

AWARDS CEREMONY AT IRVINE MARRIOTT JUNE 12, 2025



FAMILY OWNED BUSINESS AWARDS

2024's Winners Continue to Grow

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2025 Nominees

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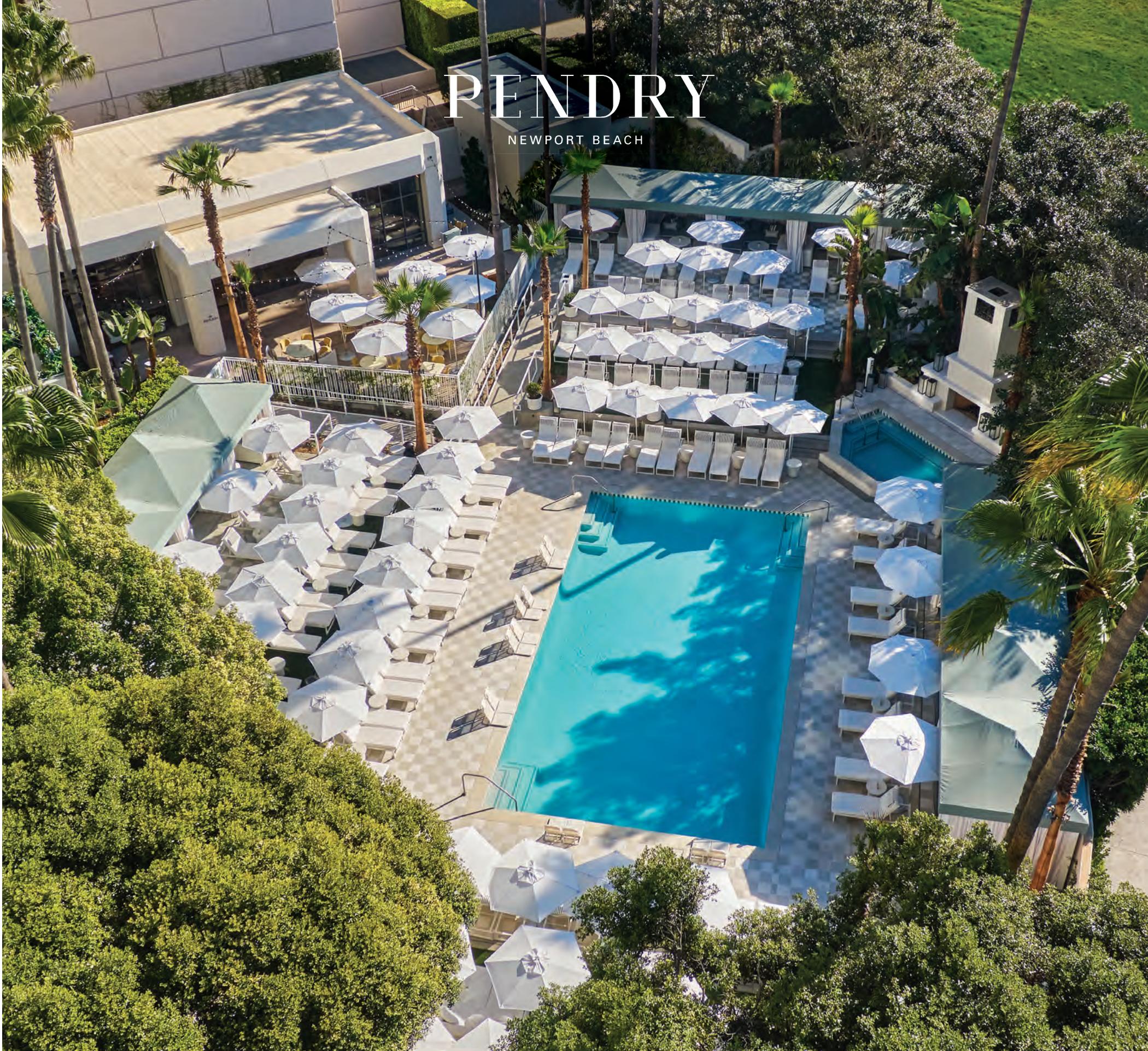


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Haunani Nakabara,
Director of Tax Operations, Intuitive,
and Women United co-chair





Customers Bank: Leading the Way in Customer Satisfaction

Only a year after entering the Southern California market, Customers Bank is making waves in the financial services industry. With assets exceeding \$22 billion, this subsidiary of Customers Bancorp (NYSE: CUBI) has recently released its first annual Net Promoter Score (NPS), placing it at the top of the industry with an impressive score of 73. This score is evidence of the bank's unwavering commitment to delivering exceptional customer service through a high-touch, single-point-of-contact business model.

