



Julie Beckley - Senior Vice President – Business Development, Wells Fargo Commercial Banking

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



Erika Coniglio - Business Development Director, RSM US LLP

Erika Coniglio invests time in getting to know people and companies to determine the best path for collaboration. With over 25 years in consulting and professional services, including 16 years at RSM, she has steered notable achievements, such as guiding an Orange County firm to the #1 rank on Inc. magazine's fastest-growing list in 2000. An expert in C-level relationship management across telecommunications, IT and finance, Coniglio spearheads the growth of RSM's Southern California practice. She engages new clients, supports existing ones in the Irvine office, and focuses on audit and assurance, tax, business advisory (including transaction support) and enterprise risk management. Coniglio's commitment extends throughout Orange County and the Inland Empire, where she provides solutions for sectors like healthcare, technology, manufacturing and business services. Known for her strategic vision, Coniglio fosters trust and respect in every relationship, laying the groundwork for lasting partnerships.



Eugene De La Cruz - Middle Market Manager, Umpqua Bank

Eugene De La Cruz is a distinguished banking executive with over 20 years of experience in Southern California's financial services industry. As senior vice president, middle market banking market manager at Umpqua Bank in Irvine, De La Cruz leads a Commercial Banking team dedicated to providing holistic working capital support, offering strategic advisory services to help companies optimize their financial operations and achieve sustainable growth. His leadership and strategic vision make him a trusted partner for business leaders seeking to navigate the complexities of today's financial landscape.



Devin Dickson - Managing Director, BMO

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



Brian Fischbein - Business Development Director, Synoptek

As business management director for Synoptek, Fischbein is responsible for cultivating and expanding strategic relationships to drive growth. With extensive experience across technology and financial sectors, he brings a unique perspective on executive career paths and business success. Fischbein has successfully launched and scaled two businesses focused on executive career placement, roundtable discussions, and high-value relationship building. His commitment to integrity and transparency has earned him the trust of executives nationwide, particularly in Southern California, where he serves as a trusted advisor. Outside of work, Fischbein is a devoted father to three children and an active supporter of youth sports, particularly at Mater Dei High School. He is also a passionate advocate for theater and dance, supporting his daughters' artistic pursuits. A dedicated member of YPO, Fischbein has served on the boards of several prominent local charities, reinforcing his commitment to community impact.



James Gibson - Senior Vice President, Commercial Banking, KeyBank

James Gibson joins KeyBank as a senior relationship manager responsible for expanding the bank's relationships with financial services partners and middle market companies primarily in the Orange, Inland Empire and San Diego counties in Southern California. Based in Newport Beach, he has more than 20 years of experience working in financial services in the region.



Stacy Hubbard - Principal | Managing Director, OC, Marsh & McLennan Agency

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



Justin Jessee - Chief Executive Officer, Impactful Resources

Justin Jessee is the founder & CEO at Impactful Resources, an Orange County based human capital boutique focused exclusively on supporting the Office of the CFO. Jessee is a reformed CFO turned human capital executive with 20+ years of experience in finance, accounting, IT, and professional services. Jessee has worked, consulted, and managed engagements from start-ups to Fortune 100 companies on a broad range of strategic, operational, and financial projects. He is the OC leading authority in helping CFOs be more Impactful.



Steve Krenik - SVP / Relationship Manager, U.S. Bank

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



Gloria Lee - Client Relations Partner, Rutan & Tucker LLP

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



Thomas Lowrey - Senior Relationship Manager, PNC Bank

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



Tim Meade - Director, PwC

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



Paul O'Mara - Senior Vice President, U.S. Bank

Paul O'Mara is a senior vice president at U.S. Bank managing a portfolio of middle market relationships in the Orange County Commercial Bank. He provides the bank's wide array of products and services to middle market clients in the Southern California Region. Prior to assuming his current role, O'Mara was managing director at Union Bank managing the Orange County Middle Market team. From July 2009 to October 2019, O'Mara was regional vice president at Wells Fargo Bank. O'Mara held a number of other positions at Wells Fargo over 20 years including divisional sales manager where he managed a team of business development officers covering the Midwest portion of the country. O'Mara spent 16 years at Continental Bank/Bank of America as a market executive for the middle market lending division in Chicago. O'Mara earned his Bachelor of Science degree in Finance from Eastern Illinois University, Charleston, IL. O'Mara is a member of the University of California-Irvine Chief Executive Roundtable. For the past five years, O'Mara has been a board member of the J.F. Shea Therapeutic Riding Center. Paul is a Board member of the Forum for Corporate Directors (FCD).



Melissa Pollard - Senior Vice President, Fifth Third Bank

Melissa Pollard is a senior vice president and senior relationship manager for Fifth Third Bank's commercial banking practice in Orange County where she brings 37 years of experience to her clients. She has been with Fifth Third for seven years where she is responsible for new business development and ongoing client management. She previously worked for Comerica Bank for 20 years and Bank of America for 10 years. She earned her BS and BA degrees from the University of Richmond in Virginia. An east coast native, Pollard has been married for 34 years with two grown children, and they have lived in Aliso Viejo for the past 27 years. She enjoys spending time with her family, traveling and other outdoor activities. Pollard is a longstanding director on the board of Association for Corporate Growth Orange County and their exclusive Women in Leadership banking sponsor since inception. She also serves on the Associates Board of Second Harvest Food Bank of Orange County and the Boys and Girls Clubs of Central Orange Coast's Women of Greatness Committee. In addition, she is an active member of Orange County United Way's Women United, Financial Executives International, Center for Business Growth, Executive Connections, and ProVisors.



Matt Primeau - Partner and Founder, Conexus

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



Richard Reisman - Publisher & Chief Executive Officer, Orange County Business Journal

Richard Reisman is publisher of the Orange County Business Journal. Reisman joined the Business Journal in 1990. Since then, the publication's acceptance by the business community has been dramatic. Paid circulation and advertising volume has grown significantly, making it possibly the top Business Journal in the country. Prior to the business journal, Reisman was director of marketing for the Orange County edition of The Los Angeles Times. Earlier in his career, Reisman practiced law in San Francisco and Washington, D.C. While in private practice in Washington, Reisman served as special counsel to the House Ethics Committee. Reisman holds an MBA from UCLA, where he was awarded the R.C. Baker Foundation Fellowship, and a law degree from George Washington University, where he graduated with honors. Reisman is listed in "Who's Who in America" and has served on numerous boards.



Barnaby Wang - Managing Director, Executive Search, Century Group

Barnaby Wang is a managing director and 9th year president's club recruiter for the Orange County Executive Search practice at Century Group. He holds 21 years of experience in specialized finance & accounting staffing focused on executive search, permanent placement services, and temporary staffing. Prior to joining Century Group, Wang had worked at two international publicly-traded staffing firms in three major metro markets: Orange County, Los Angeles, and San Francisco. Wang has been a board member of the Orange County Chapter of the Institute of Internal Auditors (IIA) since 2011 and is currently a governor. He graduated from UCLA with a Bachelors of Art Degree in Psychology and has served as president of the UCLA Alumni Network in Orange County.



Lisa Westhafer - Senior Vice President, Fifth Third Bank

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