newest and largest investment to date, DailyPay, which provides same-day paychecks: “Their ability to sign up marquee names has been impressive. We think this market is going to explode. The majority of employers will offer this service within two years.”

**RICH SULLIVAN**

CFO  
ACORNS GROW

**WHY:** New CFO at closely watched fintech expected to go public late this year at valuation topping \$2B. **NOTABLE:** Background on Wall Street includes VP of investor relations at AT&T Inc., deputy CFO at DreamWorks Animation SKG, CFO at STX Entertainment and most recently serving as VP of corporate financial planning and analysis at \$50B-valued Twitter Inc. **QUOTABLE:** “I really think Acorns stands apart in general and in the industry. It’s at the cross section of tech and finance and social responsibility.”



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— David, San Diego



  
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**SADIRA FURLOW**CMO  
HAPPY MONEY

**WHY:** Marketing exec tasked with growth for one of OC's best-funded fintech firms. \$500M-valued company helps its users consolidate, reduce and eliminate high-interest credit card debt via loan products. **RECENT:** Joined Tustin's Happy Money from PepsiCo, where she was VP of marketing for the Frito-Lay portfolio and chief marketing officer of its nutrition bands. **QUOTABLE:** "We are shifting the financial services paradigm and creating an entirely new category at the intersection of finance and human happiness that Happy Money will own."

**THOMAS FREEMAN**CFO  
ALIGNMENT HEALTHCARE

**WHY:** Help turn Orange-based firm, a fast-growing Medicare Advantage company focused on providing population health management services to health systems and provider groups across the country, into a public company this year. **RECENT:** March IPO put company's valuation in the billions. Company posted \$955.4M in 2020 sales, up 27% year-over-year. Expects over \$1.1B in sales this year. **NOTABLE:** In 2014, he led General Atlantic's \$125M investment in Alignment; in 2015, he joined Alignment as VP of corporate development, becoming CFO in 2017. Was 31 at time of IPO.

**JACK HARTUNG**CFO  
CHIPOTLE MEXICAN GRILL

**WHY:** Went from the world's largest restaurant company—McDonald's Corp. (NYSE: MCD)—to growing restaurant business now OC's second most valuable public company. **RECENT:** Attributed Chipotle's success during pandemic to investing in technology years before. "A lot of companies are playing catch-up." **NOTABLE:** In 2020, named Outstanding CFO of a Public Company at Business Journal's annual CFO of the Year Awards. **QUOTABLE:** "What makes me most proud is how our company has navigated through this pandemic. We've stayed true to what makes Chipotle a special brand. That makes me feel good about the past year and about the future."

**DAVID DAHL**CEO, PRESIDENT  
WHITTIER TRUST

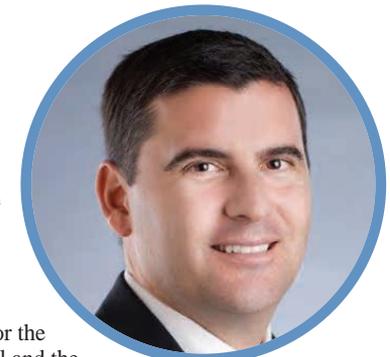
**WHY:** Newport Beach exec runs the oldest and largest multifamily investment office located on the West Coast. It has \$19B in assets under advisement. **NOTABLE:** Avid sailor, took part in famed Transpac race that travels 2,225 nautical miles from Long Beach to Honolulu. **OC LEADER BOARD, AUG. 16:** Of lessons learned in the race, said "you must have a quality team, each team member must know his or her role and there will never be enough training. Mental attitude, focus and commitment are essential components to success."

**SCHARRELL JACKSON**COO  
LENDISTRY

**WHY:** Local accounting vet now in the fintech world, on exec team of business and commercial real estate lender based in Los Angeles. Lendistry ranks second nationwide in SBA Community Advantage lending. **RECENT:** 30 years in accounting prior to joining new firm this year, still works out of OC. In 2020, BPM lured her away from Irvine's Squar Milner LLP. **NOTABLE:** In 2011, received a Business Journal Women in Business award. **QUOTABLE:** "It's a fabulous organization with an aggressive growth model," Jackson said at the time of her hiring at the fintech. "We are moving at rapid pace and serving the community and [its] people by providing access to capital to all people."

**RICK NOGUEIRA**REGION MANAGER  
JPMORGAN CHASE

**WHY:** Oversees middle-market banking in OC, Inland Empire, serving firms from \$20M to \$500M in revenue. Joined Chase as a senior banker in 2009 and was promoted to the position of region manager in January 2012. **NOTABLE:** Active in the community; board of directors for the Orange County Business Council and the Business Leadership Committee for Segerstrom Center for the Arts. Bachelor's degree in Business Finance from San Diego State University and a Master of Business Administration from California State University, Long Beach. **FUN FACTS:** Wife, Semra; sons, Jack and Matthew; favorite musical group as a kid: Guns N' Roses.



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**RICK ARVIELO**CO-FOUNDER, CEO  
NEW AMERICAN FUNDING

**WHY:** Along with wife, Patty, a 2018 Business Journal Women in Business winner, founded Tustin-based mortgage lender that employs 5,000 in more than 200 branches and services a portfolio of 141,000 loans worth about \$34.7B. Top 10 nonbank lender nationally. **RECENT:** Was biggest revenue gainer on the Business Journal's annual list of private companies, reporting 2020 sales jumped 113% to \$1.3B. **QUOTABLE:** "When interest rates dropped, it was like the floodgates opened up" to increased demand.

**KAREN FLORES**CFO  
GAN LTD.

**WHY:** Steering company seeking to be platform for biggest casinos. Has wide range of media and tech experience, including for Disney and Microsoft. **RECENT:** Stock was up 100% after 2020 IPO, as of this summer. After Q1 results exceeded expectations, boosted 2021 revenue forecast. Predicts better operating leverage long term. Says in Q1 statement: "As we gain scale, become more efficient, and move through a period of significant investment for growth, we anticipate to drive improved profitability." **NOTABLE:** Helped launch MySpace Music and restructuring rounds of company prior to it being sold in 2011.

**STEPHEN GORDON**FOUNDER, CEO  
GENESIS BANK

**WHY:** Well-known area banker, entrepreneur. When the economy is faltering, Gordon sees opportunity. **NOTABLE:** After the dot-com bust in 2000, co-founded Commercial Capital Bancorp, which was sold for almost \$1B in 2006. Following 2008 financial crisis, in 2010 led the \$460M recapitalization of Bay Cities National Bank and renamed it Opus Bank. Left Opus in 2018, bank was sold for \$743.9M in 2020. **RECENT:** Five days after Opus sale closed, he filed paperwork to start his third venture, Genesis Bank. Already raised \$57M to fund commercial bank. **QUOTABLE:** "I have tendency to start banks in contrarian times," he said of starting Genesis during pandemic. "This is a once in a 100 year moment."

**REZA JAHANGIRI**FOUNDER, CEO  
AMERICAN ADVISORS GROUP

**WHY:** Provider of reverse mortgages, largest in country. Counts Tom Selleck as spokesman. Reported more than \$700M in revenue last year. Winner of Business Journal's Excellence in Entrepreneurship Award in 2019. **RECENT:** Relocated its Orange HQ to the Irvine Towers high-rise office complex, bucking the coronavirus trend towards buildings with fewer floors. **QUOTABLE:** "Moving our headquarters to Irvine Towers, in the heart of Irvine's 'financial district,' gives AAG greater access to Orange County's talent pool, while maximizing the work-life benefits for our employees."

**DAN IVASCYN**CIO  
PIMCO

**WHY:** Oversees 250+ portfolio managers handling \$2.16T of assets under management, far and away OC's largest investment firm. Won 2017 Business Journal Businessperson of the Year in finance along with CEO Manny Roman. **RECENT:** Pimco Foundation in May said it will give its largest donation ever, \$10M, to the Global FoodBanking Network to help communities suffering from hunger. Ivascyn personally contributing another \$5M. **QUOTABLE:** "We expect the pickup in inflation to be temporary. We do think there will be a leveling off, somewhere close to Central Bank target rates."

**DAN LUBECK**FOUNDER, MANAGING DIRECTOR  
SOLIS CAPITAL PARTNERS LLC

**WHY:** Runs investment firm specializing in the lower middle market, companies with revenue of \$15M to \$75M, typically in services, niche manufacturing and software sectors. **RECENT:** Emcee for Business Journal's CFO event in October. **NOTABLE:** Has been a lower middle-market private equity investor for over 26 years and has participated in more than 70 company acquisitions and divestitures. Prior to founding Solis in 2002, co-founded a leveraged buyout firm, Unique Investment Corp. **QUOTABLE:** "We believe that investing in companies is really betting on the leaders and leadership teams."





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**MARC MILLS**CEO  
PACIFIC RIM CAPITAL

**WHY:** Runs one of OC's largest private finance companies; leases forklifts, cranes and other material-handling equipment for large companies in the manufacturing and transportation industries. Posted revenue of nearly \$200M last year, and has nearly \$850M in assets under management.

**RECENT:** Longtime partner, Dave Mirsky, retired at end of year. Mills, a Harvard grad, assumed CEO role at company. **QUOTABLE:** Not following partner's plan. "I have no plans to retire. We've really refined the strategy over time, and I feel confident in the strategic direction of the company."

**GREG CUSTER**EVP  
WHITTIER TRUST

**WHY:** Helps manage \$19B in assets at West Coast's oldest and largest family office, a trust that made its money discovering oil in Bakersfield. Board of OC YMCA. Named 2020 Man of Character by OC Boy Scouts. Often top volunteer at Pasadena Tournament of Roses. **RECENT:**

Whittier Trust named one of the top five worldwide best Multi-Family Office by the Society of Trust and Estate Practitioners. **NOTABLE:** Whittier a heritage sponsor of the California-to-Hawaii Transpac sailing race. Custer owns a Duffy. **QUOTABLE:** "Whittier's objective is to provide investment management and trust services to wealthy families by assisting them with the transition of wealth by creating a family's legacy and a lasting difference."

**SAJAN PILLAI**CHAIRMAN, CEO  
MCLAREN STRATEGIC VENTURES

**WHY:** Built Aliso Viejo-based UST (previously UST Global) into \$1B-plus tech service giant with 25,000 employees. Now heads recently formed McLaren investment firm and SPAC offshoot. **RECENT:** Pillai left UST in 2019 and went on to focus efforts on investment firms Season Two Ventures and McLaren Strategic Ventures.

McLaren Technology Acquisition filed plans to go public in September with the aim of raising \$200M.

**NOTABLE:** Pillai would own 20% of the SPAC after it goes public.

**SHANNON EUSEY**CO-FOUNDER, CEO  
BEACON POINTE ADVISORS

**WHY:** After starting Beacon Pointe in 2002 with father Garth Flint, has built it to \$15B+ in assets under advisement.

**RECENT:** Employing roll-up strategy to buy other RIAs throughout country. **NOTABLE:** Received an Orange County Business Journal Women in Business Award in 2017. Graduated from UCI where she played Division I volleyball, UCLA MBA. Boards have included Pacific Mercantile, the UCI Athletic Fund Board, others. **QUOTABLE:** "We're in 15 offices now and we'd like to expand that to 50 offices in the next several years."

**ALLEN STAFF**MARKET PRESIDENT  
BANK OF AMERICA

**WHY:** Top local exec for banking powerhouse. **RECENT:** BofA said in August that it distributed \$915,000 in grants to 34 Orange County nonprofits that will help drive economic opportunity and upward mobility for individuals and families and put them on a path toward stability and success.

**QUOTABLE:** On the gift, said that "the strategic investment into immediate short-term and longer-term needs has been key in helping disadvantaged communities progress as society begins to safely reopen. By investing in the Orange County's incredible network of nonprofits, Bank of America provides philanthropic capital to help advance economic and social progress, enabling our community to succeed."

**BILL RUEHLE**CFO  
MOVANDI

**WHY:** Former Broadcom CFO who managed its successful IPO and hyper revenue growth that created one of Orange County's best-known, and most valuable, technology firms. Now guiding 5G wireless tech upstart Movandi, which also counts Broadcom ties, towards its next steps of growth.

**RECENT:** Named CFO in March. Said he expects company possibly going public or being bought by another firm. **QUOTABLE:** "You stage a company prepared to be a public company whatever the outcome is going to be, because that means you're going to build the right things at the company."



**ROGER KIRWAN**FOUNDER, CHAIRMAN, CEO  
WOODSIDE CREDIT**WHY:** Financial services industry veteran whose Newport Beach-based auto financing company specializes in loans for buyers of classic, collector and exotic cars.**RECENT:** Among fast-growing private companies in OC. As of September, year-to-date loan originations were 40% ahead of 2020 levels, representing the 12th consecutive year of record growth for the company.**NOTABLE:** Founded Ganis Credit Corp. in 1980 and is credited with revolutionizing financing in the recreational vehicle space as the first to offer 15-year loans for RVs. Sold Ganis to Bank of Boston in a 1995 deal. At Woodside, introduced 12-year loan terms for cars priced over \$100,000; two years ago, that structure expanded to 15-year terms for cars over \$200,000.**PATTY ARVIELLO**CO-FOUNDER, PRESIDENT  
NEW AMERICAN FUNDING**WHY:** Launched firm in 2003 with her husband, Rick Arvielo. Company ranked No. 1 on the Business Journal's list of the fastest-growing companies this year; revenue now tops \$1.4B.**RECENT:** Keynoted Business Journal's Women in Business Awards event Oct. 28, after earning a nod as a 2018 Business Journal Women in Business award recipient. Company has been on a hiring tear, bringing on 20 to 30 people weekly last year.**NOTABLE:** Has been in the industry since she was 16. Said husband Rick: "Patty's passion is serving the underserved. It's the number one way that people create wealth in this country and she's an ambassador for the industry."**JOE DURAN**HEAD OF PERSONAL FINANCIAL  
MANAGEMENT  
MANAGING DIRECTOR  
GOLDMAN SACHS**WHY:** In 2005, founded Newport Beach-based United Capital Financial Advisers. Built it into one of the nation's largest registered investment advisers with \$25.7B in assets under management. Sold for \$750M to Goldman Sachs,where he is now head of personal financial management. **NOTABLE:** Author of multiple financial advice books.**QUOTABLE:** Tweeted secret to marriage: "Never stop treating your partner like you're dating. The rest are obvious: You'll have to work to keep it vibrant. Be healthy, stay fun, show them the best of you, be kind, be the safe place and help them to shine. 30 years, 27 married, to an intoxicating woman."**TIM NGUYEN**FOUNDER, CHIEF STRATEGY OFFICER  
MERIDIANLINK**WHY:** Started software company that serves credit unions and smaller financial institutions, now has a \$2B market cap. Honored with Business Journal Innovator of the Year Award in September. **RECENT:**MeridianLink went public in July raising \$241.5M. Projecting sales this year of \$256.7M. **NOTABLE:** Vietnameserefugee, started business while a student at UCI. **QUOTABLE:** "If you have ever applied for a loan in the past 20 years, chances are you have crossed paths with us digitally as we have touched millions of consumers. We're like the Intel Inside chip of financial institutions."**LEV BARINSKIY**CO-FOUNDER, CEO  
SMARTFINANCIAL.COM**WHY:** At age 20, became youngest operator of an agency at Allstate. Built first company to \$20M in annual sales before selling it in 2012 to Bankrate. Same year, he started SmartFinancial to provide leads for insurance companies.**RECENT:** Costa Mesa firm doubling sales annually to \$100M+; may go IPO. Plans for more than 300 employees by end of 2021. **NOTABLE:** Made Business Journal's July list of Best Places to Work, in the midsized company category. **QUOTABLE:** "We work hard, play hard. It resonates with our team."**BAYO THOMAS**OC CONSUMER EXEC  
BANK OF AMERICA**WHY:** Key local exec for OC's largest bank by local deposits.**RECENT:** BofA's deposits climbed 13% to \$27B as of mid-2020, an astounding \$3B increase. Third straight year it has been OC's largest commercial bank by deposits. **QUOTABLE:** BofA in 2019 focused on educating both customers and employees on how to use its technology services. "That education paid off—

once the pandemic hit, we saw a faster adoption by our clients to gravitate to self-service," he said. "The fact is it was clear early on—the way people would do their banking changed drastically" due to the pandemic.



**IVO TJAN**FOUNDER, CEO  
COMMERCEWEST BANK

**WHY:** Runs eighth-largest commercial bank based in OC. More than \$900M in assets. Indonesian native came to U.S. with his parents when he was 8 years old. Knew his career path when he was 18. Has reported profit almost every quarter since its founding. **RECENT:** Relocated and expanded its Irvine HQ to former base of Entrepreneur Media. At forefront of OC employers in returning to an in-person workforce. **QUOTABLE:** “Our new corporate office is larger and in a facility that will accommodate our growth for many years to come.”

**NEWTW MORRIS**PARTNER  
ANKONA CAPITAL

**WHY:** Part of upstart venture capital firm headed by notable Orange County tech entrepreneurs and backed by other wealthy area investors. Previously won Business Journal Innovator of the Year Award for founding Telogis, a logistics software maker which was sold to Verizon for \$900M in 2016. **RECENT:** VC firm has raised \$67M; looking to invest in software companies at \$5M to \$15M run rate that are ready to scale. **QUOTABLE:** “When we ... hear these pitches, if we think that there is a breakout, we track them. When they bubble up to potential investments, we reach out.”

**DANIEL WALKER**CEO  
FARMERS & MERCHANTS BANK

**WHY:** Fourth generation in family-owned bank that was founded in 1907 by great-grandfather C.J. Walker. Daniel began as entry-level teller in 1968. Orange County has 13 F&M branches with nearly \$4B in deposits. **RECENT:** F&M ended 2020 with \$9.87B in assets, an increase of nearly 30% year-over-year. Officials said in early 2021 the bank isn't slowing down and could hit \$11B by the end of this year. **QUOTABLE:** The growth to \$10B in assets, a few years earlier than previously expected, “threw us into excitement and then some new long-term planning.” F&M Bank “does not want to give up its momentum in the market by any means.”

**BYRON ROTH**CHAIRMAN, CEO  
ROTH CAPITAL

**WHY:** Runs largest investment bank based in OC. Has raised \$77.5B for small cap companies, up from nearly \$60B a year ago. Has completed 370 mergers, acquisitions and advisory assignments, up from 335 a year ago. Host of biggest annual finance conference in South OC at Ritz-Carlton. **RECENT:** Has been involved in four SPACs in past year, as a sponsor. **NOTABLE:** Other business interests include partnering with Green Bay Packer QB Aaron Rodgers on RX3 LLC, a \$50M influencer fund focused on consumer brands that already has two companies valued at more than a billion.

**JULIAN MOVSESIAN**FOUNDER, CEO, PRESIDENT  
SUCCESSION CAPITAL ALLIANCE

**WHY:** Runs what company calls the largest, longest-running, and most respected premium financing program in the industry. Acts as an adviser to advisers, offers advanced life insurance planning for businessowner and high-net-worth clients, “with a singular focus on maximizing the performance of your client’s life insurance assets.” **RECENT:** Firm has helped advisers place more than \$52B of protection and \$5.1B of financed premium. **NOTABLE:** Born in Cairo, Egypt of Armenian descent, convinced his parents at age 17 to let him move to Southern California, where he lived with guardians, put himself through high school and flipped burgers at a local McDonald’s to earn his keep.

**RORY MCKINNEY**HEAD OF INVESTMENT BANKING  
D.A. DAVIDSON & CO.

**WHY:** Leads business unit that provides financial advisory and capital markets expertise, with over 90 professionals in 10 offices throughout U.S. Joined in 2007, has successfully advised numerous public and private companies on over 100 merger and acquisition and capital raising assignments. Works in Costa Mesa. Finance degree from DePaul University. **RECENT:** D.A. Davidson announced in September that it served as exclusive financial adviser to Levelset, which is being bought for \$500M by Procore Technologies, a provider of construction management software. **NOTABLE:** Newport Beach resident, previously managed West Coast office of Hovde Financial, an investment banking firm exclusively focused on financial institutions.



**MANNY ROMAN**CEO  
PIMCO

**WHY:** Runs one of the world's largest money managers. Since he joined Newport Beach firm in 2016, assets have soared \$680B to \$2.16T this year. Won 2017 Business Journal Businessperson of the Year in finance along with CEO Dan Ivascyn. **RECENT:** Pimco Foundation in May said it will give its largest donation ever, \$10M, to the Global FoodBanking Network to help communities suffering from hunger. Roman personally contributing another \$5M. **QUOTABLE:** Told WSJ earlier this year: "Pimco today is different from Pimco 10 years ago."

**ROBBIN NARIKE PRECIADO**REGIONAL PRESIDENT  
MUFU UNION BANK

**WHY:** Current role since 2011; duties include several SoCal counties. Helps oversee fifth-largest commercial bank in OC with \$7.6B deposits, 944 workers; 38 branches. Is unit of Mitsubishi UFJ Financial Group. Previously 21 years at Wells Fargo. Serves on boards of OC Business Council, United Way. **RECENT:** Women in Business Award nominee; has written on financial and life planning for women. **NOTABLE:** 30+ years senior industry exec. Oversaw the opening of high school branch in Anaheim at Loara High School, in partnership within the Anaheim Unified High School District; won a top award in 2016 from the Orange County Business Council.

**2021 HOBBIES**

**David Bahnsen:** I do a lot more running outdoors now than I used to.

**Jim Madden:** A doubling down on outdoor sports, including competitive sailing.

**Michael Thomas:** I have been sailing out of Newport Harbor on larger and larger sailboats during the last 18 months.

**Richard Afbale:** I took up boxing as a hobby, sport and training exercise. What a great way to stay in shape!

**Jeff Verdon:** I took up cooking and taught myself to be a decent cook.

**Don DiCostanzo:** Outdoor activities including swimming and biking (electric, of course!).

**Joe Duran:** We experimented with our cooking and made several dishes for the first time, like slow-cooked paella.

**Seymour "Sy" Everett:** Stand-up paddle boarding.

**Steve Milner:** I am most dedicated to hiking. I love the All Trails App. Even though I am a life-long OC resident, I have discovered so many fantastic places in OC.

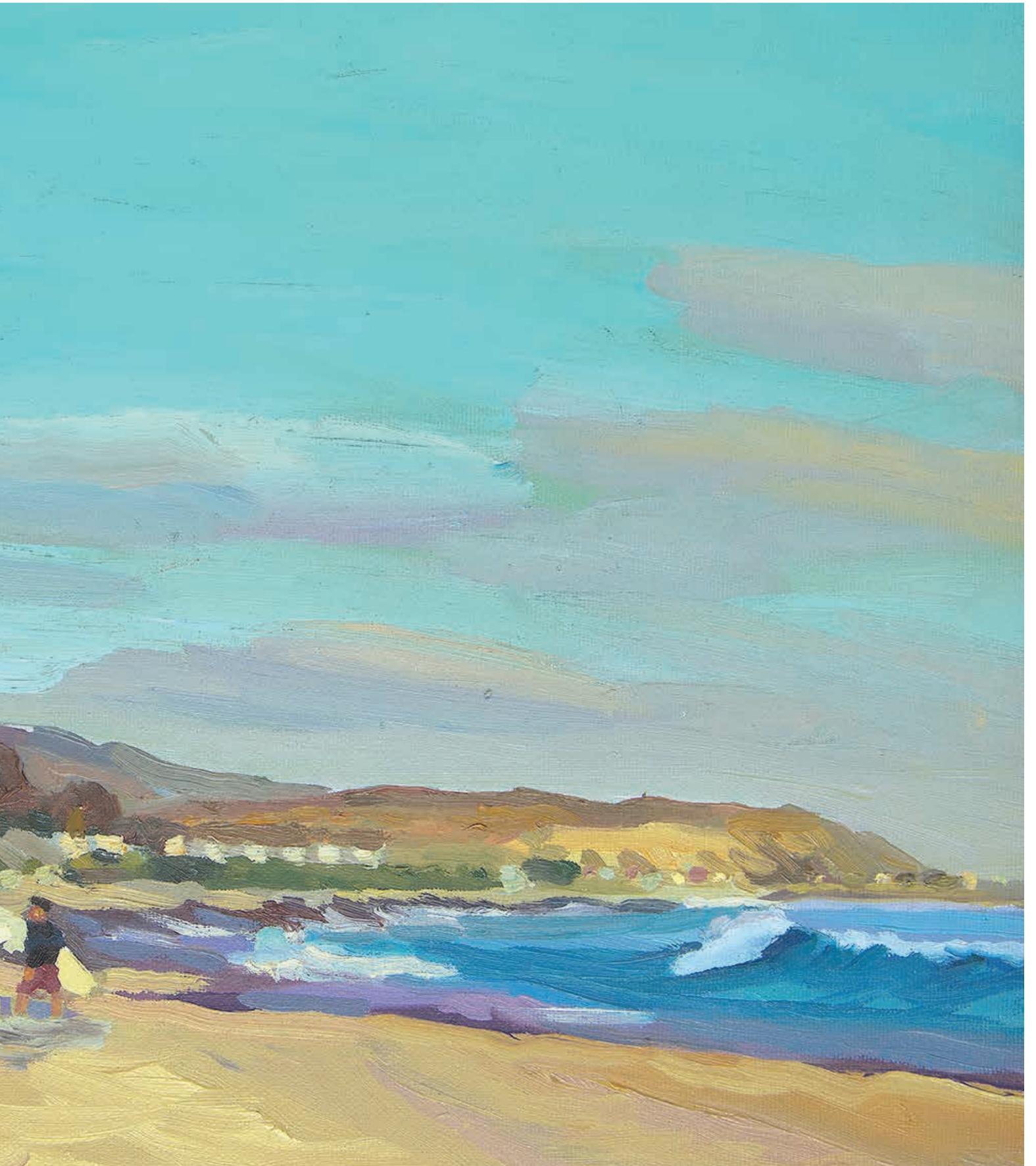
**Daniel Walker:** My passion is polo.

**Gary Crisp:** I took up boxing at BoxHaus in Newport Beach.

**Ramin Mousavi:** I started reading a book a week—something I had done since I was 15 but had stopped doing for a few years—and have stuck with it.



Kevin A. Short, "High Tide at the Church, Trestles," 1990, oil, 15 x 19". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.



HEALTHCARE

**AMIR AGHDAEI**CEO, PRESIDENT  
ENVISTA HOLDINGS

**WHY:** Dental-focused company in Brea, serves over 1M dentists in 150 countries, was originally formed as a subsidiary of Danaher Corp. in 2018. Raised nearly \$650M in an initial public offering in September 2019, when Danaher spun off the business into a stand-alone public company.

Consumables, equipment and services provider. **RECENT:** Envista units include Ormco and Nobel Biocare Systems that make specialty products, KaVo Kerr makes equipment and consumables. Each unit among OC's larger dental companies. **QUOTABLE:** "We are off to a great start in 2021. A robust recovery in the dental market combined with strong execution and our continuous improvement culture drove broad-based strength across our portfolio."

**JEFF HAMMOND**EXECUTIVE DIRECTOR  
HOAG AT HOME

**WHY:** New offshoot of Newport Beach-based hospital operator; aims to provide affordable at-home healthcare for the aging population via skilled nursing, physical therapy, occupational therapy, speech-language therapy, and medical social services.

**RECENT:** The new home health division has over 100 team members. The unit will include hospice services, palliative care, and at-home physician visits, among others. **NOTABLE:** Hammond was previously chief executive of home health, hospice, private duty, palliative care, and home infusion at Providence St. Joseph Health. He founded and owned Sea Crest Home Health Services Inc. in Newport Beach.

**QUOTABLE:** "Patients prefer to be treated at home if they can, and our services allow them to do that."

**BJARNE BERGHEIM**CEO, PRESIDENT  
SONENDO

**WHY:** Runs dental company best known for its GentleWave root canal system. On Business Journal's list for two consecutive years as a fastest-growing mid-sized private company.

**RECENT:** Says returning to growth mode post-pandemic at a much faster rate than other dental equipment providers due to technological and safety advantages of its GentleWave, a product to clean root canals. **NOTABLE:** Company filed plans for an IPO in October. **QUOTABLE:** "We're changing root canal therapy in a big way."

**STEVE BILT**CEO  
SMILE BRANDS

**WHY:** Runs one of country's top Dental Support Organizations, which manages practices for dentists. Co-founded its predecessor business in 1998, left in 2014 and returned to the helm in 2016. **RECENT:** Major corporate reengineering project in wake of pandemic, which devastated dental industry and initially dropped Smile Brands' revenue by some 90%. "Our team was incredible. We adapted. We reinvented. We went back when we got something wrong and looked at it again."

**QUOTABLE:** Smile Brands reopened its 450 affiliated dental locations in 17 states and invited all furloughed employees to return in 2020. "Not a stone was unturned, and we ended up growing bigger than we were going in," he said.

**ERIK WEXLER**PRESIDENT OF OPERATIONS  
AND STRATEGY,  
PROVIDENCE SOUTH

**BIO:** Heads healthcare giant's southern footprint in California, Texas and New Mexico. Named to new role in January, previously ran Southern California Region for Providence, the Southland's largest healthcare system. Regional organization anchored by 13 hospitals, over 90 outpatient centers, and four physician foundations. Local hospitals include St. Joseph Hospital-Orange, St. Jude Medical Center in Fullerton, and Mission Hospital in Mission Viejo and Laguna Beach.

**NOTABLE:** Providence partnered with Edwards Lifesciences and the cities of Irvine, Santa Ana, Costa Mesa and Tustin to open two mass vaccination clinics—a continuation of its efforts to expand healthcare services to more in the community, including underserved areas of the population. Providence provided \$260M in overall community benefit with \$27M in direct support to its community partners in OC last year.

**QUOTABLE:** "We believe health is a human right, and that health begins with a focus on wellness through primary care. We invest in the health of our communities by expanding access to care; educating challenged communities about healthy eating, fitness and preventive care; recognizing and managing social determinants of health; and addressing mental health as part of our commitment to whole person care. This all helps us realize our vision of health for a better world."





## 7,459 reasons to celebrate!

Throughout the pandemic, our 7,459 UCI Health Heroes — doctors, nurses, therapists, techs, scientists and staff members — have provided compassionate and innovative care to our patients and the most vulnerable in our community.

Their dedication to go above and beyond in meeting the challenges that have faced us, their professionalism and resilience, are inspiring. I cannot overstate the gratitude I have for each of them and the incredible efforts they make to ensure that our patients live their best lives.

I thank them all for stopping at nothing to protect our community.

Sincerely,  
Chad Lefteris, CEO, UCI Health

**UCI Health**

**JAMES GLIDEWELL**FOUNDER, CEO  
GLIDEWELL LABS**WHY:** Runs world's largest privately owned dental implant provider: sales in excess of \$500M, thousands of local workers with cluster of buildings in Irvine, Newport Beach.

Products include crowns, dentures, composites, ceramics. Directs R&amp;D.

**RECENT:** Exec has a growing real estate portfolio with close to half a million square feet of office, manufacturing buildings around John Wayne Airport. Paid nearly \$11M in June for 24,000-square-foot office at Von Karman Avenue and Michelson Drive. **NOTABLE:** Boating enthusiast, who acknowledged the hobby's high cost when he told SuperYacht Times, "I've always owned boats and I take the beating. I have a large enough company that it doesn't bother me that much. It is a benefit for my children."**TOM BURNS**CEO, PRESIDENT  
GLAUKOS**WHY:** Leads maker of devices and drugs for microinvasive glaucoma surgery. Moving into eyecare therapies for corneal diseases with \$400M purchase of Massachusetts-based Avedro in 2019. **RECENT:** Executed commercial rollout of newest stent, iStent inject W. Product aims to increase ease-of-use factor for some 9K cataract surgeons in the U.S. Resolved in patent lawsuit with Irvine-based stent maker Ivantis. Tangle with feds over Medicare reimbursement for product. **NOTABLE:** New 160K-square-foot HQ in Aliso Viejo opened this year.**EDWARD KIM**PHYSICIAN-IN-CHIEF  
CITY OF HOPE ORANGE COUNTY**WHY:** Renowned oncologist tapped for OC operations late last year. Will spearhead physician recruitment, cancer care and research, and introduce entirely new therapies to the community at City of Hope's planned \$1B cancer care network in Irvine. **NOTABLE:**

Was most recently chair of investigational therapies and cancer research and medical director of the clinical trials office at the Levine Cancer Institute of Atrium Health, as well as a professor of medicine at University of North Carolina-Chapel Hill.

**QUOTABLE:** "My No. 1 vision is to introduce City of Hope technology, innovation and research and make sure that people can access it close to where they live—in Orange County."**NICK GREEN**CEO, PRESIDENT  
AVID BIOSERVICES**WHY:** Runs Tustin-based drugmaker, which has transitioned from making its own drugs to manufacturing drugs for other companies in the last two years. **RECENT:** Avid has seen its share price more than triple over past year. Sported market cap of \$1.3B as of October. Investing in new local facilities to support extra work. Grabbing new contracts related to COVID.**QUOTABLE:** "With the pedigree Avid has in terms of its history as a commercial manufacturer, we're in a good position to attract new business, and we're executing in a very interesting and attractive marketplace with good demand for biologics," Green said in February.**GAVIN HERBERT SR.**FORMER CHAIRMAN, CEO  
ALLERGAN**WHY:** Founding father of OC's ophthalmic and drugmaking industry. Joined father's eyecare-focused pharma firm in the 1950s. Later moved to Irvine when little else was here. Botox "started as something we thought might do \$10 million." **RECENT:**An investor, adviser, to upstart drugmaker Anivive, which focuses on pet therapeutics. One of several at firm with Allergan ties. **NOTABLE:** Established Gavin Herbert Eye Institute at UC Irvine Health. With wife, Ninetta, has backed eye research for decades with millions of dollars. **QUOTABLE:** "I saw similarities between Anivive and Allergan. We always had eight to 10 differentiated products in our pipeline that addressed large unmet needs."**ROBERT BRAITHWAITE**CEO, PRESIDENT  
HOAG MEMORIAL  
HOSPITAL PRESBYTERIAN  
NEWPORT BEACH**BIO:** Head of Hoag's entire healthcare network, including two hospitals and Hoag Orthopedic Institute, some 600 beds.**NOTABLE:** Plans to vastly expand Irvine hospital campus, through \$226M buy of existing facilities and excess land next to 405 freeway. City filings indicate that land has the potential to hold more than a dozen new facilities on the campus, including a Women's Hospital as well as a Digestive Health Hospital, among other medical buildings, support facilities and parking structures. Two-phased expansion could add 432,000 square feet to the Hoag campus, and increase the number of hospital beds there to 391.

# “I chose to fight, so I came to Hoag.”

SARAH'S STORY



## An ER Doctor Fights—and Defeats—Breast Cancer During Pandemic

Sarah worked on the front lines as an emergency room physician in the height of the COVID pandemic. Her world came to a halt when the mother of three found out she had an aggressive form of breast cancer. At Hoag, Sarah never felt like a number. Hoag saw her as a person, a mother and a fellow physician. Daily, she felt the support of a team fighting hard to get her back to being healthy for her family. Today, cancer-free, Sarah credits the care and support she received at Hoag for helping her defeat breast cancer once and for all.

[Hoag.org](https://www.hoag.org)

**RICHARD AFABLE**CHAIRMAN, PRESIDENT  
BE WELL OC

**WHY:** One of the area's more prominent healthcare executives, former chief executive at Hoag Hospital and St. Joseph Hoag Health from 2005 to 2017.

Former CEO of Concierge Key Health, one of Orange County's closely watched healthcare-related startups. **RECENT:** Tackling mental health issues via Be Well, which opened \$40M facility along 57 freeway at start of year.

Largely funded by three groups: CalOptima, the County of Orange, and a collection of area hospitals. Another facility in works at OC Great Park.

**QUOTABLE:** Stakeholders invested "not only because it was the right thing to do, but because we think there is a business case for this."

**SAID HILAL**FOUNDER, CEO  
APPLIED MEDICAL RESOURCES CORP.

**WHY:** Medical industry vet since 1979 when he worked at American Hospital Supply Corp. Runs OC's No. 2 medical device firm with some \$600M in sales and customers in 80 countries. **RECENT:** Continues to increase headcount with 3,188 employees locally, up 3.9%. Majority of workforce is in OC. Owns numerous buildings in South OC. **NOTABLE:** California State University, Long Beach grad with a bachelor's in mechanical engineering, master's in mechanical engineering. Met wife, Linda, on campus in 1969.

**KEVIN MANEMANN**CEO  
PROVIDENCE SOUTHERN CALIFORNIA

**WHY:** Named to post in March. Leads a team of 31,000 caregivers including 5,200 physicians on staff at 11 hospitals for one of the Southland's largest healthcare systems. **RECENT:** Launched and staffed two large-scale vaccination sites in Santa Ana and Irvine, as part of efforts to overcome accessibility challenges and immunization hesitancy within local communities. **QUOTABLE:** "Patients want convenient care, and Providence is committed to delivering high-quality, affordable care close to where people work and live. In fact, we are growing our network with the goal of being 15 minutes from 15 million people in the communities we serve."

**DAVID-ALEXANDRE GROS**CEO  
ELEDON PHARMACEUTICALS

**WHY:** Biopharma exec with leadership roles at Sanofi, Imbria Pharmaceuticals. Appointed to post during Novus Therapeutics' acquisition of ALS drugmaker Anelixis Therapeutics in 2020. Company renamed Eledon.

**RECENT:** Advanced AT-1501, a "promising investigational drug" to treat ALS, known as Lou Gehrig's disease, to Phase 2 trials. Raised \$108M in a private investment in public equity deal. **NOTABLE:** Exec team additions from Urovant Sciences, Allergan, Biogen. Keith Katkin, chairman of Eledon, was founding CEO of Urovant, and previously orchestrated the sale of Aliso Viejo drugmaker Avanir for \$3.5B.

**VIVEK JAIN**CEO  
ICU MEDICAL

**WHY:** Leads one of OC's largest medical device makers.

**RECENT:** Said in September it struck a deal to pay \$2.35B for Smith Group PLC's medical division, bringing syringe and ambulatory infusion devices, vascular access and vital care products to fold. ICU shares jumped 36% on news of the deal in early September. **NOTABLE:** Replaced ICU founder Dr. George Lopez in 2014, joining from the procedural solutions division of San Diego-based medical device maker CareFusion Corp. **QUOTABLE:** Smith Group combo "makes sense for the medical device marketplace and fits well with ICU Medical's existing business."

**CHAD LEFERIS**CEO  
UCI HEALTH  
ORANGE

**BIO:** Oversees OC's only academic medical center and all clinical and patient-serving operations. Also heads the overall UCI Health system, which includes UCI Medical Center, the area's largest hospital, and more than a dozen outpatient research and specialty care centers throughout Orange County and portions of Riverside County.

**NOTABLE:** Plans moving ahead for \$1B medical complex on land the school owns at the corner of Jamboree Road and Birch Street. Dubbed the UCI Medical Center Irvine-Newport, project to include an acute care hospital with emergency and surgery departments and an ambulatory care center. Will join the previously announced \$221M UCI Health Center for Advanced Care planned nearby. All facilities, spanning about 800,000 square feet combined, are expected to receive patients in 2025.

**QUOTABLE:** The medical center will introduce specialty services to the region to "fulfill a need that was envisioned decades ago."



# PROTECTING ORANGE COUNTY DURING UNCERTAIN TIMES



The COVID-19 pandemic has created turmoil across the globe. But, through it all, CHOC President and CEO Kimberly Chavalas Cripe has remained focused on protecting the health and well-being of our community's children and families, as well as staff. Before COVID-19 spread to Southern California, the insightful leader convened a command center to ensure a well-coordinated response. New safety measures were promptly implemented, and a host of resources were made available, including mental health support, dozens of pediatric and family-oriented COVID-19 articles, and a free, 24/7 nurse helpline for parents (1-844-GET-CHOC). To learn more and to get helpful tips, visit [choc.org/coronavirus](https://choc.org/coronavirus).



**GENE RAPISARDI**

MARKET PRESIDENT,  
SOUTHERN CALIFORNIA AND  
NEVADA  
CIGNA

**WHY:** Longtime Cigna vet, oversees one of OC's largest PPOs, with enrollment topping 70K. Large dental plans, too.

**RECENT:** In collaboration with Providence and Hoag, developed the Select Network HMO plan for employers with 100+ employees. Plan includes reporting for transparency; analytics and intervention management to reduce overall health risks; closing gaps in care to improve outcomes. **QUOTABLE:** "Cigna collaborates with providers to ensure we're all focused on the same goal—getting people connected to the right care that delivers the best quality at the best price, which is the very definition of value."

**PETER YU**

MEDICAL DIRECTOR  
FETAL CARE CENTER OF  
SOUTHERN CALIFORNIA  
CHOC

**WHY:** Pediatric surgeon who is bringing together maternal-fetal medicine specialists, neonatologists and pediatric cardiologists to offer consultation, diagnostics, treatment planning and after-birth care to families in one place.

**RECENT:** Newest addition to CHOC campus. Opened \$5.25M fetal care facility on sixth floor of CHOC building in Orange; is planning fetal surgery center in 2024. New spot was made possible through a collaboration between CHOC and UCI Health.

**QUOTABLE:** "Maternal-fetal medicine programs are difficult to establish because there are really two patients: mom and baby."

**BARRY PORT**

CEO  
ENSIGN GROUP

**WHY:** Longtime healthcare exec in skilled nursing sector. Joined \$5B-valued company in 2012, named to top spot in 2019. Multibillion-dollar REIT provides a variety of skilled nursing and assisted living services, physical, occupational and speech therapies and other rehabilitative and healthcare services. **RECENT:** Acquired St. Catherine Healthcare, a 99-bed skilled nursing facility in Fullerton. Counts about 240 healthcare facilities in 13 states in its portfolio. **NOTABLE:** The company that keeps on giving: spun off San Clemente's real estate investment trust group CareTrust REIT in 2014; Idaho-based Pennant Group in 2019.

**TONY LEMMO**

CEO  
BIODOT

**WHY:** Runs maker of ultra-low volume dispensers that are used in the production of diagnostic tests. Counts leading in vitro diagnostic manufacturers and academic institutions among clients. **RECENT:** Acquired for \$84M by Ontario, Canada-based ATS Automation Systems. It's the second sale for the company in a little over a year; it was sold to Boston-based private equity firm Artemis Capital Partners in 2020. Operations staying local. **NOTABLE:** With ongoing revolution in diagnostics industry, has seen double-digit growth in past two years. \$40M+ in revenue in 2021.

**PETER KLAES**

GENERAL MANAGER  
B. BRAUN MEDICAL

**WHY:** Top local official for medical device firm, which makes infusion pumps and IV fluids used to hydrate patients, administer drugs and replace blood. Firm counts 2,200 area employees, fourth-most for area device maker. **RECENT:** Firm in midst of \$500M overhaul of 30-acre Irvine campus just off Jamboree Road.

**NOTABLE:** Money going to "the replacement of aging equipment, upgrading utilities and production lines, and increasing capacity." **QUOTABLE:** B. Braun has "been committed to Southern California and manufacturing at this facility" ever since the late 1990s.

**MARK COSTA**

EXECUTIVE DIRECTOR, ORANGE COUNTY  
SERVICE AREA  
KAISER PERMANENTE  
ANAHEIM



**BIO:** Helms Oakland-based nonprofit health enterprise with hospitals in Anaheim, Irvine, medical offices around county that serves nearly 600,000 members. Employs close to 8,000 full and part-time workers in Orange County, easily tops among OC hospitals.

**NOTABLE:** In late 2020, Kaiser Permanente spent \$40M to buy a 10-acre site at portion of the Westminster Mall with plans to build a new medical office facility. The site is expected to become its third local hub, and its first OC medical property not situated within a larger campus. Timing for project hasn't been disclosed.

**QUOTABLE:** Kaiser officials said preliminary proposals call for a phased construction of a "large medical office with primary and specialty care." Forthcoming project will be "a huge win-win for us, our members and the larger community," they tell the Business Journal.