"Exceptional customer service is not just a priority for us, it's the cornerstone of our culture and the key to our success. This focus is so central to who we are, it's embedded in our name," says Sam Sidhu, President and CEO of Customers Bank. "I'm immensely proud of our score, which places us at the top of the financial services industry. Our ranking is also above the scores of many service-oriented consumer brands like Ritz-Carlton, Airbnb and Starbucks. These results are a testament to our team and their commitment to wow each stakeholder."



NPS is a widely recognized measure of customer loyalty and satisfaction, used by businesses worldwide. It measures how likely customers are to recommend a company, product or service to a friend or colleague, with scores ranging from -100 to 100. A high NPS score signifies customer satisfaction with a company's services, with promoters more inclined to refer new customers, incur lower service costs and stay with the company for longer periods.

At Customers Bank, customers are at the forefront of everything they do. Every decision they make is guided by the understanding that their customers are the foundation of their success. According to Sidhu, "It is their trust and partnership that enable us to grow

and thrive. When our customers succeed, we succeed."

One shining example of Customers Bank's commitment to exceptional service is Custom Packaging Supply, a custom packaging and logistics company based in Camarillo, CA. When Custom Packaging Supply needed a new headquarters and distribution facility to match their high-quality products and exceptional customer service, Customers Bank was there to support their vision with financing that



matched their momentum. According to Bill Gannon, President of Custom Packaging Supply, "The team at Customers Bank were incredibly responsive and presented a compelling proposal in record time allowing us to move forward seamlessly with our expansion plans. We now recommend Customers Bank to everyone we do business with."

Customers Bank's success is not limited to its NPS score. The bank has received numerous accolades, including being ranked No. 1 on American Banker's 2024 list of top-performing banks with \$10 billion to \$50 billion in assets and No. 72 out of the 100 largest publicly traded banks in the 2024 Forbes Best Banks list. The Bank was also featured in Inc.'s Best in Business 2024 list in the Financial Services category.

As the bank moves forward, they remain laser-focused on the areas that differentiate them: delivering truly exceptional service, providing sophisticated product offerings and maintaining a single-point-of-contact model to ensure a seamless customer experience.

With a commitment to delivering exceptional customer service and a proven track record of success, Customers Bank continues to set the standard in the financial services industry.

To experience banking built for entrepreneurs, by entrepreneurs, visit customersbank.com or contact one of our bankers below.

Multimedia

- NPS Infographic
- Custom Packing Supply Picture

Judi Prejean, Executive Vice President and Executive Director, is a respected banking leader with more than 40 years of experience helping businesses grow and thrive. She currently leads Customers Bank's West Coast teams across California and Nevada, following leadership roles at Bank of the West and Signature Bank. Known for her strategic guidance, deep client relationships, and hands-on approach, Judi has helped companies navigate major milestones, expansions, and acquisitions with confidence—growing from startup to national success. A trailblazer and mentor, she is recognized for advancing women in banking, developing high-performing teams, and giving back through community and nonprofit leadership. Judi is honored as one of the Los Angeles Business Journal's 2025 Top 100 Bankers. Judi can be reached at jprejean@customersbank.com.



Danielle Suakjian, Senior Vice President and Group Director, is a seasoned banking professional with more than 25 years of experience delivering strategic financial solutions to mid-sized and large businesses. Danielle leads, directs, and coordinates key partners in designing integrated credit and liquidity strategies for clients with \$25 million to \$1 billion in annual revenue. Known for her client-centric approach, she serves as a trusted advisor and advocate, ensuring tailored solutions that support business growth and financial stability. Prior to joining Customers Bank, Danielle held senior leadership roles at Signature Bank, City National Bank, and Bank of America, where she consistently managed complex client portfolios and drove results through collaborative execution. Based in Newport Beach, she is deeply committed to helping clients succeed through thoughtful financial guidance and long-term partnerships. Danielle can be reached at dsuakjian@customersbank.com and (714) 931-3185.





Estate Planning Insights from a Forbes Top 200 CPA

By Manuel Ramirez & Daniel Garrett

Estate planning is often considered the exclusive domain of attorneys, but a certified public accountant's involvement is equally crucial, particularly for business owners, high-net-worth individuals and families with complex financial portfolios. While attorneys draft the legal documents, a CPA ensures the estate plan is grounded in financial reality, helping clients make informed, tax-smart decisions that preserve wealth across generations.

A key contribution to the estate planning process by CPAs is an analysis of a client's complete financial picture. This analysis goes far beyond income and tax returns. CPAs assess assets and liabilities across all ownership types: personal, joint, trust-held and business-related. They inventory retirement accounts, investment portfolios, real estate, insurance policies and ownership in closely held companies. Understanding how these assets are titled and their tax characteristics is critical for determining how and when they should be transferred.

This analysis helps forecast estate tax exposure and guides lifetime gifting strategies. For example, a CPA can model how different gifting approaches, such as using the annual exclusion, leveraging valuation discounts or setting up irrevocable trusts, impacts both current and future tax liabilities. They also monitor the use of the lifetime exemption, which is especially important ahead of the potential 2026 sunset of the higher federal estate tax threshold.

For business owners and clients with illiquid assets, CPAs project future liquidity needs to ensure there is enough cash available to pay estate taxes and expenses without forcing a rushed sale of key assets. This insight can inform decisions around life insurance, entity restructuring or the timing of a business sale.

By translating financial complexity into actionable insights, CPAs support attorneys and advisors in building plans that work in practice, not just on paper. They also flag inconsistencies, like beneficiary designations that contradict the client's will or trust.

Ultimately, a CPA's involvement in estate planning ensures your strategy is not only legally sound but also tax-efficient, well-funded and aligned with your long-term financial goals. Their big-picture perspective is essential to building a legacy that lasts.

Contact us today to learn how we can help you navigate what's next.



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About RJI CPAs

Founded in 1980, RJI CPAs provides comprehensive accounting, tax, and advisory services and has earned national recognition on Forbes' list of America's Best Tax and Accounting Firms. Chairman and International Tax Partner Manuel Ramirez has also been named one of Forbes' Top 200 CPAs and included in the Forbes Best-in-State CPAs list. As a PCAOB-registered firm and member of DFK International—a global alliance of independent accounting firms—RJI upholds the highest standards of quality and integrity. Learn more at www.rjicpas.com.

Built on Purpose

No Accidents. Just Strategy.

By Gus, Chief Vibe Officer at a now-thriving boutique hotel in Palm Springs

Edited by: Samantha McDermott

My mom says **branding isn't a logo or a vibe—it's how a business shows up, earns trust, and grows on purpose.** I've watched her help Fortune 500s and fast-growing companies figure that out for years. But this time, she did it for us.

I'm Gus—a chihuahua-terrier mix and the mascot of what was once a neglected roadside motel. Today, it's a **mid-market boutique hotel** with a **loyal following, national press mentions,** and a clear identity. I've watched it all from the lobby couch—where **strategy meetings, guest hugs, and repeat bookings** are simply how we operate now.

But it didn't start that way.

When **my humans bought the place,** it was rundown and barely staying afloat. **My mom invested her 401K (with my dad)** and dove in. She'd never run a hotel—but had shaped brands across **tech, healthcare, and professional services.**

She reimagined the story, rebuilt the presence, and redesigned the experience. My dad handled the physical transformation. Together, they **turned a forgotten space into a living case study.**

What I've learned from the sidelines:

- Your story is your strategy.
- Change takes guts—but clarity helps.
- Belonging beats buzz.
- Purpose builds loyalty.
- Marketing is trust, not hype.
- Agility wins.

Need a partner to help your brand grow, evolve, or find its voice again?
Reach out—Sam's the real deal.

Samantha McDermott, Strategic Communications Consultant
SMcDermott@SaJoAdvisors.com | [linkedin.com/in/smcdermott](https://www.linkedin.com/in/smcdermott)
Gus, Chief Vibe Officer. Still judging you... from the couch.



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WHEN LOVE AND LEDGER COLLIDE: PROTECTING FAMILY-OWNED BUSINESSES IN DIVORCE

By Paul Nelson, Esq

For many entrepreneurs, their business is more than a balance sheet—it's legacy, livelihood, and often, a family affair. But when marriage falters, that same business can become a battleground. Divorce and family-owned enterprises are a combustible mix, especially in California's community property landscape. If you or your spouse owns or operates a business, ignoring its legal posture in the marriage is a mistake that can cost millions.

One of the most overlooked aspects of high-asset divorce is the commingling of personal and business interests. Spouses may work in the business, contribute capital, or even defer compensation which can open the door to claims of community property rights, even if the business was founded before marriage. And while valuation experts will eventually be called in, their job is far easier (and less expensive) when the legal foundation is solid from the start.