# Congratulations on being named to the OC 500



**Stephen E. Thorne IV**  
Founder and CEO

Pacific Dental Services® supports over 850 dental offices across the country with a full range of business services. Our purpose is to help clinicians create Healthier, Happier Patients® while enjoying the freedom to focus on comprehensive, oral health care. Founder and CEO Stephen E. Thorne IV is leading the way in raising awareness of the link between oral and overall health. We call this The Mouth-Body Connection®.

We congratulate Steve for being named a leader in Orange County, and even more for his innovative vision to utilize advanced, proven technology to improve health outcomes for patients in Orange County and beyond.



**PACIFIC**  
DENTAL SERVICES®

**MARSHALL MONCRIEF**CEO  
BE WELL OC/MIND OC

**WHY:** Heading group of local public health leaders tackling mental health issues in the county. Former regional executive director for the Institute for Mental Health and Wellness at Providence St. Joseph Health.

**RECENT:** Opened \$40M facility in Orange at start of the year, to treat mental health, substance use disorder issues. 60,000-square-foot site said to be first step in a movement to “lead the nation in optimal mental health and wellness for all residents.” **QUOTABLE:** Of opening, said “this is a major milestone for Orange County.”

**JEFF MARGOLIS**CHAIRMAN  
WELLTOK

**WHY:** One of OC’s most connected healthcare-tech execs. Former CEO, current chairman of Welltok, a healthcare consumer activation company. Previously, founder and CEO of Newport Beach’s TriZetto, which he led to a successful IPO and a \$1.4B private equity buyout.

**RECENT:** Chairman of NextGen Healthcare Inc., formerly of Irvine, and on board of Orange’s Alignment Healthcare Inc. **NOTABLE:** Serves on the board of directors at Hoag Hospital and various advisory boards at UCI. **OC LEADER BOARD, MARCH 29:** “I am calling for partnerships between Silicon Valley and the healthcare industry to improve people’s total health. Doing so can extend healthier and more fulfilling lives.”

**RICHARD SANCHEZ**CEO  
CALOPTIMA

**WHY:** Leads public health insurer for medium- and low-income families in Orange County.

**RECENT:** Announced at start of year \$45.6M in funding that supports COVID-19 vaccination efforts among its 801,270 members. Agency said it will coordinate an outreach program for Medi-Cal members and members experiencing homelessness in partnership with the OC Health Care Agency. Announced retirement, effective this November.

**QUOTABLE:** “Healthcare is a calling, and it has been a privilege to serve and help ensure access to quality health care for the most vulnerable members of the community.”

**DAVID MOATAZEDI**CEO, PRESIDENT  
EVOLUS

**WHY:** Runs neurotoxin upstart, maker of Jeuveau, touted as a cheaper, more effective version of Allergan’s Botox. Held senior marketing roles with Allergan for more than a decade, including SVP of medical aesthetics, before joining Evolus in 2018. **RECENT:** Ended litigation with Allergan Aesthetics, others, allowing Jeuveau to continue to be sold domestically. \$35M payment to Allergan parent among other considerations. **QUOTABLE:** “We believe increased competition and options benefit all market participants.”

**RHONDA LONGMORE-GRUND**CEO  
ALLIANCE HEALTHCARE SERVICES

**WHY:** Irvine firm is one of the nation’s largest provider of MRI services, with revenue approaching \$500M. Appointed CEO in 2017. Previously with Printronix and Ingram Micro. **RECENT:** Becoming an even bigger powerhouse. Alliance’s China-backed owner, Tahoe Investment Group Co., this year sold the provider of outpatient radiology and oncology services for health systems to Florida’s Akumin Inc. for \$820M. Alliance is the larger of the two companies. **QUOTABLE:** “It’s one of the biggest transactions in the space. It’s an exciting combination.”

**JOHN KAO**FOUNDER, CEO  
ALIGNMENT HEALTHCARE  
ORANGE

**BIO:** Created provider of increasingly popular Medicare Advantage insurance plans. Plans are required to cover traditional Medicare expenses such as doctor visits and hospital costs. They also offer extra coverage for needs like vision, dental and hearing exams, and prescription drugs.

**NOTABLE:** Late March IPO raised nearly \$500M in proceeds, and company is now valued at close to \$5B. IPO proceeds will be used to expand Alignment’s reach beyond the three states—California, Nevada, North Carolina—it currently covers.

**QUOTABLE:** “Becoming a publicly traded company marks a milestone in Alignment Healthcare’s journey to reinvent healthcare as we know it,” he told the Business Journal. “It allows us to reach a much larger audience, with the trust, support and backing of our new shareholders and investors. Together, we will reimagine, recreate and restore healthcare delivery to one of the most important populations in America—our seniors.”



CONGRATULATIONS TO

# RAMIN MOUSAVI

ON OF THE  
*ORANGE COUNTY  
BUSINESS JOURNAL'S*  
OC500



PRESIDENT & CEO of  
**CATHWORKS**

I am honored to lead CathWorks, a company with a transformational product portfolio, exceptionally talented people, and committed investors and strategic partners." —Ramin Mousavi

Under Ramin's leadership, CathWorks is rapidly advancing product innovation, deepening clinical adoption of the CathWorks FFRangio™ System, and expanding global commercial growth.

CathWorks' revolutionary non-invasive platform is transforming how physicians diagnose and treat patients with coronary artery disease around the world.



**AUGIE NIETO**CO-FOUNDER  
AUGIE'S QUEST

**WHY:** Fitness industry mogul behind Lifecycle, Life Fitness, Octane Fitness. After stricken with amyotrophic lateral sclerosis in 2005, began campaign to treat and cure ALS, known as Lou Gehrig's disease. Joined ALS Therapy Development Institute (ALSTDI), where he continues to serve as chairman. **RECENT:** Instrumental in creation of Anelixis Therapeutics, a Boston-based firm spun out of ALSTDI in 2014, developing AT-1501, a "promising investigational drug" to treat ALS. Anelixis merged with Irvine-based Novus Therapeutics and raised \$108M in a PIPE deal in 2020. Company renamed Eledon Pharmaceuticals, based locally. **NOTABLE:** Has raised over \$160M to fund research for ALS, with wife, Lynne.

**JIM ROBINSON**CEO  
UROVANT SCIENCES

**WHY:** Healthcare exec with specialty in urology. Took over Irvine-based company in 2020 ahead of successful FDA approval for its first medication that treats overactive bladder issues, Gemtesa. **RECENT:** Largest shareholder, Japan's Sumitovant Biopharma, purchased the company for \$216M in March. Committed to Irvine amid sale; OC's fastest-growing drugmaker by headcount. **QUOTABLE:** Company's sale "puts Urovant in an even stronger position to focus on a successful launch of Gemtesa for patients with overactive bladder, successfully drive our business, continue advancing our development pipeline, and seek further opportunities for business growth."

**KATIE SZYMAN**CORPORATE VP, CRITICAL CARE  
EDWARDS LIFESCIENCES

**WHY:** Oversees critical care and vascular business at OC's largest publicly traded firm; joined in 2015. Served as president of global diabetes, multiple VP roles at Medtronic for more than a decade prior. **RECENT:** Emerging critical care division received FDA clearance for its Acumen IQ Finger Cuff, a device which pairs with its software that predicts low hypotension, a condition that can lead to organ damage and death. **QUOTABLE:** This predictive technology "demonstrates our commitment to patient care and providing clinicians with 'smart' monitoring tools that allow for better prediction and management."

**STEPHEN THORNE**FOUNDER, CEO  
PACIFIC DENTAL SERVICES

**WHY:** Launched company in 1994, and grew it into the country's third-largest dental support organization with over 800 affiliated offices in 24 states. Seeks to let clinicians focus more on the patient; worry less about the business. **RECENT:** Aims to strength the mouth-body connection with a \$120M investment to build the first true electronic health and dental record. **QUOTABLE:** On surviving the onset of the pandemic, said that Pacific Dental "had a remarkable rebound in the second half of last year, and despite the pandemic, revenue was down only 1% from 2019."

**AISHA BARRY**PRESIDENT  
ADVANCED STERILIZATION  
PRODUCTS

**WHY:** ASP makes sterilization and disinfection products for healthcare uses, including a sterilization system to decontaminate N95 respirator masks, called Sterrad. **RECENT:** Joins ASP from Phillips, where she served as a GM and VP for patient monitoring. Has also been a VP of patient management at Medtronic. Replaces Dominic Ivankovich in the president's role for the company, whose operations in Irvine have expanded over the past year. **NOTABLE:** ASP has installed nearly 10,000 Sterrad systems in 6,300 hospitals across U.S., according to FDA. **QUOTABLE:** Company says her "extensive healthcare background coupled with software and consumer products innovation will help strengthen ASP's digital expertise, develop strategic alliances, and expand our international sales presence."

**BARRY ARBUCKLE**CEO, PRESIDENT  
MEMORIALCARE HEALTH SYSTEM  
FOUNTAIN VALLEY

**BIO:** Head of Fountain Valley-based health system with five area hospitals that bring in close to \$3B in revenue. MemorialCare counts 200-plus care locations in Orange County and Los Angeles. Largest nonprofit healthcare system based in OC.

**NOTABLE:** In April, system's Orange Coast Medical Center and Saddleback Medical Center received an "A" Safety Grade from Leapfrog Group, an organization committed to healthcare quality and safety.

**QUOTABLE:** Upon receiving the PSMF 5-Star designation, said "patient safety and quality of care are always top of mind and top of heart at MemorialCare. I commend the incredible work PSMF is doing to bring together health systems, healthcare technology companies, patient advocates and others to dramatically improve patient safety."



**GREG STAPLEY**CEO  
CARETRUST REIT

**WHY:** Runs one of area's larger healthcare-focused REITs. Real estate portfolio consists of more than 200 skilled nursing, assisted living and independent living facilities with nearly 25,000 beds. Ensign Group of San Juan Capistrano spun off CareTrust in 2013. **NOTABLE:** "When the pandemic broke, we firmly believed that our outstanding operators would find a way to navigate through the challenge," he told analysts in February, after beating 2020 expectations. "This gave us the confidence to maintain both our dividend and guidance. That confidence proved well placed as CareTrust collected 99.3% of contract rents in 2020." **QUOTABLE:** REIT's "results and the ongoing performance by our tenants under some of the most difficult circumstances imaginable have proven once again the value of our operator-first investment discipline," he said at start of year.

**RON KURTZ**CEO, PRESIDENT  
RxSIGHT

**WHY:** Aliso Viejo firm is the maker of the first artificial lens that can be adjusted after cataract surgery to customize and optimize a patient's vision. **RECENT:** Bill Link-backed firm got FDA clearance for product in 2017. Went public in late July, raised some \$118M in proceeds. Proceeds from IPO being used to support commercial expansion, including hiring additional commercial personnel, and for product development, research activities and clinical development. **NOTABLE:** Was founder of another ophthalmic company, Irvine's IntraLase Corp., which in 2007 was bought by AMO for \$808M.

**ROBERT LOUIS**CHIEF OF NEUROSURGERY,  
EMPOWER360 CHAIR  
HOAG MEMORIAL HOSPITAL  
PRESBYTERIAN

**WHY:** Fellowship-trained minimally invasive neurosurgeon. Since 2015, has led the development and implementation of virtual reality technologies for preoperative simulation and intraoperative navigation. **RECENT:** Launched virtual reality programs on mindfulness for expectant mothers, and for front-line nurses in Hoag's COVID-19 unit. Experiential VR center opening at Newport Beach campus. **QUOTABLE:** "We have seen the power of virtual reality-enabled programming to support the mental health and well-being of our patients. We're one of the first hospitals to deploy a solution to help our nurses battle chronic stress and burnout that's come along with the pandemic."

**JULIE SAWYER-MONTGOMERY**PRESIDENT  
BECKMAN COULTER DIAGNOSTICS

**WHY:** Runs Beckman, one of OC's largest medical companies with 850 local employees. Brea-based unit of Washington, D.C.-based Danaher Corp. is one of the largest in vitro diagnostics companies in the world. **RECENT:** Named president of Beckman last January. Previously led Beckman's \$2B developed markets business across North America, Europe and Latin America as well as global marketing and research and development for the firm. **QUOTABLE:** "Beckman Coulter can make 25 million rapid antigen tests a month and essentially increase the number of reported tests in the nation by 40%," Sawyer-Montgomery said of firm's COVID test. "And we can do it at a very affordable price—just \$4 per antigen test at a workflow that is highly scalable."

**SHANNON BLALOCK**CEO  
JCYTE

**WHY:** Runs well-funded ophthalmologic firm whose therapy treats blinding-eye disease known as retinitis pigmentosa. **RECENT:** Named CEO in February, joined jCtye as chief operating officer in July 2020. Previously served as global development leader of portfolio development and R&D strategy for Santen Pharmaceuticals. **NOTABLE:** Company entered a \$252M licensing agreement with Santen in mid-2020. Received \$50M in upfront cash and \$12M in convertible debt. It is also eligible to receive \$190M in future milestone payments as its products are sold in markets outside the U.S., particularly in Asia and Europe.

**KIMBERLY CHAVALAS CRIPE**CEO, PRESIDENT  
CHILDREN'S HOSPITAL OF  
ORANGE COUNTY  
ORANGE

**BIO:** Runs OC's only dedicated pediatric hospital. Hospital has 333 licensed beds, including 54-bed satellite facility in Mission Hospital and 3,600-plus workers.

**NOTABLE:** CHOC was the first children's hospital in the country to receive PSMF's 5-Star Hospital award.

**QUOTABLE:** In an article with Masimo's Joe Kiani published this April in the Business Journal, said that "every healthcare system and individual clinician wants the best possible outcomes for patients. A key component of clinical excellence is often the hospital's level of commitment to a culture of safety and transparency."



**BRANDON KERNS**CFO  
LANDMARK HEALTH

**WHY:** Finance exec for fast-growing Huntington Beach medical firm, which provides in-home, 24/7 medical care to 160,000 chronically ill patients across 18 states, deploying advanced practitioners to patients' homes within an hour. Company says it's now the largest provider of home-based healthcare in the country. **RECENT:**

Kerns, who joined in 2018, has helped oversee the company's 500% increase in revenue, a 700% increase in profit and an employee count that's doubled to 1,800. Named Business Journal CFO of the Year for a private company in September. **QUOTABLE:** "We're enabling an amazing mission of providing medicine to a vulnerable population. I believe you do your best work when you feel connected to the mission of your company."

**HANS KEIRSTEAD**CEO  
AIVITA BIOMEDICAL

**WHY:** Stem cell therapy expert whose biotechnology firm has several ongoing trials for the personalized treatment of skin, brain and ovarian cancers.

**NOTABLE:** Founder of Bill and Sue Gross Stem Cell Clinic at UCI, and previously ran California Stem Cell Inc., a stem cell therapy firm that sold for about \$124 million in 2014.

**RECENT:** Completed a \$25M round of financing in late 2020, with plans to use proceeds to fund several cancer vaccines, as well as a COVID-19 vaccine. Keirstead received Mission Plastics' 2021 Global Humanitarian Award in September. **QUOTABLE:** "Helping patients around the world access leading surgical and therapeutic options has long been a passion of mine."

**VINCE TIEN**CO-FOUNDER, CEO  
360 CLINIC

**WHY:** Westminster-based healthcare provider, which started running drive-thru COVID test sites for the County of Orange last year. Has plans to scale with testing kiosks, concierge services and telehealth offerings this year.

**NOTABLE:** 360 Clinic expanded model to its kiosks and fleet of testing vans, with plans to more than double its current base of 250 employees to about 600 by end of 2021. **QUOTABLE:** The company had opened 16 kiosks spanning from sites at Laguna Woods City Hall to Santiago Canyon College in Orange as of early 2021. "Our goal is to provide access points for at least one or two kiosks in every city in OC to meet demand," Tien said.

**ANNETTE WALKER**PRESIDENT  
CITY OF HOPE ORANGE COUNTY  
IRVINE

**BIO:** Healthcare leader tapped to build City of Hope, Orange County, to incorporate 21st-century approach to treating and curing cancer. Planning massive hospital and research facility at Irvine's Great Park Neighborhoods. \$1B investment in the area.

First part of that plan, a 190,000-square-foot comprehensive cancer center, is under construction and set to open next year. It will be joined by an adjacent specialty hospital, which is being built from the ground up, and is scheduled to open by 2025.

**NOTABLE:** Received a \$50M gift from the charitable arm of homebuilder Lennar Corp. near end of March, to help move OC project ahead.

**QUOTABLE:** "We're on fire about making sure the cancer center opens in 2022." Says center is "on schedule and on budget" to open next August, with goal to bring whole-person and whole-family care to Orange County.

**THE BEAUTIFUL GAME**

Former competitive soccer player **Emile Haddad** could have a bit more time to play, after turning over the CEO role at **FivePoint Holdings** earlier this year.

He's not alone among the OC500 with ties to the game.

"I was a competitive soccer player through college," says **Cisochare's Mike Gentile**. "I stopped playing in my early 40's but have just returned to playing again in an over-45 league."

"It feels great to be a rookie again in something, really anything, at 46!"

If anyone needs a coach, call **Newmeyer & Dillion's Louis "Dutch" Schotemeyer**.

"I really doubled down on my involvement with youth soccer in an effort to connect with my youngest daughter and also do something good in the community," Schotemeyer says.

## IN OFFICE, HYBRID, REMOTE

**Editor's Note:** We asked OC500 members about their companies' back-to-work policies. Edited responses follow.

**Deepak Garg, Smart Energy Water:** We are hybrid—operating both from the office and home. Being a tech player, we were at an advantage to manage 100% work from home with minimal disruptions. Now, as we reopen, our teams want to come back and resume work from the office. We have given them all the flexibility on how they work.

**Nicolas Verheem, Teradek:** We're back, but much more flexible. About 70% of employees are in the office on any given day.

**Roy Dekkel, SetSchedule:** We've embraced the hybrid model and allow many of our employees to work from home

**Julie Sawyer Montgomery:** At **Beckman Coulter**, we're evolving our workplace to be flexible in a post-COVID world. We're embracing a hybrid model for roles that could flex to work both remotely and onsite. Bottom line, our goal is to be "One Team Everywhere," whether onsite, hybrid, or remote.

**Chris Beals:** In March of this year, we officially transitioned to a "Weedmaps from Anywhere" work mode, which made working from an office optional for employees, role permitting. Ultimately, we believe work is not a place, but something you do, and we've found that this approach has only provided us more opportunity for growth.

**Ed Thomas, Tilly's:** We have been operating with a hybrid model. Most of our office has been coming in two days per week. I am not a big fan of this. Having the team together in person is critical to the success of the company. We made it work during the peak of the pandemic.

**Martha Daniel, IMRI:** We have adopted a hybrid model. Employees work two days out of the week in the office with staggered days to minimize the number of employees in the office at any given time. We did, however, reduce office space and change the environment to open seating and shared offices.

**Dan Lubeck, Solis Capital:** We are fully back at the office and have been for some time. We feel comfortable as our office is not densely populated, and we typically use stairs (not an elevator) to access our office.

**Kimberly Cripe, CHOC:** We have invested in resources, especially technology, to support a successful hybrid model and to ensure we continue to exceed our high standards of performance.

**Kristen Allison:** We have really embraced the hybrid model at **Burnham** because we think it's so important to allow employees to have the flexibility, and we have seen the effective results.

**David Bahnsen, Bahnsen Group:** 100% in office, always and forever. We care about our culture, our brand, our ability to collaborate together, and most importantly, seeing clients in person in our office.

**Jeff Margolis, Welltok:** I went to work in my offices where all others vanished aside from my executive assistant and the copier repairman.

**Sharrell Jackson, Lendistry:** We are absolutely embracing the hybrid model. It is critical that we pivot as a result of COVID and take advantage of the reduction of real estate cost, ability to obtain talent nationwide which can reduce overall salary expenses and create a space where our employees come to collaborate, learn and work.

**Bryan Gadol, Holland & Knight:** Still working from home and enjoying it immensely. However, it will be great to get back to the office for in-person collaboration and long-term team development soon.

**Edward Kim, City of Hope:** We are a hybrid model. There are the clinical teams who are on ground, providing care. We must ensure they can do their work and treat patients safely. The other members of our teams are mostly virtual. We're working to keep everyone connected as productive colleagues.

**Patty Arvielo, New American Funding:** We've moved to a hybrid model. We've seen the benefits of this new way of working. Being a woman-owned company, we know the struggle in finding a balance between life and work. Embracing this hybrid model allows our team to give both their life and their work the attention that each deserves.

**Frank Martell, CoreLogic:** Our business has adopted a "Flexible Working Model" with employees having the freedom to select a number of days each week to work remotely that afford them flexibility.

**Randy Barth, Think Together's** main office in Santa Ana and our nine regional offices across California are operating hybrid. Our school site staff, who serve students in over 450 schools, are all safely operating in person.

**John DeCero, Mechanics Bank:** Our front-line employees at our branches and many essential back-office employees have never stopped going in. Today, we are operating under a hybrid model, and will continue to monitor federal, state and local health-safety guidelines to determine when we can plan for a full return to the office.

**Roger Kirwan, Woodside Credit:** We went completely remote for two months and then came back to 90+ % in the office. We used the shutdown as the impetus to take our loan booking and sales procedures entirely electronic.



Steve Santmyer, "Main Beach Volleyball, Laguna Beach" undated, watercolor, 22 x 30". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.



HOSPITALITY / FOOD

**BRYAN STARR**

CEO, PRESIDENT  
GREATER IRVINE CHAMBER,  
DESTINATION IRVINE

**WHY:** Heads Greater Irvine Chamber of Commerce for OC's biggest center of business, and its economic development and tourism marketing divisions.

**RECENT:** Destination Irvine playing a "significant role" in recovery of travel to the city; travel spending brought in \$781M to city's economy pre-pandemic. **QUOTABLE:** "Group business is returning to Irvine," he said in late June. "May was the fourth consecutive month our destination sales team received more than 20 leads for future group business, the most since March 2020."

**SIR TORBEN AASKOV**

OWNER  
TRADEWORKS

**WHY:** Local businessman, Chapman grad and the Honorary Consul of Denmark in California. Runs Orange's Tradeworks, which sells imported gourmet food and beverages from Denmark and other European countries to some of the country's largest supermarket chains. **RECENT:**

Knighted by Queen Margrethe II, in a virtual ceremony. Working with firm Made In Africa to bring ethically sourced chocolates to the U.S. **QUOTABLE:** The Coto de Caza resident said the Queen's award was a result of "meritorious service as Consul of Denmark in Los Angeles and my contributions and work for Danish interests in the U.S."

**JOHN CAPPASOLA JR.**

CEO, PRESIDENT  
DEL TACO RESTAURANTS

**WHY:** Former Del Taco brand chief leading restaurant chain based in Orange County, largest restaurant operators, with about 600 stores in 16 states.

**RECENT:** Has its sights set on opening 15 new locations in 2021 as it builds on a digital framework already a few years into the making, and begins the rollout of a revamped restaurant design. **QUOTABLE:** On evolution of digital's growing influence in industry, says "whatever this new normal is going to look like, convenience is always going to be here to stay. Generally, once a consumer gets greater access, they don't go backwards."

**STEVE HEELEY**

CEO  
POKÉWORKS

**WHY:** Tapped to lead fast-growing poke concept numbering 60 with some 75 in development and set to open by the end of 2022. **RECENT:** Chain's former CMO promoted to CEO in August, succeeding co-founder and now Head of Culinary Mike Wu.

CEO appointment follows March hiring spree that beefed up C-suite with Heeley, Chief Development Officer Larry Sidoti and Michael Walters made permanent COO after serving in the position on an interim basis. **QUOTABLE:** "We went from zero to 60 in five years. There was a COVID year where growth slowed, but even during COVID we had franchisees open restaurants. We see this as a play to be the leading, most trusted premium fast-casual poke brand."

**BRIAN NICCOL**

CHAIRMAN, CEO  
CHIPOTLE MEXICAN GRILL INC.  
NEWPORT BEACH



**BIO:** Runs OC's second-most valuable public company. Counts close to 2,800 locations, and expects to open around 200 new spots this year. When the Mexican-themed restaurant chain in 2018 moved its HQ from Denver to Newport Beach, shortly after Niccol's appointment, its market cap was around \$7B. It's now worth nearly \$50B.

**NOTABLE:** Company said it intends to hire some 20,000 workers this year in the U.S., while also boosting restaurant wages. The average hourly wage is expected to reach \$15 per hour by the end of June. The pay for a general manager position, which Chipotle calls Restaurateur, is expected to average \$100,000. The company said it's possible for employees to work their way up to that position in three and a half years.

**QUOTABLE:** Chipotle packed a powerful punch in its digital game last year; digital sales spiked 134% from a year earlier to \$870M and accounted for half the chain's overall \$1.7B in first-quarter revenue. Chipotle's loyalty program totals 21M members. "As our digital ecosystem has evolved from a commerce system to platform of engagement, we continue to look for ways to enhance convenience and access, including Chipotlanes, alternative store formats, digital-only menu offerings and Chipotle Rewards," he said.



# R.D. OLSON

## DEVELOPMENT

# R.D. OLSON

## CONSTRUCTION



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**ANDREW GABRIEL**CO-OWNER  
LOUNGE GROUP**WHY:** Counts a dozen Orange County restaurants and bars, including Wild Goose Tavern, Playa Mesa, and The Country Club, all on 17th Street in Costa Mesa; The District Lounge in Old Towne Orange; Matador Cantina and 2J's Lounge in Fullerton.**RECENT:** Added Muldoon's Irish Pub in Newport Center to fold. Reported\$10.5M buy. **NOTABLE:** With partner Mario Marovic, Business Journal's Restaurateurs of the Year for 2021.**QUOTABLE:** At onset of pandemic, closures meant food would spoil, so Marovic and Gabriel gave the food away to their 600 employees. "I was in the kitchen flipping burgers and feeding staff," Gabriel recalled.**TAYLOR DECOSTA**FOUNDER, CEO, EXECUTIVE CHEF  
TAYLOR MADE CUISINE**WHY:** Former Nordstrom retail associate who turned her culinary skills into a multimillion-dollar meal prep company. **RECENT:** Expanded to 6,000-square-foot HQ offices and industrial kitchen this year to accommodate ballooning business. Last year sales grew 200% from 2019, driven by pandemic. 2021 sales expected to grow150% to \$2M. **NOTABLE:** Former private chef for Kobe Bryant. **QUOTABLE:** "Sometimes you get wrapped up in everything and then you stop and look around. All of this is a culmination of a lot of hard work and a lot of intention and passion. I started this when I was 26 and when you start something, you don't always think that far in the future, but I now have a multimillion-dollar business."**KEN CRUSE**CEO  
SOUL COMMUNITY PLANET**WHY:** Former CEO of Sunstone Hotels now heading San Juan Capistrano-based hospitality investor, operator. **RECENT:** Closed a \$210M investment fund and announced plans to become its own hotel owner. Kicked off its acquisition strategy by closing on a 138-room waterfront hotel in Hawaii, Hilo Seaside Hotel, in March. Added Laguna Beach's Riviera in October. **QUOTABLE:**

"With our most recent equity investment, we can do about \$500 million in hotel acquisitions, and we want to put it to work fairly quickly. We have a goal of buying 25 to 30 hotels within the next two to three years."

**RUSS BENDEL**CEO, PRESIDENT  
THE HABIT BURGER GRILL**WHY:** Leads fast-casual burger joint that ranks seventh among largest restaurant chains in OC. Sales estimated to be \$465M in 2020 with 800 local workers.**RECENT:** Habit went public in 2014 and was acquired for \$375M in 2020 by Taco Bell parent Yum Brands Inc. **NOTABLE:** Bendel named 2019 OCBJ "Person of the Year" in restaurant category. **QUOTABLE:** Noted at the

time of the Yum acquisition: "We always felt that this brand had a lot of runway in front of it and that is something that [Yum CEO] David [Gibbs] and Yum sees as well. They see it in the early stages of a growth cycle with a lot of potential in front of it."

**MARK KING**CEO  
TACO BELL CORP.  
IRVINE**BIO:** Head of OC's largest restaurant operator with systemwide sales of \$11.7B and a local workforce of 4,500. Chain counts 7,000 restaurants, including about 130 in OC. Taco Bell announced early this year a goal to have 10,000 locations open globally in this decade, with an emphasis on its Taco Bell Go Mobile and digital restaurant efforts. Held hiring fair in April with aim of bringing on 5,000 new workers.**NOTABLE:** Company flexed its digital muscle last year, offering products such as the \$5 Create Your Own Box promotion available exclusively through its app and online. It also announced a new, smaller footprint restaurant concept focused on the mobile and off-premise channel called Taco Bell Go Mobile.**QUOTABLE:** "After sticking to an in-office routine for many years, I had to challenge myself to reconsider my presumptions around traditional corporate culture and assumptions about working from home," King wrote in a late 2020 blog post. "Would I be able to onboard new members of my executive team successfully while working remotely? How would I help a struggling colleague without impromptu in-person conversations? I pushed myself to address these issues unconventionally and found that getting away from routine inspires creativity and new perspectives."

**PAMELA WAITT**

FOUNDER, PRESIDENT  
OC RESTAURANT ASSOCIATION

**WHY:** Group formed in 2007, aims to promote and market the OC restaurant industry. **RECENT:** 2021 events included “Taste, Explore and Experience,” a culinary tour of area eateries that kicked off with OC Restaurant Week in March, aims to drive business to restaurants. **NOTABLE:** Owns the TacoTuesday.com website domain. **QUOTABLE:** “We’re still going to have a heavy takeout audience. It’s not going anywhere. Orange County Restaurant Week has 200,000 diners that love that week—it’s one of the largest restaurant weeks in the nation, and we will mold it however the dining circumstances are, which will be dine in or take out.”



**MARIO MAROVIC**

CO-OWNER  
LOUNGE GROUP

**WHY:** Counts a dozen Orange County restaurants and bars, including Helmsman Ale House, Malarky’s Irish Pub, Stag Bar, Dory Deli, Blackie’s by the Sea, and Muldoon’s, all in Newport Beach. **RECENT:** Added Muldoon’s Irish Pub in Newport Center to fold. Reported \$10.5M buy. **NOTABLE:** With partner Andrew Gabriel, Business Journal’s Restaurateurs of the Year for 2021. **QUOTABLE:** Why would anyone buy a restaurant during a pandemic and plan to open two more despite current restrictions on dining? “Some of the best opportunities come at the most inopportune times.”



**JAY BURRESS**

CEO, PRESIDENT  
VISIT ANAHEIM

**WHY:** Helms largest destination management organization in the county, overseeing new investment and development in area like the 200,000-square-foot Anaheim Convention Center expansion in 2018, and leading efforts to book new business in the wake of COVID-19. Chairman of Orange County Visitors Association, works with Ed Fuller. **RECENT:** Helped lead local DMO push to receive government funding for tourism sector to recoup losses, helping land new sports events for region. **QUOTABLE:** “The number of leads coming in from meeting planners is back at 2019 levels, with hotels performing especially well right now.”



**ALICIA WHITNEY**

FOUNDER, CEO  
PRJKT RESTAURANT GROUP

**WHY:** Veteran Huntington Beach restaurateur with several acclaimed Surf City eateries under her belt, including SeaLegs Wine Bar and adjacent SeaSalt Woodfire Grill. Submitted bid in 2016 to create four upscale concessions at Bolsa Chica State Beach. **RECENT:** Adding new restaurants, beach concessions and other amenities along a stretch of Huntington State Beach. Huntington Beach House to open to the public first. **QUOTABLE:** “We’re revitalizing not one but two beaches with eight concessions, plus all the food and beverage for festivals, weddings, volleyball—all on this beach. To pull it off, we had to take on the best of the best in the industry.”



**MARK WETTERAU**

CHAIRMAN, CEO  
GOLDEN STATE FOODS CORP.  
IRVINE



**BIO:** Runs Orange County’s fifth-largest private company with nearly \$5B in sales and a workforce of about 6,000. Supplies, makes and distributes food products for companies such as McDonald’s, Chipotle, Starbucks, Chick-fil-A and Wendy’s among others. Feeds tens of millions daily. Started off in St. Louis-based Wetterau Inc., a \$6B food business founded by great-grand father. Ran Shop ‘n Save as CEO in 1987. Returned to family business in 1990 as president and sold business to SuperValu Stores Inc. the following year for \$1.1B. Wetterau Associates bought minority take in Golden State in 1998; Wetterau bought out majority owner Yucaipa Cos. in 2004.



**NOTABLE:** Golden State counts 10 innovation centers globally. It is constantly developing new recipes for foods, beverages and sauces; improving product packaging; and, more recently, creating shelf-stable milk that went to food banks across the U.S. Recently-announced plans to add electric trucks to its last-mile delivery fleet.

**QUOTABLE:** As to what his favorite GSF products are at some of the company’s customers, says it’s “impossible for me to choose a favorite from our 100 brands of quality menus from customers that we serve, but I can honestly say that I have ‘favorite’ items on each of their menus!”

**ALLAN TEA**

FOUNDER  
CALI DUMPLING DELIVERY  
CO-OWNER  
HELLO KITTY CAFE

**WHY:** Local restaurant industry vet who co-founded the popular Hello Kitty Cafe and more recently Cali Dumpling Delivery with his wife, Candace Tea. Family also owns and runs Capital Seafood and Capital Noodle Bar in Irvine.

**RECENT:** Cali Dumpling business born out of the pandemic initially serving homes in the San Gabriel Valley and Orange County. Has since expanded to San Diego and Northern California and projecting \$2M in 2020 sales. Company also growing customer base of restaurants. **QUOTABLE:** “The bigger picture for me on this one is to grow into one of the larger, if not the largest, dumpling manufacturers that provides top-notch, restaurant-quality dumplings.”

**JASON MCCLAIN**

PROPRIETOR  
MCCLAIN CELLARS

**WHY:** Longtime area entrepreneur who started winery, now in its fifth year of business and just three years removed from its first sale, but already a name to know among wine enthusiasts. **RECENT:** The up-and-coming winery based in Laguna Beach is rapidly growing its presence in the industry, with a new location in Santa Barbara County opening last year and other spots across Southern California in the works. **NOTABLE:** Honored at Business Journal Family-Owned Business Awards in August. **QUOTABLE:** “I was made to do this. I have owned and sold 14 businesses, I have had a motivational speaking company, it all prepared me for this. McClain Cellars is the culmination of my existence on this planet.”

**CHRIS SIMMS**

CO-FOUNDER, CEO  
LAZY DOG RESTAURANTS

**WHY:** Oversees 11th largest restaurant chain in Orange County with 2020 sales of \$187.5M and an estimated 500 workers locally. Counts 40 locations. **RECENT:** 2020 proved an innovation renaissance for Lazy Dog, which moved quickly when restrictions rolled out. Began selling meal packs loaded with essential goods.

Got more creative with meal prep ingredients for Mother’s Day, retro TV dinners. **NOTABLE:** Restaurant industry lifer. Grandfather, Arthur J. Simms, and father, Tom Simms, started Mimi’s Café. Opened Lazy Dog with his father in 2003, with first restaurant in Huntington Beach.

**BILL O’CONNELL**

CEO  
O’CONNELL HOTEL GROUP

**WHY:** 50+ years in hospitality business, in 2020 opened Anaheim’s first four diamond resort not on Disney grounds. 12-story project cost topping \$300M, JW Marriott Anaheim Resort counts 466 rooms next to the Anaheim GardenWalk shopping center.

**RECENT:** Along with the JW Marriott, O’Connell Hotel Group and Prospera’s plans for development next to the GardenWalk shopping center also included a proposal for a second hotel, this one to run at least 350 rooms on Disney Way. Plans in flux as a result of coronavirus. **NOTABLE:** On occupancy rates for firm’s six Anaheim properties after pandemic-related closures, says, “We are gradually climbing out of the hole.”

**JIM HYATT**

CEO  
CALIFORNIA PIZZA KITCHEN

**WHY:** Helms restaurant chain with some 195 restaurants in seven countries. **RECENT:** Took over Veritone’s old offices at Costa Mesa’ Met complex, announced move of its HQ from Los Angeles. **QUOTABLE:** The move to Costa Mesa “makes a lot of sense for a variety of reasons: it fits with our strategic goals for our new phase of growth; it places us in an important trade area near a high concentration of our CPK restaurants; and our new location delivers against our needs for an open, collaborative, tech forward and COVID-safe office space.”

**ALAN REAY**

PRESIDENT  
ATLAS HOSPITALITY GROUP

**WHY:** England native heads state’s top hotel brokerage and research firm. Clients include institutional investors and public hotel firms, such as Sunstone Hotels. Publishes biannual reports of California hotel sales and new hotel development. **RECENT:** Hotel market recovered from pandemic ahead of prior expectations, with investor interest returning in full to harder-hit destinations like Anaheim. **QUOTABLE:** “There’s a tremendous amount of buyer interest in California, particularly for new product in what buyers perceive to be strong markets.”



**CHRIS BRITT**CEO  
BRITT PRIVATE CAPITAL

**WHY:** Runs food-focused investment firm with an eye for buying founder-led companies. Co-CEO at Mountain Mike's, Juice It Up chair. **RECENT:** Both Mountain Mike's, Juice It Up underwent digital, restaurant transformations recently. Now enjoying strong sales so far this year, in addition to growing footprints.

**NOTABLE:** Played baseball at Stanford University while earning B.A. in economics. MBA in finance, entrepreneurial studies at UCLA Anderson School of Management.

**HAITHAM HAMMAD**FOUNDER, PRESIDENT  
PITA PITA

**WHY:** Mediterranean restaurant with ambitious growth plans.

**RECENT:** Laguna Hills-based company got \$13M investment—its first from an outside source—from Samer Fakhouri, executive chairman of Jordan's Al Eqbal Real Estate Development and Triumph Venture Capital, that will help push the four-restaurant concept to open 20 locations over the next three years. **QUOTABLE:**

"There's a lot of people—they slap Mediterranean or Middle Eastern on their restaurant. There's quite a few out there, but it's the authenticity of the food. I don't want to give you baba ghanoush that doesn't taste like baba ghanoush."

**PHILLIP CHANG**FOUNDER, CEO  
YOGURTLAND FRANCHISING

**WHY:** Heads Yogurtland, which celebrates 15 years in business this year. Counts more than 280 locations in the U.S., Australia, Dubai, Indonesia and Thailand among other places. Ranked No. 14 on Business Journal's list of the largest OC restaurant chains, based on an estimated \$102 million in 2020 sales. **RECENT:** New concept: Holsom by Yogurtland. Company in late 2020 debuted the first of what will be many Holsom locations, designed as local hangouts that allow customization of everything from toast to fruity drinks. And, frozen yogurt, of course. **NOTABLE:** Learned English listening to Christian sermons on the radio as he drove to one of the two or three jobs he always had in rotation when he first came to the U.S. from Korea at age 21. "I'd listen to the pastor sermons because they are the ones who speak slowly and give full sentences."

**CARMINE IOMMAZZO**GENERAL MANAGER  
WESTIN ANAHEIM RESORT

**WHY:** Led construction and 2021 opening of 618-room luxury hotel in Anaheim, a \$250M property next to the Anaheim Convention Center and across the street from Disneyland. Joined resort in 2017 after counting management positions at several Hawaiian resorts.

**RECENT:** Hotel opened in June as the city's second four-diamond hotel to open not on Disney grounds, following the opening of the 466-room JW Marriott. **QUOTABLE:** "There's nothing like this hotel currently in the Anaheim market. Guests can come here and won't have to leave unless they're going to Disneyland or a meeting at the convention center."

**AMAR SANTANA**CHEF, PARTNER  
VACA GROUP

**WHY:** Orange County's best-known chef. Laguna Beach's Broadway, Costa Mesa's Vaca among top dining spots in county. Third location, The Hall: Global Eatery, a food hall in South Coast Plaza, launched at end of 2019. Top Chef Season 13 runner-up. **RECENT:** Guest judge, dining panelist for Season 18 of Top Chef, filmed in Oregon. **NOTABLE:** Started career at Charlie Palmer's Aureole restaurant in Manhattan; Palmer later chose him to head the kitchen at his debut SoCal offering Charlie Palmer at Bloomingdale's in South Coast Plaza. With business partner Ahmed Labbate, named Business Journal's Restaurateurs of the Year in 2020.

**ADAM BEER**SVP, ASSET MANAGEMENT  
TWIN BRIDGES HOSPITALITY

**WHY:** Key local official for asset management offshoot of Dauntless Capital Partners, a private equity firm with local offices in Newport Beach that invests in hotels and other asset types. **RECENT:** Under-the-radar Dauntless—which was part of last year's \$216M buy of the Newport Beach Marriott Hotel & Spa near Fashion Island, has bought trio of hotels this year from R.D.

Olson Development, including pair of properties in Maui and another in Pasadena. Ownership has ties to Marriott family. **NOTABLE:** Initial GM of Newport Beach's Lido House boutique hotel, also built by R.D. Olson.



**ROSS PANGILINAN**CHEF, RESTAURATEUR  
MIX MIX KITCHEN BAR**WHY:** Filipino-American chef behind Mix Mix Kitchen Bar in Downtown Santa Ana and Terrace by Mix Mix at South Coast Plaza. Business Journal's Chef of the Year for 2019.**RECENT:** An eventful 2020. Opened his newest restaurant, ReMix Kitchen Bar at the Long Beach Exchange shopping center near the city's airport, "a week or two before the lockdown" in March 2020. Business has rebounded. **QUOTABLE:** "Orange County has been so helpful throughout the last year. Costa Mesa gave us a grant that helped us. The city of Santa Ana built us a spot on the street for Mix Mix so we were able to have people sit outside."**ANDREW KIM**CEO, PRESIDENT  
WABA GRILL**WHY:** Leads OC's newest restaurant operator to have HQ here, with chain that numbers nearly 200 locations. Appointed to top spot in March, succeeding Kyle Lee who co-founded WaBa with Brian Ham and Eric Lee.**RECENT:** Capped 2020 with the company's best ever sales. Moving HQ from City of Industry to Anaheim building, bought in the summer. **QUOTABLE:** "The demand for healthy fast casual continues to flourish, and I'm confident in our lasting ability to thrive in a marketplace driven by quality ingredients, healthy menu options and bold flavors—a trio of consumer demands that are hallmarks of WaBa Grill."**GRETCHEN SHOEMAKER**OWNER  
GEORGIA'S RESTAURANT**WHY:** Known as Nana, has been serving Southern-style cuisine for seven years as anchor tenant at the Packing House in Anaheim and, since July 2019, at the Long Beach Exchange. **NOTABLE:** Native of Philadelphia who married her high school sweetheart, George, and moved west with him to Lake Forest. While raising three daughters, Gretchen launched a successful catering business built on family recipes that delivered a true home-cooked experience. Daughter Nika-Shoemaker Machado and husband later convinced her to start restaurant. **QUOTABLE:** "I love it when people come up to me and say 'girl, I know you're from Georgia' and I say, 'Oh girl, I'm not.' I'm from Orange County by way of Pennsylvania."**SUSAN TAYLOR**CEO, PRESIDENT  
JUICE IT UP**WHY:** Leads one of the oldest fruit, juice and smoothie chains with more than 100 locations operating or in development.**RECENT:** Chain's seen strong start to 2021 with first half comparable sales up 48.1%. Promoted to president and CEO in 2020. Previously served as VP of operations. Joined company in 2019, overseeing franchising, real estate, construction, training and store design. **NOTABLE:** Ops specialist. Previously served as Sharky's Woodfired Mexican Grill director of operations. Before that, clocked 14 years at Jamba Juice with most recent position senior director of franchise operations.**ED ST. GEME**FOUNDER, MANAGING PARTNER  
JUPITER HOLDINGS**WHY:** Bought Mountain Mike's Pizza with Chris Britt in 2017. Following year bought Juice It Up. **RECENT:** Mountain Mike's ranks 10th among the largest restaurant chains in OC with more than 235 locations and at least 21 set to open this year. Juice It Up performance also running strong with its own digital refresh and more than 100 locations open or in development. Sales in first half of 2021 up nearly 50%. **NOTABLE:** Attended Stanford, where he played football and earned an economics degree. Spent two months as safety at LA Rams in 1985.**GEORGE MUNZ**GENERAL MANAGER  
WALDORF ASTORIA MONARCH  
BEACH RESORT & CLUB**WHY:** Former Ritz-Carlton executive tapped to open the first Waldorf Astoria property in OC. Counts 30-year hospitality career, including a decade-long leadership stint at the nearby Ritz-Carlton Laguna Niguel.**RECENT:** Joined the 400-room Dana Point hotel in January during an internal rebranding that converted the Monarch Beach Resort into the Waldorf Astoria. Upgrade to property in the works. **QUOTABLE:** Rather than a grand opening party, the opening of the Waldorf Astoria has been a bit more subdued. "We are prioritizing safety first and foremost, making sure our employees and our customers are comfortable," Munz said. "Instead of a grand opening party we hope we can host a big celebration next year."

**JONATHAN BLACKFORD**CHEF, OWNER  
FORK & KNIFE

**WHY:** Found a former bakery on 17th Street in Costa Mesa and transformed it into his culinary paradise. Opened Fork & Knife in late 2020, offers a hot dinner pickup menu, high-end grab-and-go, and a curated gourmet market with many housemade products from pasta to pâté. Business Journal's nod as Chef of the Year for 2021. **NOTABLE:**

Spent 10 years as executive chef at A Restaurant in Newport Beach and newer sister concept, CdM Restaurant in Corona del Mar. Began adding in-dining options to restaurant. **QUOTABLE:** "It has always been my goal to open a restaurant of my own, but the timing wasn't right for a full-service dining experience."

**SAM KING**CO-FOUNDER, CEO  
KING'S SEAFOOD CO.

**WHY:** Started, runs one of OC's largest full-service restaurant operators with 22-location portfolio that spans upscale seafood, steakhouses and American in premium and fine dining segments. Concepts include Water Grill, King's Fish House, Fish Camp, Lou & Mickey's, 555 East, Meat on Ocean and Pier Burger. Group also runs its own seafood distribution facility. **RECENT:** Growth continued despite pandemic. Opened King's Fish House at Westfield Valley Fair in San Jose last October; now one of company's busiest restaurants. Water Grill set to open new restaurants in Denver and Bellevue. Set to embark on new phase of growth that will include Water Grills opening at a rate of one a year, along with new/remodeled King's. **NOTABLE:** Expects 2022 sales to surpass \$200 million.

**AJESH PATEL**CEO, PRESIDENT  
PROSPERA HOTELS

**WHY:** Former international investment banker, now heads strategy and development for private Orange-based hotel developer. Mostly in Anaheim, properties include Hyatt House and Hampton Inn & Suites in the city's resort area. UC Berkeley grad; board member at Visit Anaheim.

**RECENT:** Partnered with O'Connell Hotel Group in the development of the JW Marriott Anaheim Resort, the first four diamond resort to open in the city not on Disney grounds. 12-story project, 466 rooms. Estimated \$300M project opened during pandemic. Plans for a second hotel nearby are in flux. **QUOTABLE:** "We are targeting people that want to get away and have a curated luxury experience, and with the JW brand, they know we are ensuring safety and cleanliness."

**DOUGLAS PASQUALE**CHAIRMAN, INTERIM CEO  
SUNSTONE HOTEL INVESTORS

**WHY:** Head of longtime local hotel REIT, which invests in higher-end projects it dubs "long-term relevant real estate." Strategic seller in recent years, slimming down portfolio from 30 at the end of 2014 to 18 as of September, readying capital for future deals. **RECENT:** Returned to the market as a buyer in May when it paid \$265M, or a little more than \$2M per room, for the recently built, 130-room Montage Healdsburg in Sonoma County. Largest deal in the state in 2021 at the time. Plans to buy more hotels as the tourism market recovers. Took over CEO role from John Arabia in September on interim basis. **QUOTABLE:** "We intend to invest in our remaining hotels to unlock latent value and acquire additional hotels that are more likely to create long-term per-share NAV growth."

**LAURENT VRIGNAUD**OWNER  
MOULIN

**WHY:** Business Journal's Restaurateur of the Year in 2019 thanks to his France-inspired collection of Moulin restaurants.

**RECENT:** Opened a sixth location called Moulin Bouillon, styled on bustling brasserie-style restaurants that dominated Paris in the late 1800s where blue-collar workers could enjoy a hearty meal of meat and a broth, or bouillon, at affordable prices. Located adjacent to his flagship Moulin on Bristol in Newport Beach. South Coast Plaza site in the works. **QUOTABLE:** "While the original Moulin is a nod to my childhood in Paris, Moulin Bouillon will be a tribute to my grandfather and our weekly lunches at Bouillon Chartier in Paris."

**YOU'LL FIND ME AT ....**

**Robbin Narike Preciado:** Huntington Hyatt hotel—the pool and spa are amazing.

**Patty Arvielo:** My favorite place in the world to travel to with my husband Rick is Capri, Italy.

**Mandy Fry:** We live in San Clemente in front of Trestles, the world-renowned surf spot. Our whole family surfs together.

**John JJ Jackson:** I am veteran horseman. Most of my riding is on local trails near my ranch in Norco, but I have a history of "horse packing" in the Bob Marshall Wilderness in Montana.

**Martha Daniel:** Travel. I absolutely love traveling.

**Bobby McDonald:** The golf course. The Orange County Fair. Heroes Hall. Anaheim VFW. Disneyland.



Sylvia Moonier, "Waxing Up," undated, oil, 40 x 30".  
The Hilbert Collection. Courtesy of the Hilbert Museum  
of California Art at Chapman University.

INNOVATION

**JACK SYAGE**

CO-FOUNDER, CEO  
IMMUNOGENX



**WHY:** Heads early-stage developer working on clinical trials of celiac disease. Syage, who holds a Ph.D., has published over 130 papers, delivered about 100 invited talks and has over 30 U.S. patents issued or pending. Publishes regular updates on COVID at syage-covid19-assessment.com.

**NOTABLE:** In 2011, sold his Tustin-based company Syagen Technology Inc., a provider of chemical analysis instruments to detect explosives carried by airline passengers, to French company Safran. **OC LEADER BOARD, FEB. 1:** After statistical analysis of trends in the pandemic’s spread, said “I am not making any predictions when we will return to full normalcy because society will always find a way to prolong the problem.”

**MICHAEL COLGLAZIER**

CEO  
VIRGIN GALACTIC



**WHY:** Runs aerospace company backed by Virgin Group founder Richard Branson, aims to send wealthy tourists into space. Company refers to itself as the world’s first commercial spaceline. **NOTABLE:** Tapped for top post in mid-2020. Colglazier was president of Anaheim’s Disneyland Resort from 2013 to 2018, where he headed planning for the \$1B-valued Star Wars: Galaxy’s Edge, which opened in 2019. Also serves as chairman of University of California, Irvine’s CEO Roundtable. **RECENT:** Virgin Galactic, based in New Mexico, set up executive offices at fittingly named local office project: Flight at Tustin Legacy. Branson took maiden flight in summer, public company valued near \$7B at that time.

**AYISHA FAREED**

CO-FOUNDER, CEO  
PANHWAR JET



**WHY:** Entrepreneur whose latest venture is an upstart Newport Beach-based company that aims to build luxury, all-electric aircraft that can charge in-flight. **RECENT:** In August announced a \$10M Series A funding deal, which came just ahead of an unveiling of its first prototype and test flight. Valkyrie Group, a venture capital firm with offices in Newport Beach, provided the funding.

**NOTABLE:** The company is developing the “ElectroBird,” a two-seater electric plane that promises to fly at speeds up to 350 mph and travel some 2,000 miles.

**KENNY RUETER**

CO-FOUNDER, CEO  
KAJABI



**WHY:** Runs 10-year-old software platform for small businesses and entrepreneurs; aims to equip creators with all the tools they need to manage their website, product offerings, marketing campaigns and members.

**RECENT:** Raised \$550M in new financing round that pushes the company’s valuation north of \$2B. Largest funding deal in over a year in OC. Relocated to 43K-square-foot office space at the Spectrum Terrace in 2019. **NOTABLE:** The company’s customers have generated over \$2.5B in gross merchandise value, reaching over 50M people in 120 countries.

**KHALIL ZAHAR**

CEO  
FIGHTCAMP



**WHY:** Heads Costa Mesa fitness experience company that equips fighters with all the gear—a punching bag, gloves and punch counters—and the technical training needed to dive into boxing at home. **RECENT:** This summer, the 7-year-old firm said it raised \$90M in a round of financing, in a bid to become the boxing and mixed martial arts communities’ version of cycling giant Peloton. **NOTABLE:** Mike Tyson is an investor. **QUOTABLE:** “People are working out more and (are) older, and the technology keeps getting better. It’s gotten to a point where we can provide an experience that you can’t recreate at every boutique gym.”

**MIKE MUSSALLEM**

CEO  
EDWARDS LIFESCIENCES CORP.  
IRVINE



**BIO:** Runs Orange County’s largest medtech employer—about 4,500 workers here, and more than 15,000 worldwide. Maker of heart valves and related products, as well as critical care monitoring equipment. By far OC’s most valuable public company; it’s the first health-care company based here to ever sport a market cap near \$70B.

**NOTABLE:** A \$5M gift to the University of California, Irvine from Linda and Mike Mussallem will support integrative cardiology training and research in the Susan Samueli Integrative Health Institute and initiate a UC system-wide health coaching program.

**QUOTABLE:** On Edwards’ levels of R&D, and focus on innovation, says that “when you go first, you have the opportunity to learn faster than others. Simply put, you are a key contributor to shaping the way value gets created.”

**DYLAN BALSZ**CEO  
ANIVIVE

**WHY:** Started drugmaker focused on pet-specific products in 2015, with backers including numerous execs with ties to Allergan, including that firm's founder, Gavin Herbert Sr. Raised \$45M in seed capital. **RECENT:** Delivered new treatment for dogs with the most common canine cancer. Did so in 3.5 years and \$5M in R&D costs, less than half the industry average. **NOTABLE:** Sold his first venture, a waste management system developer for pet owners, International Pet Solutions LLC, as an undergraduate business student at Chapman University. **QUOTABLE:** "Veterinarians are prescribing the same off-label chemotherapies they had when they began their careers 20 years ago. The unmet need sounds obvious, but solving it is not."

**BOBBY AZAMIAN**CEO  
TARSUS PHARMACEUTICALS

**WHY:** Runs clinical-stage drugmaker that went public in late 2020 IPO, sported nearly \$500M market cap as of October. **RECENT:** Inked March deal with Shanghai's LianBio to develop and commercialize its lead product, TP-03, for two inflammatory eye conditions in Asian markets. Transaction worth up to \$200M in upfront and milestone payments; Tarsus said it expects to receive about \$70M in the next 12 months. **NOTABLE:** Tarsus backers include Newport Beach's Flying L Partners and Horowitz Group, and Aliso Viejo-based Visionary Ventures, an offshoot of business accelerator Octane. **QUOTABLE:** "We're just getting started."

**ANDREW NINH**FOUNDER, CHIEF STRATEGY OFFICER  
DOCBOT

**WHY:** Oversees tumor detection software platform that applies artificial intelligence to colonoscopy scans; can detect whether a small growth is cancerous with 98% accuracy. Teamed with UCI researchers to launch company in 2013. **RECENT:** Raised \$4M in a Series A round of financing and named Andrew Ritter, a gut microbiome therapy exec, chief executive. Pursuing its first FDA submission for detection of colon cancer. Business Journal 2019 Innovator of the Year award winner. **QUOTABLE:** "We envision a company that through optical procedures can directly prevent cancers, as well as other digestive diseases."

**LARRY WOOD**CORPORATE VP  
TRANSCATHETER AORTIC VALVE  
REPLACEMENT UNIT  
EDWARDS LIFESCIENCES

**WHY:** Thirty-year veteran in surgical heart therapy business. Has led Edward's largest division, Transcatheter Aortic Valve Replacement (TAVR), since 2007 inception. Unit had \$902M in sales in the second quarter.

**RECENT:** Working on early TAVR trial focused on asymptomatic patients with severe aortic stenosis.

**QUOTABLE:** "Our team has stayed laser focused on achieving the best outcomes for patients. We know that if we do right by patients, everything else will fall into place."

**TIM VANDERHOOK**CEO  
VIAIT TECHNOLOGY  
IRVINE

**BIO:** One of three brothers on executive team of Irvine-based ad tech company, which is positioning itself to grab a larger share of the digital advertising market, helping advertising agencies and marketers get placement for their customers across a variety of channels, including desktops, mobile phones, connected TVs, streaming audio and digital billboards.

**NOTABLE:** Viant burst into trading on Feb. 10 priced at \$25 per share, rapidly climbing to \$64 in the following days and closing the first week with a market cap around \$3.8B. Valuation now lower. It raised about \$250M in gross proceeds from the IPO.

**QUOTABLE:** Started company in parent's home in Yorba Linda; prior to IPO firm was best known for buying social media site MySpace a decade ago. "We continued to grind it out through good times, bad times and now to be able to go public and hopefully with a great future."





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**NEEL GROVER**FOUNDER, EXECUTIVE CHAIR  
INDI

**WHY:** E-commerce executive with over 20 years' experience; his firms have sold over \$5B in products online. His current venture, Indi, based in Newport Beach, helps designers, artists, influencers, educators, athletes and others monetize their talents.

**RECENT:** Keynote speaker for Business Journal's 2021 Innovator of the Year Awards, recounted how he turned then Aliso Viejo-based Buy.com into the country's third-largest e-commerce site, and made it consistently profitable, before its 2010 sale to Japan's Rakuten.

**QUOTABLE:** "When you have nothing to lose, be very bold."

**SCOTT SHREEVE**CEO  
CROSSOVER HEALTH

**WHY:** Runs primary care upstart which has raised some \$110M. Found a niche by serving large, self-funded tech employers that act as their own medical insurance companies, using a combination of on-site or near-site healthcare clinics that it runs.

**RECENT:** Enticing large employers with its Commercial Advantage model, which plays off the Medicare Advantage model for senior citizens. Opening numerous centers to serve Amazon employees. Business Journal Excellence in Entrepreneurship Award winner this year.

**QUOTABLE:** Of Commercial Advantage plan, says it's "a type of care model that has a large care team, an integrated approach, and [it] is really focused on delivering outcomes. We're doing that in the commercial market with self-insured employers, and that's where we see the growth really taking off."

**NOAH KERNER**CEO  
ACORNS GROW

**WHY:** Heads closely watched fintech in Irvine to show novice investors that small amounts, over time, can create wealth. Simple idea has become worth billions in just a few years. Since joining company in 2014, micro-investing app maker has built AUM to nearly \$5B. **RECENT:** Going public via popular SPAC route, saying it has \$2.2B valuation. That's nearly three times its reported valuation from 2019, when it landed a \$105M Series E funding round and was approaching unicorn status. **QUOTABLE:** "We have to take the steps to get Acorns into the hands of as many people as possible," Kerner told the Business Journal in June. "Going public will help spread Acorns."

**VIC MERJANIAN**CEO  
TITAN HST

**WHY:** Growing tech firm's products allow users and emergency personnel to communicate emergency information instantly—including GPS coordinates, text, audio, pictures and videos—increasing information dissemination and reducing emergency response time.

**RECENT:** COVID-related product update helps its business users manage virus transmission and on-site cleanliness quickly and securely. **NOTABLE:** Received Business Journal's Excellence in Entrepreneurship Award in 2018.

**QUOTABLE:** "We're looking at enhancing and inventing technologies that redefine security and preempt incidents before they arise."

**BILL HOFFMAN**CEO  
INARI MEDICAL  
IRVINE

**BIO:** Runs medical device maker of products for patients suffering from blood clots and venous diseases; OC's IPO darling of 2020. Went public at \$19 a share; a year later Inari's stock now close to \$80, with valuation near \$4B. Company's first two products are catheter-based devices that allow physicians to take out large amounts of clots in their veins.

**NOTABLE:** Major expansion plans in Irvine, at new facility running 121,000 square feet in the Irvine Spectrum area.

**QUOTABLE:** "We're expanding our R&D efforts pretty dramatically, adding a number of engineers, and we're working on a whole slew of new products, not just in these disease states, but other venous disease states," Hoffman told the Business Journal late last year. "We're going to continue to develop world-class products, and lots of them."





# CONGRATULATIONS, **VIC MERJANIAN!**

*Founder & CEO of Titan Health & Security Technologies, Inc.*

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**MICHAEL JAFAR**CEO  
DESKTOP HEALTH

**WHY:** Previously spent two decades at Allergan, then two years as CMO at smaller upstart Evolus. This year took top job at newly formed 3D printing company that focuses on additive manufacturing solutions for dental applications. Company created after its publicly traded parent, Desktop Metal, spent \$300M to buy Michigan-based EnvisionTee. **RECENT:** Desktop launched its first product in May, Flexcera Smile, which are prosthetic dentures made from resin and 3D fabrication. **QUOTABLE:** “We’re well capitalized to explore our ideas, and within two years we’ll have a nice portfolio of technologies. We’re looking to acquire companies in material science (or with) ingenuity around scanning or translating technologies.”

**RAMIN MOUSAVI**CEO  
CATHWORKS

**WHY:** Leads developer of the FFRangio system, which provides X-ray imaging of the coronary artery branch and applies machine learning to help doctors identify coronary issues in a noninvasive manner. Counts roles at Baxter International, Edwards Lifesciences. **RECENT:** Rejoined company as CEO in June; previously led marketing efforts. Raised a \$30M Series D round of financing, with backers including Deerfield Management in January. **NOTABLE:** Most imaging cases can be completed in under four minutes using the FFRangio system, which is less than half the time compared to the traditional wire-based approach currently in use. **QUOTABLE:** “We are bringing a disruptive technology,” Mousavi said in June.

**KYLE LAUGHLIN**CEO  
SURFLINE

**WHY:** New exec at Huntington Beach-based firm, billed as the world’s largest surf report, forecasting and content creator. Joined Surfline after leading a hardware and software team at Amazon; that team oversaw connected hardware and software experiences for Amazon Echo and Alexa. **RECENT:** \$30M funding round from Playa Vista-based venture firm TCG, marks first institutional investment, and comes amid growth for the sport of surf. **QUOTABLE:** Surfline story is “a story of heritage and true grit. The team has built a successful company with a world-class product and a massive, global audience.”

**MATT GRIMM**COO  
ANDURIL INDUSTRIES

**WHY:** Part of exec team at high-tech defense and border surveillance company, formed in 2017 but already among OC’s most valuable private companies with valuation around \$3B. **RECENT:** Raised \$200M in Series C funding last year, another \$450M Series D this year, and a series of big government contract wins. Huge new HQ plans in store in Costa Mesa. **QUOTABLE:** Anduril “sits in a unique intersection between technology and defense and while we have a robust software development team, we also have research and development, flight test engineers, and hardware engineers who need access to materials, workshops and testing environments that aren’t available remotely,” Grimm said when announcing the new HQ plans.

**RAY COHEN**CEO  
AXONICS  
IRVINE

**BIO:** Runs medical device maker that went public in 2018, surpassed \$1B market valuation in 2020, now valued at nearly \$3B. Aims to lead the market with its sacral neuromodulation device, which treats patients with overactive bladder conditions.

**RECENT:** Generated \$111.5M in sales last year, in one of the fastest rollouts of a new medical device in recent history. In early 2021, announced plans to buy London-based Contura and its hydrogel bulking agent for \$200M in cash and stock.

**QUOTABLE:** Not his first rodeo. Won Business Journal Excellence in Entrepreneurship Award in 2002, as CEO of cardiac defibrillator maker Cardiac Science Corp. “When you’re in this business, you learn how to ask the right questions and gather the experts together so that you can become educated for yourself and your team,” he said late last year. “The fallacy is that to somehow create a company you have to be an expert in the topic. I think there are so many other things you need to be expert in—hiring people, raising capital, having a vision for the future.”



**RYAN HONARY**

DEVELOPER/FOUNDER  
SENSORY AI

**WHY:** Sensory AI is building an artificial intelligence-based sensor network based on Honary's work, which he developed as a 13-year-old after witnessing the devastation of the Camp Fire in 2018. He was exposed to programming at a young age by his father, Hooman Honary, an engineer who has worked at Intel and Broadcom. **RECENT:** Sensory AI said this summer it received about \$1.8M in Small Business Innovation Research grants from the U.S. Navy. **QUOTABLE:** Ret. Rear Admiral Mark Heinrich, an investor and adviser to Sensory AI: "It's clear that Sensory AI's emerging capabilities will be an important, future capability in pollution prevention and compliance, as well as reducing the cost of operations and maintaining the readiness of the Fleet."



**FABIAN BATTAGLIA**

CEO  
MOBIX LABS

**WHY:** Heads upstart chipmaker developing the building blocks necessary for simplifying the design of next-generation 5G wireless products. **RECENT:** Came out of stealth mode in February, raising \$12.5M. Mobix counts numerous ties to longtime area chipmaker Microsemi Corp., including Battaglia and chairman Jim Peterson, the former CEO on Microsemi. Brought local firm Cosemi Technologies Inc. into fold via acquisition. **QUOTABLE:** "The company at its core is an R&D/innovation company," aimed at solving the challenges of the high-speed portion of 5G, Battaglia said. "We are true RF (radio frequency) experts."



**BILL CARPOU**

CEO  
OCTANE

**WHY:** Runs OC's largest business accelerator, with aim to create 55K high-paying jobs in Southern California by 2030. Industry events spotlight region as a hub for medical technology, ophthalmology, aesthetics and deep technology. **RECENT:** New sources of capital to prop up local entrepreneurs and ensure returns from successful investments benefit Southern California. First fund of its type, Elevation Fund I, is planned to total up to \$50M. Artificial intelligence initiative, healthsocial.ai, to foster "precision medicine for one, population health for all." **NOTABLE:** Partner in Visionary Ventures, Elevation Ventures. Board member of Irvine wireless tech firm Mobix Labs. Former operating partner at Blackstone.



**ROBERT RANGO**

CEO, PRESIDENT  
ENEVATE CORP.

**WHY:** Runs well-funded Irvine-based company focused on fast-charging batteries for electric cars. Former exec in Broadcom's mobile and wireless group. **RECENT:** Says Enevate may be heading for an IPO within two years following an \$81M Series E funding round in February. Formed in 2005, company has raised \$191M to date. **QUOTABLE:** "It's going to enable us to accelerate our commercialization of our battery technology," Rango said of the Series E. "The whole electric vehicle space is definitely accelerating. The market's obviously attracting a lot of new investors."



**JOE BURNETT**

CEO, PRESIDENT  
CLEARPOINT NEURO

**WHY:** Helms medical device maker whose hardware and software platform are used to perform minimally invasive brain procedures while the patient is inside an MRI scanner. Firm previously known as MRI Interventions. Market cap topped \$400M this summer. **RECENT:** Its hardware platform was in 60 top hospitals in the U.S. as of late 2020, and continues to achieve double-digit growth. **QUOTABLE:** "After three years, we've begun to build a track record and credibility among investors. People understand the conditions we help treat and see our technology could unlock therapies for very sick patients," he said.



**CAREN MASON**

CEO, PRESIDENT  
STAAR SURGICAL  
LAKE FOREST

**BIO:** Runs most valuable OC-based publicly traded company in the area's thriving ophthalmology industry. \$5B+ market value; its shares have more than doubled over past year. Staar's implantable contact lenses are used to treat a wide range of vision impairments through a surgical procedure that takes about 30 minutes on average. Product serves as an alternative to laser-based procedures like LASIK. **NOTABLE:** Moved HQ from Monrovia to Lake Forest in 2019. **QUOTABLE:** After Q1 earnings report in early May, said Staar is maintaining its "track record as the fastest-growing U.S. publicly traded ophthalmology company." Company expects 2021 sales of \$215M to \$217M.



**PHILIP FELGNER**

PROFESSOR OF PHYSIOLOGY AND BIOPHYSICS, DIRECTOR UCI VACCINE RESEARCH AND DEVELOPMENT CENTER, PROTEIN MICROARRAY LABORATORY

**WHY:** Life's work dedicated to gene therapy and immune system research has led to 280 published papers, 50 patents cited by other scientists more than 38,000 times and development of the first commercially available mRNA vaccines by Pfizer, BioNTech and Moderna. **RECENT:** Honored with Global Impact Award at Business Journal's Innovator of the Year Awards. **QUOTABLE:** "I thought this process of putting genes into cells is something God does, or evolution anyway. So easily you can transform cells in a culture dish. It was an awesome thing."

**KENNETH CHANG**

FOUNDER  
UCI DIGESTIVE HEALTH INSTITUTE

**WHY:** Expert on stomachs who started the UCI Digestive Health Institute in 2017. Has conducted a number of clinical trials, published more than 470 papers and book chapters, holds five patents. **RECENT:** Honored with Innovator of the Year Award by the Business Journal in September. U.S. Food and Drug Administration in 2020 approved tool developed by Chang called Endoscopic Ultrasound Guided Portal Pressure Gradient, used to assess liver health, diagnose disease's advance. **NOTABLE:** CV is 97 pages long. **QUOTABLE:** Chang's mission in OC is "innovation through compassion."

**BENJAMIN TIGNER**

CEO  
OVERAIR

**WHY:** Heads Santa Ana-based company that is developing air taxis to operate its own service and to sell them to third-party operators. \$25M in backing to date. **RECENT:** Company plans flight testing of Butterfly in 2023 and certification of the vehicle in the middle of this decade. **NOTABLE:** Overair is a spinoff from Lake Forest-based Karem Aircraft, run by famed drone and aerial vehicle pioneer Abe Karem. Overair's Butterfly vehicles are expected to be significantly quieter than typical helicopters. They are electric vertical takeoff and landing, making them ideal for urban areas. Overair's goal is to make the air taxis reach a scale that enables costs to be competitive with today's auto ride-sharing platforms.

**TONY SMITH**

CO-FOUNDER, CEO  
RESTAURANT365

**WHY:** Runs all-in-one software platform for restaurant accounting and operations. One of OC's better-funded startups, with over \$127M in backing. **RECENT:** Acquired Compeat, an Austin-based competitor, on undisclosed terms. Doubled customers and revenue to over 28,000 restaurant locations and \$60M. Business Journal Innovator of the Year Award winner in September. **QUOTABLE:** Combination with Compeat creates "the most robust restaurant management platform in the world," with modules for accounting, analytics, inventory, scheduling, payroll and more. "We can better deliver on our mission to help restaurants thrive at this time of rebuilding the industry we all love."

**JIM MAZZO**

CEO  
AVELLINO LAB USA  
EXECUTIVE CHAIRMAN  
NEUROTECH PHARMACEUTICALS  
CHAIR  
OCTANE



**BIO:** Most prominent executive in Orange County's ophthalmic industry. Over 42 years of experience, led Allergan's North American and European eyecare organizations, served as CEO of Advanced Medical Optics, among other notable roles. Active on many corporate fronts. Chairman of local tech and medtech accelerator Octane, which he helped found.



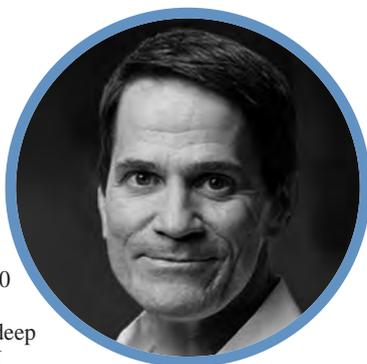
**NOTABLE:** Avellino, where he was named CEO late last year, is focused on gene therapy and molecular diagnostics. Firm recently launched AvaGen, the world's first DNA test to confirm the presence of genetic indicators that are positively associated with corneal dystrophies and keratoconus genetic risk-factors. Other OC execs involved with Avellino include Masimo's Richard Gannotta and former Edwards Lifesciences' Aimee Weisner.

**QUOTABLE:** "I promised myself I'd only get involved in efforts that are transformational in healthcare, and [Avellino] is an opportunity to challenge my own mindset and learn every day."

**JOEL PORTICE**

CEO, PRESIDENT  
EGNITE

**WHY:** Runs Aliso Viejo-based healthcare software company whose main product is CardioCare, a platform developed at Edwards Lifesciences over the last six years and deployed at more than 50 hospitals in the U.S. Platform has applied artificial intelligence and deep machine learning to more than 1M echocardiograms to identify patients in need of treatment for structural heart disease. **RECENT:** Spun off by Edwards in February, but remains its largest investor. **QUOTABLE:** “The healthcare system is deeply fragmented. We’re trying to bring together a more practical identification and engagement process for patients.”



**FLOYD AMUCHIE**

VP, CORPORATE CONTROLLER  
VIRGIN GALACTIC

**WHY:** Finance exec at space tourism company backed by Richard Branson. Firm went public via a reverse merger in 2019. It sported a market valuation approaching \$6B in October. Exec offices at Tustin’s aptly named Flight campus. **RECENT:** 36-year-old was awarded the Business Journal’s Rising Star Award at CFO of the Year Awards event in September. **NOTABLE:** Previously served as a VP and corporate controller at high-tech traffic movement and safety company Iteris in Santa Ana. **QUOTABLE:** “I’ve always been taught to lift as I climb,” he says. “It’s just a natural thing to do.”



**RICHARD LEE**

FOUNDER, CEO  
VIRTUAL DENTAL CARE

**WHY:** Founder in 2003 of local dental software maker Planet DDS; is back with new product, Teledentix, one of the first teledentistry platforms that launched in 2017, saw heavy use amid pandemic. **RECENT:** Double-digit growth in 2020; averages 4,000-10,000 video sessions monthly. **QUOTABLE:** On being a pioneer in teledentistry, says the company leads the pack, says it’s “not just a Zoom. We have communications, collaboration and outreach tools. We’ve stitched everything together in a meaningful seamless way to provide continual services from preventative care to education to treatment.”



**MARK MOSHAYEDI**

MANAGING PARTNER  
SPACE INVESTMENT PARTNERS

**WHY:** Former exec at storage device maker STEC, sold for \$340M to Western Digital in 2013. Co-founded commercial real estate investment firm in 2018 with Ryan Gallagher. **RECENT:** Turned car hobby into side hustle; launched My Car Auction with Gallagher in 2021, a website and app that allows users to sell their car from their home. Recently completed redevelopment of 52,000-square-foot Costa Mesa building that will soon be first OC service center to EV maker Rivian. **NOTABLE:** Counts one of the area’s most valuable car collections; a recent addition to his garage was a new McLaren Speedtail, one of only 106 of its kind planned in production.



**RANDOLPH MANN**

FOUNDER, PRESIDENT  
ESVOLTA

**WHY:** Runs Aliso Viejo-based firm with a straightforward idea: take excess electricity from utility companies, store it in huge battery installations and then ship it back when it’s needed. **RECENT:** A unit of the huge Australian bank Macquarie is investing in esVolta to make its idea work. The investment, whose size was not disclosed, will “support the continued North American expansion of esVolta and finance its portfolio of over 600 MWh (megawatt hours) of contracted energy storage projects, primarily in California, and an additional development pipeline of more than 2 GWh (gigawatt hours),” the companies said. **NOTABLE:** Macquarie deal comes about a year after esVolta landed a nearly \$140M senior secured credit facility to finance a series of large utility projects.

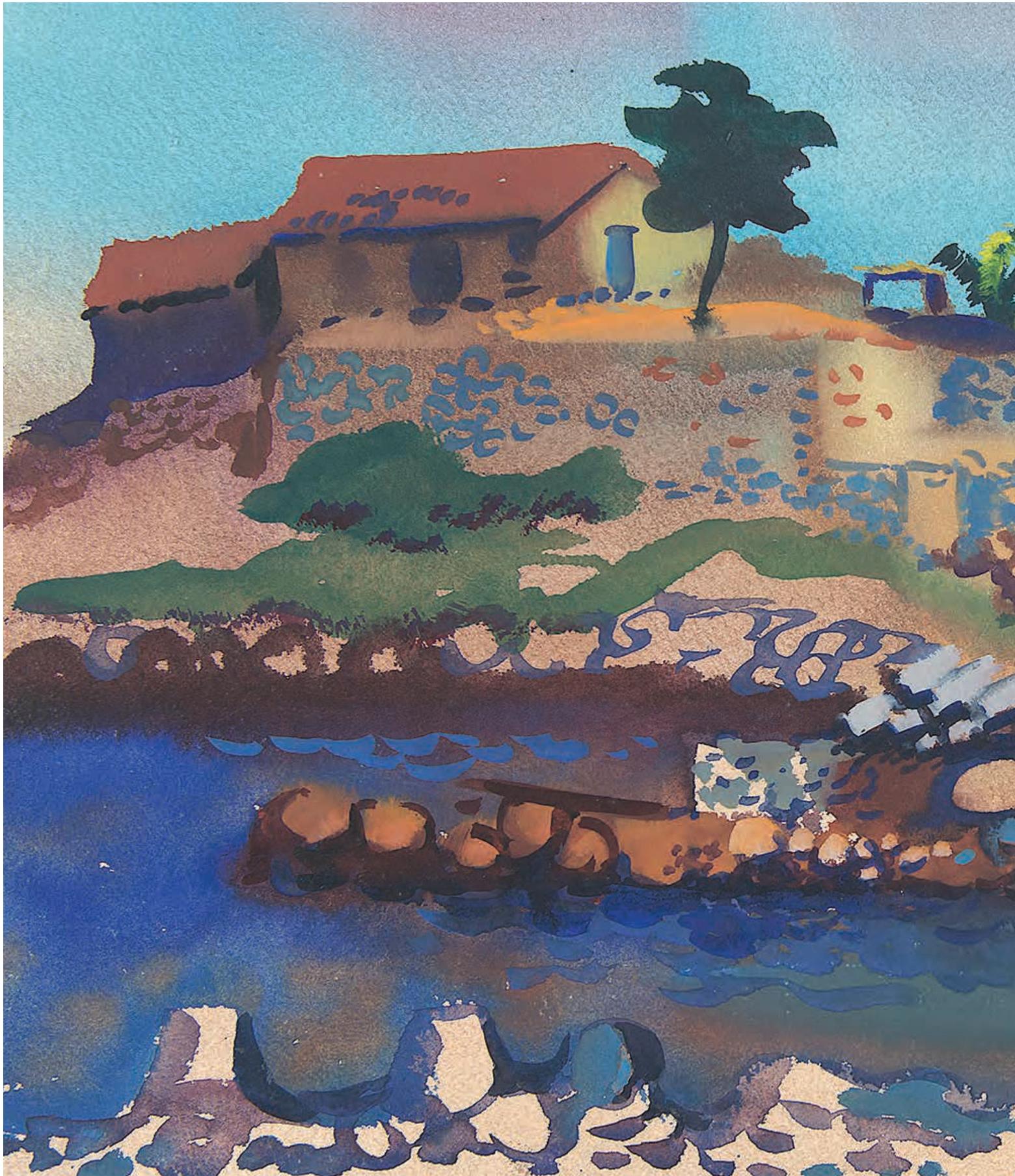


**DEEPAK GARG**

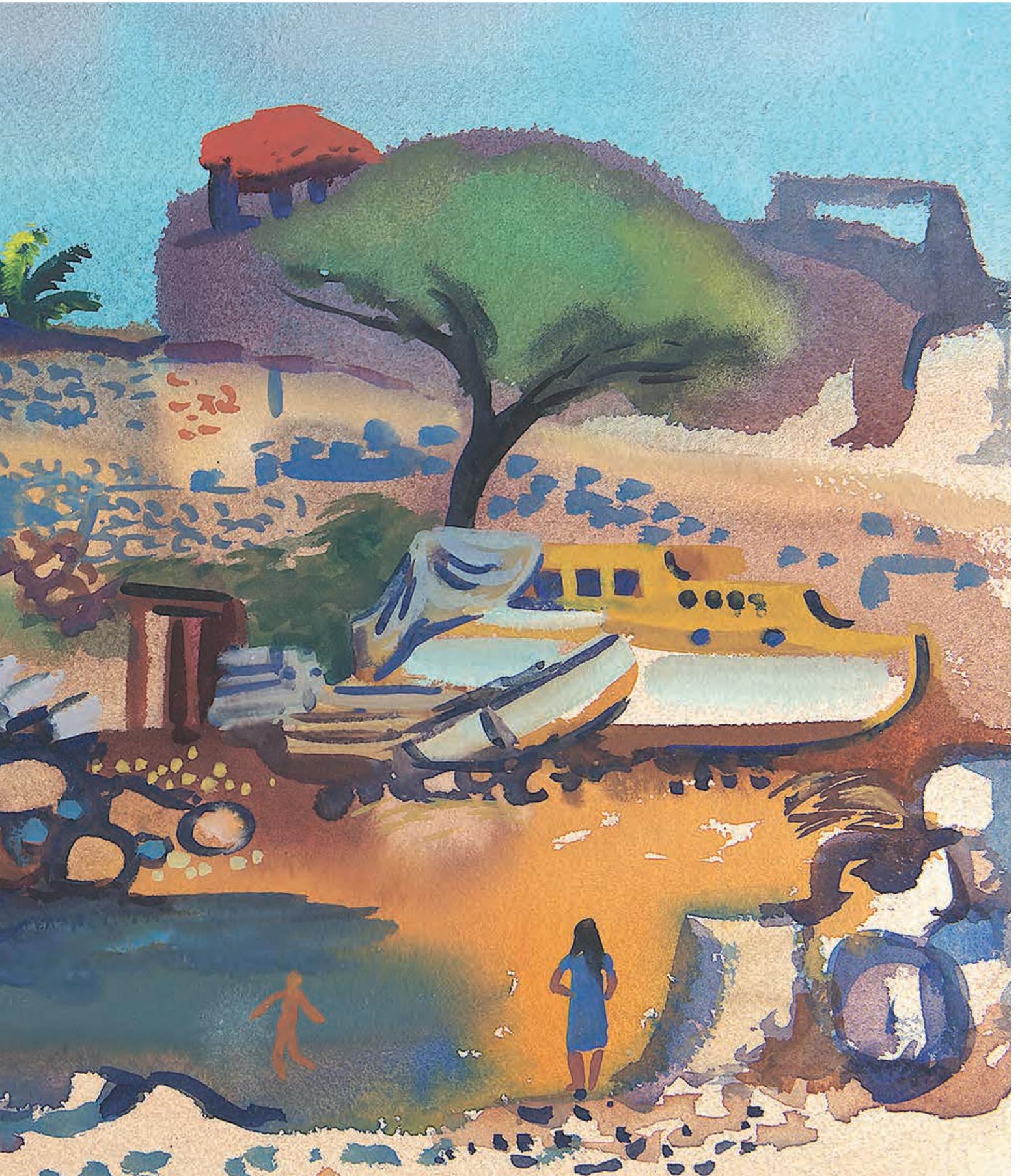
FOUNDER, CHAIRMAN, CEO  
SMART ENERGY WATER

**WHY:** His Irvine-based tech company helps utilities and their customers conserve water and energy, saying his company’s goals have global impact on the environment. Estimated revenue \$70M to \$150M. **RECENT:** Recipient of a Business Journal Excellence in Entrepreneurship 2021 Award in May. **QUOTABLE:** “We are not only a technology company. We’re just changing billions of people’s lives by leveraging technology to a point that it is available to the most developed countries to the developing countries. The challenge we are addressing is the most fundamental human right—water and power. If you don’t get that, if you don’t have that available, we cannot live.”





Erle Loran, "Coastal Community," undated, watercolor, 15 1/2 x 22 1/2 ". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.



LEGAL

**SEYMOUR 'SY' EVERETT**CO-FOUNDING PARTNER  
EVERETT DOREY LLP

**WHY:** Co-founded Irvine-based law firm Everett Dorey with Samantha Dorey in August 2017. Law firm defends corporations and other organizations in civil lawsuits. Everett Dorey has 21 lawyers, five of them partners. **RECENT:** aims to create an environment "where people want to come to work every day."

Embraced work-from-home capabilities before COVID-19 hit Orange County in March 2020. The firm ranked No. 2 on the Business Journal's listing of Best Places to Work in Orange County in the small employer category this year. **QUOTABLE:** "We've come to the realization that for clients to succeed, our employees must succeed."

**CHARLES RUCK**PARTNER  
LATHAM & WATKINS

**WHY:** Advises on mergers and acquisitions, capital markets, and general corporate and securities matters. Serves as primary outside counsel to a number of public and privately held companies, regularly represents boards of directors and special committees in complex strategic corporate governance matters. **RECENT:** Named the global head for nearly 30-office firm's corporate practice. **NOTABLE:** Offices in OC and New York. Named among Top M&A Lawyers in North America by MergerLinks 2020. Named M&A Attorney of the Year by Euromoney's Legal Media Group 2019.

**ALAN GREENBERG**PARTNER  
GREENBERG GROSS LLP

**WHY:** Has been trying cases for more than 25 years after starting his career as a Wall Street transactional lawyer. Greenberg has been repeatedly named as one of the Top 100 lawyers in California by the Daily Journal and has been named a "Winning Litigator" by the National Law Journal. Co-runs prominent local litigation firm with Wayne Gross. **RECENT:** Honored by The Best Lawyers in America 2022, noted for commercial litigation and white-collar criminal defense. Coronavirus pandemic means "it's a new world we live in," including Zoom depositions. Has served as managing partner of Greenberg Gross since the start of the firm. **NOTABLE:** Cases have included RICO work, fraud, kickbacks, class action, arbitration.

**WENDY PETERSON**GENERAL COUNSEL  
KNOBBE MARTENS

**WHY:** Member, Corporate Counsel Section of Orange County Bar Association. Handles all internal legal matters for OC's largest law firm. Prior to Knobbe, was general counsel of Wynn Oil Co., assistant general counsel of Parker Hannifin's Seal Group. **RECENT:** Serves on the board of Shidler College's Pacific Asian Center for Entrepreneurship. 2019 recipient of Hall of Honor award from the University of Hawai'i at Mānoa Shidler College of Business. Has served on board of directors of OC Legal Aid Society, and the American Heart Association's OC division. **NOTABLE:** Produced award-winning indie film "Hello, My Name is Frank," official selection Newport Beach Film Festival 2015. Was editor-in-chief, University of Hawaii Law Review.

**MIKE FLYNN**PARTNER  
GIBSON, DUNN & CRUTCHER LLP

**WHY:** Practice focuses on corporate and securities law with an emphasis on mergers and acquisitions, capital markets transactions and general corporate representation. **RECENT:** Served as partner-in-charge of the Orange County office from 2016-2021. **NOTABLE:** Represented Landsea Homes Inc. of Newport Beach in its reverse merger with a SPAC in a transaction valued at \$510M. Landsea is now OC's largest publicly traded homebuilder; represented OC-based EnCore Group and affiliates in connection with its acquisition by the Boeing Co.

**BRUCE STUART**FOUNDING PARTNER  
STUART KANE LLP

**WHY:** Experience encompasses a wide range of transactional real estate matters, including acquisition, development, construction and permanent financing, joint ventures, leasing, and dispositions. Practices in the real estate group. Extensive experience in shopping center development, financing, leasing, acquisitions and sales. Founding partner of Stuart Kane. Former shareholder and chair of the real estate practice at Stradling Yocca Carlson & Rauth. **RECENT:** Among seven partners at firm included The Best Lawyers in America 2022, has been on list since 2017. **NOTABLE:** Clients include Irvine Co., Donahue Schriber, Curci Companies, IHP Capital Partners, Merlone Geier.



# PROTECTING ORANGE COUNTY'S WEALTHY



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*Managing Partner*

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**BRYAN GADOL**PARTNER  
HOLLAND & KNIGHT

**WHY:** Head of the California Corporate, M&A and Private Equity practice and a partner in Holland & Knight's Orange County office. Guides clients at all stages of the corporate life cycle in connection with mergers and acquisitions, private equity, securities transactions, reorganizations and other corporate matters. **RECENT:**

Clients include L Squared Capital Partners, Solis Capital Partners, Lugano Diamonds & Jewelry, Veros Software.