Without a preemptive strategy, you risk loss of control, or exposure to a valuation far above market reality—especially if goodwill is contested. You may also face scrutiny over

income available for support when corporate and personal finances are closely entwined.

What's the solution? It's not waiting until the petition is filed. Business owners should consult a family law attorney *before* marriage, *during* the life of the business, and *certainly* before marital strain becomes legal warfare.

Tools like prenuptial and postnuptial agreements can clearly define separate vs. community interests. Shareholder agreements can restrict involuntary transfers of shares. Compensation structures can be adjusted to avoid phantom income claims. Even trust planning and corporate restructuring may be on the table.

Too often, entrepreneurs focus on building the business and forget to insulate it. But as any seasoned litigator will tell you, the courtroom is not the place to start estate or asset protection planning.

Divorce doesn't have to destroy the business you've worked so hard to build. With foresight, legal precision, and the right counsel, it can be shielded from the fallout.

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When the stakes are highest



WAIT, ARE WE STILL MARRIED?

WHY THE DATE OF SEPARATION MATTERS MORE THAN YOU THINK

By **Paul Nelson, Esq**
Family Law Attorney
Newport Beach, California



One of the most common—and surprisingly loaded—questions I ask in a first meeting is: *“When did you separate?”* You’d think it’s a simple answer. It’s not. I’ve heard everything from “When she changed the Netflix password” to “When he forgot our anniversary... again... in 2019.”

In California, the **date of separation** isn’t just about when you stopped liking each other. It’s a legal milestone with massive consequences. Under **Family Code §70**, separation happens when one spouse decides the marriage is over *and* their actions make it clear—no more joint dinners, no more shared finances, and definitely no more “let’s just see how things go.”

Here’s the twist: you can be **legally separated while still living together**. Yes, even if you’re both in the same house, watching the same *Friends* reruns, you might be “done.” But if you’re still splitting Costco runs and Venmo-ing each other for takeout, don’t expect the judge to buy it.

So why does this date matter? Because everything acquired between the date of marriage and the date of separation is **community property**—meaning it’s potentially split 50/50.

That big work bonus? The crypto account you opened “just to see what happens”? Your soon-to-be-ex may have a piece of it... *unless* it came after the legal separation.

The biggest myth I hear: *“We didn’t file anything, so we weren’t separated.”* Wrong. It’s not about paperwork—it’s about intent and conduct. Did you tell them it’s over? Did you move to separate bedrooms? Separate bank accounts? Even one person’s clear decision to end the marriage can set the date.

The second biggest myth: *“Can I just pick a date that’s better for me?”* You can try. But if your spouse disagrees, buckle up—because now it’s a fact-heavy dispute and judges don’t have time for your vague feelings. They want **receipts**—literally.

If you’re even thinking about ending your marriage, start tracking this stuff. The date of separation is like the last episode you watched together on Netflix—once one of you starts a new season alone, you’re on different storylines. And legally? That’s when the plot splits, too.

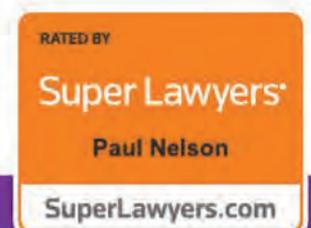
Bottom line? Understand the legal impact early—because in divorce, timing really is everything.

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Protect What You've Built. Plan for What's Next. Strategic Legal Counsel for Family-Owned Businesses

Every family-owned business has a story—built on hard work, shared values, and a vision for the future. At Adams Corporate Law, we're proud to serve as legal partners to the family enterprises shaping California's economy and honored to celebrate the achievements of those recognized at this year's Orange County Business Journal Family-Owned Business Awards event.

Navigating growth and longevity brings unique challenges. Decisions around leadership, ownership, and long-term strategy require not only sound business judgment, but also thoughtful legal planning. Whether you're preparing for a leadership transition, exploring a business sale or expansion, or entering a new partnership, having experienced legal counsel can make all the difference.

Adams Corporate Law is a boutique corporate law firm headquartered in Orange County, California. We work closely with founders, partners, and next-generation leaders to help them make pivotal moves with clarity and confidence. From corporate governance and restructuring to succession planning, mergers, acquisitions, buyouts, and changes in ownership structure, our legal strategies are tailored to align with your goals and values. We bring structure to complex decisions, mitigate risk, and help preserve both relationships and enterprise value. Our team also provides ongoing support in contract negotiation, risk management, and regulatory compliance—ensuring your business remains well-positioned as it grows.