**NOTABLE:** Represented Newport Beach's Lugano in its September sale to Compass Diversified, an owner of leading middle market businesses. Deal valued at \$256M.

**DUTCH SCHOTEMEYER**PARTNER  
NEWMAYER & DILLION

**WHY:** Practice concentrates on providing legal advice to companies operating without dedicated in-house legal counsel, as well as within the real estate, construction, and labor & employment practices. Military veteran who counseled William Lyon Homes on topics ranging from labor and employment to contract negotiation; served as VP and associate general counsel, and worked on homebuilder's 2020 sale to Taylor Morrison Corp. **RECENT:** Co-authored article "Cal/OSHA Revised the Emergency Temporary Standards for COVID-19 Prevention" on June 3, 2021. **NOTABLE:** Has stayed connected to military background by mentoring Marines looking to transition into their civilian careers. Also heavily involved in youth soccer, having coached at Our Lady of Fatima School, Mission Basilica School and with the California Football Academy in San Clemente.

**STEVEN NATAUPSKY**MANAGING PARTNER  
KNOBBE MARTENS

**WHY:** Largest OC law firm: close to 150 local attorneys. Focused on intellectual property.

**RECENT:** "Throughout the pandemic, we helped companies in the healthcare space that were developing vaccines and other inventions to care for patients."

**NOTABLE:** Clients have included Masimo and Monster Energy. Serves as an adjunct professor of Intellectual Property Law at UCI School of Law. Previously served as an adjunct professor at Whittier Law School and the University of San Diego School of Law.

**QUOTABLE:** "As things return to normal, the demand for both litigation and transactional attorneys will increase."

**JEFFREY VERDON**FOUNDER  
JEFFREY M. VERDON  
LAW GROUP

**WHY:** Managing partner of namesake firm. He has been practicing law in the areas of taxation and comprehensive estate planning since receiving his Masters of Law from Boston University in 1979. Specializes in estate, trust and income tax planning, and asset and lifestyle protection planning for high-net-worth clients across the United States.

**RECENT:** Frequent presenter at Business Journal events, including September's Family-Owned Business Awards. **NOTABLE:** Often is published in Kiplinger Reports. A founding member of one of the earliest and most distinguished publications on comprehensive estate planning, Jacob's Report on Asset Protection Strategies.

**MARK PETERSON**PARTNER  
O'MELVENY & MEYERS LLP

**WHY:** Assists a broad range of clients whenever they are exploring complex acquisitions, dealing with board-level issues, or for practical, business-oriented legal advice. Clients include public and private companies in industries including consumer products, healthcare, life sciences, medical devices, technology, natural resources and data analytics. **RECENT:** Helped lead the O'Melveny team that advised Urovant Sciences on its \$681M definitive merger agreement with Sumitovant Biopharma; deal to take Urovant private completed early this year. **NOTABLE:** Memberships have included board chairman of the USA Volleyball Federation and membership on the board of Meade Instruments Corp.

**MICHELE JOHNSON**PARTNER  
LATHAM & WATKINS

**WHY:** Named to the Top 250 Women in Litigation 2020; Global Chair of the Litigation & Trial Department; represents financial institutions, Fortune 500 companies, boards of directors, and individuals in securities, M&A, and other complex commercial litigation. **RECENT:** During pandemic, said "we saw a surge of activity in the technology, healthcare and life sciences, and energy sectors." **NOTABLE:** Former member of Latham's Executive Committee and former managing partner of the Orange County office. **QUOTABLE:** "We have such a dynamic and vibrant tech and life sciences community that I expect continued growth in those areas."

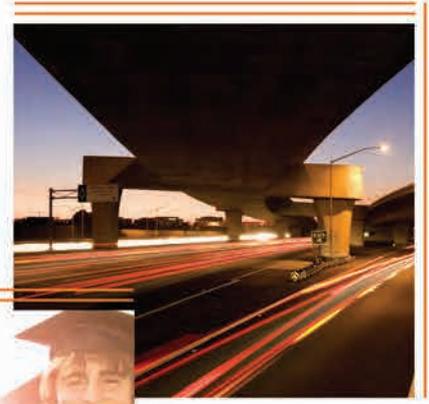


## Resilient OC

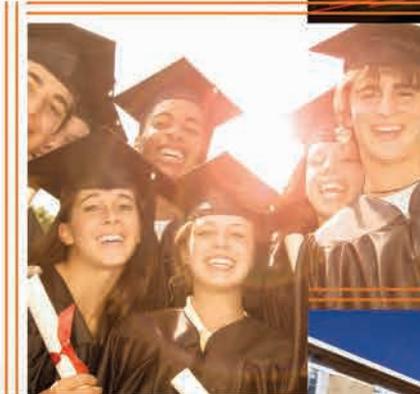
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- Lucy Dunn, President and CEO, Orange County Business Council

**JAMES MCDONALD**

MANAGING PARTNER, IRVINE OFFICE  
FISHER PHILLIPS

**WHY:** Tries employment cases before juries, judges, and arbitrators. Has defended hundreds of employment lawsuits alleging wrongful termination, employment discrimination, sexual and other forms of harassment, wage and hour violations, retaliation, and defamation.

**RECENT:** Says the firm uses an apprentice-type training model which, during remote work in the pandemic, has helped to ensure associates aren't deprived of opportunities to develop skills, client relationships and relationships in the community. **NOTABLE:** Advises employers on how to prevent employment disputes from arising, and on how to manage union strikes and picketing.

**JENNIFER KELLER**

PARTNER  
KELLER/ANDERLE LLP

**WHY:** Runs women-owned law firm; has tried over 150 cases to jury verdict and won almost \$1B. Focus on business litigation, intellectual property and white-collar criminal defense.

**RECENT:** Ranked the No. 1 attorney in Southern California by Southern California Super Lawyers in 2020 and 2021. **NOTABLE:** Represented Mark Towfiq in software exec's well-publicized dispute late last year with Pimco co-founder and neighbor Bill Gross. Case involved noise and privacy issues in Laguna Beach's exclusive Rockledge Beach area, verdict seen by law watchers as a resounding victory for Towfiq. **QUOTABLE:** Stated Gross' attempts at settling the dispute during the court case as a sign that the Bond King was "losing the trial badly."

**WAYNE GROSS**

PARTNER  
GREENBERG GROSS LLP

**WHY:** Often selected to serve as lead trial counsel by companies, executives, and celebrities in their highest-stakes litigation matters; equally at representing plaintiffs and defendants. Co-runs prominent Costa Mesa-based litigation firm with partner Alan Greenberg. **RECENT:** "Lawyer of the Year – Litigation – Regulatory Enforcement" in Los Angeles by The Best Lawyers in America 2021. Equally adept at representing plaintiffs and defendants. **NOTABLE:** Former federal prosecutor in Los Angeles and Orange County, prosecuted cases of national and international significance. These included the UCI Fertility case, the Katarina Witt (Olympic Gold medalist) stalker case, and one of the first criminal trademark infringement cases brought to trial in Southern California.

**RYAN WILKINS**

SHAREHOLDER  
STRADLING YOCCA CARLSON  
& RAUTH

**WHY:** Focuses on corporate finance transactions, mergers and acquisitions, SEC and FINRA compliance, and corporate governance matters. Chair of Stradling's corporate and securities law practice group. **RECENT:** Co-authored September 2020 alert: "As Ransomware Attacks Increase, The SEC Takes Notice." **NOTABLE:** Earned three varsity letters in football from UCLA and was a member of two PAC-10 championship teams. Earned the Jackie Robinson Memorial Award for Overall Excellence (2000) and played in the Rose Bowl (1999), the Cotton Bowl (1998) and the Sun Bowl (2000).

**DANIEL CALLAHAN**

FOUNDING PARTNER  
CALLAHAN & BLAINE

**WHY:** Featured in the Best Lawyers in America for 16 years straight, 2005-2021; named one of Top 10 Attorneys in the United States by the National Law Journal. Successes include a \$50M settlement in a road design case against the city of Dana Point, and a \$934M jury verdict obtained in 2003 in a complex business dispute entitled Beckman Coulter vs. Flextronics. **RECENT:** Member of the board of directors for the Segerstrom Center for the Arts; Chairman for the New Majority for Orange County. **NOTABLE:** Graduated with honors from the UC Davis School of Law in 1979, while serving as editor of the Law Review.

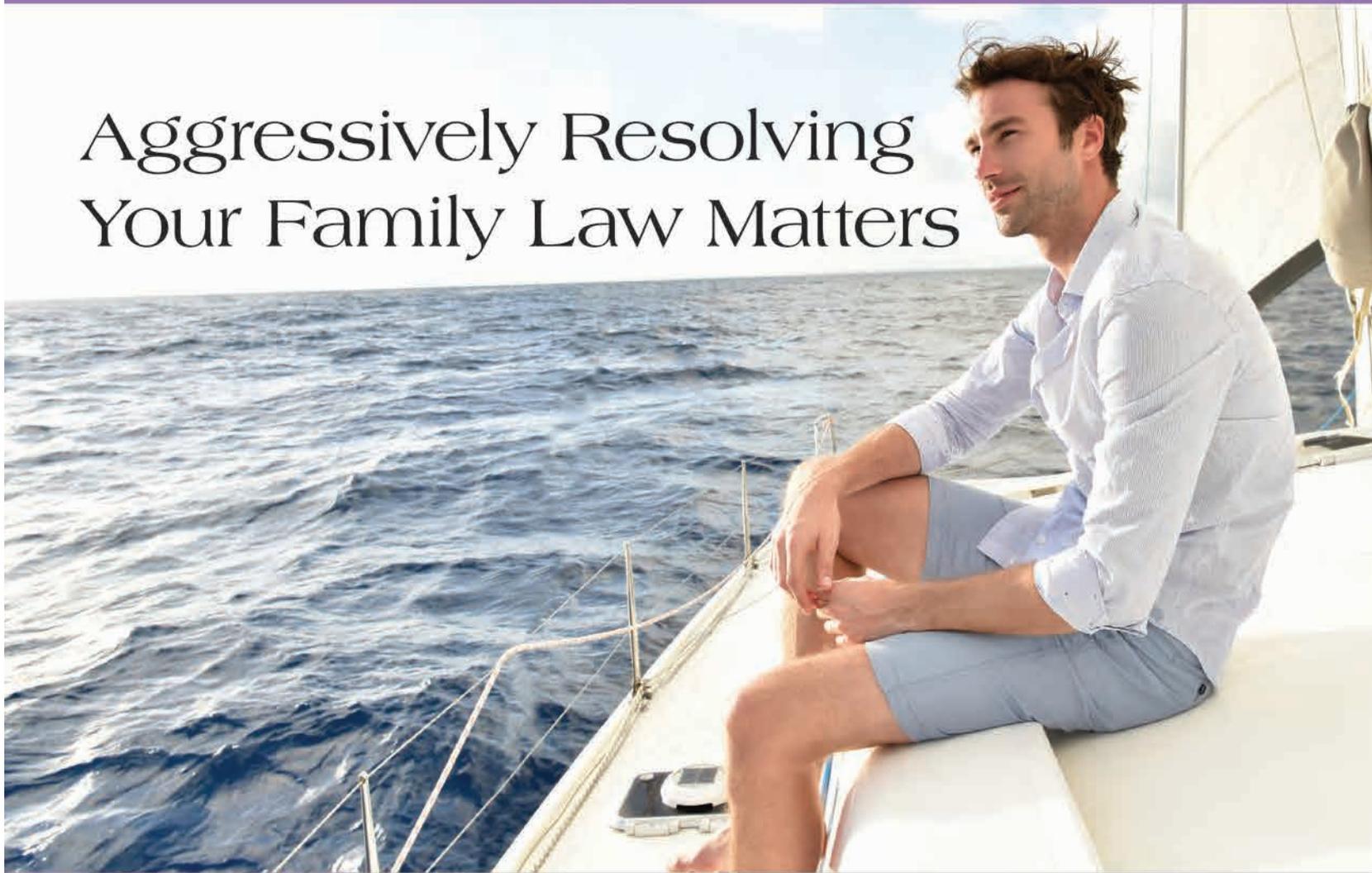
**CARY HYDEN**

PARTNER  
LATHAM & WATKINS

**WHY:** Has led approximately 200 merger and acquisition transactions representing clients in a broad range of industry segments, firm's website says. Advises companies, private equity sponsors, and financial advisers on mergers and acquisitions, capital markets, and general corporate and securities matters. "Dealmaker" designation for defense of Allergan against hostile takeover attempt by Bill Ackman and company's eventual sale to Actavis. **RECENT:** Clients have included Fox Head, Volcom, DC Shoes, Oakley, Beckman Coulter, Tilly's, William Lyon Homes, Broadcom, Asics, Edwards Lifesciences. Has been named by Daily Journal to list of Top 100 Lawyers in California on multiple occasions. **NOTABLE:** Community involvement includes P.A. announcer, Laguna Beach High School Football Games; member of CHOC Children's Foundation board of directors.



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**MARK FRAZIER**MANAGING PARTNER  
RUTAN & TUCKER

**WHY:** Named Southern California “Super Lawyer”; Best Lawyers in America, 2021; has litigated cases in state, federal and bankruptcy courts and counseled clients for almost four decades. Leads one of largest law firms in OC. **RECENT:** Named MP in 2020; oversaw firm’s HQ move to one-and-a-half floors at The Boardwalk in Irvine from Costa Mesa; also has offices in Palo Alto and San Francisco. **NOTABLE:** Joined Rutan in trial department straight out of law school in 1982, made partner in 1990. **QUOTABLE:** “We had been going digital for many years. We really ramped up that effort so we wouldn’t have to have a lot of paper storage space at Boardwalk.”

**WYLIE AITKEN**FOUNDING PARTNER  
AITKEN AITKEN COHN

**WHY:** Nationally recognized trial lawyer, founding partner of Aitken Aitken Cohn. At 35, was the youngest president in the history of the State Trial Bar. With wife, Bette, prominent backer of Chapman University. Political heavy hitter in Democratic circles. **RECENT:** Representing one of families involved in litigation surrounding helicopter crash that killed Kobe Bryant, others. Helped Chapman form a strategic partnership between University of Massachusetts’ online division and Brandman University to expand educational opportunities for working adults. Brandman sold to UMass division in September. **NOTABLE:** Frequent guest on radio and television programs.

**ED SUSOLIK**SENIOR PARTNER, SUPERVISING  
TRIAL ATTORNEY  
CALLAHAN & BLAINE

**WHY:** Expert in insurance law, representing corporate and individual policyholders in the Western U.S.; chair of the Insurance Department at Callahan & Blaine. **RECENT:** Has been an adjunct professor at USC Law School on numerous occasions, where he teaches Insurance Law. Retained on many occasions as an expert witness on insurance law issues by both insurance companies and policyholders. Recognized by his peers as one of the “Top 100 Attorneys in Southern California” annually from 2010 to 2021. **NOTABLE:** Born in Czechoslovakia; USC grad with degrees in philosophy, English and history; graduated second from USC law school in 1990; was an editor of the Law Review. Was professional golfer for several years.

**JASON DE BRETTEVILLE**SHAREHOLDER  
STRADLING YOCCA CARLSON  
& RAUTH

**WHY:** Defends companies, financial institutions and executives in civil and criminal litigation matters. Chair of Stradling’s litigation department; focuses on corporate investigations and white-collar defense, securities litigation and enforcement, business litigation. He and his team secured a rare dismissal with prejudice on behalf of Endologix, a publicly traded medical device company. **RECENT:** Named one of Best Lawyers in America for 2022. **NOTABLE:** Served as an assistant U.S. attorney in the Central District of California from 2001 through 2006. As a prosecutor, he tried seven felony cases to verdict.

**TIM MCELFIH**PARTNER  
FERRUZZO & FERRUZZO

**WHY:** Partner and chair of the law firm’s Corporate and Real Estate Practice Group. Handles all aspects of M&A transactions, entity formation, and commercial finance. His practice includes negotiating and managing joint ventures, including real estate transactions. Also, he serves as outside counsel for businesses that include entity structuring, transactional, and corporate governance matters. **RECENT:** Award presenter at Business Journal’s Family-Owned Business Awards in September. **NOTABLE:** Born in Anchorage, Ala. Received his bachelor’s degree from University of California, San Diego in 1999. Juris Doctor degree from Pepperdine.

**SHANE CRIQUI**PARTNER  
STUART KANE LLP

**WHY:** Practices in the Employment Litigation, Business Litigation and Real Estate Litigation groups for Newport Beach firm. Has defended publicly traded companies, has been named a “Best Lawyer” in America for 2021, and has been named a “Rising Star” by Super Lawyers magazine four times. **NOTABLE:** Prior to becoming a lawyer, he worked as an investment banking analyst for CIBC World Markets (aka CIBC Oppenheimer) in New York City. **OC LEADER BOARD, FEB. 22:** “In a well-intentioned push for more diversity on public company boards, California has passed two different laws ... which could “affect a sea change in the composition of boards of public companies with principal executive offices in California.”



# Innovation for a Sustainable Future

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John Severson, "Going My Wave," undated, print, 11 x 8 1/2 ". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.

MEDIA / SPORTS / ENTERTAINMENT

**JAN-CHRISTOPHER NUGENT**

CO-FOUNDER, CEO  
NOGIN

**WHY:** Technology firm that helps brands boost their e-commerce games. Clients include Bebe, Yeezy, True Religion, Hurley and Charming Charlie. Founded business with Chief Technology Officer Geoffrey Van Haeren.

**RECENT:** Acquired vintage-inspired e-tailer ModCloth earlier this year marking the first fashion brand acquisition by the tech company. Rebranded in 2021 from Branded Online, which in 2019 reported sales up 77% from the prior year to \$43.6M. Business scaled through the acquisition of Zther Interactive four years ago and OneStop Commerce two-and-a-half years ago. **QUOTABLE:** “The real key to all this is merging art and science. You can be a great tech nerd or you can be a spectacular merchant. To combine the two is tough.”

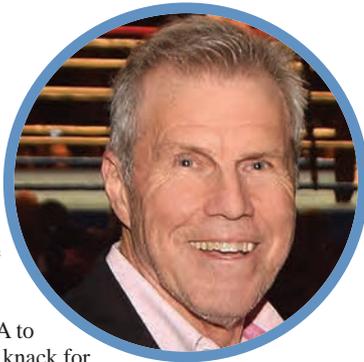


**ROY ENGLEBRECHT**

FOUNDER, CEO  
ENGLEBRECHT PROMOTIONS  
& EVENTS

**WHY:** Among top fight promoters in SoCal; company’s flagship Fight Club OC series, including boxing and MMA matches, held at The Hangar at the OC Fair & Event Center.

**NOTABLE:** Longtime sports marketing exec went from the NBA to the fight world in 1980s. “I have a knack for putting butts in seats, if you will, and at that time [in the early ’80s] there were only about seven licensed boxing promoters in the state so I said ‘Boy, that’s nice. I won’t have a lot of competition.’” **QUOTABLE:** Added drive-in lucha libre wrestling matches to fold during pandemic; crowd watched from their cars. “You have to pivot. You cannot be a purist during a pandemic,” he said. “We do boxing, MMA and now wrestling. You can’t be locked in.”



**RON HASSE**

PRESIDENT, PUBLISHER  
SOUTHERN CALIFORNIA  
NEWS GROUP

**WHY:** Runs Orange County’s largest media publisher in OC with a portfolio that includes the Orange County Register, 10 additional dailies and a dozen-plus weeklies spanning OC, Inland Empire, Long Beach and L.A.

**RECENT:** Launched Skyline Agency in bid to grow content marketing services. Recently closed Register HQ office in Anaheim offering reporters, other employees option to work from home or in one of the company’s other offices. **QUOTABLE:** “One of the biggest challenges for journalists these days is that the skill set required to be successful now goes well beyond being able to gather news and write gracefully—what we traditionally think of as the core skills of a reporter.”



**REBECCA HALL**

FOUNDER, CEO  
IDEA HALL

**WHY:** Among area’s well-known, most-connected media and marketing executives. **RECENT:** Branding and public relations firm ranks No. 3 among OC’s largest PR firms with a team of 27. Works with clients in government, healthcare, hospitality, nonprofit, real estate, retail and consumer. **NOTABLE:** Chapman University grad, has served on board of trustees and as alumni president. Currently member of school’s board of governors and Chapman50.



**BRENDA SPRINGER**

FOUNDER, CEO  
REVEILLE

**WHY:** Started, runs OC’s fifth largest PR firm by worker count. Clients include City of Hope Orange County and Sole Technology. Reps companies in the consumer, healthcare, hospitality, manufacturing, nonprofit, real estate and retail industries. **NOTABLE:** Got start at Los Angeles Mission, working with young Hollywood to raise awareness about homelessness on skid row. **QUOTABLE:** On the 2020 operating environment: “As PR professionals, we’re conditioned to go, go, go and sustain momentum, so a forced hiatus is not our norm.”



**JOSH D’AMARO**

CHAIRMAN  
DISNEY PARKS,  
EXPERIENCES AND PRODUCTS



**BIO:** Oversees Disney’s travel and leisure businesses, which include Anaheim’s Disneyland and five other theme park-resort destinations in the United States, Europe and Asia; cruise line, vacation ownership program, and other business lines. Previously president of Walt Disney World Resort, before that was president of the Disneyland Resort, where he opened the Star Wars: Galaxy’s Edge land.

**NOTABLE:** Recent local proposal, called DisneylandForward, requests new approvals from Anaheim “to allow for integrated development to be located and built throughout Disney properties.” The approximately two-year planning process is expected to set Disney up for several decades’ worth of development in Anaheim. Could pave way to add new attractions, hotel rooms, retail, dining and other mixed-use elements within the 500-acre resort that’s OC’s largest tourist draw.



**STEVE CHURM**EVP, PUBLIC AFFAIRS  
FIVEPOINT HOLDINGS

**WHY:** Chief communications officer for developer of Irvine's Great Park Neighborhoods, other mega-projects in state. Publishing, journalism vet; was chief revenue officer at Freedom Communications, and founder of Churm Media; publisher of OC Metro, sold to Freedom. **RECENT:**

Board chairman of Orange County United Way, heavily invested in pandemic relief efforts.

**OC LEADER BOARD, FEB. 8:** "When the pandemic first hit here, the stakes were too high not to jump in with every resource and potential solution we could muster. Compassionate corporate and community partners reacted quickly and joined us; and together we began focused efforts to bring hope to Orange County's most vulnerable families and individuals."

**BRIAN CALLE**CEO  
STREET MEDIA

**WHY:** Former opinion editor at the Southern California News Group, publisher of the OC Register, and current publisher and CEO of LA Weekly, Irvine Weekly. Slowly building a media empire in Irvine. **RECENT:** Bought Bay Area's Marina Times and New York's iconic Village Voice newspapers at start of year, the latter deal bookending Street Media's presence on both sides of the country. **QUOTABLE:** On need for alternative media post-pandemic, says there's "just going to be an explosion and desire to do things, and I feel like having a brand like the Voice there to help people and guide them on where to go and what's going on, the cool stories and people doing interesting things and innovative things, it's going to be so necessary."

**ARIANNA BARRIOS**CEO  
COMMUNICATIONS LAB

**WHY:** The "B" in "LAB." Runs Orange PR firm with work in government, healthcare, Hispanic, hospitality and other industries. Clients include Southern California Edison, city of Anaheim, East Orange County Water District and Cigna Healthcare, among others. **RECENT:** Firm jumped into the top 10 on this year's ranking of the largest firms to No. 7, from No. 12. **NOTABLE:**

Longtime communications consultant. Started agency in 2013 after Barrios and husband and partner Brian Lochrie (the "L" in "LAB") bought the marketing and media business of Faubel Public Affairs.

**GARY CRISP**FOUNDER, CEO, PRESIDENT  
CRISP IMAGING

**WHY:** Operates digital printer with 11 locations and more than 150 employees. Former sales and marketing executive at Unilever and PepsiCo. Started business with wife, Julie, as Copy Club in Orange, transitioned to reprographics driven by customer demand and then pivoted again to boost tech and digital services. Became C2 Reprographics in 2014 and then Crisp Imaging in 2017. **NOTABLE:** Likes jazz, fine whiskey, premium cigars, sports. Hosts Super Bowl party at American Legion in Newport Beach for Marines and Veterans each year.

**RICHARD REISMAN**CEO, PUBLISHER  
ORANGE COUNTY BUSINESS JOURNAL

**WHY:** Long-running head of OC's premier business publication, among country's largest regional business newspapers. Face of the publication, largely responsible for maintaining OC's "community of business."

**RECENT:** Paper pivoted, thrived during unprecedented COVID year in 2020 and move from physical to virtual awards for paper's signature events. Awards resumed in person earlier this year, drawing large crowds. **NOTABLE:** Celebrated 30 years as the paper's publisher in 2020. Married in September.

**WIL SHELTON**FOUNDER  
WIL POWER INTEGRATED MARKETING

**WHY:** Counts powerful perch when it comes to connecting global brands with the African American consumer. Maintains a network of more than 100,000 Black barbershops and salons throughout the nation, which he then links with his client base of companies, such as AT&T and Universal Pictures, looking to reach an African American audience through experiential, lifestyle and integrated marketing. **NOTABLE:** Helped his network of salons work its way through pandemic, by leveraging their often formidable social media stature in their communities. "I started preaching about finding opportunities in the crisis and told salon owners and barbershop owners 'Don't be paralyzed by this,'" he said. **QUOTABLE:** "I had my salon for 10 years and while I was doing hair behind the chair, I found out I was a marketer disguised as a hair stylist."



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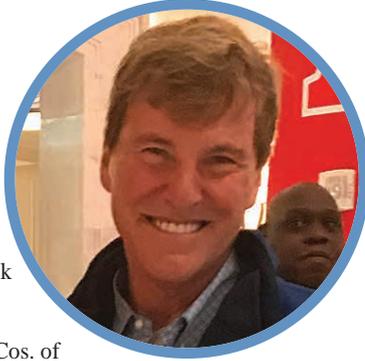
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**LEIGH STEINBERG**

FOUNDER, PARTNER  
STEINBERG SPORTS  
& ENTERTAINMENT

**WHY:** Famed sports agent that inspired the Jerry Maguire movie character. Has represented some of the biggest names in the NFL, including record number of No. 1 draft picks. Reps KC Chiefs Patrick Mahomes, who counts largest contract in the sport. **RECENT:** Billionaire Ron Burkle's Yucaipa Cos. of Los Angeles in February took a significant equity stake in the business, a deal which should allow the firm run by Steinberg and partner Chris Cabott to ramp up its content production, marketing operations and business development. **QUOTABLE:** Burkle is "someone I always really admired," he told Business Journal. "Both his business experience, and his involvement in philanthropy."

**SHANA STARR**

CEO  
BASTION ELEVATE

**WHY:** Runs seventh-largest public relations firm in OC with work in the automotive, consumer, government, healthcare, Hispanic, hospitality, manufacturing, nonprofit, real estate, retail and technology spaces. **RECENT:** Moved quickly to keep up with the times, clients in 2020. Introduced services such as social listening, community management and SEO strategies across the content the firm produces. Company's Newport Beach office has increased to 15 employees since the pandemic; L.A. office added two. Agency opened the Boston office in fall 2020 to service Commonwealth of Massachusetts. **QUOTABLE:** "We are the type of agency that really drives the program and process."

**INGRID OTERO-SMART**

CEO, PRESIDENT  
CASANOVA MCCANN

**WHY:** Runs OC's largest Hispanic and multicultural advertising agency, also among Top 10 largest overall among ad shops here. Clients include Nestlé, Chevrolet, Coke, Ulta Beauty, USPS, Cigna and U.S. Bank.

**RECENT:** Closed on her buy of a majority stake in agency in late 2020. "We started looking at the market and it seemed like the right time to control our destiny."

**QUOTABLE:** Expects more business due to growing multicultural demographics in country. "Clients that really haven't either marketed at all or not made a commitment to multicultural [marketing] are going to have to take a deep look at their plans and we will be there for them, because it's no longer an opportunity; it's a necessity."

**TANYA DOMIER**

CEO  
ADVANTAGE SOLUTIONS  
IRVINE

**BIO:** Longtime head of food- and retail-focused marketing behemoth, which counts more than 3,500 clients, including Amazon, Walmart, Target, Kroger, PepsiCo, Bayer and AT&T. They are supported by thousands of employees, backed by more than 400 data analytics experts funneling the insights used to inform brand strategies, sales plans, merchandising, e-commerce and other services Advantage bills its customers for.

**NOTABLE:** Advantage, long one of OC's largest private companies by revenue, went public last October through a reverse merger with Naples, Fla.-based Conyers Park II Acquisition Corp. The deal was among the first for an area company using the increasingly popular SPAC route. It came several years after the firm first looked to go public via a traditional IPO. Firm now valued at around \$4B.

**QUOTABLE:** Seeing an uptick in business as pandemic subsides. "We are helping consumer goods companies and retailers navigate out of COVID, and our service to them has reinforced their trust in our essential sales and marketing services."

**RAJEEV KAPUR**

CEO  
1105 MEDIA

**WHY:** Irvine-based firm is one of Orange County's larger media companies, one that includes a bevy of business-to-business media titles, as well as events and research and analytics. Some of the 30+ brands it operates include Defense Systems, GCN, Redmond and Washington Technology. **RECENT:**

This year sees firm set to launch a marketing agency, with company revenue topping \$40M. **QUOTABLE:** Central to company's success is the content its trade journals continue to produce. "I think at the end of the day, the one thing that's not going to change is that content is still going to be king."



**JEFF MOORAD**

MANAGING PRINCIPAL, MSP SPORTS  
CAPITAL CHAIRMAN, GLOBAL  
SPORTS, MORGAN LEWIS

**WHY:** Former sports agent and partner of Leigh Steinberg turned sports executive and owner, including stints with San Diego Padres and Arizona Diamondbacks. **RECENT:** Recent MSP investments include several European soccer teams, as well as the McLaren Racing team. The Formula 1 team, where Moorad has a director's spot, is reportedly valued at nearly \$800M and putting up strong results this year. **NOTABLE:** \$800M sale of San Diego Padres in 2012 was the third-highest price for MLB franchise at the time. Studied at UCLA and Villanova University, where he founded the Jeffrey S. Moorad Center for the Study of Sports Law in 2012.



**YOSHI MARUYAMA**

CEO  
TOCA FOOTBALL

**WHY:** Entertainment exec transforming Costa Mesa soccer training company into world-class experience provider. Former SVP at DreamWorks Animation, Universal Parks & Resorts. **RECENT:** Raised \$40M for aggressive expansion; plans to grow from 12 soccer training centers to 26, running 50,000 to 100,000 square feet each. Opened first "Toca Social" venue, with interactive-based soccer games and food and drink options in London. Similar to popular Topgolf concept. **NOTABLE:** Aims to help soccer players perfect their "first touch" with its tennis-like "touch trainer" ball machines. Concept comes from founder Eddie Lewis, a 15-year professional soccer player in England and the U.S.



**TOMMY TALLARICO**

CEO  
INTELLIVISION ENTERTAINMENT

**WHY:** 32-year veteran of the gaming industry who has worked on more than 300 game titles that have sold 200M units resulting in more than \$10B in sales. **RECENT:** Relaunching vintage-inspired home video game console called Amico. It had already pre-sold 100,000 Amico units, resulting in more than \$25M in sales, as of early July. Business Journal Best Places to Work honoree in July. **NOTABLE:** Prior version of Intellivision, which began in 1979, gained prominence for developing the first 16-bit game console a full two generations before it became the industry standard. Tallarico relaunched company in 2018.



**JOHNNY AND CINDY JOHNSON**

OWNERS  
BLUE BUOY FAMILY SWIM SCHOOL

**WHY:** Runs Tustin organization that emphasizes swim safety, and has also trained nearly a dozen Olympians over the decades. **RECENT:** 2021 Family-Owned Business Award winner. **NOTABLE:** Johnsons joined the school's ownership team in 1977 and became sole owners in 2007. **QUOTABLE:** By providing a safe swimming foundation for children, students can come into their full potential with learning and honing their swim stroke and style. "Our goal is not to produce Olympians, but we give our students that foundation that so many kids are missing in their early lessons," Johnny said.



**NICOLAAS VERHEEM**

CEO  
TERADEK, CREATIVE SOLUTIONS

**WHY:** Runs Irvine tech company that helped build a revolutionary wireless video transmission system for on-set monitoring on movie and TV sets, which eliminate the need of bulky cables that plague motion picture and other broadcasting industry production sets worldwide. **RECENT:** Teradek received Academy Award for its technological achievements. The Academy's "Scientific and Engineering Award" was presented in a virtual ceremony in February. **NOTABLE:** Company's Bolt system has been used in countless sets, including Star Wars sequels, prequels and spinoffs. Honored in September Business Journal Innovator of the Year Awards. **QUOTABLE:** "It all started from this little seed that was planted right here in Irvine."



**ADAM PLISKA**

CEO, PRESIDENT  
WORLD POKER TOUR

**WHY:** Runs Irvine-based gambling tour whose television show is seen worldwide by more than 150M people annually, and whose global events have awarded more than \$1B in prize money over the years. **RECENT:** Oversaw much of the high-stakes negotiations in early part of year that resulted in WPT being sold for about \$105M, well more than the firm's prior valuation of around \$50M. Retained position post-sale. **NOTABLE:** Has been with WPT since 2003, and seen several ownership changes over that time. Of latest sale, says, "Our headquarters will remain here. I was raised and live in Orange County, [and] I've collected the most experienced team in the industry, many of which live in the area."



**PETE DEUTSCHMAN**

FOUNDER, CHIEF BUDDY OFFICER  
THE BUDDY GROUP

**WHY:** Runs fast-growing Costa Mesa marketing firm. Started company with local entrepreneur Mike Gray, whose parents founded St. John Knits. Sits on board of Aliso Viejo business accelerator Octane. **RECENT:** Reported \$4.6M in revenue for the 12 months through June, reflecting 132% growth from same period two years prior. Ranked second among Fastest-Growing Small Companies list of firms with \$10M or less. **NOTABLE:** Agency is named after dog. **QUOTABLE:** “The Buddy Group in its DNA is theater, film and television.”

**ADAM TOWNSEND**

CFO  
VIZIO

**WHY:** Tapped to be CFO as TV maker turned media company prepared for an IPO. Longtime media vet who has also clocked time at Showtime Networks Inc. as CFO and CBS Corp, most recently as EVP of corporate finance and investor relations. Overseeing the books at a time of great change at Vizio as it looks to build its Platform+ advertising division. **RECENT:** Honored by the Business Journal in September with a CFO of the Year Award. Helped take Vizio public in March 2021, when it raised about \$257M. **NOTABLE:** UCLA grad with a bachelor’s in biology.

**STRIKE UP THE BAND**

**Stradling Yocca’s Jason de Bretteville** wasn’t alone among OC500 entries citing Irvine’s **FivePoint Amphitheatre** as one place they were looking to return to this year.

He was the only one, though, who might be going for playing tips. He picked up playing the bass guitar during 2020.

Now, “I am still really bad at playing the bass, but not as bad,” he said of his continuing 2021 hobby.

Fellow lawyer **Michele Johnson** could provide some advice; the **Latham & Watkins** partner has been part of not one but two rock bands, **Diversion** and **Dixie’s Deceivers**.

UCI’s **Bryan Hervey** said that in the past year “I played more guitar in the evenings and tried to expand my musical repertoire.”

He practiced more than UCI Chancellor **Howard Gillman**, who notes that the “pandemic year gave me a chance to spend more time on online chess, and I’ve stuck with that.”

“I wanted to spend a lot more time on the drums, but it was a busy year last year and I didn’t spend the kind of time I wanted,” Gillman said.

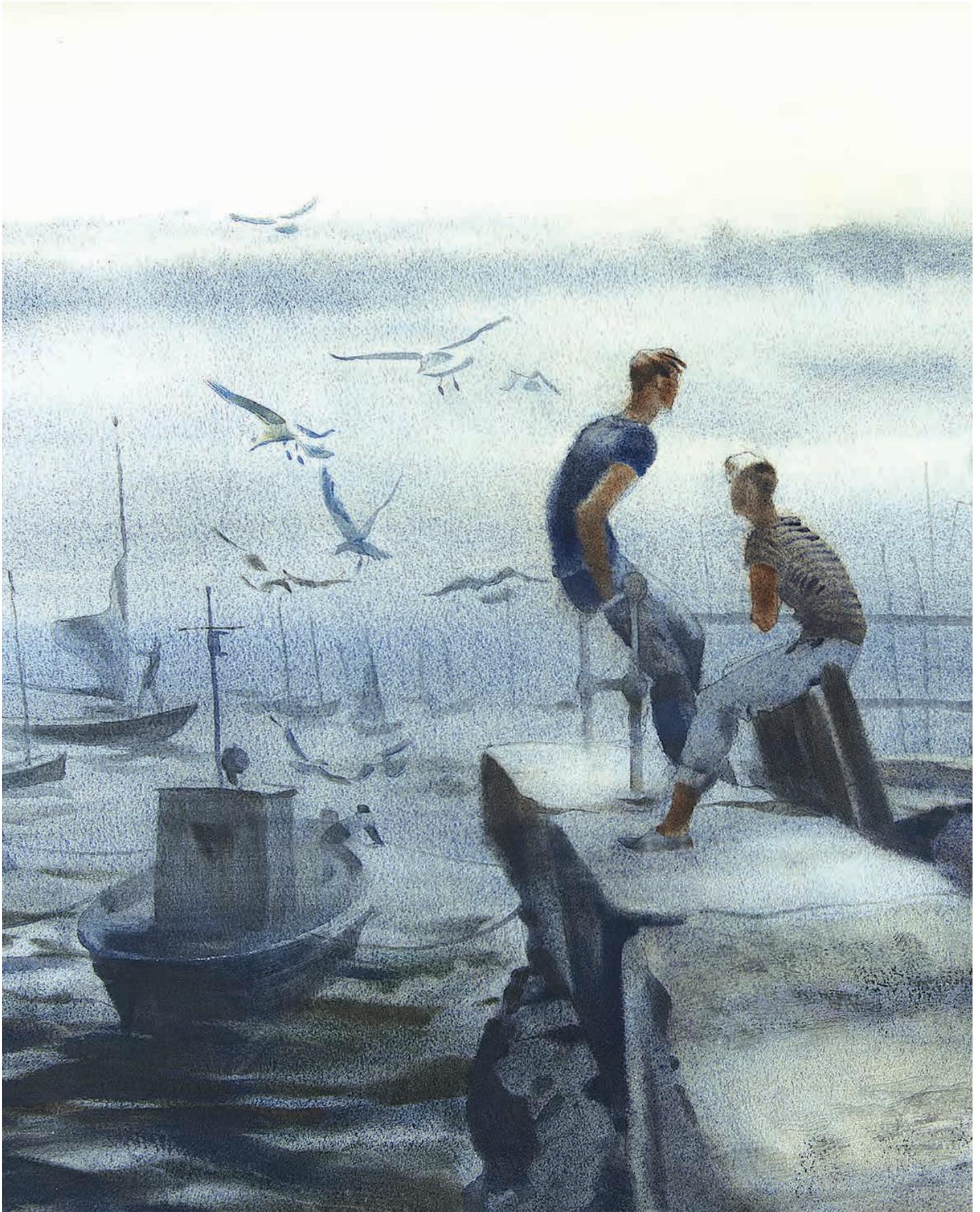
**JOSH BLAKE**

FOUNDER, CEO  
GANDER GROUP

**WHY:** Entrepreneur behind Fountain Valley-based E-Lux Electric Bikes; started Irvine maker of high-end products in 2015. Family-owned firm develops luggage, handbags and accessories for more than 300 casinos that are used to gift to loyal gamers. Expects to close 2021 with \$60M in revenue, about double from 2020.

**RECENT:** Pulled \$3M in new financing to fund retail growth, the first time Blake outsourced capital since company’s start. **QUOTABLE:** “Coming out of COVID, we knew we needed to concentrate our efforts on the specific market we were working on, which is retail, but we didn’t want to give up any equity. That’s one of the reasons why I hadn’t raised funds in the past.”





James Green, "Becalmed" (detail), undated, watercolor, 20.75" x 27.75". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.

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**WIL SMITH**FOUNDER, PRINCIPAL  
GREENLAW

**WHY:** Among OC's top commercial property investors, developers with growing local portfolio of 5M square feet. About \$5B in acquisitions since founding in 2003. **RECENT:** Last year sold its stake in the former campus of Mitsubishi Motors North America Inc. in Cypress, soon to become one of several planned ground-up distribution hubs for Seattle-based Amazon. Company also in talks with San Clemente to develop a new 105,000-square-foot e-commerce distribution facility. **NOTABLE:** Last year announced \$10M gift to USC, where he received masters in 1999. Donation establishes the Wilbur H. Smith III Department of Real Estate Development at USC's Price School of Public Policy.

**CHRIS BURNS**REGIONAL SVP  
DUKE REALTY

**WHY:** Opened Irvine office for one of country's largest industrial real estate investment trust, where West Coast operations are run. Duke owns and operates approximately 159M rentable square feet of industrial assets in 19 markets. Southern California portfolio nearing 16M square feet across 35 properties. **RECENT:** Overseeing development of former campus of Mitsubishi Motors North America Inc. in Cypress. Amazon will occupy an existing but upgraded 146,000-square-foot warehouse at the property, along with a parking lot and loading area totaling 11.5 acres. **NOTABLE:** Duke earned top spot in the Business Journal's Best Places to Work awards in the large employer category.

**HENRY PYLE**OPERATING PARTNER  
CHARTWELL REAL ESTATE  
DEVELOPMENT

**WHY:** Privately held real commercial real estate company counts more than 400,000 square feet of industrial projects in development in Fontana, Corona, and Rancho Cucamonga. **RECENT:** Going local, with prominent buy in Newport Beach. Family group taking over ownership of the Balboa Fun Zone. Has pledged to restore the mixed-use entertainment property on the Balboa Peninsula waterfront to its former glory. **QUOTABLE:** Said the amusement park area played a fun part of both his youth, and that when the site was listed, "We pursued it vigorously. Anything in our hometown that's iconic, if it [is listed for sale], we're paying attention."

**MIKE MCKEE**CHAIRMAN  
TGR FOUNDATION

**WHY:** Longtime area real estate exec who now chairs education-focused charity founded by Tiger Woods. Has been the chairman of the board of governors for more than a decade. **NOTABLE:** Former right-hand man of Irvine Co.'s Donald Bren, one-time chief executive of Irvine Co. Served as principal for Peter Ueberroth's Contrarian Group since 2018. **QUOTABLE:** "It's been incredibly rewarding to be a part of an organization that has had a positive impact on more than 2 million kids," McKee said of the TGR foundation.

**JIM MADRID**EVP  
MCCARTHY BUILDING COMPANIES

**WHY:** Heads Southern California operations for St. Louis-based commercial construction firm, tops in Orange County. The firm's Newport Beach office reported a 19% jump in annual revenue to nearly \$1.2B. **RECENT:** Projects in OC include Saddleback College ATAS, Santa Ana College STEM, Soka University Residential Hall and STEM Building. **NOTABLE:** Increasing work in healthcare sector.

**JEFF REINSTEIN**CEO  
PREMIER WORKSPACES

**BIO:** Runs one of the largest privately held coworking/executive suite operators in the country, which has been in business nearly 20 years. Premier, backed by fellow Irvine-based firm Bascom Group, has owned or operated a total of 132 shared workspace locations over its history. Over two decades, Premier said it has never had an unprofitable year, nor defaulted on a lease.

**NOTABLE:** Looking to capitalize on recent distress in the coworking sector. Moving forward with plans to grow by taking over distressed locations from other operators, and add more than 100 new locations over the next few years.