We understand that family dynamics often shape business decisions—and that long-term success depends on more than just technical accuracy. Our role is to offer clear, practical guidance that protects what you've built and supports the future you envision.

To this year's honorees, congratulations! Your commitment to leadership, resilience, and legacy is inspiring. At Adams Corporate Law, we're here to help ensure your next chapter is built on a strong foundation.



Addison Adams, Esq.

To learn more, visit our website at www.adamscorporatelaw.com or call (714) 619-9360 to connect with our team.

Adams Corporate Law is a leading law firm specializing in a full range of corporate legal services for businesses, investors, and funds of all sizes—with a particular emphasis on mergers and acquisitions. We are "lawyers who close deals."

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Driven by Values, Defined by Family: Spotlight on Generational Success

We have always recognized that family-owned businesses are more than just enterprises – they are legacies built on trust, tradition, and enduring values. Passed down through generations, these businesses carry forward the vision and commitment of their founders, often becoming pillars in the communities they serve. Running a family-owned business is not for the faint of heart – it takes resilience, tenacity, and an unwavering commitment to something greater than profit: **LEGACY**.

CommerceWest Bank is proud to support the Family-Owned Business Awards, and honored to celebrate the achievements of the family-owned businesses that continue to uphold their heritage while embracing the future.

Generations of Leadership, Values, and Vision

Family businesses are uniquely positioned – preserving the values that shaped them while evolving to meet modern challenges. From succession planning to sustainable growth, they balance continuity with innovation.

At CommerceWest Bank, we understand these dynamics because we take the time to truly know our clients.

Every business we support is rooted in a story – and we are committed to helping that story continue for generations to come.

We work with family business leaders at every stage, helping them navigate pivotal decisions with tailored financial solutions and strategic insight.

A Human-Centered Approach, Always

In a world where many financial institutions rely on automation and algorithms, CommerceWest Bank takes a different approach. We're relationship-driven – a partner who sees the full picture behind the numbers. To us, every client is more than a name – they're part of our family and our legacy. We're committed to protecting what matters most: their purpose, their people, and their future.

We understand that success looks different for every business – and that's why our approach is never one-size-fits-all. Whether it's funding a new location, managing cash flow, or preparing the next generation to take the helm, we provide the insights and attention that family-owned companies deserve.

Our mission is to create a complete banking experience tailored to each client's specific needs, providing high-quality, low-stress, and personally tailored financial services. We are redefining banking for family-owned businesses in our community!

Celebrating Excellence in Family Business

The Family-Owned Business Awards spotlight the very best of business leadership – and this year's honorees remind us that true success is measured not only by growth, but by integrity, consistency, and community impact.

These businesses are testaments to the power of values-driven leadership. They've endured changing markets, rising competition, and generational transitions – all while maintaining a clear sense of who they are and what they stand for.

At CommerceWest Bank, we stand for excellence in everything we do, simply because our clients deserve it.

Our forward-thinking approach navigated our company to be ranked as one of



America's Best Regional Banks and Credit Unions in 2025 by Newsweek. We were recognized in the Annual List of the Top 100 Publicly Traded Community Banks, named to the OC500 Directory of Influence in 2024, recognized as one of the Strongest Banks in the Nation by Bauer Financial, and one of the 2024 Fastest-Growing Public Companies.

We are deeply committed to making a meaningful impact—not just in the lives of our clients, but throughout our community. Together, the Bank and our employees proudly raise tens of thousands of dollars annually for Southern California nonprofits. Our efforts are especially focused on organizations that hold a special place in our hearts: those dedicated to supporting children, individuals with disabilities, veterans, people facing hardships, and those bravely battling life-threatening illnesses.

More Than a Bank – A Trusted Advisor

At CommerceWest Bank, we don't just work for businesses – we work with people. Our role goes beyond providing financial services; we serve as a trusted advisor invested in our clients' long term success. It's this personal, thoughtful approach that sets us apart – and why so many family – owned companies choose to grow with us.

As a full-service business bank, we offer a wide range of commercial banking services, remote deposit solutions, online banking, mobile banking, lines of credit, working capital loans, commercial real estate loans, SBA loans, and treasury management services.

To the family-owned businesses shaping today and tomorrow – we celebrate you.

Conclusion

At CommerceWest Bank, we are honored to support the Family-Owned Business Award winners and nominees. Our human-centric approach to banking reflects our dedication to understanding and serving the unique needs of each client. By fostering genuine relationships and providing tailored solutions, we empower family-owned businesses to achieve excellence and drive positive change within our communities.

Congratulations to all the award winners and nominees. Your success is built on legacy, leadership, and love for what you do, and we are proud to be part of your journey.

Ivo A. Tjan, Chairman & CEO

Ivo A. Tjan is the Founder of CommerceWest Bank. He is currently the Chairman, President and CEO of CW Bancorp and CommerceWest Bank. Founded in 2001 and headquartered in Irvine, CA, the Bank caters to businesses throughout the state of California with our digital banking platform. The Bank offers a wide range of commercial banking services, including remote deposit solutions, online & mobile banking, M&A / working capital loans, commercial real estate loans, SBA loans and treasury management services.



Mr. Tjan previously held a wide range of management roles at Eldorado Bank, Home Savings of America and Great Western Bank. He was named to the Orange County Business Journal "OC50" List that recognizes individuals dedicated to contributing to the community, to the "OC500" List that honors Orange County's most influential business leaders, and by the Los Angeles Times as a Southern California Banking and Finance Visionary. Past accolades include being a recipient of the Robert Ross Founders Award from the MDA,

Vivid Magazine's Annual Top 10 Asian American Entrepreneurs, and OC Metro's Hottest 25 People of Orange County, California.

Mr. Tjan is committed to making a difference in the lives of his clients, in helping businesses achieve their goals, and in supporting his community. Through his innovative leadership, he has created a unique and highly acclaimed company with personally tailored services for small and middle-market businesses. CommerceWest Bank's achievements include ranking #5 in the Top 100 Publicly Traded Community Banks by American Banker, being recognized by Newsweek as one of America's Best Regional Banks & Credit Unions 2025 & 2024, and receiving a 5 Star Safety & Soundness Rating by Bauer Financial.

Mr. Tjan holds a Bachelor of Arts Degree in Business Administration from California State Fullerton University. He is an active member and/or board member of several corporate, social and charitable organizations including Working Wardrobes, Young Presidents' Organization (YPO), CEO Affiliation Group, Bank CEO Network and The Pacific Club. He is also a former Board Member for California State Fullerton University, New Majority, Marconi Foundation, The Children's Museum, CASA and the American Bankers Association Government Relations Committee.



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Protecting Families of Wealth from Themselves: Lessons from HBO's *Succession*

The wealth planning industry recently has been under scrutiny, often negatively and unfairly portrayed for its work with high-net-worth families across the globe. This perception, amplified by massive data leaks such as the “Pandora Papers” and the “Panama Papers,” has prompted certain media outlets to cast legal and highly sophisticated planning work done for families in an undeservedly nefarious light. Too often, prudent tax planning is mischaracterized as tax evasion, privacy labeled as secrecy, and asset protection as unethical—despite the fact that these strategies are designed and carefully executed under the laws of progressive and highly regulated U.S. trust jurisdictions.

Very much to the contrary, the work done in the wealth planning industry for families of extreme wealth is both virtuous and vital. When properly and legally implemented, planners safeguard legacies and ensure that wealth is preserved and protected across multiple generations—indeed protecting families of wealth from themselves—addressing the complexities of preserving wealth and family harmony amid extreme affluence and intergenerational dynamics.

HBO's hit series *Succession* offers a compelling lens into what can go wrong when these complexities and challenges go unaddressed and highlights the critical need for strategic trust planning, modern trust laws, and effective family governance among ultra-high-net-worth families.

The Roy Family: A Cautionary Tale

Reportedly inspired in part by the life of media mogul Rupert Murdoch, *Succession* provides a dramatized but cautionary illustration of the pitfalls families with substantial wealth often face—and why protecting the next generation from themselves is critical. The fictional Roy family, led by patriarch and first-generation wealth creator Logan Roy, built a global media empire worth billions. Yet their story is one of dysfunction, characterized by power and control struggles, wealth preservation and asset protection challenges, and personal crises, particularly among the second generation of siblings.

While the show's drama is exaggerated for entertainment, the challenges depicted are sadly all too real for ultra-high-net-worth families, with issues often rooted in:

- Lack of clear and proper trust or succession planning, creating intense rivalry and family conflict among second and subsequent generations.
- Inadequate preparation of the next generation for the responsibility of running a business and handling extreme wealth.
- Absence of clear governance and communication structures.

Safeguarding Wealth and Family Harmony: The Role of Modern Trust Law and Situs Selection

Modern trust laws, particularly in top-tier trust jurisdictions like South Dakota, offer powerful planning tools to address the very challenges that plagued the Roy family. These tools keep control with trusted family advisors and are designed to protect next and subsequent generations from themselves while fostering harmonious family relations and multi-generational wealth preservation. By placing a family-owned business and wealth into a well-settled trust, first-generation wealth creators can:

- Designate specific heirs to inherit wealth and business operations

over multiple generations.