**QUOTABLE:** "Over the past nearly 20 years, Premier Workspaces has taken over and repositioned 74 distressed or bankrupt shared workspace locations. There is no company in our industry that has the same track record or depth of experience."



# THANK YOU MIKE MCKEE

FOR YOUR DEDICATION AND SERVICE TO YOUTH  
IN ORANGE COUNTY



**TGR Foundation congratulates Mike McKee for his recognition as one of Orange County's 500 most influential leaders.**

As the chairman of our Board of Governors, Mike has helped us make a significant impact in the lives of students from underserved communities and drives us toward Tiger's vision to reach millions of students through our education programs. In addition to his role on the board he is a loyal donor, mentor and advocate. We are grateful for his ongoing service and leadership.

## JOIN THE MOVEMENT

Help students from underserved communities through education.

**Get Involved:** [TGRFoundation.org/PathwaysForward](https://TGRFoundation.org/PathwaysForward)



**JONATHAN BRINDSEN**

PRESIDENT  
IRVINE CO. OFFICE PROPERTIES

**WHY:** Previously chief executive of master planner Midway in Houston, now a top local executive for Irvine Co., overseeing management and growth of office portfolio for region’s largest real estate firm; portfolio spans 53M square feet, majority in OC. Took over from Doug Holte as head of company’s office division in May. **RECENT:** Inked 701,000-square-foot deal in Silicon Valley with Apple Inc. at the Pathline Park office complex, a 1.3M-square-foot campus Irvine Co. is developing in Sunnyvale. **NOTABLE:** Real estate career spans nearly three decades; current chairman of the Urban Land Institute Americas. Former adjunct professor at the University of Houston Bauer Graduate Real Estate Program.



**LISA BHATHAL MERAGE**

CHEIF IMPACT OFFICER,  
MANAGING PARTNER  
REVITATE

**WHY:** Runs, along with brother Alex, alternative asset platform of the Bhathal Family Office. Raj Capital established after selling family’s 50-year-old women’s swimwear business, RAJ Swim, to private equity. Family has since brought apparel company back into fold. **NOTABLE:** Married to PE investor Richard Merage, son of Paul Merage. **RECENT:** Offshoot real estate firm RevOZ formed in 2017, aims to invest in invest \$1B in new projects in Opportunity Zone areas across country. Revitiate launched this fall. **QUOTABLE:** “Our goal is to build a nationally-recognized model that integrates social impact into real estate investments,” she says of RevOZ. “We feel we have a civil responsibility to invest in lower-income communities, especially in the wake of COVID-19.”



**BILL WILHELM**

PRESIDENT  
R.D. OLSON CONSTRUCTION

**WHY:** At construction firm affiliate of R.D. Olson Development for more than half of its 40-year history, spearheading projects including Lido House, Irvine Spectrum Marriott, Paséa Hotel and Spa, and Chapman University’s Reeves Hall. **RECENT:** Maintained project volume throughout pandemic, recently kicking off renovation of Sheraton Park Hotel on the Anaheim Convention Center campus, and building mixed-use Bolsa Row in Westminster’s Little Saigon district, to include a 200-unit apartment complex, retail and the city’s first full-service and four-star hotel by Wyndham Hotels and Resorts. **QUOTABLE:** “We’ve been fielding calls from existing customers ... who had pressed the pause button on projects last year, and are ready to pick back up.”



**DARYL CARTER**

FOUNDER, CHAIRMAN, CEO  
AVANATH CAPITAL MANAGEMENT  
IRVINE



**BIO:** Runs one of the larger apartment owners based in OC. Firm acquires and operates affordable, age-restricted and workforce housing on behalf of institutional investors, counts more than 80 properties with a portfolio approaching 12,000 units; nearly 1,500 of those units have been added since the start of 2020. One of country’s largest proponents of investing in economically disadvantaged communities.

**NOTABLE:** Focus on affordable housing in OC of late with buys in Garden Grove, Anaheim. Deals, its first here, totaled more than \$100M. Looking for more local opportunities.

**QUOTABLE:** “We are very bullish on the Orange County market,” Carter told Business Journal in April. “There’s a great need for affordable housing here, and we will continue to be active in scouting investment opportunities here.”



**JOSH CHILDRESS**

CEO  
LANDSPIRE GROUP

**WHY:** Former NBA star who has become a notable player in the area’s commercial real estate scene, co-founding his own investment firm and striking up strategic partnerships with other local investors over the past few years. **NOTABLE:** Made OC his home during his 15-year basketball career. Stayed local when he made his first commercial investment in 2018, acquiring Sunflower Plaza, a shopping center and office building across the street from South Coast Plaza. **RECENT:** Involved in last year’s acquisition of Newport Beach Marriott Hotel & Spa, at \$216M was the priciest hotel sale in California in 2020. **QUOTABLE:** “Orange County is a mecca for commercial real estate,” Childress told the Business Journal. “The network here has exposed me to so many great groups and partnerships.”



# OUR PROMISES, DELIVERED.



Chris Burns — Executive Vice President

We congratulate one of our experienced leaders, Chris Burns, executive vice president, on the honor of being named one of the most influential individuals in Orange County and earning a spot on the *Orange County Business Journal's* 2021 OC 500. Under his leadership, the Southern California team continues to focus on our clients' needs by providing the best sustainable solutions from start to finish. Buildings may be our business, but our strength is in our people.



**JEFF ROOS**REGIONAL PRESIDENT  
LENNAR

**WHY:** Responsible for overseeing homebuilding operations in the Western Region for country's largest homebuilder, with regional base in Irvine. Joined Lennar in 1996. Started and managed Lennar's Orange County Division, which was the foundation for Lennar's expansion in California. **RECENT:** Inducted into California Homebuilding Foundation's Hall of Fame this year. **NOTABLE:** Helped found Lennar Charitable Housing Foundation in 2001. It serves as a financial vehicle to assist homebuilders with the opportunity to help meet country's homeless problem.

**JOHN COMBS**FOUNDER, PRINCIPAL  
RIVERROCK REAL ESTATE GROUP

**WHY:** Former head of Insignia ESG's property services division, founded Newport Beach-based commercial real estate management and leasing firm in 2003 that specializes in office, industrial and retail management. West Coast portfolio tops 40M square feet. Company ranks No. 7 among OC's largest commercial property managers. **RECENT:** Made its first personal investment when it acquired 20,400-square-foot Irvine office near the airport for its new headquarters. Invested in extensive renovation to achieve Fitwel designation, a new industry standard originally created by the U.S. Centers for Disease Control (CDC) and U.S. General Services Administration. **QUOTABLE:** "We're building a space that's not only safe, but gets our employees excited about returning."

**JOHN DRACHMAN**CO-FOUNDER  
WATERFORD PROPERTY CO.

**WHY:** Leads Newport Beach-based real estate investment firm Waterford Property Co. along with Sean Rawson. Heads firm's commercial division and all capital raising activities. Previously founded Stillwater Investment Group in 2014, and was vice president with Greenlaw Partners. Has been involved in north of \$1.6B of office, retail and apartment transactions. **RECENT:** Company is rapidly expanding into "essential housing" sector through new partnership with California Statewide Communities Development Authority; program aims to lower rents at high-quality properties. **QUOTABLE:** "This business model allows us to grow our assets under management while also fulfilling a need we've seen in the market."

**JON JAFFE**CO-CEO, CO-PRESIDENT  
LENNAR

**WHY:** Long the top OC official for Miami-based homebuilder, country's largest. Sizeable local presence, among the largest builders at FivePoint Holdings' Great Park Neighborhoods in Irvine. Acquired biggest OC builder, CalAtlantic Group, in a \$9.3B deal in 2018. **RECENT:** Named co-CEO in late 2020, had been the president. Now based at Miami HQ. In March, Lennar Foundation gave \$50M to City of Hope for its Irvine campus. **NOTABLE:** Has 30+ year career with company, built its California operations. **QUOTABLE:** Said Lennar's City of Hope gift is a reflection of the company's belief that "we hold in high regard giving back to the community we're able to make our careers in, our living in."

**JOHN HO**CEO  
LANDSEA HOMES CORP.  
NEWPORT BEACH

**BIO:** Runs the fast-growing Newport Beach-based homebuilding arm of China real estate company Landsea Group. Builder was launched from scratch seven years ago, and is now the largest publicly traded homebuilder based in OC. The 250-employee business had north of \$700M revenue last year. Business Journal's Businessperson of the Year in the real estate sector.



**NOTABLE:** Went public early this year via the SPAC route, and now counts a roughly \$400M market cap. Expanding to Texas and Florida through April's \$54.6M acquisition of Vintage Estate Homes. New developments just announced for sites in Anaheim, San Juan Capistrano, alongside existing Lake Forest's Iron Ridge community.

**QUOTABLE:** "I built it one land acquisition and one employee at a time, and it's been an incredible seven years," he said in late December. "Being a public company will only continue that."

# Congratulations to the OC 500

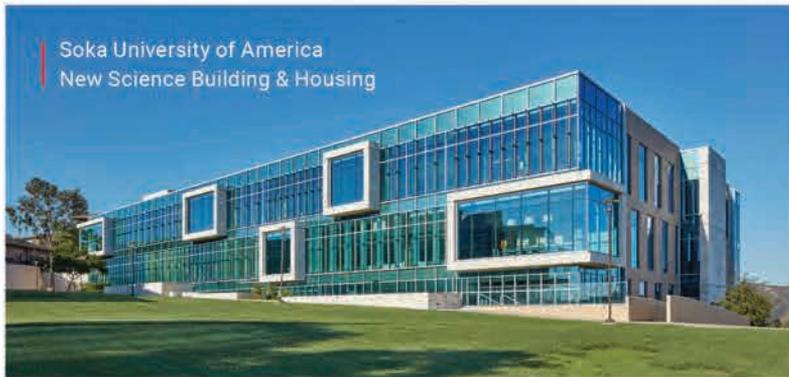
Congratulations to our Orange County Office Leader Jim Madrid who has reinforced McCarthy's longstanding legacy of building up Orange County's communities. As a 37-year industry veteran, Jim has made significant contributions to some of McCarthy's most successful projects in Southern California.



20401 SW Birch Street, Newport Beach, CA 92660 | (949) 851-8383 | [mccarthy.com](http://mccarthy.com)



Pelican Hill Resort Golf Club Parking Structure



Soka University of America  
New Science Building & Housing



Brea Superblock I  
Parking Structure



CHOC Bill Holmes Tower



Chapman University Musco Center for the Arts



UCI Center for Advanced  
Care Medical Office Building



St. Jude Medical Center  
Northwest Tower

**LYNN JOCHIM**PRESIDENT, COO  
FIVEPOINT HOLDINGS

**WHY:** One of area's top real estate execs, leads operations for the state's largest master developer. Instrumental in development of Irvine's Great Park Neighborhoods **RECENT:** Added president to her title this year as founder Emile Haddad stepped down from CEO spot. Serving as interim "principal executive officer" for FivePoint. Oversees all employees at the Irvine-based firm, which has sold almost 7,000 homesites to date at Great Park Neighborhoods. **NOTABLE:** 2019 Business Journal Women in Business Award honoree. FivePoint in 2021 completed one of its largest land sales to date, a \$328M deal for 774 home sites in Irvine.

**LAURA KHOURI**PRESIDENT  
WESTERN NATIONAL PROPERTY  
MANAGEMENT

**WHY:** Oversees 24,000 apartment units in Southern California, Nevada and Utah for Western National Group. Joined firm in 1985, named president in 2010. Married to Western National CEO Michael Hayde. **RECENT:** Along with Hayde, donated \$1M to Laura's House, partially funding the acquisition of the new Laura's House Domestic Violence Resource Center in Aliso Viejo, a resource center for domestic violence survivors and a community hub to educate the public about the epidemic of domestic abuse. **QUOTABLE:** "Laura's House has been my personal passion for over 15 years, and I am both proud and humbled to be a part of a team leading us toward this exciting milestone in the organization's history."

**SEAN RAWSON**CO-FOUNDER  
WATERFORD PROPERTY CO.

**WHY:** Multifamily executive that founded Waterford Group in 2013; merged with John Drachman's Stillwater Investment Group in 2019 to form Waterford Property Group. Rawson has sourced, entitled and developed nearly \$2B in real estate transactions throughout career, which includes leading housing developer St. Anton Partners' expansion into Southern California. Now heading multifamily expansion at Waterford with emphasis on affordability. **RECENT:** Company was involved in six acquisitions with the newly formed state agency totaling 2,022 rental units and more than \$1B in Southern California in the first half of 2021; that figure could hit closer to \$1.5B by the end of the year. **QUOTABLE:** "This program is part of our overall affordable housing strategy and complements our existing traditional housing portfolio."

**JUSTIN LOIACONO**PRINCIPAL  
HARBOR ASSOCIATES LLC

**WHY:** Long Beach-based real estate investor does much of its work in OC. Harbor has bought nearly 30 projects totaling north of 4M square feet throughout Southern California and Colorado since its inception in 2015. **RECENT:** In March, partnered with Chicago's Singerman Real Estate to buy 15 and 25 Enterprise offices Aliso Viejo. \$92M buy was priciest reported deal involving an Orange County office property in over half a year. Brought Harbor's local portfolio to 1.1M square feet. **QUOTABLE:** "We believe high-quality and well-located suburban office assets will outperform moving forward."

**PAUL JOHNSON**EVP, COMMUNITY DEVELOPMENT  
RANCHO MISSION VIEJO CO.

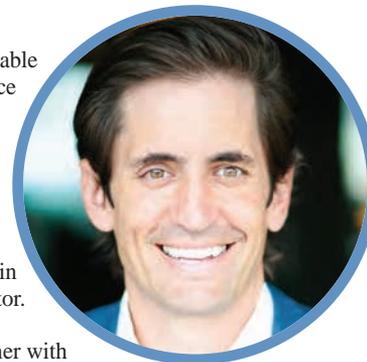
**WHY:** Key exec at South County's largest master-planned community. Some 14,000 homes to be built over course of RMV's multi-phased development. **RECENT:** Sold its current stock of homes and preparing to launch land sales for its next large neighborhood, Rienda. That 2,700-unit community is scheduled to open next year. **QUOTABLE:** "Between low interest rates, low supply and a reinforced importance on the home, the housing industry did extremely well last year. Orange County continues to look attractive as buyers look for a new home."

**PARKE MILLER**EVP  
LINCOLN PROPERTY CO.

**BIO:** Leads Dallas-based landlord's OC division. Notable holdings include Flight office development on former Tustin Marine base. Creating OC's first ground-up creative office project earned his Business Journal's nod for Businessperson of the Year in 2020, for the real estate sector.

**NOTABLE:** Frequent partner with coworking companies at its properties. Regarding sector headwinds, Miller said while "just like in retail, there very well may be bankruptcies and/or closures. And just like in retail, great locations and great properties will be fine long term, even if there are painful impacts in the short term."

**QUOTABLE:** "High-rise office projects were going out of vogue before the pandemic, and that's only accelerated in the past year," he said in April.



# Birtcher Anderson & Davis

STRATEGY. ACCOUNTABILITY. RESULTS.

Essential full-service real estate operator offering a broad spectrum of integrated real estate services coast to coast.

## CONGRATULATIONS ART BIRTCHER! 50 YEARS OF EXCELLENCE

Mr. Birtcher has over 57 years of experience across a wide array of disciplines in commercial real estate including development, acquisitions, financing and asset and property management.

- Over \$100,000,000 invested in last 12 months in CA, TX, and FL
- Approximately 10,000,000 Sq. Ft. of Industrial and Office under management
- Over 2,000 Commercial Tenants, and Over 3,500 Mobile Home units under mgmt.



Arthur B. Birtcher  
Co-Chairman and Principal



 **Birtcher  
Anderson & Davis**

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949.545.0500 main | 949.545.0575 fax



**ALAN DAVENPORT**CEO  
INTERIOR LOGIC GROUP

**WHY:** Runs country's largest provider of outsourced interior finish and design services for homebuilders. Provides homebuilders variety of sales and marketing, design, and installation services via network of design studios, warehouses and fabrication facilities. **NOTABLE:** \$1.2B in revenue for the nine months ended Sept.

30, 2020. **RECENT:** Irvine-based company filed plans to go public near start of year, then reversed course. PE-backed firm announced its sale to investment giant Blackstone in a \$1.6B-valued deal.

**QUOTABLE:** "As we look to the future, we believe Blackstone will be an excellent strategic partner for our business as we accelerate our planned growth initiatives."

**DOUG HOLTE**FOUNDER  
AGILE WORKWEEK INVESTMENT

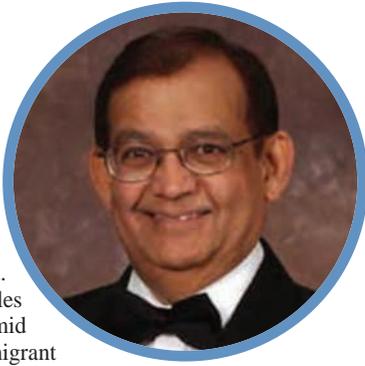
**WHY:** Former president of Irvine Company Office Properties, where he was responsible for overseeing the firm's 50M-square-foot office portfolio spanning California, New York City and Chicago. He helped to grow that portfolio by 16M square feet during his time at the firm.

**RECENT:** Founded Agile Workweek Investments, which invests in modern properties and technologies for modern workweek priorities. **NOTABLE:** Joined think tank by ThoughtExchange and CEO Leadership Alliance of OC to determine what landlords need to do to attract the next generation of talent to their buildings.

**MANU SHAW**FOUNDER, CEO  
MSI

**WHY:** Flooring, countertop, wall tile products distributor with 2,600 employees. One of the pioneers of granite for kitchen countertops. Multiple Business Journal honors. Largest natural stone distributor in North America.

**RECENT:** Over \$2B in annual sales as people upgraded their homes amid pandemic. **NOTABLE:** 1970 immigrant from India, co-founded firm in 1975 with wife, Rika. Big break came in 1981 to provide granite for Vietnam Veterans Memorial, Washington, D.C. **QUOTABLE:** "Natural stone has stood the test of time and remains the most visual part of a home—found in entryways, kitchen counters, master baths, fireplaces, columns, patios and landscaping. Natural stone endures as mankind's best friend and is an incredible job-creation machine."

**DAN YOUNG**PRESIDENT  
CAMINO ENTERPRISES

**WHY:** The former head of community development and No. 2 exec at Irvine Co. Launched consulting, development firm 2016, now tasked with major project in Anaheim's Platinum Triangle, branded as ocV!be.

**RECENT:** Working with Henry and Susan Samuelli for the development of the 115-acre site surrounding the Honda Center; \$3B investment promises offices, retail, apartments and more. The first phase is scheduled to open in 2024.

**QUOTABLE:** "We want to achieve a unified customer experience, from the apartments to the offices," Young says of Anaheim project.

**ROBERT OLSON**CEO, PRESIDENT  
R.D. OLSON DEVELOPMENT  
CEO  
R.D. OLSON CONSTRUCTION

**BIO:** California's dominant hotel developer for over a decade. Since 2008, company has completed about 20 projects with over 3,000 rooms. Those projects have a value topping \$2.2B. Business Journal Businessperson of the Year for 2019.

**RECENT:** The pandemic hasn't stopped the developer from planning his next steps. A pair of hotels totaling 266 rooms at the revamped Dana Point Harbor—dubbed Dana House and Surf Lodge—remain on target to move ahead in the next few years, as does a 16-story project featuring a rooftop bar along Sunset Boulevard in Hollywood. Olson also has plans outside California, including a new resort in the works in Sedona, Ariz., which would mark his Newport Beach-based firm's first development project in that state.

**QUOTABLE:** "We're very positive," Olson told the Business Journal in April. "We've learned a lot about the industry (in the past year) and made adjustments." Creating a curated customer experience—for guests of all types, business or leisure—is now the key for hotel operators, he said. Guests "want to stay at a place where the locals hang out, a place that's comfortable, and has a good team of people."



**RICHARD JULIAN**

PRESIDENT  
ADVANCED REAL ESTATE SERVICES

**WHY:** Leads one of area’s largest multifamily investors. Advanced counts north of 10,000 apartment units in Southern California.

**RECENT:** Sold Surf City mobile home site in late 2020 for more than \$200M, has deployed proceeds to purchase numerous local complexes, including Irvine’s 2600 Axis, bought for \$58M in February.

**NOTABLE:** In addition to more affordable rental offerings, Advanced is the developer of Corona del Mar’s ultra-high-end condo project, Aerie, a seven-unit project overlooking Newport Harbor where units run more than \$10M. **QUOTABLE:** Of 2020 investments, said “we are fortunate to have acquired so many properties in such a tumultuous year.”



**ALLISON RAWLINS TIFT**

VP  
LAND ADVISORS ORGANIZATION

**WHY:** Represents investors, developers and builders in Orange County as a lead broker for one of the region’s top land brokerages. **RECENT:** Part of team that represented Toll Brothers in its nearly \$100M buy of the former Nakase Nursery site in Lake Forest after several years of planning. More than 500 homes planned for the 125-acre site. Also brokered TRI Pointe Group Inc.’s deal to acquire a 3.7-acre site near Santa Ana’s Main Place Mall, where 74 townhomes are planned. **QUOTABLE:** “The transaction closed on time and according to schedule, despite the headwinds of the COVID-19 pandemic, which demonstrated the demand for real estate infill Orange County.”



**JIM KROHN**

PRESIDENT, APARTMENT OPERATIONS  
IRVINE CO.

**WHY:** Runs apartment operations for OC’s top rental owner, with California portfolio topping 50,000 units. Got position in 2018.

Previously founding partner and chief exec at Alliance Residential Co. Among top 20 national apartment managers in the country.

**RECENT:** Overseeing largest apartment project currently under construction in Irvine: the next phase of its Los Olivos community, with about 2,000 units being built. Recently opened Promenade apartment project in Irvine Spectrum market. **NOTABLE:** University of Arizona grad, member of the Urban Land Institute and National Multifamily Housing Council Executive Committee.



**CODY CANNON**

MANAGING PRINCIPAL  
CUSHMAN & WAKEFIELD

**WHY:** New top local exec for CRE brokerage. The firm counts about 50 area brokers, 140 OC employees, and nearly \$3.5B in local sales and lease transactions annually. Appointed to position in August, also heads Inland Empire division. **NOTABLE:** Newport Beach resident counts more than 15 years of industry experience with a focus on capital markets. He previously served as co-executive managing director of the Greater Los Angeles region for fellow brokerage Colliers, where he oversaw seven offices and was the region’s executive leader of the Capital Markets and Debt service lines.

**QUOTABLE:** “We will grow our market share and drive best-in-class results for our clients. I can’t wait to get to work.”



**JASON MAXWELL**

SVP, GENERAL COUNSEL, SECRETARY  
IRVINE CO.

**WHY:** Leads legal, risk management and records management groups for OC’s top real estate firm. Joined Irvine Co. in 2021 after 14-year career with Houston real estate giant, Hines, where he was SVP and co-head of the global legal department.

**RECENT:** Took over GC role from Clay Halvorsen, who retired in April. **NOTABLE:** Started Hines legal function in 2006, and led sales negotiations for nearly 200 totaling \$25B. Founding chairman of the Real Estate Law Committee of the Association of Corporate Counsel. J.D. from Georgetown.



**ANTHONY ROZIC**

NORTH AMERICA CEO  
GOODMAN

**WHY:** Leads North America ops for Goodman Group, a \$26B-valued industrial investor that operates locally out of Irvine. Rozic joined firm in 2004 as chief financial officer, named to current position in 2016.

**RECENT:** Broke ground on the largest industrial project currently on the books in Orange County, a speculative, 1.5M-square-foot logistics campus at the former Kimberly-Clark tissue paper manufacturing site in Fullerton. Construction is expected to be completed by spring 2022. **QUOTABLE:** The Fullerton project is being “built to meet the needs of the new digital economy,” and is being touted as the firm’s “most sustainable” facility in OC.



**JEREMY MAPE**

PRINCIPAL, DIRECTOR OF ACQUISITIONS  
WESTERN REALCO

**WHY:** Heads acquisitions, entitlements and construction for the Newport Beach firm, among the most active industrial developers in Orange County over the past decade with several million square feet of projects completed. **RECENT:** Company invested nearly \$100M across sites in Brea, Fullerton and Lake Forest, with plans to develop new ground-up industrial products totaling close to 500,000 square feet. Turning former office sites into industrial facilities. **QUOTABLE:** “Out of all of the sectors, industrial has the most legs left in the cycle, and we’ll continue to scout well-located acquisition opportunities.”

**DAVE PROLO**

PRESIDENT  
LAND SALES & HOMEBUILDING  
IRVINE CO.

**WHY:** Head of land sales and homebuilding for Irvine Co. and its homebuilding arm, Irvine Pacific, where he oversees planning, development and operations for the Villages of Irvine. Previously led regional homebuilding divisions for Lennar, CalAtlantic Homes, and SoCal operations of one-time Irvine builder John Laing Homes. Named to post at end of 2020, replacing retired Irvine Co. vet Dan Hedigan. **RECENT:** Communities on the Irvine Ranch sold 800 homes in 2020, earning it the No. 14 slot on the John Burns Real Estate Consulting list of the 50 most successful master-planned communities. **NOTABLE:** Started homebuilding career by working with his two grandfathers in California. Throughout career, managed delivery of more than 7,000 homes in six western states. Board member for HomeAid Orange County.

**FRANK SURYAN JR.**

CHAIRMAN, CEO  
LYON LIVING

**WHY:** Heads private multifamily investor, launched in 1988 by late Gen. William Lyon. Newport Beach company has acquired north of 21,000 units in California, Colorado, Florida and Georgia, and has developed more than 11,000 units to date. About \$2B in assets. **RECENT:** Partnered with Eagle Four Partners in its \$216M acquisition of the Newport Beach Marriott Hotel & Spa. Extensive renovations underway at 532-room property. **NOTABLE:** Owns more than a dozen Sonic Drive-In restaurants in California. Wine connoisseur who counts ownership stake in Foley Wines. Philanthropic work includes Orangewood Foundation, Boys and Girls Club of Los Angeles Harbor, and Mater Dei High School.

**JOEL STENSBY**

FOUNDER, CEO  
KPRS CONSTRUCTION SERVICES

**WHY:** Construction industry veteran that co-founded KPRS Construction Services in 1998. Has since diversified company to offer construction services in various sectors, including office, industrial, retail, multifamily, hospitality, etc. More than \$4B in projects to date, including Playa Vista, Aquarium of the Pacific and San Francisco’s former PacBell Park. **RECENT:** OC’s seventh largest construction firm with \$608M in annual revenue. 2020 Business Journal Excellence in Entrepreneurship honoree. **QUOTABLE:** “While progress is not without challenges, we are looking forward to being through the hurdles and moving forward as a company and as a community to have COVID in our rearview mirror.”

**CHRIS MARSH**

FOUNDER, CEO  
CHERRY TREE CAPITAL PARTNERS

**WHY:** Local real estate veteran who previously oversaw an aggressive development and acquisition push for Irvine Co.’s apartment division. Left in August to lead a new venture of his own. **RECENT:** Cherry Tree is a new multifamily investment platform that aims to increase the stock of workforce housing in the Midwest and Sun Belt markets. Has a near-term goal of acquiring north of 1,000 units per market over the next 18 months. **NOTABLE:** Former Irvine Co. second-in-command, Dan Young, on Cherry Tree’s advisory board. **QUOTABLE:** “There’s a tremendous opportunity for strategic renovation and repositioning of existing apartment communities in the Sun Belt markets today.”

**STEVE CASE**

EVP  
IRVINE CO.

**WHY:** Oversees office marketing and leasing for OC’s largest landlord. Responsible for leasing and marketing strategies and results for the company’s nearly 50M square feet of office properties in OC, San Diego, Silicon Valley, Los Angeles, Chicago and New York. **RECENT:** Unveiled first phase of low-rise, loft-style office project, Innovation Park in Irvine Spectrum. **QUOTABLE:** “We wanted to deliver an open-air village that is unlike anything in the market today, and makes employees want to return to the office.”



**BILL SHOPOFF**

CEO, PRESIDENT  
SHOPOFF REALTY INVESTMENTS

**WHY:** Master developer, real estate investor, entitlement specialist. Local projects include Uptown Newport project along Jamboree Road, which will ultimately include 1,200-plus homes and apartments. **RECENT:** Received the green light for plans to redevelop a former oil storage facility in Huntington Beach into a mixed-use site that will add 250 single-family homes, a hotel and other commercial and recreational amenities. **NOTABLE:** Paid \$26.5M in 2016 for the Surf City site just off PCH that held three large, above-ground oil tanks developed by Southern California Edison in the early 1970s.



**CARL MCLARAND**

FOUNDER, CHAIRMAN, CEO  
MVE + PARTNERS

**WHY:** Architect and designer of some of Southern California's most iconic projects, such as Water Garden, a 1.2M-square-foot office that's the largest ever approved by the city of Santa Monica. **RECENT:** Added former Gensler executive Kap Malik to MVE as principal and member of the firm's executive management team. **NOTABLE:** Working on mixed-use project in the Bay Area town of San Mateo that will convert a 14.5-acre area into a mixed-use development with more than 900 homes and 40,000 square feet of commercial space. Project dubbed Concar Passage.



**NATALIA OSTENSEN**

EVP  
OLEN PROPERTIES CORP.

**WHY:** Oversees day-to-day operations at company founded by her father, Igor Olenicoff, one of the area's largest local property owners. Heads commercial property unit leasing team at the company. Also owns Andrei's Conscious Cuisine, and more casual concept Dandelion Conscious Cafe & Catering. **RECENT:** Along with Olenicoff, headlined the 22nd annual Family-Owned Business Awards, the Business Journal's first in-person event in 18 months. **NOTABLE:** Laguna Beach native, USC grad. Accepted large business award for Family-Owned Business in 2009.



**TREVOR TAIT**

MANAGING DIRECTOR  
TAIT AND ASSOCIATES

**WHY:** Santa Ana civil engineering, environmental service, land planning and architectural firm with growing roster of high-profile projects. **RECENT:** 2021 Family-Owned Business Award winner. **NOTABLE:** In Newport Beach, the company was recently granted approvals by the OC Board of Supervisors to develop the former Coyote Canyon Landfill into a mixed-use recreational hub. Firm is still in the early entitlement process for the 375-acre Newport Coast property. **QUOTABLE:** Newport Beach spot "has the opportunity to become a national model of how to sustainably repurpose landfill sites."



**ART BIRTCHER**

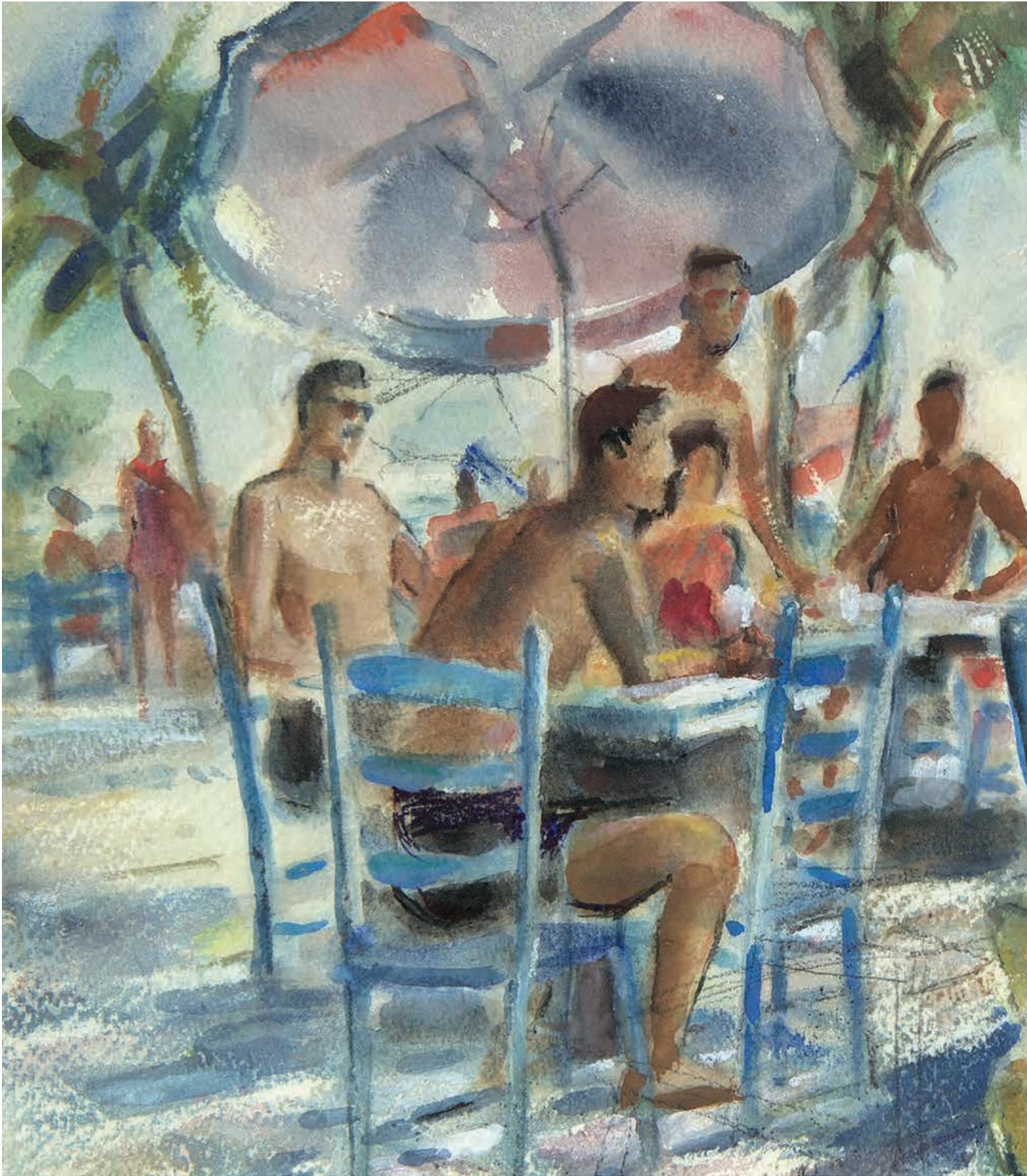
CO-CHAIRMAN  
BIRTCHER ANDERSON &  
DAVIS ASSOCIATES

**WHY:** Industrial investor, whose fifth-generation family company was founded in 1939. Birtcher family is one of OC's better-known real estate families. **RECENT:** San Juan Capistrano - based Birtcher Anderson Realty, led by Birtcher and Bob Anderson, finalized its acquisition of Newport Beach-based Davis Partners at the start of the year. Combination of the two firms bring their joint total commercial footprint to nearly 11M square feet. **NOTABLE:** Birtcher Anderson & Davis will be led by co-chairmen Birtcher and Anderson, and Davis Partners' Bob Thiergartner and Daniel Karcher. Combined company employs about 130 in OC.



**RESTAURANT RECOMMENDATIONS**

- James McDonald:** Pelican Grill
- Tracy Branson:** Red O Restaurant
- Chris Beals:** Left Coast Brewing
- Rebecca Hall:** Broadway by Amar Santana, Vaca, A Restaurant
- Peter Yu:** LSXO
- Kenneth Chang:** Anaheim White House
- Mandy Fry:** Maison Café and Market
- Julian Movsesian:** The Winery and Marché Moderne
- Sharrell Jackson:** Mozambique
- Dave Wilson:** Glasspar Restaurant
- Reza Jahangiri:** 242 Cafe Fusion Sushi
- Alan Davenport:** Nobu, Mastro's and Javier's
- Ed Thomas:** Pelican Grill, Rose's Cantina, O'Neill's Bar & Grill
- Bernadette Boden-Albala:** Bistango, Carmelita
- Heidi Zuckerman:** Knife Pleat



Alexandra Bradshaw, "Boardwalk, Laguna Beach," c. 1940, watercolor, 12 x 18". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.



SERVICES / ACCOUNTING / INSURANCE

**THOMAS BENNETT**

MANAGING PARTNER  
ORANGE COUNTY, SAN DIEGO  
BAKER TILLY US LLP

**WHY:** Top local exec for Orange County's seventh-largest accounting firm; Baker Tilly entered OC last year by buying Irvine's Squar Milner. Also runs San Diego market for Chicago-based firm. 15 years' experience, works with startups and public companies alike. **RECENT:** Succeeds Steve Milner, who now leads the firm's Western U.S. market, based out of Irvine Towers office complex near airport. **QUOTABLE:** "Having spent my entire career in Southern California, I'm honored to lead our professionals in these markets as we help our clients navigate today's challenges and prepare for what's next."



**KRISTEN ALLISON**

CEO, PRESIDENT  
BURNHAM BENEFITS

**WHY:** Joined Burnham Benefits Insurance Services in 1990s. Bought most of firm in 1995. Past Business Journal Women in Business honoree. **RECENT:** Built firm to \$52.6M in annual sales. Year ago, acquired by Florida-based BRP Group where she is now regional president. **NOTABLE:** Burnham ranked No. 1 on Business Journal's Best Places to Work list in July, among mid-sized companies. **QUOTABLE:** In statement about being acquired, said: "Our world-class team of experts utilizes a data science-centric approach to provide customized employee benefit and retirement solutions for our clients, and our level of service is unmatched in the industry."



**MIKE CORBO**

CEO, PRESIDENT  
MITSUBISHI ELECTRIC US

**WHY:** Oversees 2,960 employees who generated \$1.6B in sales in 2020; aiming for \$2.7B by 2025. Provides HVAC systems, elevators and escalators, semiconductor and power devices and data walls. **RECENT:** In May was named first non-Japanese CEO of unit. Americas Corporate Office provides strategic and operational services to other Mitsubishi Electric group companies in North America including factories in Ohio, Pennsylvania and Kentucky. **QUOTABLE:** "We're bullish on the economy. When COVID came, we all anticipated a dramatic downturn, which was short lived. The rebound came back quickly."



**PATRICK MAHONEY**

PRESIDENT  
WEST COAST ARBORISTS

**WHY:** Part of family-run business that holds contracts with over 300 municipal agencies to manage more than 30M trees, employs more than 1,000 workers across 18 offices and is projected to do \$150M in sales this year. **RECENT:** 2021 Family-Owned Business Award winner. **NOTABLE:** Acquired business in 1973, while in high school. **QUOTABLE:** "Why do we have 300 of the 480 cities [in the state] under contract? It's because we have all this tree inventory and tech that we bring to the cities. Most of your typical tree companies are like what I bought. There are some bigger ones but, typically, they're mom-and-pops."



**BRAD HALL**

PARTNER  
MGO LLP

**WHY:** Started accounting firm Hall & Co. 35 years ago, building it to 60 employees with specialties including technology, pharmaceuticals, apparel, and research tax credits. It ranked No. 16 on the Business Journal's 2021 list of Orange County accounting firms by number of local employee count. **RECENT:** Joined Los Angeles-based MGO at start of year. The two firms together will rank among the 15 largest accounting firms in Orange County. **QUOTABLE:** "We'll be one of the bigger firms in Orange County," Hall told the Business Journal after the deal was announced. "We'll be able to expand into a national footprint."



**STEVE JONES**

CEO  
ALLIED UNIVERSAL

**BIO:** Took a security services company that generated \$12M in 1996 to \$18B. April's acquisition of London-based G4S PLC created the world's seventh-largest private employer—with more than 800,000 employees.

**QUOTABLE:** "The plan is to grow to \$25B in annual sales by 2026. We're not slowing down."



“If your actions inspire others to dream more, learn more, do more and become more, you are a leader.”

- Simon Sinek, Author and Inspirational Speaker

Right here in the heart of Orange County, our team at Word & Brown General Agency, led by President Jessica Word, has inspired health insurance brokers to address the diverse needs of small and large businesses for more than 35 years.

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We congratulate all of the **2021 most influential business leaders of Orange County**. Thanks for all you do . . . and keep influencing and inspiring all of us.



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

**Word&Brown.**

**PAMELA JUNG**

FOUNDER, CEO  
WORKFORCE SOLUTIONS GROUP

**WHY:** Provider of in-home care staffing for national healthcare plans. **RECENT:** Sales growth may top 60% this year. Sold firm for \$30M, including \$25M in cash and another \$15M in incentives, to Florida's Cross Country Healthcare this summer. West Coast hub to remain in Foothill Ranch. **NOTABLE:** Winner of Business Journal Women in Business Award in 2017. **QUOTABLE:** Her proudest moment was 2008 when the financial crisis struck, and her company was facing bankruptcy. "I could not bring myself to do that. We came very close to being on the edge," she said. "I felt if I put my head down and focused, we could turn it around."

**KIM LETCH**

OFFICE MANAGING PARTNER  
ORANGE COUNTY  
ERNST & YOUNG

**WHY:** Leads second-largest accounting and consultancy in OC with 542 workers. **RECENT:** Member of CEO Leadership Alliance Orange County, board of trustees at Sage Hill School. **QUOTABLE:** "I served clients in every stage of their growth and helped companies from early stage startup through the challenges of launching initial products to global market leadership. In addition, I had the great pleasure of meeting some of California's best and brightest entrepreneurs through my role as Program Director for the EY Entrepreneur of the Year Awards."

**DAVE HARVEY**

FOUNDER, PRESIDENT  
HARVEY & CO.

**WHY:** M&A advisory expert. Has provided buyers such as equity funds or their portfolio companies with advice on more than 440 transactions, some of which it participates as an investor. Brea's CoolSys a notable client. **RECENT:** Business booming, as baby boomer owners are retiring and looking to possibly sell their businesses, in addition to the roll-up strategy employed by many PE-backed buyers. **NOTABLE:** Last year, average acquisition Harvey advised on had about \$17M in annual sales, which is small by Wall Street standards. **QUOTABLE:** "We're below the radar screen of the \$100 million to \$300 million that are super frothy and have a big auction process. When you got a \$20 million business, there are less options."

**LAUREN KELLY**

CMO  
THOUGHTEXCHANGE

**WHY:** Joined in 2021, previously held title of SVP and CMO of Irvine Company Office Properties and led global strategy for Dell's commercial business, representing over \$60B in revenue. **RECENT:** Joined board of management consulting firm Prophet. **NOTABLE:** Together with CEO Leadership Alliance of OC, formed task force to address how OC can "become an even stronger talent magnet."

**STEVE MILNER**

MANAGER, WESTERN REGION  
BAKER TILLY US LLP

**WHY:** Built Squar Milner to fourth-largest accounting firm headquartered in California, and largest based in OC, before partnering with Chicago's Baker Tilly in 2020. **RECENT:** Now has about 650 employees reporting to him under new role. **NOTABLE:** Bought eight firms over a decade while with Squar Milner. **QUOTABLE:** On joining larger Baker Tilly: "We know we will be invited to parties that we previously weren't."

**ADAM COFFEY**

SENIOR ADVISOR  
FORMER CEO, PRESIDENT  
COOLSYS

**BIO:** Former head of country's largest service of air conditioning and heating systems; major clients include Costco, Starbucks, and the country's largest grocery chains. Annual sales approaching \$1B. Since Coffey became CEO in 2016, CoolSys has made more than a dozen buys.

**NOTABLE:** CoolSys and its operating businesses cover every stage of mission-critical systems from engineering and design, to installation, service and maintenance, and energy optimization. Has more than 3,000 employees nationwide, serving the daily needs of more than 45,000 customer locations across North America.

**QUOTABLE:** Works with Newport Beach-based Harvey & Co. to help find suitable acquisition candidates. "With more than 4,500 potential acquisition targets in the USA for CoolSys, we rely on Harvey & Co. to 'shake the trees' and help our internal deal team focus their activity on targets (that are) pre-qualified."