- Reduce state and federal tax liabilities.
- Obtain privacy and confidentiality.
- Achieve asset protection.
- Maintain direction and control over trust assets.
- Educate and prepare next and future generations.

All of this can be achieved by leveraging the sophistication of South Dakota's progressive and cutting-edge trust laws, as they provide innovative and effective solutions for families through:

- **Dynasty Trusts:** The cornerstone of multigenerational wealth preservation, empowering families to avoid estate taxation and establish enduring legacies.

- **Privacy and Confidentiality:** How privacy laws like South Dakota's can shield family wealth from unnecessary disclosure, enabling discretion and reducing conflict.

- **Domestic Asset Protection Trusts:** Safeguarding family wealth from external threats, lawsuits, and intra-family disputes.

- **Directed Trusts:** A revolutionary model that unbundles asset management and trust administration functions, ensuring settlors and advisors maintain control over aspects of trust administration and wealth transfer.

- **Family Governance:** Critical to ensuring that wealth serves as a tool for empowerment rather than a source of division.

- **Private Trust Company:** A tailored approach for families managing complex assets to preserve wealth, plan for succession, and maintain control over their wealth.

Beyond Succession: Lessons Learned

While *Succession* is great entertainment, the lessons learned serve as a stark reminder of the perils facing families with extreme wealth. Too often, destructive human tendencies—greed, rivalry, jealousy—are exacerbated by poor planning and a lack of communication, destroying ultra-high-net-worth families and individual family members over generations.

However, next and subsequent generations can be well protected from themselves and avoid disruptive family dysfunction by simply selecting the proper trust jurisdiction, such as South Dakota, engaging powerful modern trust laws, and participating in effective family governance strategies.

If you are looking for further information on any of the tools and strategies discussed, we invite you to visit our website at www.bridgeford-trust.com and contact Bridgeford Trust Company's team at info@bridgefordtrust.com.

While all trust administration and corporate governance functions at Bridgeford Trust Company are performed and executed through our two offices in South Dakota, education, planning, and marketing activity is coordinated through Bridgeford Advisors, Inc. dba Bridgeford—a legally distinct sister company of Bridgeford Trust Company—with locations in California, Florida, Pennsylvania, and South Dakota. To connect with our team in California, please contact David Warren, President & CEO of Bridgeford, at dwarren@bridgefordadvisors.com or by calling (949) 798-6262.



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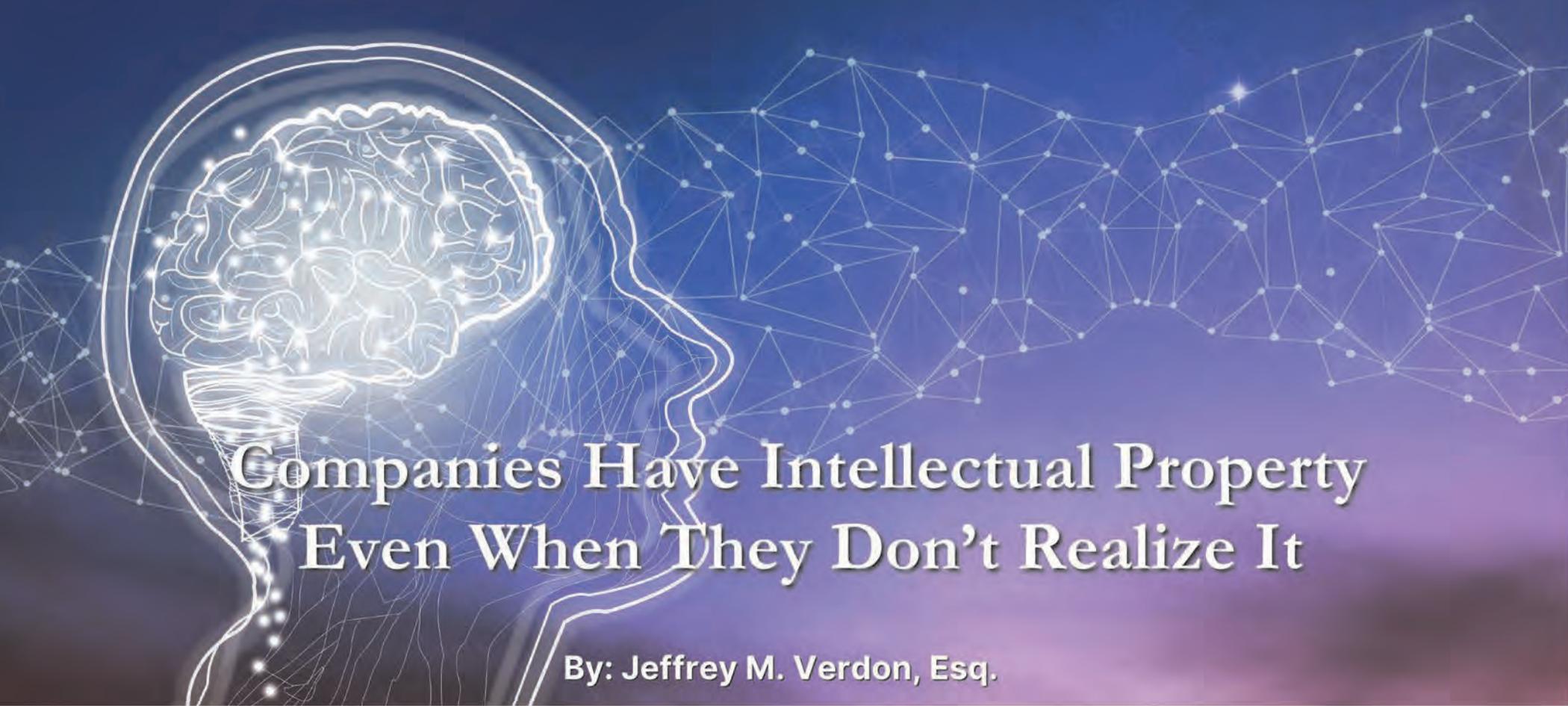
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Companies Have Intellectual Property Even When They Don't Realize It