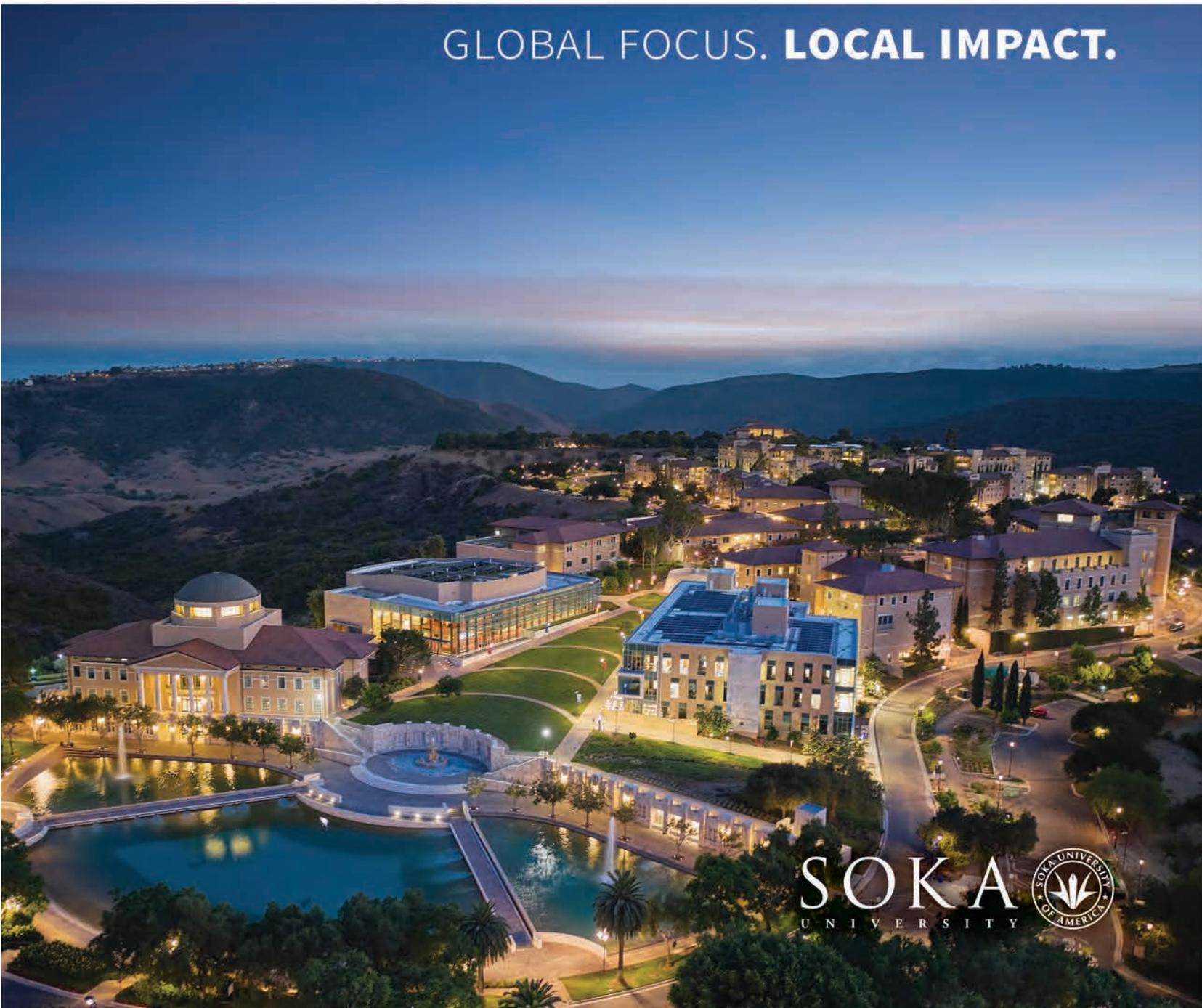
## Celebrating 20 years in Orange County

On May 3, 2001, a new university opened in Aliso Viejo, dedicated to educating leaders committed to making the world a better place. Since then, Soka University of America has graduated more than 1,500 students from 57 countries and is now ranked among the top 30 liberal arts colleges in the country.

All Soka graduates have studied abroad and bring multilingual skills, critical thinking, and problem solving to the workforce. Our world-class Soka Performing Arts Center is a treasured space for artists and audiences alike. When the county needed help curbing the pandemic, Soka stepped up as a supersite for nearly 300,000 vaccinations.

These local contributions are inspired by our commitment to advancing peace globally. Join us as we commence the next phase of our journey in educating global citizens who embody wisdom, courage, and compassion. [www.soka.edu](http://www.soka.edu)

# GLOBAL FOCUS. LOCAL IMPACT.



SOKA  
UNIVERSITY



**LINDA PERNEAU**CEO, PRESIDENT  
VOLT INFORMATION SCIENCES

**WHY:** Heads staffing services company with large physical base in Orange. Typically employs an average of 35,000 people. Provides contingent workers and personnel recruitment services for larger businesses in a variety of industries. **RECENT:** Relocated HQ from New York to Orange, although it's looking to slim down its office space at 12-acre office complex in city, long known as Volt Corporate Park. **QUOTABLE:** On changing needs during pandemic, said "new opportunities utilizing emerging skills have arisen out of the need to ensure employee wellness and safety and the determination of essential businesses to remain operational."

**JESSICA WORD**PRESIDENT  
WORD & BROWN  
GENERAL AGENCY

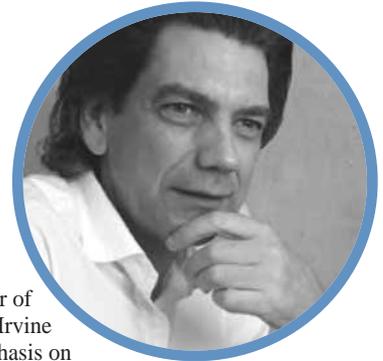
**WHY:** Daughter of company co-founder of group of companies that has 500+ employees who provide services to brokers in the health insurance and employee benefits industries. **RECENT:** Wrestling with how to build company culture while permitting employees to work from home. **OC LEADER BOARD, JUNE 14:** "Decisions are being made to either return our workforce in-person, continue to work from home or in many cases, implement some sort of hybrid arrangement. The decision is a seismic shift in corporate America."

**PAUL SHORT**MANAGING PARTNER  
RSM US LLP

**WHY:** More than 20 years of experience providing financial statement audit, audit of internal control and advisory services. After 23 years at KPMG, joined RSM in 2017; now ranked sixth largest in OC. **RECENT:** Grew OC employee count 13% to 255 year-over-year, biggest increase among top 10 accounting firms in OC last year. **NOTABLE:** Has extensive experience working with middle market multinational companies and is well versed in SEC reporting, IPOs, secondary equity offerings, debt offerings, and mergers and acquisitions. **QUOTABLE:** "I'm a growth-oriented, market-facing guy."

**MICHAEL ROBINSON**PRINCIPAL  
ROBINSON HILL ARCHITECTURE

**WHY:** With partner John Hill, ex-LPA duo runs Irvine architecture firm helping to reinvent a number of high-profile locations in area, including Newport Beach's Balboa Yacht Club. **RECENT:** Turned former McCormick & Schmick's restaurant and brewery site at corner of Main Street and Gillette Avenue in Irvine into quartet of new spots, with emphasis on outdoor dining area. **NOTABLE:** Duo began as consultants to Irvine Co.'s retail division, starting on small projects like kiosks and growing up into ground-up projects and then expanding into hotels and restaurants. **QUOTABLE:** "Patios are becoming the most important part of restaurants. We're embracing the outside."

**MARSHALL SOLOMON**MANAGING PARTNER  
ORANGE COUNTY  
DELOITTE LLP

**WHY:** Heads largest accounting firm in Orange County with 847 employees. **RECENT:** Took over in February from Tim Brandt, who became global CFO of Santa Ana-based Allied Universal. **NOTABLE:** Specialty is corporate taxation, working as the lead tax partner and lead client service partner for several multinational-based corporations headquartered in Southern California. **QUOTABLE:** "Lot of people think of us just as an accounting firm. What we do is solve complex problems. It could be technology related or strategy and operations ... If you have a business issue, we have people who are here and helping you to identify it and solve the problem."

**JIM MORRIS**CHAIRMAN, CEO  
PACIFIC LIFE INSURANCE CO.

**WHY:** Runs insurance giant famous for leaping whales; second-largest private company headquartered in Orange County. \$11.5B in revenue in 2020. **RECENT:** Announced retirement in August, effective April 2022. Will cap nearly 40-year career at PacLife. Remaining on board. **QUOTABLE:** Successor Daryl Button said, "he led Pacific Life through some significant economic challenges, including the 2008 financial crisis and the current COVID-19 pandemic, all while building a culture focused on customer service, growth, and innovation that has well-positioned Pacific Life for continued success."





# TOGETHER, WE'RE STRONGER

Cigna congratulates the OC 500 for their leadership in the Orange County community. Together, we can help everyone live their best life.



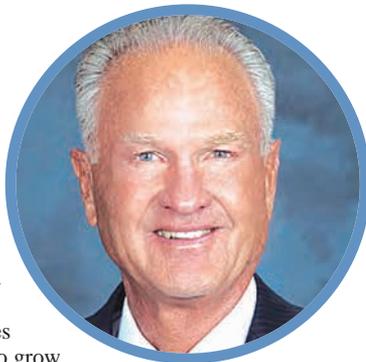
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**TOM CORBETT**

CHAIRMAN, CEO  
ALLIANT INSURANCE  
SERVICES

**WHY:** Started at Newport Beach office when it had “zero business” in 1977, became CEO in 1994. Now the world’s 10th largest insurance broker with annual sales topping \$3B. Named Business Journal executive of the year for 2018, in financial services category. **RECENT:** Continued to grow throughout the pandemic, acquiring industry leader Senior Market Sales Inc. of Omaha, Neb. **QUOTABLE:** The deal “solidifies our commitment to a full-service benefits platform and diversifies our offerings with innovative new technologies, tools, and resources.”

**JOHN BOYLE**

CEO  
AUTOMOBILE CLUB OF  
SOUTHERN CALIFORNIA

**WHY:** Runs largest member of AAA group with est. \$6.6B in 2020 sales; ranks fourth among OC’s largest private companies by revenue. Has large base of operations in Costa Mesa. Took position in 2017, was COO. **RECENT:** Hiring 1,600 as post-pandemic travel boom surges. Early this year announced \$70M in COVID relief for policyholders. **QUOTABLE:** “As the largest club in the AAA federation, we have more than 15,000 employees serving more than 16 million members in 21 states across the country. For more than 115 years we have enjoyed great success.”

**DARRYL BUTTON**

CFO, CEO-ELECT  
PACIFIC LIFE INSURANCE CO.

**WHY:** Will be only the 15th chief executive in Pacific Life’s 154-year history when he takes over top role from Jim Morris in April 2022. **NOTABLE:** Prior to joining Pacific Life in March 2017, served for 17 years at Aegon where his last role was chief financial officer and a member of the executive board. **QUOTABLE:** Morris said, “Darryl is a proven leader who has a deep knowledge of the insurance industry and a commitment to the financial security our products provide to our policyholders. He understands the balance between strategic growth and risk management that will ensure Pacific Life’s continued success.”

**KATE DUCHENE**

CEO  
RGP

**WHY:** Oversees Irvine-based global consulting firm valued at nearly \$600M. Clients of RGP, previously known as Resources Connection Inc., include majority of Fortune 100 members. **NOTABLE:** Joined RGP from O’Melveny & Myers, where she practiced employment litigation for 10 years. On the boards of the UCI Foundation, Collectors Universe, and the Orange County Community Foundation. Among area business execs advocating area to invest and plan well to attract next generation of talent. **QUOTABLE:** “It used to be that you fit life into work. Now it’s the opposite—how do you fit work into life?”

**LELAND SMITH**

FOUNDER, CEO  
SERVICE CHAMPIONS

**WHY:** Heads fast-growing Brea-based provider of heating and air conditioning services. Largest residential service provider of heating and air conditioning services in the Western U.S. nearing \$500M in annual revenue. **RECENT:** Sold last year to private equity investment firm Odyssey Investment Partners. Remains in charge. Firm is expanding outside of California through company acquisitions in Colorado and Arizona. **QUOTABLE:** An initial public offering is “a real good possibility.”

**THE HAPPIEST PLACE**

OC’s largest tourist attraction isn’t short on local fans. Numerous OC500 entries cited **Disneyland** as the place they were most excited to revisit upon its reopening earlier this year.

**Sloane Keane:** Me, my boys and every other SoCal resident is thrilled to be at the Happiest Place on earth again, Disneyland!

**Chad Lefteris:** As a relative newcomer to Southern California, we were excited for Disneyland to reopen so that we could make our first visit back in May.

**Thomas Bennett:** I have so many wonderful childhood memories from Disneyland and my kids have missed out on that during the pandemic. I’m excited to take them to Disneyland again.

**Vikki Shepp:** As a Disney fanatic, I’ve been especially excited to get the chance to return to Disneyland. There’s nothing like a day of amazing Orange County weather and getting my steps in at the Happiest Place on Earth.

**Newth Morris:** I have little kids who are very excited to go back to Disneyland ... so I have to be excited about that.



CoolSys is the parent company of the nation's largest team of HVAC, refrigeration, engineering, and energy solutions experts, that specialize in a full spectrum of best-in-class service experiences and solutions for customers in the retail, food service, commercial, and industrial market segments.



To learn more, visit [coolsys.com](https://www.coolsys.com)



Susan Hertel, "Save the Whales," undated, oil, 44 x 70". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.



TECHNOLOGY

**CHRIS BEALS**CEO  
WM TECHNOLOGY

**WHY:** Runs OC's most valuable cannabis-related public company. Online directory, Weedmaps, acts like "Yelp" for dispensaries. Joined as general counsel in 2015, named CEO in 2019. Law degree from University of Pennsylvania. **RECENT:** Raised \$579M in proceeds from a reverse merger with New York-based SPAC Silver Spike Acquisition Corp. Now a multibillion dollar-valued. Plans to "aggressively deploy capital."

**QUOTABLE:** IPO represents "watershed moment" for cannabis industry. "The most important driver of my growth and Weedmaps being able to scale is a focus on understanding the needs of cannabis businesses and consumers."

**MARK ANDERSON**CEO  
ALTERYX

**WHY:** Took the reins as CEO of one of OC's tech darlings after co-founder Dean Stoecker stepped down in October 2020. **RECENT:** Entered into multiyear tech partnership with McLaren Formula 1 car racing to improve auto team's performance. Deal seen as way to market Alteryx name to larger audience. CFO Kevin Rubin told the Business Journal the company is undergoing a transformation aimed at bolstering the business. Made first buy as CEO, for Australia's Hyper Anna, in October. **NOTABLE:** Silicon Valley vet who previously served as president at internet security firm Palo Alto Networks, which has a \$47B market cap.

**HEATHER FALCONE**CEO  
THERMAL-VAC TECHNOLOGY

**WHY:** Heads growing Orange-based business key to missile defense, deep space exploration, commercial and space heavy payload launch vehicles, medical devices, oil exploration and many other areas; leading facility for brazing, heat-treating and finishing. Company has 11 vacuum brazing furnaces. **RECENT:** Thermal-Vac won a Family-Owned Business Award in the medium-sized company category from the Business Journal in August. **NOTABLE:** Its work will be featured on the launch vehicle for the Artemis missions that will put the first female astronaut on the moon by 2024. Company also participated in the Perseverance project for the Mars rover.

**TIM BRITT**CEO  
SYNOPTEK

**WHY:** Heads IT consulting and services provider that's been among Orange County's fastest-growing tech firms. Business geared to companies from mid-market to Fortune 100. Helps guide businesses safely into cloud computing. **RECENT:** Boosted its communications offerings via a local buy in the summer, acquiring the direct RTC business of Juxto, which is also based in Irvine. RTC refers to various types of live telecommunications that occur without transmission delays. **QUOTABLE:** "Last spring with the pandemic we had a lot of customers stopping and suspending projects," Britt said. "It just steadily came back all last year ... we're back to pre-pandemic levels."

**LIAM GRIFFIN**CHAIRMAN, CEO, PRESIDENT  
SKYWORKS SOLUTIONS

**BIO:** Runs chipmaker, Orange County's third-most valuable public company with valuation approaching \$30B. Introducing an array of components to support the shift to 5G, the next phase in global wireless telecommunications. Firm moved HQ designation from Massachusetts to Irvine last year; Griffin already worked from base at UCI Research Park. Added chairman title in May, succeeding David Aldrich.



**NOTABLE:** Predicting a record year as it seeks more revenue beyond its mainstay customer, Apple. Says company is pursuing "revenue diversification" along with its emphasis on super-speed 5G communications. In a key move in that direction, Skyworks said in April it would buy infrastructure and automotive chip unit of Silicon Laboratories for nearly \$2.8B. The company said the acquisition is a nearly \$20B market opportunity that will accelerate its expansion into the semiconductor industry's most important growth segments.

**QUOTABLE:** Silicon Labs deal "will broadly expand our capabilities across high-growth end markets including automotive, communications, and industrial, creating new and highly compelling opportunities for Skyworks."



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**DEREK COPPINGER**CEO  
RAPTOR SCIENTIFIC**WHY:** Portfolio company of Newport Beach investment firm L Squared Capital Partners: seeks to consolidate high-tech test and measurement production in the aerospace and defense markets.**RECENT:** Acquired TestVonics, a Peterborough, N.H.-based manufacturer of equipment that is used to test, verify and calibrate a range of air data instruments, as well as airspeed monitors used on rotary and fixed wing aircraft. It was Raptor's third acquisition.**QUOTABLE:** "The fragmented aerospace and defense testing and measurement market is ripe for consolidation and presents a significant opportunity for growth through M&A."**STEVE BRONSON**CHAIRMAN, CEO, PRESIDENT  
INTERLINK ELECTRONICS**WHY:** New to OC, firm makes manufacturing sensors that are used in the automotive, medical, industrial, and robotics fields, among other sectors. **RECENT:** Company moved its HQ from Ventura County to Irvine last year. Uplisted to Nasdaq in March.**QUOTABLE:** The uplisting "will provide significant benefits, including increased visibility of the company amongst investors, increased access to capital, and potential for greater liquidity."**MARTHA DANIEL**FOUNDER, CEO, PRESIDENT  
IMRI**WHY:** Tech vet whose career has spanned both corporate and government sectors. IMRI provides program management for over \$300M in data center operations; currently designing the public safety broadband first responder network; and provides cybersecurity governance and compliance, among other projects.**RECENT:** Business Journal honoree in October 2020 for Family-Owned Business Awards, her second honor from the publication. In 1999, was a Women in Business award winner.**NOTABLE:** Prior to founding IMRI, served in the U.S. Navy.**QUOTABLE:** "Being a Black female, coupled with the doubts when I walked into the room, I was challenged many times. But I was never intimidated because my military background prepared me for that level."**IKE KAVAS**FOUNDER, CEO  
EPHESOFT**WHY:** Irvine firm provides document processing automation and data enrichment software. Company's platform captures data from documents, enriches it with context and amplifies the power of that data. **RECENT:** Founded in 2010, seeing increased work in financial services and mortgage industries. Goal "is to help mortgage lenders and underwriters accelerate the entire loan process so they can serve their customers better and faster." **NOTABLE:** Company has offices in Singapore, London, Frankfurt, New Delhi, and Boise, Idaho, in addition to Irvine.**TYLER BEECHER**EXECUTIVE CHAIRMAN  
TRACE3**WHY:** Guides the fast-growing IT services provider and consulting firm in Irvine. Ranked No. 17 last year on the Business Journal's list of largest private companies; \$1.4B in revenue, nearly \$100M in EBITDA. It has 25 offices, all in the U.S., and counts 900 employees companywide. **RECENT:** September sale announced by company, to investment giant American Securities. Terms not disclosed.**QUOTABLE:** Fond of quoting a saying often attributed to President Abraham Lincoln: "Give me six hours to chop down a tree and I will spend the first four sharpening the axe."**CHAD STEELBERG**CEO  
VERITONE**WHY:** Runs closely watched artificial intelligence company founded in OC. Family affair: brother Ryan is the company's president. Company's operating system, aiWARE, powers a diverse set of AI applications and intelligent process automation solutions for commercial and government organizations. **RECENT:** 2020 revenue of \$58M a record high. Inked partnership with Alteryx, among numerous other deals. Moved corporate base to Denver, but remains in area. **QUOTABLE:** Said brother Ryan of company's efforts during coronavirus, "Veritone employees have been working overtime to help our customers navigate the pandemic. We have seen more digital innovation in the last two months than we have seen in the last two years."



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**Orange County Business  
Journal's OC500**

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**KRISHNA SUDHEENDRA**CEO  
UST

**WHY:** Leads Aliso Viejo tech firm which provides a variety of tech services to large corporations. Its client list consists of Fortune 500 and Global 1000 companies. The company, which counts deep ties to India, had more than \$1.2B in revenue last year. **RECENT:** Started the year with a streamlined new name—so long, UST Global—and an eye on more acquisitions. Announced ambitious hiring plans in summer, adding thousands of workers. **QUOTABLE:** “We wanted to create a bold UST brand that represents our core strengths—agility and flexibility” along with its focus on customers, he said at the start of the year.

**LIBBY DUANE ADAMS**CO-FOUNDER  
CHIEF ADVOCACY OFFICER  
ALTERYX

**WHY:** One of three entrepreneurs who in 1997 started data analytics firm in a small office above a restaurant in Old Towne Orange. Company has since grown into a major international force in data analytics. **RECENT:** Responsible for strengthening upskilling and reskilling efforts for Alteryx customers to enable a culture of analytics, scaling the presence of the Alteryx SparkED education program and furthering diversity and inclusion in the workplace. **NOTABLE:** One of only a handful of female founders to take a technology company public, along with her founding counterparts, Dean Stoecker and Ned Harding; earned a bachelor’s degree from Castleton University in Vermont. Recipient of a Business Journal Women in Business Award in October 2020.

**LARRY WHITE**CEO, PRESIDENT  
TOSHIBA AMERICA  
BUSINESS SOLUTIONS

**WHY:** Head of Lake Forest-based printer- and copier-oriented company. **RECENT:** Succeeded Scott Maccabe at the start of July. **NOTABLE:** White joined the company in 1996 and had been serving as chief operating officer, overseeing strategic planning across Toshiba’s business operations throughout North and South America. Said that company will operate in a way that’s “not much different than what we’ve been doing,” and added that “the ship has been going in a really good direction for a long time.” **QUOTABLE:** “The worldwide semiconductor shortage is certainly having an impact on our business, as well as some of the logistics issues we’re facing getting products out of China.”

**JIM PETERSON**CO-FOUNDER  
PETERSON CAPITAL GROUP

**WHY:** Launched investment firm after 2018 departure as Microsemi CEO, following \$10.3B sale of chipmaker to Microchip Technology. Now an active investor in other area tech companies; counts stake in Irvine’s Lantronix. **RECENT:** Backing Irvine’s Mobix Labs; the upstart 5G-focused firm named Peterson as its new chairman at start of year. Mobix counts \$12.5M in funding. **NOTABLE:** A-lister in philanthropic circles, corporate engagement. Known as “Jimmy P.” With wife, Sheila, leading UCI’s \$2B capital campaign. About halfway to meeting goal, says “my guess is when we close the two (billion), we just go for three, right?”

**JASMIN YOUNG**CEO  
NETREO

**WHY:** Her company, which specializes in IT management, has seen increased customer interest, as enterprise systems monitoring and troubleshooting have become increasingly important, especially with more people working from home during the pandemic. **RECENT:** Acquired Stackify, a Leawood, Kan.-based developer of software used to monitor and fix faulty applications. **NOTABLE:** Netroe is owned by San Carlos-based investment firm Software Growth Partners. Netroe reached global workforce of more than 100 employees as of April. **QUOTABLE:** “With Netroe, companies can quickly analyze where the breakdown is—and with Stackify, developers of applications such as Microsoft, can actually find out where the bug is in the software and fix it.”

**PENNY COTNER**CEO, PRESIDENT  
INFINITE ELECTRONICS  
INTERNATIONAL

**WHY:** Runs global supplier of electronics components for wired and wireless communications networks. Counts a dozen brands under its umbrella, estimated to have annual sales approaching \$300M. **RECENT:** Expanded family of brands with purchase of Libertyville, Ill.-based NavePoint LLC, an online provider of networking equipment and services. In March, bought by PE giant Warburg Pincus from Genstar Capital on undisclosed terms. **QUOTABLE:** Warburg’s investment “will further strengthen and expand our industry-leading product portfolio, while enhancing our mission to provide our global engineering customer base with deep technical expertise and support.”





## A Good Connection is Music to Your Ears

Singer/Songwriter Giana Nguyen didn't exactly set out to own a nontraditional music studio with primarily children as students, but that is exactly what happened when she opened Dancing Keys Music Studio in Irvine.

In 2012, Nguyen was focusing on her music career when her former business partner found her online after hearing one of her songs playing on a local radio station. He sought her out for her contemporary style. A longtime pianist, at the time she was teaching piano to a few students from home and seeking new business opportunities. He approached to collaborate, and she jumped at the opportunity.

Together with a third partner, they opened Dancing Keys Music Studio in March 2013 as the only commercial studio in Orange County to specialize in the Australian-developed piano method from Simply Music, the world leader in playing-based music education. In the years since opening, Nguyen has transitioned to be the sole owner of the studio but she and her team have continued to bring this multi-sensory piano approach to families throughout the region. In early 2020 this approach was amplified by the COVID-19 pandemic when the studio that only offered in-person lessons had to quickly close and pivot to online instruction.



"We had our own spring break in a sense where we didn't teach lessons and figured out how to keep serving our students," explains Nguyen. A mic stand with a smart phone clipped onto it could serve as an overhead camera and Zoom would become the new classroom. She went to a local music store to buy all the equipment and pulled together her instructors for technical training and

implementation. In one week, the business shifted completely online with all instructions taking place remotely.

"Our community of students and parents are very resilient, adaptive, and everyone jumped on board."

She adds, "Cox Business internet has been the ticket to making this all happen. There is no way we would be able to do this without a fast and reliable broadband connection."

Dancing Keys Music Studio was able to provide virtual lessons throughout the 2020 shut downs and her client base grew as more parents wanted to find a way to keep their children engaged safely in STEAM activities. "Music really served as an outlet during this hard time for students and instructors alike," said Nguyen.

This sentiment was on full display for the community in December of 2020 when the studio hosted a Zoom holiday showcase. Parents decorated or created backdrops in their own homes for when their child was spotlighted on screen. They were able to connect and cheer each other on via the platform. This past June as California re-opened, Dancing Keys Music Studio hosted an outdoor concert in the courtyard of Woodbridge Village Center for students' families and the community at large. These "Piano Parties" have always served as catalyst for students to publicly showcase the joy of music.

Earlier this year, following the state lifting mandates on operations and masks, Nguyen started operating as a hybrid studio where students can take both virtual lessons at home or in-person lessons at the Woodbridge Village Center location. She even has group lessons where one student participates from home and the rest in her studio. As of August 2021, sixty percent of her students are doing virtual lessons and the team still utilizes technology, physical distancing, air filters in each room, and a robust cleaning schedule for in-studio lessons.



**ANDREW LITTLEFAIR**CEO, PRESIDENT  
CLEAN ENERGY FUELS

**WHY:** Runs OC's most valuable energy company with nearly a \$2B market cap as of September, promotes cleaner fuel use with natural gas and renewable natural gas; sells Redeem renewable natural gas. Co-founded Newport Beach-based company with Texas oil tycoon T. Boone Pickens in 1997.

**RECENT:** Has built network of nearly 550 fueling stations in the U.S. and Canada; recent deal with Amazon could make it one of Clean Energy's top shareholders.

**NOTABLE:** Board member of Ronald Reagan Presidential Foundation and Institute. **QUOTABLE:** "The demand for customers for RNG continues to accelerate."

**JEFF VOLPE**PRESIDENT  
VIEWSONIC, AMERICAS

**WHY:** Head of global provider of visual solution products that conducts business in more than 100 countries worldwide. Company provides hardware and software that include monitors, projectors, digital signage, ViewBoard interactive displays, and the myViewBoard software ecosystem.

**RECENT:** ViewSonic in May was introduced as the Official Gaming Monitor and Official Streamer Room Partner of the Allied Esports flagship esports venue, HyperX Esports Arena Las Vegas. **NOTABLE:** Company has committed \$500,000 in funding and in-kind technology to the Orange County United Way's Empowering Future Generations initiative. In July named as one of the Business Journal's Best Places to Work in Orange County for 2021 at No. 22 in the midsize company category.

**MIKE GENTILE**FOUNDER, CEO  
CISOSHARE

**WHY:** Founded, runs cybersecurity company based in San Clemente. **RECENT:** No. 21 on Business Journal's Best Places to Work in the small companies category. Says working from home is like the "Wild, Wild West" because of threats and vulnerabilities.

**QUOTABLE:** "The most common thing we see right now is attacks on cloud infrastructures because people are dumping all kinds of information in them—without anyone knowing what is truly there. They think the cloud provider is responsible for doing the security, which they are not, you are, and this is leading to simple configuration errors that leave data easy to steal."

**LARRY MADDEN**CFO  
VIANT TECHNOLOGY

**WHY:** More than 30 years of "hands-on" experience in fast-moving, growth-oriented companies, as well as mature businesses. Was CFO at the Weinstein Company, 2005-09, and two Nasdaq-listed companies; a board member of a third Nasdaq-listed company. Spent eight years at E&Y. **RECENT:** Led February IPO that valued advertising tech company around \$2B initially. Analysts forecast revenue growing 25% to \$206M this year and another 23% to \$253M in 2022. **NOTABLE:** Has led 30+ M&A transactions and raised \$2B+ in debt and equity financing.

**STEVE MILLIGAN**BOARD MEMBER  
SC MASTER FUND

**WHY:** Former CEO of Western Digital Corp., grew one-time Irvine-based memory products firm into global tech powerhouse.

**NOTABLE:** Involved with CEO Leadership Alliance of Orange County, forged by the leaders of some of the most prominent Orange County companies to grow OC into a top-tier innovation region in the U.S.

**RECENT:** Alliance created SC Master Fund, a fund of funds to invest in local VCs that in turn invest in early-stage innovation companies in OC. Plans to raise \$500M in next five years. **OC LEADER BOARD, JAN. 25:** "The emphasis is on supporting startups in Angel, Seed or Series A or B funding stages where local capital markets are not adequately meeting demand."

**DONALD MCCLYMONT**CO-FOUNDER, CEO  
INDIE SEMICONDUCTOR

**WHY:** Leads auto-focused chip and software company, formed in 2007 and last year shipping its 100 millionth unit. Offerings include advanced driver assistance systems that help with parking and collision avoidance along with back-up and forward cameras to avoid hitting someone. Its chips will ultimately be used with self-driving cars. **RECENT:** Went public via the increasingly popular special purpose acquisition co. or SPAC route. Counted market valuation of about \$1.5B as of late summer. **NOTABLE:** Prior to founding Indie, McClymont, a native of Scotland, held executive roles at Axiom, Conexant and Skyworks. **QUOTABLE:** "We have pretty aggressive goals. We want to drive the company to be a significant player in the market that we service."



**NGUYEN NGUYEN**CEO  
COSEMI TECHNOLOGIES

**WHY:** Maker of high-speed active optical cables. Also develops the underlying physical layer semiconductors that go inside the company's interconnect active optical cables. **RECENT:** Was an adviser to Irvine wireless upstart Mobix Labs; this summer Mobix announced it would buy Cosemi, its first acquisition. **QUOTABLE:** On OC's role as a hub of chipmaker talent says "Southern California as a whole, and OC in particular, for years has been the bedrock for these knowledge-based human resources—from the defense industry to the space and telecom industries."

**ALAIN MONIÉ**CEO  
INGRAM MICRO

**WHY:** In charge of world's biggest distributor of technology hardware, reporting 2020 sales of \$49.1B; employs 35,000 in 60 countries. **RECENT:** Former parent HNA Technology of China sold Ingram for \$7.2B to Platinum Equity of Los Angeles. Deal completed in June, returns OC's biggest company by revenue to U.S. hands. **NOTABLE:** Saw growth under HNA ownership, expects the same going forward. "In other words, we keep doing what we've been doing; it's working!" **QUOTABLE:** "One of the most exciting aspects of partnering with Platinum Equity is they want us to accelerate our growth and will give us access to their substantial resources to do so."

**RICH FENNESSY**CEO  
TRACE3

**WHY:** Helms fast-growing IT services provider and consulting firm in Irvine, which provides cloud, data intelligence, security, software development and operations, and enterprise IT services to thousands of corporate customers. **RECENT:** Acquired Silicon Valley's Groupware Technology in late 2020. The deal is expected to boost annual revenue to as much as \$1.6B while expanding its market position in Northern California and Arizona. **NOTABLE:** Aiming to become a \$2B company in a few years via organic growth and acquisitions. "We've been on a nice growth trajectory for several years," Fennessy said. Company in was bought be bought by investment titan American Securities Corp.

**BRAD REE**CTO  
IOXT ALLIANCE

**WHY:** Helps guide Newport Beach-based alliance that has established standards for security of everyday electronic items such as cellphones, lighting controls, auto tech. He cites concern about what security comes with these high-tech products that consumers care about and live with. **RECENT:** ioXt scheduled its inaugural ioXt Asia summit in June to give participants the opportunity to "learn about cybersecurity in the smart home and the latest trends in 5G and mobile technology." **NOTABLE:** Setting up ioXt chapter in China. Alliance was set up by OC entrepreneur Gary Jabara, who sold Mobilitie to BAI of Australia.

**DERMOT SMURFIT**CEO  
GAN LTD.

**WHY:** Irish entrepreneur built up Irvine-based online gambling and sports betting technology business after getting initial help from tycoon uncle Sir Michael Smurfit and others. Company went public in U.S. in May 2020. Market value climbing towards \$1B. **RECENT:** New clients include Soaring Eagle Casino & Resort in Michigan, Wynn Resorts in Las Vegas. **NOTABLE:** GAN predicts its revenue will jump to between \$103M and \$108M this year, about three times what it was in 2020. **QUOTABLE:** "We design the websites, the mobile apps. We program them. We bolt them onto the top of this enormous enterprise software platform, which handles everything from the payment processing to enabling the content."

**MARYAM ROFOUGARAN**CO-FOUNDER, CO-CEO  
MOVANDI

**WHY:** Leads Irvine-based 5G telecom equipment company with her brother Reza Rofougaran. Irvine firm is seeking to innovate 5G millimeter wave networks. Makes components of the millimeter wave system used in high-speed wireless broadband communication. **RECENT:** The company was founded in 2016. Siblings count ties to Broadcom and this year hired that company's former CFO. **QUOTABLE:** On OC's draw as hub for semiconductor firms, says: "The combination of well-established semiconductor companies, young hungry talent (from nearby schools), and need for innovation in the industry and beautiful location and environment, creates a great opportunity for new companies in Orange County to emerge and thrive."



**JEFF GARDNER**CEO, PRESIDENT  
CALAMP**WHY:** Top exec at tech company whose vehicle tracking products serve OC's thriving auto industry, and others throughout world.**RECENT:** Past year saw total remake of CalAmp's tools for keeping track of trucks, drivers and other assets. Redesigned user interface streamlines "track and trace" visualizations and magnifies mission-critical insights to increase fleet efficiency, cost-savings and safety. Sold LoJack U.S. stolen vehicle recovery business to fellow Irvine vehicle tracking firm Spireon for \$8M upfront.**NOTABLE:** One of firm's big customers is shipping giant UPS. "We track their tractors and trailers all around the U.S.," he says.**DERRECK FORD**CO-FOUNDER, PRESIDENT  
JETEC CORP.**WHY:** Engineer-turned-entrepreneur, author, whose firm has been described as a "leader in state-of-the-art product identification solutions for the aerospace and defense industry."**NOTABLE:** While at Hughes Aircraft Co.'s hybrid microelectronic facility in Newport Beach, realized an inkjet system marking cans might be feasible for marking hybrid microelectronic chips.**OC LEADER BOARD, MARCH 15:** "I am an African American entrepreneur with over 30 years' experience owning a high-tech company in Orange County that manufactures digital product marking systems sold to industrial manufacturers worldwide. The lessons that I have learned as the 'surviving' head of a minority-owned company over this period are priceless."**FRANK MARTELL**CEO, PRESIDENT  
CORELOGIC**WHY:** Joined real estate data and analytics firm as CFO in 2011, named to top post in 2017.Provides insights for real estate, mortgage finance, insurance and capital markets. **RECENT:** Bidding war for company culminated this year in its \$6B sale to Stone Point Capital and Insight Partners. RivalCoStar Group Inc. considered paying \$6.9 B for company before pulling bid. Now a privately held company. **NOTABLE:** Former First American exec was named Business Journal CFO of the Year in 2013. **QUOTABLE:** "We look forward to working closely with Stone Point and Insight to build on our record financial and operating performance and accelerate our digital transformation and growth."**SEBASTIAN IGRETI**CO-FOUNDER, CEO  
TECHMD**WHY:** Co-founded Santa Ana-based IT services, consulting and cybersecurity company with high school chum Mark Perez in 2003, essentially "an outsourced IT department" for clients.**RECENT:** Emphasizes the cybersecurity threats; says what is even more concerning is that small and mid-sized businesses continue to be reluctant to invest in protecting themselves against cyberattacks. **QUOTABLE:** "Ransomware continues to be the biggest threat in the market and is evolving. Hackers have learned that it is much easier to trick an employee into clicking on a link than it is to hack their way into a network, so targeting employees is their primary focus."**ROY DEKEL**CEO  
SETSCHEDULE**WHY:** Heads Irvine-based software firm providing technology to the real estate industry to help agents strengthen their pipeline and drive conversations with homebuyers.The company's software serves over 30,000 active members per month; it offers lead generation, contact management and communications tools through its existing mobile app. **RECENT:** Says its software helped facilitate \$2B in transactions since inception. Ranks No. 13 on this year's Business Journal list of Best Places to Work in Orange County, in the midsize employer category. **QUOTABLE:** "We thought the problems we faced could be better solved as a technology company that can set [professionals'] schedules and make interactions more predictable."**ELLEN BANCROFT**GENERAL COUNSEL  
INDIE SEMICONDUCTOR**WHY:** Legal expert in IPOs, having handled more than 50, including Broadcom, Buy.com and Ensign Group. Winner of Business Journal 2012 Women in Business Award while serving as the head of Dorsey & Whitney LLP's California corporate group. The next year she would join Morgan Lewis & Bockius LLP, and become the managing partner at that firm's Costa Mesa office.**RECENT:** New role as GC. Joined Aliso Viejo's Indie Semiconductor, which went public in June via a SPAC. **QUOTABLE:** Regarding going public, told Business Journal in 2018 that preparation for a company is key, so that when "the window opens, you're ready to go."

**CHRISTIAN 'BORIS' BECKER**

PRESIDENT  
SATELLITE SOLUTIONS DIVISION  
TERRAN ORBITAL

**WHY:** Retired U.S. Navy rear admiral hired this year as chief executive of small satellite maker Tyvak Nano-Satellite Systems in Irvine; now president of newly named division for Tyvak parent Terran Orbital. **RECENT:** Terran announced expansion plans for Florida and Irvine. Took four floors at the 400 Spectrum Center tower, with 400 to 500 employees expected there, focusing on engineering, design and development work for satellites. Among OC's fastest-growing aerospace and defense firms. Terran also announced plans to invest \$300M for a new commercial spacecraft facility on Florida's Space Coast. **QUOTABLE:** "The demand signal for space-based solutions is enormous and Tyvak is uniquely positioned to serve those growing needs."

**MICHL BINDERBAUER**

CEO, PRESIDENT  
TAE TECHNOLOGIES

**WHY:** Leads \$5B-valued tech parent—nuclear fusion, energy beams, particle accelerators—spinning out firms after 20 years of research, including cancer-hunter targeting inoperable tumors and electric vehicle super-charging business. \$880M in backing. **RECENT:** Raised \$280M in new financing round for sixth-generation machine, Copernicus. Shareholders include late Microsoft co-founder Paul Allen, Buzz Aldrin and venture firms New Enterprise Associates and Venrock. Business Journal 2021 Excellence in Entrepreneurship honoree. **QUOTABLE:** With one of the company's power plants, "you could make copious amounts of power at economic rates with no detriment to the environment. That is, in a nutshell, why it's so important and why people are willing to invest gobs of money. It's the holy grail of energy."

**VILLE HOUTTU**

CEO  
VINCIT USA

**WHY:** Leads Irvine software development and design company Vincit USA. Parent company based in Finland. The U.S. group produced about \$6.5M revenue last year. **RECENT:** In April acquired Vuria, a website design and mobile app development firm based in Scottsdale, Ariz. The company changed its name to Vincit USA from Vincit California. **NOTABLE:** Vincit came in 37th in the Business Journal's Best Places to Work ranking, in the small-company category, for 2021. **QUOTABLE:** "We are a custom software company, and design and implement mobile apps and web systems for companies. We are a tailor shop for everything digital."

**NICOLAAS VLOK**

CEO  
MERIDIANLINK

**WHY:** His Costa Mesa-based company is a maker of software for the financial industry, including banks, credit unions, mortgage lenders, specialty lending providers, and consumer reporting agencies. **RECENT:** Went public on the New York Stock Exchange July 28; topped \$2B in valuation within first month of trading. **NOTABLE:** "Lots of folks don't know how vibrant the tech space is down in Southern California. To have MeridianLink founded, started, grown up and now become a public company, all out of Southern California and Orange County to me is a pretty remarkable story."

**ERIN O'NEILL SCHULTZ**

HEAD OF SOUTHERN CALIFORNIA  
GOOGLE FIBER

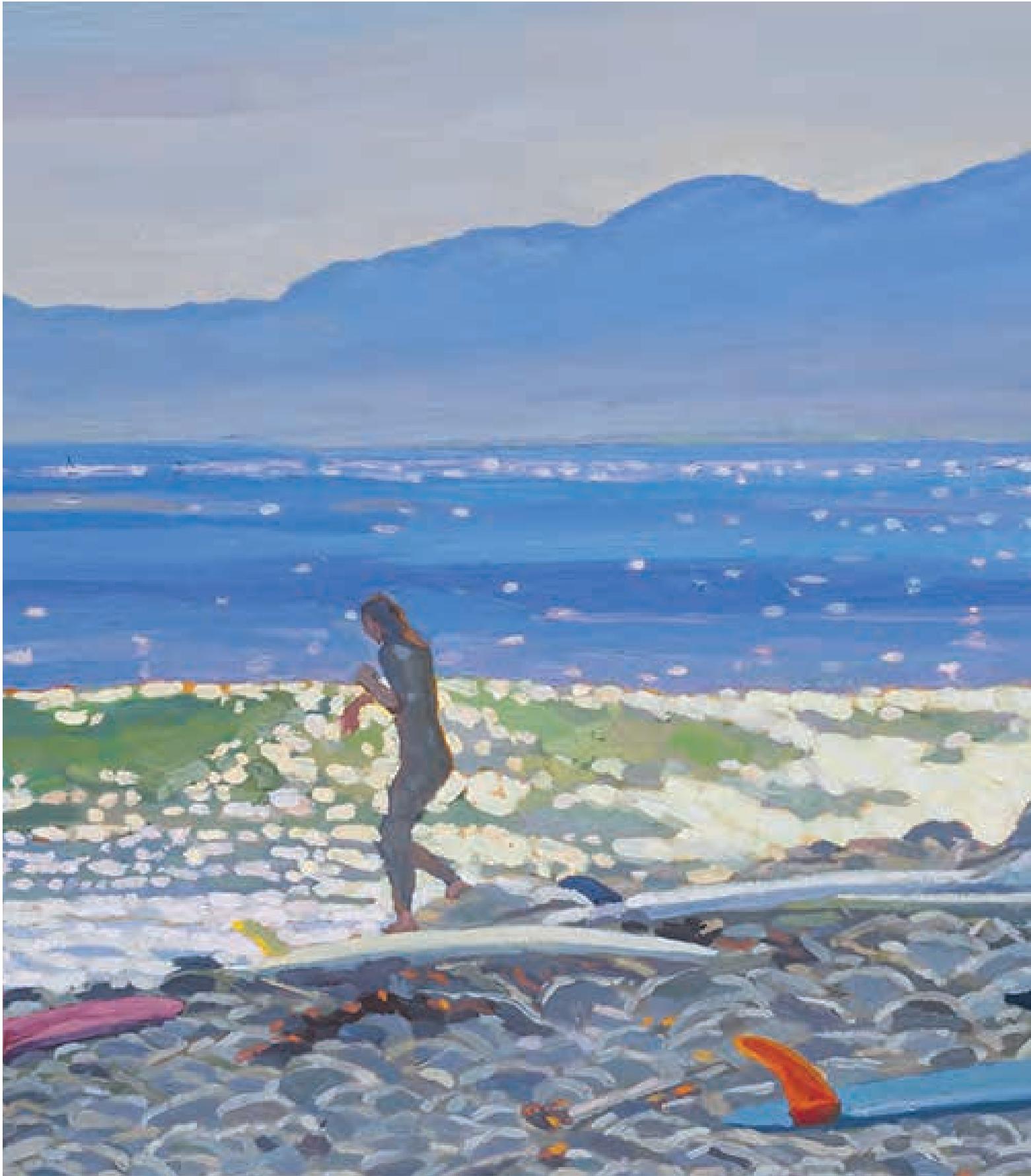
**WHY:** Leads Southern California operations for Alphabet Inc. internet service provider unit that's growing its footprint in OC. **RECENT:** Told the Business Journal it will have built out Irvine Co.'s entire apartment portfolio by 2022, following 2016 announcement by real estate behemoth of partnership with Google Fiber to bring high-speed internet to properties. Along with rental complexes, also targeting new communities in Irvine neighborhoods of Orchard Hills, Portola Springs and Laguna Altura. **QUOTABLE:** "The mission is to help all communities get access to the internet that is fast and reliable."

**KYLE KAMROOZ**

CO-FOUNDER,  
CHIEF STRATEGY OFFICER  
CLOUDVIRGA

**WHY:** Started cloud-based mortgage software company with Bill Dallas, Mark Attaway; company has raised more than \$77M from investors since its founding in 2016. Its technology powers digital mortgages for America's top lenders and automates much of the process. **RECENT:** Revenue doubled last year and it expects similar growth in 2021, spurred on by millennials and other first-time homebuyers. Sold to title insurance giant Stewart Information Systems in May, keeping base in Irvine. **QUOTABLE:** "In 2021, we expect the trends that fueled our growth last year—low interest rates, lenders wanting to diversify into other channels, and competition in the TPO (third-party originator) space—will not only continue, but accelerate."





Kevin A. Short, "Is That the Same Kid?" (detail), undated, oil, 18 x 60". The Hilbert Collection. Courtesy of the Hilbert Museum of California Art at Chapman University.



OC's WEALTHIEST



**RICK CARUSO**  
Founder, CEO  
Caruso

*Caruso*

#### WEEKEND WEALTHY

- **NET WORTH:** \$4.5 billion
- **PRIMARY RESIDENCE:** Brentwood
- **SOURCE OF WEALTH:** retail real estate development

**THE MONEY:** Developer of high-end retail properties in Southern California including **The Grove**, the **Americana at Brand** and the **Palisades Village**. The portfolio carries only a small amount of debt, reports sister publication *Los Angeles Business Journal*. The company has grown nearly 20% annually since it was founded. The company's properties' sales are three times higher than the industry average, according to **Green Street Advisors**. The newest addition to the portfolio is the **Rosewood Miramar Beach**, a resort in Montecito. It has 161 rooms and seven restaurants and bars.

**LOCAL TIES:** Sources indicate Caruso, who is an **Irvine Co.** board member, spent a large amount of time on the Balboa Peninsula over the course of the pandemic, at a waterfront residence he paid some \$15 million for in 2017 and subsequently rebuilt. He appears to be making the area a focus going forward; multiple reports earlier this year said he paid another \$18.6 million for the house next door. Despite the double lot, it's not nearly enough water frontage to park his yacht, though.

**PHILANTHROPY:** Founded in 1991, the **Caruso Family Foundation** "is dedicated to improving the lives of at-risk children and their families throughout Southern California," it says. Primary focus is ensuring educational opportunities and quality healthcare for underserved youth. In addition, it also supports public safety, culture and arts, and faith-based institutions. In 2019, Caruso donated \$50 million to the **Pepperdine School of Law**.

## THE YACHT

"What's longer than the **Leaning Tower of Pisa** and has had residents around Kingston dreaming of St. Barts? An \$83 million luxury yacht owned by billionaire George Argyros," said a July 7 report in *New York's Times Union* newspaper, detailing sightings of the family's 248-foot luxury yacht along the Hudson River.

The yacht, dubbed **The Huntress**, can reach speeds of 24 knots and cover 7,000 miles. It can be chartered; **YachtCharterFleet** says it costs about \$765,000 to charter the **Huntress** for one week, and includes a crew of 22.

The *Times Union* reported the yacht was being used by its owners this month, and noted that the Argyros' yacht was sightseeing up and down the Hudson River, "checking out some little towns" for a few months.



PHOTO CREDIT: CHARTER WORLD

## THE YACHT

An occasional and notable sight in Newport Harbor is **Invictus**, **Rick Caruso's** 216-foot mega-yacht. It is valued well over \$100 million. It was built by Delta Marine in 2013. It has required a special permit from the city to dock in the Newport Harbor in the past, and is reported to be the largest vessel to have ever moored there. With a crew of 19, it can be chartered for nearly \$700,000 a week in the summer, plus expenses, according to **YachtCharterFleet.com**.



PHOTO CREDIT: BOAT INTERNATIONAL



**THE MONEY:** Argyros family owns and runs Costa Mesa-based Arnel & Affiliates, a development and investment company George started in 1968.

**THE NUMBERS:** Arnel is reported to own close to 5,500 apartments; about 4,500 of those units are said to be in Orange County. The company also owns about 2 million square feet of office, industrial, and retail space in and around OC. Family has an extensive investment portfolio.

**BIG BREAK:** George, a Chapman University grad, went into real estate in 1962, selling land at busy intersections to gas stations.

**KEY METRIC:** Apartment rents in OC are up nearly 10% year-over-year; other investors report a nearly \$100,000 per unit boost in value for well-located complexes since the pandemic's start.

**DEALMAKING:** Argyros is the former owner of the **Seattle Mariners** baseball team—drafted **Ken Griffey Jr.**, 1987—and one-time partner, with the late **William Lyon**, in AirCal. Said to own a large stock portfolio, in addition to other investments, much of that through Costa Mesa's Westar Capital, his family's investment firm. He has taken a step back in day-to-day management of his family holdings in recent years with his wife, **Julia**, as-

suming more responsibilities, including the running of Arnel & Affiliates.

**NOTABLE:** Has a second home at **The Vintage Club** in Indian Wells. Main benefactors for nearby **Eisenhower George and Julia Argyros Health Center**, which runs 92,000 square feet.

**PHILANTHROPY:** Argyros and his family are notable philanthropists, well known for their work at Costa Mesa's **Seegerstrom Center for the Arts**, home to the **Julianne and George Argyros Plaza** and **Center for Dance and Innovation**. The 56,100-square-foot outdoor public space, which is used for a variety

of family-friendly entertainment, is the most recent big addition to OC's main arts center and was the center's main attraction during the pandemic. It was the result of a \$15 million donation from the Argyros family, which has endowed other parts of the center over the years. Family is a frequent contributor to other theaters across the country. Other beneficiaries of the family's foundation over the years include **Chapman University**, the **Alzheimer's Association**, **Children's Hospital of Orange County**, the **Richard Nixon Presidential Library and Museum**, and numerous other local causes. In November, gave \$7.5 million to **Hoag Memorial Hospital Presbyterian** to help with its nursing services.



**JULIA ARGYROS**  
President  
Argyros Family Foundation

**GEORGE ARGYROS**  
Chairman, CEO  
Arnel & Affiliates  
Founding Partner  
Westar Capital LLC

**ARNEL**

+20%

- **NET WORTH:** \$3.3 billion
- **LAST YEAR:** \$2.73 billion
- **RESIDENCE:** Newport Beach
- **SOURCE OF WEALTH:** real estate, investments



**LARRY VAN TUYL**  
Co-Owner  
Van Tuyl Companies

**THE MONEY:** Van Tuyl's father, **Cecil**, opened the family's car dealership in 1952. Van Tuyl joined the company in 1971, helped build it into the third-largest car dealership network in the country by late 1990s. Sold a controlling interest in his family's car dealerships to **Berkshire Hathaway** for a reported \$4.1 billion in stock in March 2015, when group counted some 78 dealerships, which together sold 240,000 vehicles per year and in 2013 had almost \$8 billion in revenue. Fortune spread among several family members.

**THE ORACLE:** Warren Buffett's Berkshire's shares have nearly doubled in price since the sale. Van Tuyl became chairman of what's now **Berkshire Hathaway Automotive**, but stepped down from the position last year, after a five-year term. He's reported to be buying dealerships on his own again, in Texas. His primary residence said to be in Arizona.

**WEEKEND WEALTHY:** Has a formidable real estate presence in OC. In 2018, paid a reported \$55 million for a Corona del Mar compound along the water. Sale included two technically separate, although adjoining, properties. Property, including the iconic "Big Blue House," was bought from the **Irvine** family heirs.



**WEEKEND WEALTHY**  
+20%

- **NET WORTH:** \$3 billion
- **LAST YEAR:** \$2.5 billion
- **SOURCE OF WEALTH:** car dealerships



PHOTO CREDIT: FEADSHIP

## THE YACHT

**Larry Van Tuyl** owns a mega-yacht, called **Vanish**, that's been valued at about \$125 million. The 217-foot ship was launched in 2016 by **Feadship**, and counts two helipads, an outdoor cinema, a gym, sauna, massage room, beach club, and includes "a free-standing staircase flanked by a glass wall over three decks," the Dutch luxury boat maker's website says.

# OC's WEALTHIEST

## SPORTING GOODS



**ARTE MORENO**

Owner  
Angels Baseball LP

**THE MONEY:** Owner of baseball team that Forbes ranks as ninth most valuable in MLB, at nearly \$2 billion. Last year, team brought in some \$150 million in revenue, well down from prior years due to the pandemic's impact on attendance.

**THE NUMBERS:** The club was acquired in 2003 from **Walt Disney Co.** for \$184 million; it is Moreno's chief asset, and its value continues to rise and could go much higher as new development around the stadium moves ahead. Angels roster includes two of MLB's most recognizable and marketable players, **Mike Trout** and **Shohei Ohtani**.

**KEY FIGURE:** Reached a deal for city of Anaheim to sell the baseball stadium and the surrounding parking lots to a company controlled by Moreno, for about \$320 million. Billions of dollars of residential, office and entertainment development, and perhaps a

new stadium, expected to be built over coming years. Those plans are still in the early phases, and there's talk the city could be forced to put the deal on hold. Land value will likely only increase over time, and the 153-acre site could well exceed the value of the team once built out.

**BIG BREAK:** He's on his second fortune—the first came from Outdoor Systems, a billboard company he founded with partner and Angels minority investor **Bill Levine**, taking it public in 1996 and selling to **Viacom** in 1999 for \$8.7 billion in stock.

**PORTFOLIO:** Also owns **KLAA 830 AM**, broadcasts the team's games, along with **Anaheim Ducks** hockey, **Notre Dame Football** and **ESPN** programming.

**PHILANTHROPY:** Moreno and his wife, **Carole**, are heavily involved in local charities

and other causes. The **Angels Baseball Foundation** has distributed more than \$9 million to charitable programs throughout Southern California. In addition, they founded the **Angels Scholars Award** program in 2016, which funds college scholarships.



+20%

- NET WORTH: \$3 billion
- LAST YEAR: \$2.5 billion
- RESIDENCE: Corona del Mar
- SOURCE OF WEALTH: billboards, baseball



CONCEPTUAL RENDERINGS, PHOTO CREDIT: CITY OF ANAHEIM



**THE MONEY:** Co-founded video portal Broadcast.com in 1995; sold it to **Yahoo** for \$5.7 billion in 1999. Bought majority stake in **NBA** franchise in 2000 for \$285 million from **H. Ross Perot Jr.** The Dallas Mavericks now valued at \$2.4 billion, per Forbes.

**WEEKEND WEALTHY:** Paid a re-

ported \$19 million in 2018 for a nearly 8,000-square-foot home at the Montage Residences, next to the Laguna Beach resort. **John Stanaland** and his son **Tyler**, of **Villa Real Estate**, were the listing agents. **Tim Smith** of **Coldwell Banker** represented the buyer. Says he spends about five weeks a year at the home, told Laguna

Beach Magazine: "If you see me in Laguna, always feel free to walk up and say 'hi.'"

**NOTABLE INVESTMENTS:** "Shark Tank" star and investor has stakes in **Magnolia Pictures**, **AXS TV** and numerous startups.



PHOTO CREDIT: ABC

**MARK CUBAN**

Owner  
Dallas Mavericks



**WEEKEND WEALTHY**  
+17%

- NET WORTH: \$4.9 billion (Bloomberg)
- LAST YEAR: \$4.2 billion
- SOURCE OF WEALTH: tech sales, NBA team

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BUYERS & SELLERS  
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NEWPORT COAST  
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33522 Niguel Road  
Dana Point, CA

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# OC's WEALTHIEST

## A FORTUNE IN FOOD



**LYNSI SNYDER**  
Owner, President  
In-N-Out Burger

**THE MONEY:** Upon turning 35, took over 96% ownership of the Irvine-based burger chain founded in 1948 by her paternal grandparents, **Harry and Esther Snyder**. She had seen a slow increase in her holdings in the company for a decade as part of a trust created by her grandparents.

**THE NUMBERS:** The 358-store chain posted \$1 billion in 2020 revenue, up 9% year-over-year, according to Technomic.

**KEY FIGURE:** Forbes has ranked Snyder as the youngest woman on its 400 listing of billionaires. The magazine currently pegs her fortune at \$3.6 billion, \$900 million over our estimate, which factors in a

price of a little more than \$7.5 million per In-N-Out location, if it were to be sold.

**PORTFOLIO:** In-N-Out owns all of its stores, and Snyder is on record vowing that it will remain a private company.

**FAMILY HISTORY:** She took over the president's role in 2010 from **Mark Taylor**, who'd served as president since her grandmother's death in 2006. Her father died in 1999.

**MOVING PLANS:** News reports in April said Snyder had put her nearly 19,000-square-foot home in L.A.'s Bradbury Estates on the market for \$16.8 million. It was previously owned by former



- +17%
- NET WORTH: \$2.7 billion
- LAST YEAR: \$2.3 billion
- LIVES IN: L.A. County
- SOURCE OF WEALTH: restaurants

Dodger **Adrián Beltré**; she paid \$17.4 million for it, according to reports. No word on where she would move, post-sale.



Home in Bradbury Estates for sale



New location in Colorado



**THE MONEY:** Local residents who run and are main shareholders in Corona-based Monster Beverage Corp.

**THE NUMBERS:** Sacks has 9.4% ownership in Monster, Schlosberg 9.1%, according to Monster's latest proxy statement in April. The company is valued at nearly \$50 billion.

**KEY METRIC:** Monster's shares were up almost 30% this year as of July. Each exec earned about \$15.5 million in compensation last year.

**BIG BREAK:** Immigrants from South Africa entered the beverage business in 1992 with the purchase of Anaheim-based **Hansen Natural Corp.** Sacks had left behind a career with one of the biggest law firms in Johannesburg to seek his fortune in the U.S. Schlosberg, with experience in packaging, had moved to the U.K. The two bought a public company just as the "New Age" category of waters, flavored drinks and other alternatives to **Coke** and other sodas were emerging. Energy drinks, in particular, proved a source of growth. **Coca-Cola Co.** paid \$2.15 billion for 16.7% of the company in 2015; it now has a 19.3% stake in company.

**PORTFOLIO:** Beyond beverages, the duo—who in January took on the co-CEO titles—are among the area's largest private investors in OC commercial real estate, having been involved in office purchases here valued at more than \$600 million over the past



**RODNEY SACKS**  
Chairman, Co-CEO  
Monster Beverage Corp.



**HILTON SCHLOSBERG**  
Vice Chairman, Co-CEO  
Monster Beverage Corp.

five years, according to Business Journal data. Sacks and Schlosberg were part of group that in 2019 bought 2040 Main St., the Irvine office that holds the local headquarters of law firm **Knobbe Martens**. The building sold for a reported \$130 million. Also in 2019, Sacks and Schlosberg were part of group that paid \$116 million for nearby 2211 Michelson office tower. Many of the duo recent investments were made in ventures with Irvine-based real estate investment group **Greenlaw Partners**.

**LOCAL TIES:** Sacks is reported to have a house in Laguna Beach, and Schlosberg keeps a Big Canyon address.

**PHILANTHROPY:** Company's **Monster Energy Cares Foundation** supports active duty, injured and retired military personnel, Monster athletes and their charities, the local community and first responders.



- +38%
- NET WORTH: \$4.5 billion
- LAST YEAR: \$3.25 billion
- SOURCE OF WEALTH: beverage company



**HENRY DAVIS**  
CEO, President  
Greater Omaha Packing Co.

**THE MONEY:** In 1987, took over family-owned beef supplier business started by grandfather in 1920, and grew it multiple times over. It is now the fifth-largest beef producer in the country. Forbes reports the company brings in nearly \$1.7 billion annually.

**THE MEAT:** High-end product used by some of the country's most renowned restaurants, and those in nearly 70 other countries. "Its steaks are served at some of the nation's top eateries, including Peter Luger, Minetta Tavern and Marea in New York City, French Laundry in

Napa Valley, Ruth's Chris Steak Houses and Wolfgang Puck restaurants," noted a 2017 Forbes profile.

**THE HOME:** About two years ago, Davis snapped up an oceanfront home in **Emerald Bay** for \$21 million, according to residential real estate trade industry reports. Has a primary residence in Nebraska and is reported to be one that state's three most wealthy residents.

**PHILANTHROPY:** In October, was cited by **The Orange County Museum of Art** as one of its lead donors for its



**WEEKEND WEALTHY**

- NET WORTH: \$1.1 billion (Forbes)
- SOURCE OF WEALTH: family business

new home at the **Segerstrom Center for the Arts**. The under-construction project's expected cost is \$93 million.



**PAUL MERAGE**  
Chairman  
MIG Management Services

**THE MONEY:** Along with his brother **David**, co-founded Chef America Inc., a frozen foods company that sold in 2002 to Nestlé for \$2.6 billion. Name on top of **UCI Business School**.

**THE NUMBERS:** After sale of frozen food business, began MIG Capital, which has \$1.6 billion in assets and is managed by his son **Richard**. Nephew **Greg** manages real estate arm with more than 10 million square feet and more than 6,000 multifamily units, whose value has gone well up over the past year. Brother **Cam** is founder of **First Team Real Estate**, an Irvine-based real estate firm.

**BIG BREAK:** Inventor in 1983 of popular easy-to-microwave meal **Hot Pockets**.

**REAL ESTATE HOLDINGS:** Village in Indian Wells, Avila Apartments in Rancho Santa Margarita. Real estate arm of MIG typically invests \$15 million to \$100 million multifamily, hotels, and grocery-anchored retail.

**PHILANTHROPY:** The **Paul & Elisabeth Merage Family Foundation** counts close to \$50 million in assets, according to public records. Recent donations included \$511,000 to **UCI's Shaping the Future Campaign**, \$200,000 to Sage Hill School, and \$58,000 to **Segerstrom Center for the Arts**. Also gave \$500,000 to the Merage Institute Business Executive Leadership Program to promote innovation as a way to spur new opportunities in fields like cybersecu-



**+18%**

- NET WORTH: \$2.6 billion
- LAST YEAR: \$2.2 billion
- RESIDENCE: Newport Coast
- SOURCE OF WEALTH: company sale, real estate, investments

rity and medical devices. It has programs often targeted at encouraging entrepreneurship in Israel, including those over 45 years old.



COMPASS

28 Emerald Bay

# Emerald Bay At A Glance

OFFERED AT \$11,500,000



It doesn't get better than this when it comes to the captivating views and proximity of Emerald Bay's exclusive South end beach. This nearly oceanfront property is literally steps down an adjacent staircase to the south end of Emerald Bay beach. The opportunity to own a home in this location doesn't come along very often with exceptional views from all the rooms on the primary level.

More homes sold in Emerald Bay than any other agent!\*

**Maura Short**  
Founding Agent at Compass  
949.233.7949  
maurashort.com  
DRE 01883774



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\*Maura Short has sold more homes than any other agent in Emerald Bay for the year 2021 to date (08/16/21 - \*\$28,000,000 in sales volume YTD 08/16/21)



**HASSO PLATTNER**  
Founder, Chairman  
SAP

**THE MONEY:** Plattner and a handful of other former **IBM** employees started Germany's SAP, an enterprise software company that went public in 1988 and is now one of the world's largest software companies, valued at nearly \$180 billion. Counted a nearly 6% stake as of late last year, shares now valued at a little over \$10 billion. Stepped down as CEO in 2003, still chairs the company's advisory board.



**WEEKEND WEALTHY**

- NET WORTH: \$10 billion
- SOURCE OF WEALTH: SAP stock



PHOTO CREDIT: BURNHAM WARD PROPERTIES

**THE INNOVATION:** Instrumental in SAP opening offices in the Lido Marina Village of Newport Beach; company has been boosting its base here and is reported to be opening a second location soon. The initial office is also the home of **HanaHaus**, a café and community workspace founded and operated by SAP to help spark creativity. It is the second HanaHaus in the U.S., alongside a spot in Palo Alto. Plattner, who owns the **San Jose Sharks**, is "absolutely" happy with the Newport Beach location, and is a frequent visitor, execs told the *Business Journal* in June, when the offices reopened.

**THE HOMES:** Has multiple homes in Emerald Bay, according to trade publication **Dirt**. Paid close to \$45 million for a two-house

blufftop compound there in 2014. Not his primary residence, sources tell the *Business Journal*. Company officials declined to discuss whether he lives in the area.

**PHILANTHROPY:** His nonprofit **Hasso Plattner Institute** focuses on research and teaching in IT systems engineering; he's also a member of the **Giving Pledge**.



**JARED SMITH**  
President  
Qualtrics

**THE MONEY:** Co-founded Provo, Utah-based cloud computing company Qualtrics in 2002 with his brother, **Ryan**, and father, **Scott**; Ryan was the CEO. Days before its scheduled IPO in early 2019, Qualtrics was acquired by German software firm **SAP** for \$8 billion in cash. Jared and Ryan still run Qualtrics as a unit inside SAP, according to *Forbes*, which estimates Jared's fortune as a result of the sale at \$1.3 billion.

**WEEKEND WEALTHY:** Paid a reported \$35 million, in cash, for newly built, waterfront Newport Beach mansion last year, among the most expensive residential home sale in Orange County history. The 12,710-square-foot Newport Harbor estate sits on three lots with 90 feet of frontage and a private dock that can accommodate several



boats. Sold by area real estate exec **Craig Atkins** of **City Ventures**. The home got attention through its use in "Teach Me How to Duffy" parody video. **Tim Smith** of **Coldwell Banker Residential Brokerage** was the listing agent. **Tara Foster Shapiro** of **Pacific Sotheby's International Realty** represented the buyer.



+8%

- NET WORTH: \$1.3 billion (Forbes)
- LAST YEAR: \$1.2 billion
- SOURCE OF WEALTH: Qualtrics sale



Plattner and Smith at SAP event in 2019

**Meet Lee Ann Canaday**  
**REALTOR® BROKER | OWNER**  
CDPE, CPIS, IRES, GRI, CFP, CPRES, SFR



CANADAY GROUP



- Over \$2 Billion in Real Estate Sold
- 35+ Years in the Real Estate Profession
- Top 4 RE/MAX REALTOR® in the Nation
- #1 Orange County RE/MAX Team
- Member of Chamber of Commerce
- Member of CA Realty Chairman's Circle
- Member of D.A.R.
- Member of Sales and Marketing Council
- Winner of "Woman Of The Year In Business 2012" from OCBJ
- Contributor to Register "Real Estate" Column
- Contributor to DuPont Registry Magazine's CA Real Estate



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PHOTO CREDIT: LOANDEPOT



**ANTHONY HSIEH**  
Chairman, CEO  
loanDepot

**THE MONEY:** Founder of company that ranked among nation's largest nonbank mortgage lenders.

**THE NUMBERS:** Since founding in 2010, loanDepot has generated more than \$275 billion in loans and now has 10,000+ employees.

**THE ENTREPRENEUR:** Became owner of a mortgage company at age 25 when he bought out owners and renamed firm loandirect.com, which he said was the world's first internet-based financial services company. He sold it in 2001 to **E-Trade Financial Corp.** for shares worth about \$51.5 million. At 35, he had every intention of retiring and spending his time fishing, a life-long passion. Instead,

founded HomeLoanCenter.com, selling it for an undisclosed price to **IAC/Interactive Corp.**, which merged it into **LendingTree**. After a non-compete clause ended in 2010, he started loanDepot as "a way to do something."

**BOOMING BUSINESS:** In 2015, Hsieh withdrew a potential public offering at the last minute, not satisfied with the price he was getting. He kept spending, investing \$400 million-plus to build a technology system that the company calls **mello**, so as to differentiate his firm from other mortgage lenders that aren't highly regarded on Wall Street.

**THE IPO:** Pulled the trigger on IPO (NYSE: LDI) in February after a record year,

thanks in part to decline in interest rates. Has 39% stake in the company. Holds 61% of the voting power in the company post-IPO.

**RECORD BREAKER:** Paid \$61 million last October for a mansion in Crystal Cove. It's the most paid for an OC home. In June, reported to have paid \$25 million for another home in Henderson, Nev., also a record price paid for that area.

**PHILANTHROPY:** Hosts **War Heroes on Water** tournaments, which takes wounded military members on a fishing tournament on yachts—including his own—around Catalina Island. Giving has been on upswing over the past few years. Fiercely patriotic, Hsieh is a

first-generation American, born in Taiwan. He emigrated to the U.S. with his family as a young child.



Hsieh's \$61M mansion  
at 15 Del Mar

+26%

- NET WORTH: \$2.9 billion
- LAST YEAR: \$2.3 billion
- RESIDENCE: Newport Beach
- SOURCE OF WEALTH: loanDepot, prior businesses

## THE YACHTS

Anthony Hsieh owns multiple sports fishing yachts, including the **Bad Company 144**, described on the War Heroes on Water website as "one of the largest sportfishers in the world." Adds SuperYachtTimes: "She cruises at 23 knots and reaches a top speed of 26.0 kn. She can sleep up to 12 guests taken care of by a crew of 7." It is not reported to be available for charter.



PHOTO CREDIT: WAR HEROES ON WATER

# JOHN STANALAND VILLA



7 MONTAGE WAY  
Laguna Beach | \$29,888,000



4700 SURREY DRIVE  
Corona del Mar | \$28,000,000



31 STRAND BEACH DRIVE  
Dana Point | \$23,500,000



33 MONARCH BAY DRIVE  
Dana Point | \$20,995,000



2800 OCEAN FRONT  
Laguna Beach | \$15,995,000



23512 SEAWARD ISLE  
Dana Point | \$9,995,000

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DRE No. 01223768

# The STRAND

SHOP • DINE • STAY • PLAY

Just steps away from the most iconic pier and ocean views in California, The Strand in Huntington Beach has it: a boutique hotel, mouthwatering food, and an eclectic mix of shops that embody the authentic surfing lifestyle and culture. Your summer never ends at The Strand!

## RESTAURANT/RETAIL SPACE AVAILABLE FOR LEASE

CVS Pharmacy • F45 Training • Grater Grilled Cheese • HQ Gastropub • Jolyn Clothing Company  
Merrilee's Swimwear • Rip Curl Surf Center • Shorebreak Resort

## COMING SOON

Brightwaters Wine Bar • Chicken in a Barrel • Top Dog Barkery



BOARDWALK  
INVESTMENTS GROUP



# the Garden

The Garden's exclusive location is on Pacific Coast Highway in the city of Newport Beach with guaranteed high traffic exposure. The handcrafted flower pots, tiled-lined water fountain and music throughout the courtyard offer a place for relaxation. The rustic, modern design, give this location and the high profile consumers the best retail experience in OC.

## RETAIL SPACE AVAILABLE FOR LEASE

**C'est Si Bon Bakery • Jewelers on Time  
Juxtaposition • The Bar Method  
United State Postal Service**

## COMING SOON

**Boost Hydration • Starfish Newport**

# Aliso Creek

SHOPPING CENTER

Situated on 4.2 acres along Pacific Coast Highway in the coastal Orange County community of Laguna Beach, one of the most affluent communities in Southern California. The location on the Pacific Coast Highway places the center along one of the most prominent and well-traveled roads in the county. Anchored by CVS Pharmacy and shadow-anchored by Gelson's Market, Aliso Creek Shopping Center offers a diverse mix of tenants for the surrounding community.

## RETAIL SPACE AVAILABLE FOR LEASE

**Aliso Beach Animal Clinic • Chase Bank  
CVS Pharmacy • Fantastic Sam's • Gelson's Market  
Hand & Stone Spa • La Sirena Grill  
Lovely Nails • O Fine Japanese Cuisine  
Pure Pilates • Starfish Laguna  
Sunny Fresh Cleaners • Z-Pizza**





**WILLIAM WANG**  
Co-Founder, CEO  
Vizio

**THE MONEY:** Runs one of Orange County's best-known brands, maker of flat-panel smart TVs, sound bars and other products.

**THE NUMBERS:** Largest U.S.-based

**VIZIO**

+67%

- NET WORTH: \$1.5 billion
- LAST YEAR: \$900 million
- RESIDENCE: Newport Beach
- SOURCE OF WEALTH: Vizio

flat-panel TV makers, trails only **Samsung Electronics Co.** among sales in the country. Last year, the company brought in over \$2 billion in revenue. That's up 11% from the prior year, with 2020 net income totaling \$102.5 million, up from \$23.1 million in the year prior.

**EMERGING BUSINESS:** Vizio's **Platform+** allows for streaming of services such as Amazon Prime Video and Apple TV+ on its TVs. Another growing unit, **Inscape**, helps advertisers with targeted advertising. In other words, Vizio not only wants to generate revenue selling TVs, but also make money off



the ads consumers see on those screens.

**THE IPO:** Had a nearly 56% stake in company before it was taken public in March, regulatory filings indicate. Vizio (NYSE: VZIO) is now worth more than \$4 billion. It's

unclear how much of his holdings in the company have been diluted post-IPO, as he transferred his ownership into a new class of shares that give him voting control over all company matters.



**JOE KIANI**  
Founder, CEO  
Masimo

**THE MONEY:** Co-founded medical monitoring device company in 1989. Has 8.6% stake in firm, according to the company's April proxy statement. Shares in company stock are up more than 15% to a \$15 billion market cap this year; the prior 12 months, Masimo stock increased 40%. It's now OC's third-most valuable public company.

**AMERICAN SUCCESS STORY:** Left native Iran at age 9 when he knew only three words of English. Believed in a new way to improve accuracy of patient monitoring by using what is called adaptive signal processing. Company has 500-plus patents, including more than 100 in Kiani's name.

**PAST YEAR:** "Throughout 2020, as our customers on the front lines responded to this

crisis and tried to save as many lives as possible under life-threatening conditions, we responded to their demands to rapidly secure and install new monitoring technologies, enabling them to accommodate more critically ill patients than ever before, even at home," Kiani, our **Businessperson of the Year** in the healthcare sector, said in an April letter to investors. "Within this tough environment, I am proud to say that our team contributed to the critical solutions that were, and are still, required to manage this pandemic. In the midst of the pandemic, last year was also a milestone year for Masimo as our revenues exceeded \$1 billion for the first time since our founding over 30 years ago. Today, we are even more committed to helping our customers overcome the persistent challenges related to this pandemic with an expanding portfolio of products

to improve patient outcomes.

**PHILANTHROPY:** Has passion for children, health, and poverty alleviation. Started **Masimo Foundation** to help hospitals achieve zero preventable deaths. Prominent supporter of President **Joe Biden**.

**MASIMO**

+15%

- NET WORTH: \$1.5 billion
- LAST YEAR: \$1.3 million
- RESIDENCE: Laguna Beach
- SOURCE OF WEALTH: company founder



**VINNY SMITH**  
Founder  
Toba Capital

**THE MONEY:** Gained about \$800 million in 2012 from sale of Quest Software to **Dell**. Used proceeds to start **Toba Capital**, OC's largest venture capital with \$1.3 billion of assets under management.

**BIG BREAK:** Joined Quest in 1995, when it had 35 employees and \$9.5 million in annual sales; became CEO in 1997.

**KEY NUMBER:** Was an early investor in **Alteryx**; has exited 24 companies that either

have been sold or went public, including 13 exits topping \$100 million. Is sole owner of **Toba**, which owns stakes in 40 tech and other companies.

**PAST YEAR:** Made pre-IPO investment in semi-truck battery maker **Nikola**. Started **Gron Ventures**, cannabis-focused fund that's raised \$150 million, including 65% from **Toba**. 2021 investments include **Small Door Veterinary**, a New York-based membership veterinary care company, and **Alec's Ice Cream**, a maker of super-premium organic ice cream.

**PHILANTHROPY:** Supports more than 100 charities, including his own **Teach a Man to Fish Foundation**, which had \$70.9 million in assets as of 2018, up from \$21.8 million in 2012.

**Toba Capital**

+11.5%

- NET WORTH: \$2.9 billion
- LAST YEAR: \$2.6 billion
- SOURCE OF WEALTH: Quest, venture capital fund

An avid skier, surfer



# OC's WEALTHIEST

## BROADCOM BILLIONAIRES



**HENRY SAMUELI**  
Chairman  
Broadcom

**SUSAN SAMUELI**  
Co-Chair  
Samueli Foundation

**THE MONEY:** Henry is largest reported individual owner of stock in the nearly \$200 billion-valued Broadcom, plus extensive real estate holdings, as well as ownership of the **Anaheim Ducks** and related media ventures.

**THE NUMBERS:** Estimated to have sold more than \$1.5 billion in shares since Broadcom went public in 1998. Still owns 2.3% stake in company that's now valued at about

\$4.4 billion, according to recent regulatory filings. Chipmaker holdings only represents a portion of family fortune. Stepped back as chief technology officer role at Broadcom near end of 2018, now carries chairman title. Remains confidante of CEO **Hock Tan**, whose Avago Technologies bought chipmaker in 2016.

**KEY METRIC:** Broadcom shares up about 50% year-over-year.

**BIG BREAK:** Established Broadcom in 1991 in Redondo Beach with **Henry Nicholas**. Duo vaulted into ranks of billionaires shortly after going public seven years later. Bought local hockey franchise for \$70 million in 2005. Forbes values the team at around \$460 million now.

**THE VIBE:** Samueli family putting portion of fortune into Anaheim; now owns and controls more than 125 acres in vicinity of Honda Center where hockey team plays. Has spent close to \$200 million to assemble the land, records show. Major redevelopment plans disclosed this year: dubbed **ocV!BE**, a \$3 billion plan to build a mix of apartments, offices, hotels, dining and entertainment options. Samueli reps say the family will self-finance the deal, the largest project expected to move ahead in the Platinum Triangle. The first phase is expected to deliver by 2024 and the entire project is scheduled to wrap by 2028, when Honda Center will play host to



indoor volleyball for the **Summer Olympics**.

**PHILANTHROPY:** Samueli and his wife, **Susan Samueli**, are among Southern California's top philanthropists, and are members of the **Giving Pledge**, a group that promises to give away the majority of their money during their lifetime. The **Samueli Foundation** supports science, technology, engineering, and math education; integrative health; youth services; and social justice programs. A few years ago they made a \$100 million gift to the **UCLA Samueli School of Engineering**, the largest gift ever received at their namesake school. Giving to UCLA now approaching \$200 million. The Samuelis have also donated a reported \$250 million to **UCI**, including a \$200

million gift—the largest in UCI's history—in 2017 for its **College of Health Sciences**.



### Henry and Susan Samueli +27%

- NET WORTH: \$7 billion
- LAST YEAR: \$5.5 billion
- RESIDENCE: Corona del Mar
- SOURCE OF WEALTH: semiconductors, Anaheim Ducks, real estate



**HENRY T. NICHOLAS III**  
Co-Founder  
Broadcom

**THE MONEY:** Sole trustee of the **Nicholas Technology Holding Trust**, which was reported to hold about \$1.8 billion in Broadcom stock at time of its 2016 sale to Avago Technologies. Shares have nearly tripled in price since then.

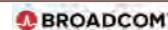
**THE NUMBERS:** He sold an estimated

\$1.2 billion in Broadcom shares since the company went public in 1998.

**KEY METRIC:** Broadcom shares up about 50% year-over-year.

**THE TWO HENRYS:** Nicholas established Broadcom in 1991 in a spare bedroom of his Redondo Beach home with fellow OC's Wealthiest member **Henry Samueli**. His 2008 divorce is the primary reason our estimate for Nicholas lags that of Samueli, who remains chairman of Broadcom.

**RECENT:** Business-related news regarding Nicholas has been slow for several years since the Avago sale. His time now is largely spent on his academic nonprofit, **Nicholas Academic Centers**. It was co-founded with retired Orange County Superior Court Judge **Jack Mandel**, has three centers in Santa Ana that have graduated more than 1,000 underserved, primarily Latino students in the Santa Ana Unified School District. Graduates have received about \$60 million in scholarships, attending top schools, such as Stanford, Harvard, Columbia, and Dartmouth.



### +29%

- NET WORTH: \$5.4 billion
- LAST YEAR: \$4.2 billion
- RESIDENCE: Newport Coast
- SOURCE OF WEALTH: semiconductors

**PHILANTHROPY:** On quest to improve victims' rights following the 1983 murder of younger sister, **Marsalee**. Known as "Marsy's Law," Nicholas-backed initiative protects victims and their families through the legal process, from the defendant's trial to restitution to parole or other post-judgment release decisions.



PHOTO CREDIT: NICHOLAS ACADEMIC CENTERS



**RJ SCARINGE**  
Founder, CEO  
Rivian Automotive

**THE MONEY:** Startup electric-vehicle builder, with nearly \$10.5 billion in funding since 2009, most of it in past three years. Company is eyeing an IPO later this year.

## RIVIAN

+233%

- NET WORTH: \$5 billion
- LAST YEAR: \$1.5 billion
- RESIDENCE: Laguna Beach
- SOURCE OF WEALTH: stake in Rivian

which if successful would make Rivian OC's most valuable public company, and make the Irvine-based company the country's second-most valuable EV maker, behind \$625 billion-valued **Tesla** (Nasdaq: TSLA). Tesla is the world's most valuable auto company.

**THE BOOST:** Scaringe's valuation bump—from \$1.5 billion to \$5 billion—is, by far, the largest increase for those on our Wealthiest list this year. An argument could be made that we are well below the true mark of his wealth. Estimates largely depend on two big ifs: if Rivian approaches the \$80 billion valuation figure being floated in reports touting its forthcoming IPO, and if Scaringe's stake in the company he founded is in the neighborhood of what **Elon Musk** owns in Tesla (roughly 20%), then a figure approaching \$14 billion is possible.

**THE ESTIMATE:** We've used a more modest \$25 billion valuation for Rivian that was cited by business press earlier this year as our baseline. Expect next year's valuation for Scaringe to also see the biggest move on our list, up or down, after the company shines more light on its ownership structure upon going public.

**THE BACKERS:** Ford, T. Rowe Price, Soros Fund Management, Fidelity Investments, Cox Automotive, BlackRock and Amazon, the latter of which has plans for some 100,000 of its electric-powered delivery trucks. Initial deliveries to Amazon have begun and Scaringe has teased that Rivian is



Rivian-built vans for Amazon

nearing mass production of the trucks.

**COMING SOON:** First release for the public, an electric-powered pickup truck began recently. Scaringe has reportedly decamped from his home near Irvine to be closer to the company's production facilities in Illinois to ensure the company meets its deadlines for mass production.

**TESLA'S REACH:** Both startups and traditional automakers are hoping to become the next Tesla, whose shares have more than doubled in the past year. The company's val-

uation far exceeds those of more established automakers.

**THE MOVE:** Rivian moved its headquarters to Irvine last year, and is adding hundreds of new positions for multiple facilities it occupies here. "The technology that moves our vehicles, and the experiences that move our customers, are developed here," the company says.

**QUOTABLE:** "Our teams are working hard to ensure our vehicles, supply chain and production systems are ready for a robust production ramp up."

PHOTO CREDIT: RIVIAN





## PALMER LUCKEY

Founder  
Oculus VR  
Founder  
Anduril Industries

**THE MONEY, PART I:** Oculus, a maker of virtual reality hardware and software products Luckey founded in 2012, was bought by Facebook in 2014 for \$3 billion. It was one of the fastest-ever multibillion-dollar exit transactions on record.

**THE MONEY, PART II:** Luckey's second virtual reality startup and defense-focused Anduril was formed in 2017 and is the fastest-growing upstart defense firm in the country. Raised \$450 million in a Series D funding round in June. The latest financing more than doubles Anduril's valuation to \$4.6 billion from its last raise in July 2020.

**THE WEALTH:** Reported not to have put much of his own money in building up Anduril, because of fierce VC interest. "We've never needed to dip into the Palmer pot,"

Chief Executive **Brian Shimpf** told Forbes. Believed to still have a significant stake in Anduril after latest funding deals. The \$2.5 billion estimate of his wealth, while nearly double from a year ago, could prove to be on the low side for the tech visionary. He's believed to be the wealthiest businessperson under the age of 30 in Southern California.

**THE TECHNOLOGY:** Anduril makes a combination of hardware and software, including autonomous drones, sentry towers and other products used to monitor and protect large areas, which are built around its artificial intelligence platform that uses computer vision, machine learning and mesh networking. Moving to huge new campus in Costa Mesa to accommodate its growing ranks of workers and new business.



**PORTFOLIO:** Owns home on Lido Island. Among reported big splurges after the Oculus sale: a 1969 Mustang, several helicopters, submarine, and an island property.

**ON INVESTING:** Favors low-risk portfolio; not interested in being a VC. "My goal is to make my business successful, to make my employees successful, not to spend my time turning the money I've already made into more money by investing in what other people are doing," he told CNBC.

**ANDURIL**

+92%

- NET WORTH: \$2.5 billion
- LAST YEAR: \$1.3 billion
- RESIDENCE: Newport Beach
- SOURCE OF WEALTH: Oculus, Anduril stakes



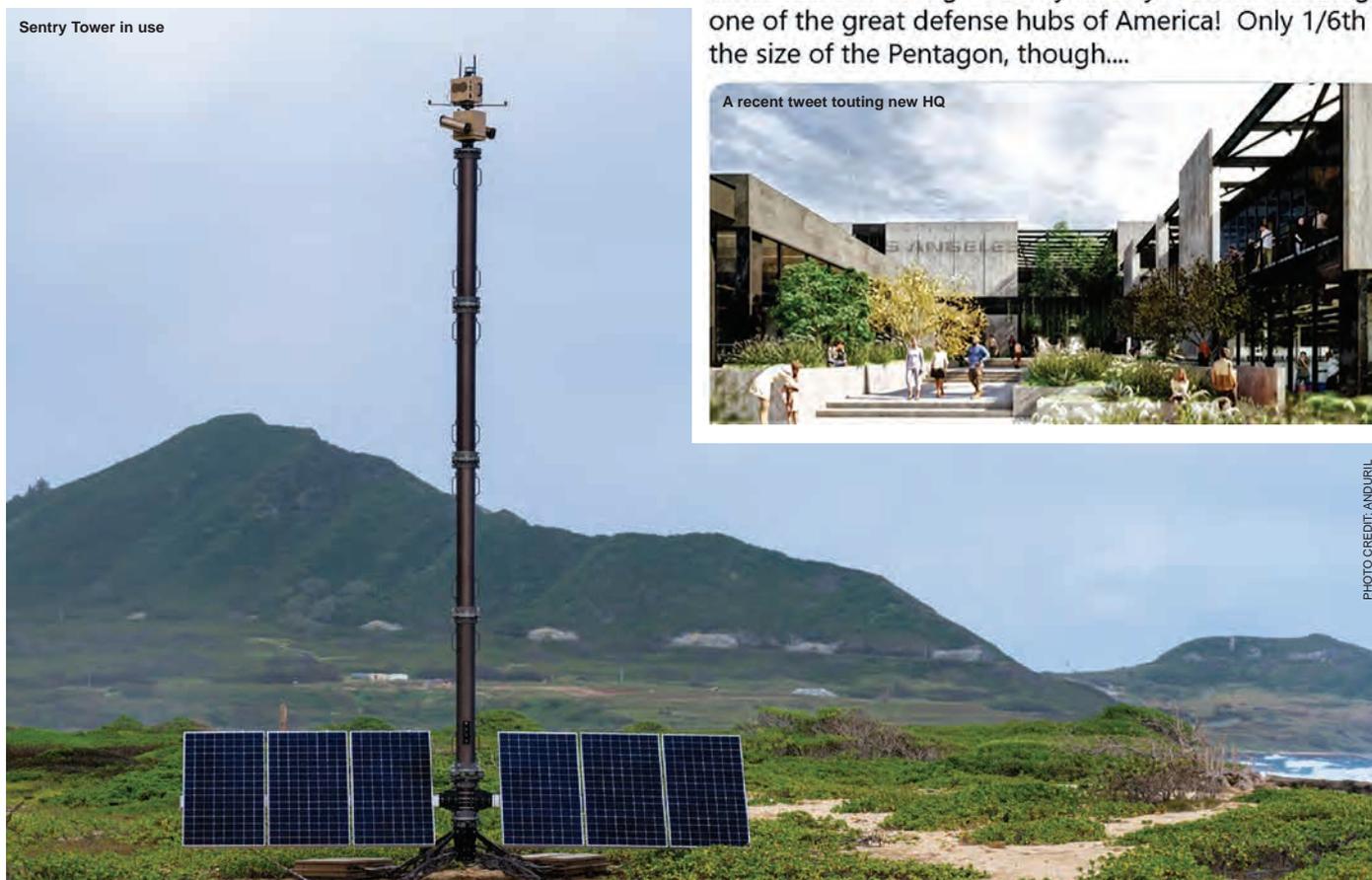
At 650,000 square feet, Anduril just signed the largest office lease in Orange County history. We are building one of the great defense hubs of America! Only 1/6th the size of the Pentagon, though....

A recent tweet touting new HQ



PHOTO CREDIT: ANDURIL

Sentry Tower in use



**THE MONEY:** Orange County's largest consumer electronics maker, and among OC's largest private companies by sales. Maker of well-known flash memory products, solid-state drives, and other computer-related items.

**THE NUMBERS:** Sold 80% of Kingston to Japan-based **SoftBank Corp.** for \$1.5 billion in 1996 and generously shared proceeds with employees. The founders bought the company back in 1999 for \$450 million. Kingston's estimated annual sales now approaching \$13 billion.

**FAST AND FURIOUS:** This year sold off its popular **HyperX** business unit to Palo Alto's **HP** for \$225 million. Still retained the ability to make memory products used by gamers, such as flash memory, dynamic random access memory and solid state drive gaming products under the Kingston name.

As such, it has kicked off a newly rebranded line, dubbed "**Fury**," for the new slate of offerings.

**BIG BREAK:** Sun, Tu co-founded memory products maker **Camintonn** in the 1980s and sold it to former Irvine computer maker **AST Research Inc.** They left AST to start Kingston after losing millions in Camintonn proceeds in the 1987 stock market crash. Now have built second fortune.

**SECRET BUSINESS:** Prior estimates of the duo's wealth factored in annual sales that were long estimated in the \$7 billion to \$8 billion range. In 2020, that figure increased to \$13 billion, due to the company's "services division," which includes the memory that Kingston makes on behalf of PC manufacturers. That business hasn't been accounted for before publicly.

**EMERGING BUSINESS:** Tu has provided more than \$50 million in funding for upstart medical diagnostic company **Fluxergy**, an Irvine-based firm working to build a better, faster test for COVID-19.

**EDUCATIONAL EFFORTS:** Sun and his wife, **Diana**, last year pledged \$1.75 million in annual contributions to expand the **Simon Scholars Programs**, a six-year scholarship program sponsoring underserved, mostly first-generation students from the end of their sophomore year of high school through college graduation.

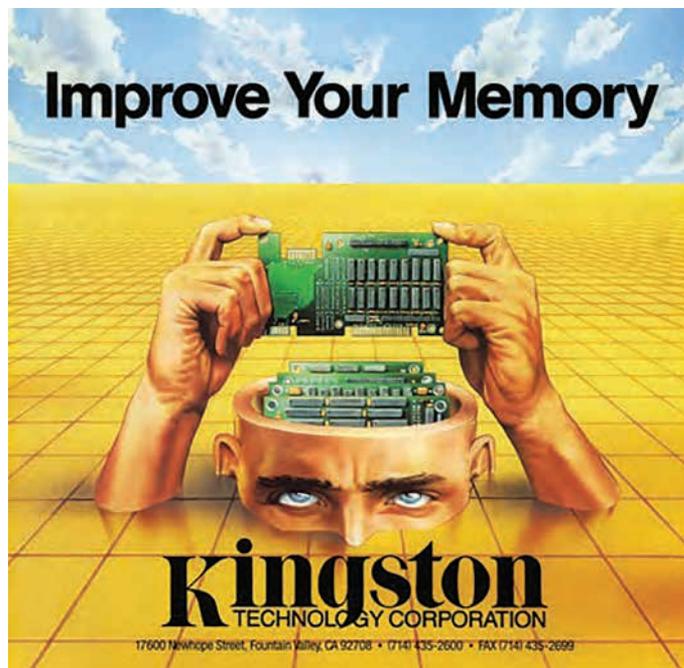
**HISTORY:** Tu, originally from China, moved to the U.S. in 1972. He once worked as a cook in his uncle's Chinese restaurant and as an apprentice welder while living in Germany as a young man. Sun, who was born in Taiwan, came to the U.S. in 1977.



**DAVID SUN**  
Co-Founder, COO  
Kingston Technology Co.



**JOHN TU**  
Co-Founder, President  
Kingston Technology Co.



Historical ad for Kingston

## THE VISION

The way **David Sun** tells it, the giant computer storage and memory products maker in Fountain Valley traces its roots to a fortuneteller in Taiwan more than 30 years ago.

Sun says he and **John Tu** were taking a trip together to Taipei, Taiwan in August 1987 when Tu insisted on consulting a fortuneteller, who told him he would find a business partner and start a company. About an hour or so later, Sun reluctantly went inside and heard the same message that included the future gazer's prediction the business would be "very big."

Shortly afterward the two men founded Kingston.

"That's a true story. It's fate, it's luck," Sun told the *Business Journal* late last year. "The fortuneteller doesn't know he and I are together. The only reason John wanted me to go in is to verify that I would be the partner."

Quipped Tu: "I paid the fortuneteller, actually."



+7%

- NET WORTH: \$6.2 billion
- LAST YEAR: \$5.8 billion
- AGE: Sun 69, Tu 79
- RESIDENCE: Irvine, Rolling Hills
- SOURCE OF WEALTH: computer storage, memory products



**GARY JABARA**  
Founder  
Mobilitie LLC  
Founder  
IoTX Alliance

**THE TECHNOLOGY:** Founder of **Mobilitie**, the largest privately held telecommunications infrastructure firm based in the U.S.

**THE BUSINESS:** Newport Beach firm is an operator and owner of cellphone towers, along with line of business providing upgraded wireless service to sports arenas, concert venues, casinos and other large venues; helping the country's largest wireless companies deploy small cell base stations, which the company uses to prep its networks for upcoming 5G service.

**THE SALES:** Mobilitie scored its first big payday in 2012 with the \$1.1 billion sale of 2,300 cellphone towers, a "portion" of the company's assets. In June, announced sale of Mobilitie to Australia's **BAI Communica-**

**tions**, in deal banking sources peg at close to \$1.7 billion. The deal, which closed in September, represents all wireless assets of Jabara.

**PORTFOLIO:** Extensive real estate holdings and related investments, much of them local. He's spent more than \$200 million on residential and commercial real estate since 2012, including several Newport Beach buildings. He's the main financial backer of **Villa Real Estate**, a luxury home brokerage that's among the largest in SoCal coastal markets. Gross sales at Villa are well over \$1 billion annually.

Backs **Chihuahua Cerveza**, an OC-based beer maker that's rapidly expanding its distribution across the U.S.

**NEXT STEPS:** Jabara says he's putting his attention post-Mobilitie sale on his **IoXT**

**Alliance**, a group he created that's designed to handle the rapidly increasing demand for Internet of Things device certification that meets security requirements across a variety of product categories. Also putting proceeds of Mobilitie sale into more real estate, he says.

**PHILANTHROPY:** Supports several schools and charities, including **New York University**, **University of Southern California**, **Orange Coast College**, **Sage Hill School** in Newport Beach and the **Newport-Mesa Unified School District**.



+36%

- NET WORTH: \$1 billion
- LAST YEAR: \$735 million
- RESIDENCE: Newport Beach
- SOURCE OF WEALTH: telecom business, real estate, other investments

### Fast Facts

*In 2012, Jabara was in the running to buy the San Diego Padres.*

*He wasn't able to buy the team, but with Mobilitie's services providing wireless services to ballparks and sports stadiums across the country, he found a way to make his way into MLB and other sports leagues—and make money too.*

# OC's WEALTHIEST

## CAR TOWN



### ERNEST GARCIA II

Owner, Chairman  
DriveTime Automotive Group

**THE PARENT CO:** Owns Tempe, Ariz.-based **DriveTime**, reported to be the fourth-largest used car retailer in the country with nearly 150 locations.

**THE IPO:** Privately held DriveTime spun off **Carvana** (NYSE: CVNA), an online site for selling used cars and arranging car loans that went public in 2017 and now sports a \$50 billion valuation. Shares have more than doubled in the past year amid a surge in used-car

prices. Garcia II is Carvana's largest shareholder, with Class B shares that equate to about 44% of Carvana's total outstanding shares if converted, the company's latest proxy statement indicates. Our estimate of \$18.5 billion is lower than the full valuation of those shares, and takes into account the stock's potential volatility, though factoring in DriveTime and other assets Garcia's wealth could be much higher. Forbes and Bloomberg estimates his wealth at around \$20 billion.



Said to be the wealthiest person in Arizona.

younger Garcia is also a multimillionaire, but is not reported to have a home here.

**THE HOME:** Has owned several homes in the area over the years; housing blogs indicate Garcia was the seller of one pricey home near Arch Point in Laguna Beach to **Patrick Soon-Shiong** over a decade ago. Sources tell the Business Journal that Garcia now owns a home in Crystal Cove, though it is not his main residence. Also reported to have a beachfront mansion in Manhattan Beach.

**THE FAMILY:** Carvana was founded by Garcia's son, **Ernest Garcia III**. The

**PHILANTHROPY:** Phoenix-based **Garcia Family Foundation** gives to a variety of educational and other nonprofit groups, with a focus on Arizona.



### WEEKEND WEALTHY

- NET WORTH: \$18.5 billion
- SOURCE OF WEALTH: auto sales, lending



Main shareholder in a \$58B auto business

PHOTO CREDIT: CARVANA

# OC's WEALTHIEST

## FOCUS ON PHILANTHROPY



**C. FREDERICK 'FRED' TAYLOR**

Co-Founder, Partner  
TGS Management LLC

**THE MONEY:** Taylor is the "T" in TGS, an extremely secretive quant hedge fund with offices in Irvine.

**THE NUMBERS:** Estimates of Taylor's wealth range vary from \$1.2 billion to multiple billions. Along with founding members **David Gelbaum** and **Andrew Shechtel**, the trio first gained national attention about six years ago when a Bloomberg news report said the hedge fund managers had "secretly directed one of the largest pools of philanthropic capital for years," one it estimated at more than \$13 billion, making it the fourth-largest charity in the U.S. that year.

**THE SECRET:** There's been next to no mention of the firm or its founders since the Bloomberg article, with the exception of Business Journal reports on Taylor's real estate investments and other deals in Irvine.



Full-building lease in Spectrum Terrace



\$50M Irvine campus bought by Taylor

Sources familiar with the founders tell the Business Journal that our prior estimates for Taylor are on the low side; we've increased our estimate this year to \$2 billion, which is still likely a conservative figure.

**THE MENTOR:** The partners are disciples of South County resident and "Man for All Markets" by **Edward O. Thorp**, founder of one of the world's first quantitative hedge funds, Princeton Newport Partners, in 1969. Thorp told Businessweek that the men opened a hedge fund in 1989, and practiced a form of statistical arbitrage, seeking to profit from the tendency of recently fallen stocks to rise, and the recently risen to fall.

**KEY METRIC:** S&P 500, up 35% year-over-year.

**REAL ESTATE MOVES:** The Business Journal has reported on several real estate

moves related to TGS since 2018, none confirmed by the firm. Taylor this year paid about \$50 million for a pair of Irvine Spectrum-area offices; their use post-sale is unknown. There's no indication they plan to lease out the space. A data center for TGS is under construction next to the 405 freeway, and the firm has leased an entire building at the new **Spectrum Terrace** office complex on the other side of the freeway, brokers report. Uses for the just-bought offices, and the Spectrum Terrace lease are unknown; both are much larger than TGS' current headquarters, and wouldn't appear to be needed by the company for its workforce, as the company is reported to be extremely methodical and picky about who it hires. "A few engineers here are downright geniuses," said one online posting on Glassdoor.

**PHILANTHROPY:** According to Inside Philanthropy, perhaps as much as \$850 mil-

lion of Taylor's giving gets funneled through the **Vanguard Charitable Endowment Program**. He's been reported to be a major supporter of the **Landmine Survivors Network** and other human rights causes. Taylor is a major benefactor and board member of **Tarbut V'Torah Community Day School** in Irvine, a Jewish day school founded by late businessman and Holocaust survivor **Irving "Papa" Gelman** on land donated by the **Samueli Foundation**.

+43%

- NET WORTH: \$2 billion
- LAST YEAR: \$1.4 billion
- RESIDENCE: homes in Shady Canyon, Laguna Beach
- SOURCE OF WEALTH: hedge fund



**RON SIMON**

Founder, Chairman  
RSI Equity Partners

**THE MONEY:** Multiple businesses built, then sold, including cabinetmakers **Perma-Bilt Industries** and **RSI Home Products**, as well as homebuilder **RSI Communities**.

**THE HISTORY:** Simon—born into the Great Depression in Los Angeles to a Russian mother and an English cabinetmaking father—turned his father's business, Perma-Bilt, into the nation's largest manufacturer of bathroom medicine cabinets. In 1987, Simon sold Perma-Bilt and started RSI Home, which became the largest manufacturer of cultured marble coun-



Rendering of Sandi Simon Center of Dance

PHOTO CREDIT: CHAPMAN

tertops, bathroom vanities, and medicine cabinets in the world.

**RECENT SALES:** RSI Home sold in 2017 for \$1.1 billion to Winchester, Va.-based **American Woodmark Corp.**, about half of it in debt and half in cash and stock. American Woodmark's stock is flat year-over-year. In 2018, RSI Communities sold to **William Lyon Homes** for \$460 million.

**THE BOOK:** "Business can be a battlefield, and I have decades of stories and the mental

scar tissue to prove it," he wrote in recently published memoir, "**Tell Me Why I Can't**."

**PHILANTHROPY:** The **Simon Scholars Program** is involved in about 20 local high schools, with 1,300 scholarships and counting, valued at more than \$40 million. The **Simon STEM Scholarship Program**, started in 2015, provides a full scholarship to **Chapman University** to pursue a STEM-area degree. Chapman received a \$9 million commitment from the **Simon Foundation** during its annual Chapman Celebrates gala in 2019. In June, he and

his wife, **Sandi**, announced a \$5 million gift to Chapman to transform a historic building near campus into a 33,000-square-foot building for the school's performing arts program. Will be called the **Sandi Simon Center for Dance**; opening next year.

+8%

- NET WORTH: \$1.4 billion
- LAST YEAR: \$1.3 billion
- RESIDENCE: Newport Beach
- SOURCE OF WEALTH: manufacturing



**ANNE CATHERINE GETTY  
EARHART**  
Heiress, Philanthropist



**CAROLINE MARIE GETTY**  
Heiress, Philanthropist

**THE MONEY:** Sisters who are the granddaughters of late oil tycoon **J. Paul Getty**.

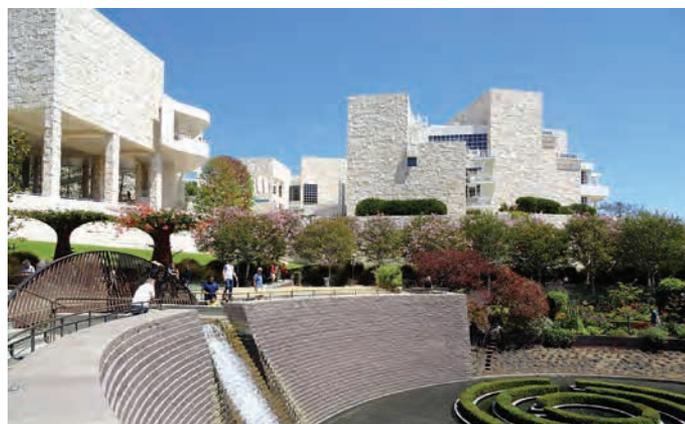
**FAMILY HISTORY:** Their grandfather made his first million in 1916 in Oklahoma oil and became a billionaire from work in Saudi Arabia and Kuwait in the 1940s and 1950s. Other holdings included aircraft maker **Spartan**.

Some news reports at the time said he was the world's wealthiest man. The sisters were born in the 1950s to J. Paul's eldest son, **George Franklin Getty II**.

**THE NUMBERS:** J. Paul died in 1976,

leaving \$700 million to fund the **Getty Museum** in Los Angeles, and a family fortune disputed for nine years by dozens of descendants. It included 40% of Getty Oil; a family trust in 1984 sold that for \$4 billion to **Texaco**. The museum also got a boost, selling its 12% holdings as part of Texaco's takeover. Anne and Caroline each received about \$750 million from the will and \$400 million apiece from the Texaco deal.

**KEY METRIC:** We've taken the very private duo's wealth up 8% to \$1.7 billion, in line with what sources say would be an average return for modest trust fund investing.



**PHILANTHROPY:** The sisters stay out of the public eye and give to environmental and left-of-center political causes. Some of Anne's giving flows through the **Marisla Foundation** in Laguna Beach, for her daughter **Sara's** middle name—which had \$40.7 million in assets at the end of 2017, according to GuideStar USA Inc. The foundation in 2016 said it would give \$100 million over five years to support projects to end overfishing, control plastic pollution, and protect marine mammals, according to a U.S. State Department report. Marisla gave money to fight the San Joaquin Hills (73) Toll Road in the 1990s and has backed the Natural Re-

sources Defense Council.

Anne was honored with a Carnegie Medal of Philanthropy in 2019. Caroline is even less in the limelight than her older sister; she's an environmental activist and has served on boards and councils of the **Wilderness Society**, **World Wildlife Fund**, and the **Monterey Bay Aquarium Foundation**.

+8%

- NET WORTH: \$1.7 billion
- LAST YEAR: \$1.57 billion
- SOURCE OF WEALTH: heiress



**BILL GROSS**  
Co-Founder  
Pimco

**THE MONEY:** Known as the "Bond King" for building Pimco into one of the world's biggest money managers; it now has \$2.2 trillion. Departed in 2014 in acrimonious split; has since reconciled. Retired in 2019.

**THE NUMBERS:** Nearly 50-year career, three-time Morningstar Bond Manager of the Year, Bond Manager of the Decade. Inducted

**PIMCO**

+39%

- NET WORTH: \$2.3 billion
- LAST YEAR: \$1.65 billion
- RESIDENCE: Laguna Beach
- SOURCE OF WEALTH: bond investing

into the Fixed Income Analysts Society's Hall of Fame. Famously avoided 2008 financial crisis with his bond fund returning 4.8%, while his benchmark dropped 4.2%, and S&P 500 Index dropped 38%.

**BIG BREAK:** After a car accident while at **Duke University**, spent months in a hospital where he read **Edward O. Thorp's** "Beat the Dealer." Pair became friends, with Gross telling Thorp: "I tell him all the time that he's responsible for my career." Says arrived at Pimco at the right time—30-year bond bull market that began in early 1980s.

**KEY METRIC:** His total return fund generated a 7.8% annualized return during the 27 years he managed it.

**GAMESTONKS:** It's not just Redditors cashing in on meme stocks. Gross said he made a cool \$10 million shorting videogames retailer **GameStop** during the company's wild market ride earlier this year. "The volatility is super high and that promotes an ability to make some money," he told the financial press.

**PHILANTHROPY:** Managing investments at **William, Jeff and Jennifer Gross Family Foundation**, where he's aiming for 5% annual return so as to donate about \$20 million annually. Donations have included **Doctors Without Borders**, **CHOC Children's Small Baby Unit**, **Laguna Food Pantry** and **Orange County Teachers of the Year** awards. Gave \$1.5 million to charities and organizations providing relief from the effects of the coronavirus on Southern California communities.

**IN HIS WORDS:** In commentary published by the Business Journal in May, said: "As for my own philanthropy, I have endeavor-



Amy Schwartz and Bill Gross married this year

ored to put my money where my mouth is, giving more toward direct action. Yes, there are a few medical buildings with my name plastered on them, and the Smithsonian's **William H. Gross Stamp Gallery** in Washington, which is more guilty pleasure than indulgence for which I apologize to no one and

which allows the public to view some of my collection. But the bulk of my giving has gone toward organizations that provide healthcare, humanitarian relief, education, and community support. In other words, groups that have a ground game and provide direct assistance to urgent causes."

# OC's WEALTHIEST

## REAL ESTATE'S RETURNS



**DONALD BREN**  
Chairman  
Irvine Co.

**THE MONEY:** The country's wealthiest real estate owner. Heads Orange County's largest real estate company, with one of the largest portfolios of apartments and office buildings in California, among other notable holdings.

**THE NUMBERS:** Company's holdings exceed 125 million square feet. It includes more than 560 office buildings, 125 apartment communities, 40 retail centers, the **Resort at Pelican Hill**, two hotels, three golf

courses, and five marinas. Buildings largely in OC, with about 35% of the portfolio in Silicon Valley, San Diego, West Los Angeles, Chicago, and New York City.

**BIG BREAK:** Bren got his start as a homebuilder in 1958. In 1977, he was part of a group that purchased Irvine Co. from the founding family, the successor to the 93,000-acre ranch bought by **James Irvine** in 1864. Bren bought out most of his partners in 1983. Became principal shareholder in 1996.

**KEY METRIC:** \$15.3 billion (Forbes estimate); \$15.9 billion (Bloomberg estimate). After lowering our estimate by \$1 billion a year ago, a few months after the onset of the pandemic, we've upped our figure by \$1.3 billion this year. Our figure is higher than other estimates of Bren, which tie much of their estimates to the performance of REITs in the office, apartment and retail sectors. While the office and retail sectors are still a mixed bag, large apartment REIT stocks are up by 25% or more this year, and Irvine Co.'s apartment division is considered the company's biggest moneymaker. The comparison to REITs only goes so far. Unlike REITs, which pay out most earnings to shareholders through dividends—a 3% payout isn't uncommon—Bren is known to reinvest most of Irvine Co.'s earnings, thereby boosting his wealth correspondingly. And of course, Irvine Co. rarely

sells its assets. Bren is also believed to have a large and highly profitable family investment office.

**LAST YEAR:** Irvine Co.-owned OC land remains among the West Coast's best-selling area for new homes, and land values remain strong. Irvine Co.'s commercial portfolio continues to grow via development and upgrades to portfolio properties. Its recent office additions have been focused on the Irvine Spectrum area, with the low-rise **Innovation Office Park**. The company has an "A+" credit rating and a stable outlook from Fitch Ratings Inc. When it uses debt to fund properties, it does so at historically low interest rates, according to recent rating agency reports. Apartment rents in OC are up some 10% year-over-year, and occupancy remains high.

**LOCAL HOLDINGS:** Fashion Island, Newport Center, half of 185-acre UCI Research Park in Irvine, Jamboree Center, MacArthur Court, the Resort at Pelican Hill, and large parts of the 5,000-acre Irvine Spectrum.

**PHILANTHROPY:** Bloomberg Businessweek magazine ranks Bren as one of the country's most generous philanthropists, estimating his lifetime giving at more than \$1.3 billion. Over \$265 million of that went toward education. He's directed more than \$70 mil-

lion to the **University of California, Irvine**, in addition to giving to other schools. Bren also set aside 57,000-plus acres—more than half of the 93,000-acre Irvine Ranch—as open space and parklands in perpetuity. The U.S. Department of the Interior and the State of California formally designate the lands as Natural Landmarks. In 2014, Irvine Co. donated 2,500 acres of land in Anaheim Hills and East Orange where it once planned more than 5,000 homes. The land will be permanent open space.

Bren has also endowed over 60 permanent distinguished professor chairs at the **University of California and California Institute of Technology**. He's also founded one of the nation's first graduate-level environmental schools, the **Donald Bren School of Environmental Science and Management**, at **University of California, Santa Barbara**.



+8%

- NET WORTH: \$18 billion
- LAST YEAR: \$16.7 billion
- RESIDENCE: Newport Beach
- SOURCE OF WEALTH: real estate



Views from Irvine Co.'s local portfolio



**IGOR OLENICOFF**

Owner, Founder, President  
Olen Properties Corp.



+23%

- NET WORTH: \$8 billion
- LAST YEAR: \$6.5 billion
- RESIDENCE: Emerald Bay, Florida
- SOURCE OF WEALTH: real estate, stock holdings

**THE MONEY:** Orange County's second-biggest commercial property owner based here.

**THE NUMBERS:** Nearly 8 million-square-foot commercial portfolio, plus more than 17,000 apartments. Has nearly 2,000 tenants, 380 buildings in OC. Sources tell the Business Journal that the Emerald Bay real estate exec also counts a stock portfolio approaching \$4 billion, if not more.

**BIG BREAK:** Worked for **Shell, Touche Ross, Motown Records**, where he was a VP and business consultant to **Berry Gordy**, expanding the company out of Detroit to Hollywood. Founding partner in real estate syndicator Gemini Pacific. VP of operations at Dunn Properties before starting Olen.

**PORTFOLIO:** A large portion of Olen's local office portfolio is low- and mid-rise business parks. It also has two office towers in Irvine and holds loans tied to other properties around John Wayne Airport. Olen's commercial portfolio in OC is "virtually debt free and cash flowing at record levels." For out-of-stage properties with debt, most count interest rates 3.8% or less and terms running 10 years or more. Along with apartments, other Olen assets include marinas, land, restaurants, airport hangars, and a golf course. Its commercial real estate portfolio covers nearly 20 million square feet, including apartments.

**STOCK WATCH:** Sources tell the Business Journal that much of Olenicoff's liquidity is invested in the stock market, and that his accounts are heavily invested in firms like



Olen HQ in  
Newport Center

**Amazon, Microsoft, Apple** and other tech firms that have largely outperformed the S&P 500, which itself is up some 35% year-over-year. Gains from those accounts likely added more than \$1 billion to his fortune over the past year.

**APARTMENTS:** Olen's largest real estate push in the past decade has been in the multifamily sector, adding thousands of apartments to portfolio, all out of town. Key

markets include Las Vegas, Phoenix, and portions of Florida, Atlanta, Nashville and most recently Charlotte. The value of its Southeastern portfolio now tops \$2 billion. All markets are overperforming, with rents up double-digit year over year, and little vacancy.

**PHILANTHROPY:** **Andrei Olenicoff Memorial Foundation**, charity for eye health, blindness cure, in memory of Igor's late son.

## OC's WEALTHIEST



**VICTOR TSAO**

President  
Miven

**JANIE TSAO**

VP  
Miven

**THE MONEY:** The founders of home networking company **Linksys Group Inc.** Victor led product development and all company operations, while Janie led sales and business growth. Developed the first affordable broadband router, allowing consumers to connect all their Internet devices up to one broadband line.

**THE NUMBERS:** Linksys sold to **Cisco Systems Inc.** for \$500 million in 2003. Couple in 2007 shifted their focus to Miven, an investment firm they had founded in 2005.

**RECENT DEALS:** Tsaos searching out investments for their private portfolio, run under Miven name (a blend of sons' names:



Famed broadband router

Michael and Steven). Manages multiple family entities that invest in a wide array of assets, including private equity, venture capital funds, hedge funds, real estate, public securities, and fixed-income instruments. The family office is in Newport Center Drive and keeps a low profile.

**PHILANTHROPY:** **Tsao Family Foundation** in Newport Beach supports religious, charitable, scientific, literary, cultural, and educational causes.



+9%

- NET WORTH: \$1.2 billion
- LAST YEAR: \$1.1 billion
- RESIDENCE: Newport Beach
- SOURCE OF WEALTH: Linksys sale, family office



**JAMES SLAVIK & FAMILY**

Chairman, Director  
Mark IV Capital

**THE MONEY:** Family controls a sizeable stake in **W.W. Grainger** (NYSE: GWW), a supply company from Lake Forest, Ill., valued at about \$24 billion. Beneficial ownership of company shares predates Grainger's IPO in 1967.

**THE MARK:** Newport Beach's Mark IV, founded in 1974, makes direct investments in commercial real estate, both in existing properties and new development. It also makes investments in private equities and venture capital. Slavik is also a founder and manager of **Emerald Bay Ventures LLC**, a private investment company.

**THE NUMBERS:** W.W. Grainger shares are up nearly 40% year-over-year, boosting the stake of family's varied interests in the company past \$1 billion. Slavik, who regulatory filings indicate held a 6.5% beneficial

## FAMILY FORTUNES



stake in the company as of 2019, stepped down from the company's board in 2020, after 30 years of service. Replaced on board by another family member who is reported to live in the St. Louis area, and whose beneficial stake in the company tops 8%, according to filings.

**CONTROL:** Slavik has been on prior editions of our Wealthiest list. He has previously contended that he's just one of many beneficiaries in the supply company, and that his own worth is too low for our listings.

**VENTURES:** Serves on the advisory board for the Cove Fund, a seed capital fund affiliated with **UCI Applied Innovation**; is a founding director for UCI Applied Innovation.

**PHILANTHROPY:** Has served as a director of the **Hoag Hospital Foundation**.



- NET WORTH: \$1.1 million
- SOURCE OF WEALTH: W.W. Grainger stock, real estate investments



SCP in June: shoppers return in droves



**SEGERSTROM FAMILY**  
C.J. Segerstrom & Sons  
HTS Management

**THE MONEY:** Different branches of the Segerstrom family operate C.J. Segerstrom & Sons and HTS Management, real estate development and management firms that run some of Costa Mesa's most valuable commercial properties, including famed **South Coast Plaza**.

**THE FAMILY:** Stakeholders in the family's varied business interests, propelled by the late **Henry Segerstrom**, include his widow,

**Elizabeth**, who along with **Sandra "Sandy" Segerstrom Daniels**, daughter of Henry's cousin **Harold** and his wife, **Jeanette**, serves as managing partner. **Anton**, one of Henry's three children from his first wife, **Yvonne de Chavigny Perry**, is also a partner in the family business.

**REVAMPS:** The Segerstroms, who started out as lima bean farmers, developed South Coast Plaza, a 2.8-million-square-foot shopping center that typically posts nearly \$2 billion in taxable sales each year. While traffic was down during the pandemic, the center used the time to expand the stores for several of its key luxe retailers, including

Louis Vuitton, Tiffany & Co. New food hall, dubbed **Collage**, coming to **Bloomingdale's** wing of center. No word yet on plans for former **Sears** spot at center.

**OTHER INVESTMENTS:** In addition to South Coast Plaza, the family-run business owns and operates four office properties on the opposite side of Bristol Street under the **Office of South Coast Plaza** banner. The Plaza, Center and Park towers are three of the city's tallest and highest-end office buildings. They total more than 1.3 million square feet and house large law firms, accountant, and other professional services firms. Each building has a different owner-

ship structure and investors, according to sources. The family also owns hundreds of acres near the San Diego (405) Freeway in Costa Mesa and Santa Ana, some of which remains developable and could likely sell for at least \$3 million an acre, if the family ever opted to sell.

**+20%**

- **NET WORTH:** \$2.4 billion
- **LAST YEAR:** \$2 billion
- **SOURCE OF WEALTH:** real estate

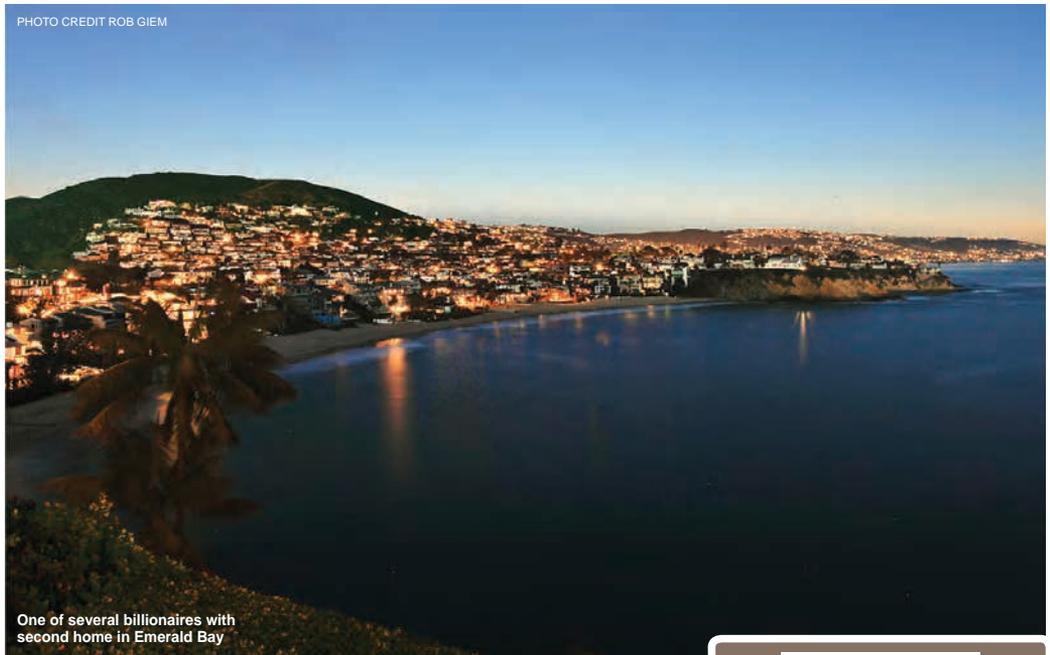
**OC's WEALTHIEST**

**LAGUNA BEACH'S REACH**



**FRANK FERTITTA III**  
CEO  
Red Rock Resorts Inc.

**THE MONEY:** With brother **Lorenzo**, bought mixed martial arts promoter **UFC** for \$2 million in 2001; cashed out in 2017 when UFC had a \$5 billion valuation; each brother reported to have 40.5% stake in business. Took family's casino business, Red Rock Resorts, public in 2016; the brothers own Las Vegas' **Station Casinos** now valued at about \$1.3 billion. Cousin **Tilman Fertitta** owns the **Houston Rockets** and restaurant firm **Landry's**, whose portfolio includes several OC properties.



One of several billionaires with second home in Emerald Bay

**WINNING HAND:** Value of Red Rock Resorts up nearly 250% year-over-year, to valuation of \$4.6 billion. Family has a significant stake in company and controls all voting matters.

**WEEKEND WEALTHY:** Bought a beachfront home in Emerald Bay community

of Laguna Beach in 2009 for reported \$28 million.

**NOTABLE INVESTMENTS:** Frank and Lorenzo are reported to own superyachts valued in excess of \$125 million, along with "planes and major pieces of contemporary art," notes a 2019 report from CNBC.

**red rock**

**WEEKEND WEALTHY**  
**+41%**

- **NET WORTH:** \$2.4 billion (Forbes)
- **LAST YEAR:** \$1.7 billion
- **SOURCE OF WEALTH:** UFC, casinos

# OC's WEALTHIEST

## LAGUNA BEACH'S REACH



**PATRICK SOON-SHIONG**  
CEO  
NantWorks LLC

**THE MONEY:** Invented cancer drug, Abraxane, which is used to treat pancreatic cancer. Initial fortune from sale of drug-maker **Abraxis Bioscience** for \$3.8 billion in 2010 and the \$4.6 billion sale in 2008 of his generic drug business **APP Pharmaceuticals**. Remains involved in other publicly traded biotech companies where has

large stakes, including **ImmunityBio Inc.** and **NantHealth**, among numerous other holdings. Sister publication **Los Angeles Business Journal** often lists Soon-Shiong as L.A.'s wealthiest resident with fortune in the \$20 billion range. **Forbes** (\$6.7B) and **Bloomberg** (\$11B) estimates greatly vary and are typically well below that of the LABJ. We've chose a midpoint figure, \$2 billion higher than a year ago, for our estimate. Primary residence is in Brentwood.

**WEEKEND WEALTHY:** Reported to have spent more than \$70 million on Laguna Beach homes over the past six years. Best-known and most-expensive property is city's Twin Points residence on a bluff between Crescent Bay and Shaw's Cove. Paid a reported \$45 million in 2016 for distinctive property, a record price for the area. Also snapped up other nearby homes for top dollar. Sellers have included fellow multimillionaire **Ernest Garcia II**, according to reports. How much time he spends in area is unclear; public sightings in OC are rare.

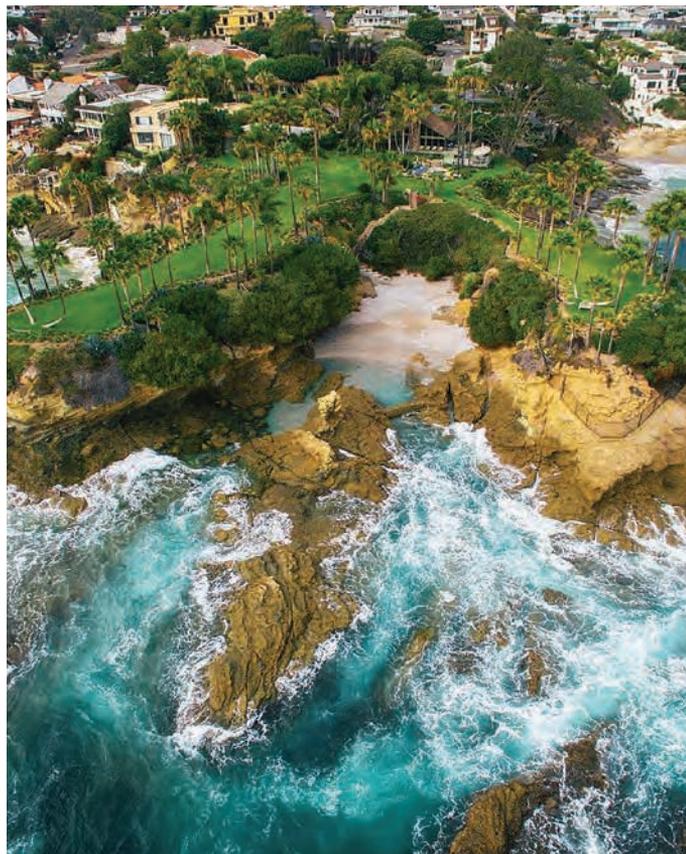
**HEALTHCARE TIES:** ImmunityBio's main COVID vaccine candidate – designed to be delivered orally – undertook clinical trials at **Hoag Memorial Hospital Presbyterian**.

**NOTABLE INVESTMENTS:** Owns the **Los Angeles Times** and **San Diego Tribune**, paid \$500 million for both. Has a minority stake in the **Los Angeles Lakers**.



### WEEKEND WEALTHY +25%

- NET WORTH: \$10 billion
- LAST YEAR: \$8 billion
- SOURCE OF WEALTH: drugmakers, media, sports



**SUE GROSS**  
Founder  
Sue J. Gross Foundation

+6%

- NET WORTH: \$1.8 billion
- LAST YEAR: \$1.7 billion
- RESIDENCE: Laguna Beach, Beverly Hills
- SOURCE OF WEALTH: divorce

PHOTO CREDIT: HOAG

**THE MONEY:** Won half of Bond King **Bill Gross'** estimated \$3 billion wealth in 2017 divorce.

**LOCAL HOLDINGS:** Multiple homes in Laguna Beach's exclusive **Abalone Point** enclave, and is reported to also have a residence in Beverly Hills.

**PHILANTHROPY:** A frequent backer of **Hoag Memorial Hospital Presbyterian**. In October 2020, gave \$5 million to Hoag with money

going toward expanding services available at the Hoag Breast Center in Newport Beach. Center to be renamed the **Sue J. Gross Comprehensive Breast Center**. "Many women I have known have bravely faced breast cancer, including my mother and two sisters," Gross said at the time. "I'm proud to be able to make this gift in all of their honors."

**ART COLLECTION:** After divorce, made \$35 million by selling a Picasso painting, "Le Repos."



Has name at Women's Pavilion at Hoag

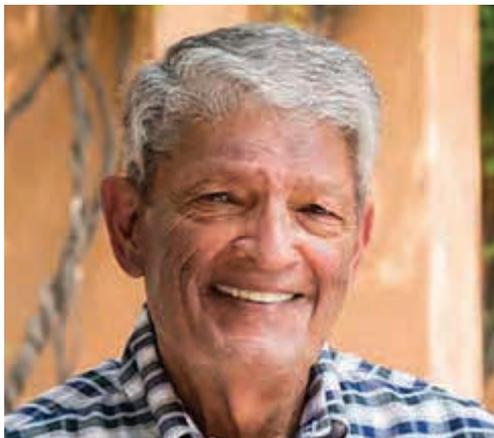
# *In Memoriam*



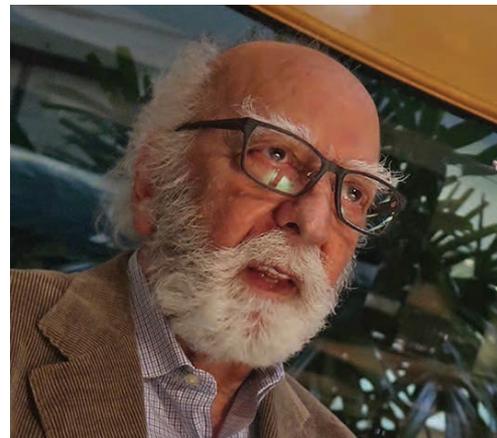
**Bill Lee**  
Lee & Associates



**Harry Rinker**  
Rinker Co.



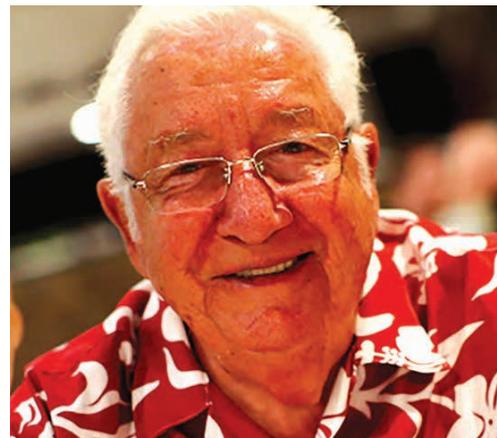
**Jim Cora**  
Disney International



**John Ghoukassian**  
Bayside and Bistango



**Paul Musco**  
Gemini Industries



**Paul Van Doren**  
Vans



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FOR BEING NAMED TO THE OC 500 FOR THE FIFTH YEAR IN A ROW!

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