By: Jeffrey M. Verdon, Esq.

Tim, after building his company, is preparing to sell it identifying the company's assets. Tim and his CFO identify valuable tangible assets such as equipment, rolling stock, cash, and accounts receivable. They chronicle the balance sheet for review by their business broker, lawyer, and CPA.

Almost immediately, Tim's lawyer asks him about his intellectual property (IP). Tim states he has none — no patents, trademarks, or copyrights.

The attorney replies that of course, the company has IP. He reminds Tim that he doesn't do the same thing as his competitors in the same way. This is IP. Tim wasn't aware of what it was, where it was, or how to protect it. The attorney cautions that Tim must get paid for it during the sale. Seeking maximum value for the business, Tim does not wish to leave funds on the table because he failed to understand his ownership of valuable IP. His lawyer warns him that if he does not identify it on a schedule of assets disastrous things can happen:

- Tim won't receive any value for the IP leaving money on the table.
- If a competitor tries to compete by stealing any technology, or if a key employee walks away or goes to work for someone else taking company knowledge, the seller (or the buyer) will have no chance to stop it because there was no representation that there was IP to protect.

But All Does Not Have To Be Lost

On the eve of selling a company, it can be too late to start a conversation about protecting IP, but better late than never. Companies have IP, but they might not know where or what it is. Even though a business owner may not know how to protect it, or exactly how valuable it is (consult with your IP attorney), it needs to be identified. Work with an IP attorney to secure it and make it exclusive to you for your benefit.

Where Is This IP Typically?

It's usually not in patents. Many companies, especially those in the B2B space without consumer-facing products or services, don't own trademarks. But almost every company has know-how. For example, do you have a unique sales or customer service technique that makes your customers loyal?

It's usually not in patents. Many companies, especially those in the B2B space without consumer-facing products or services, don't own trademarks. But almost every company has know-how. For example, do you have a unique sales or customer service technique that makes your customers loyal?

Do you have a business process that helps you deliver services faster, better, or cheaper? Do you have a way of creating a culture that keeps everyone pulling together to maximize creativity, revenue, and profitability?

Or how about this — you are a manufacturing company that has 50 machines to make widgets. An employee figured out how to turn the knobs and pull the levers to make it run just a little better.

That know-how is IP. But wait, there's more! Does your company have a process for identifying important innovations so that instead of having one of 50 machines run better, that know-how is communicated so all 50 machines run better?

It is most likely that you have IP after all. If you identify it you can protect it. Information you don't wish others to know about can be protected by strict adherence to a trade secret policy which can be combined with strong security protections to ensure they are under lock and key.

Key employees, contractors, and business partners should be bound by non-disclosure agreements to keep your information secret.

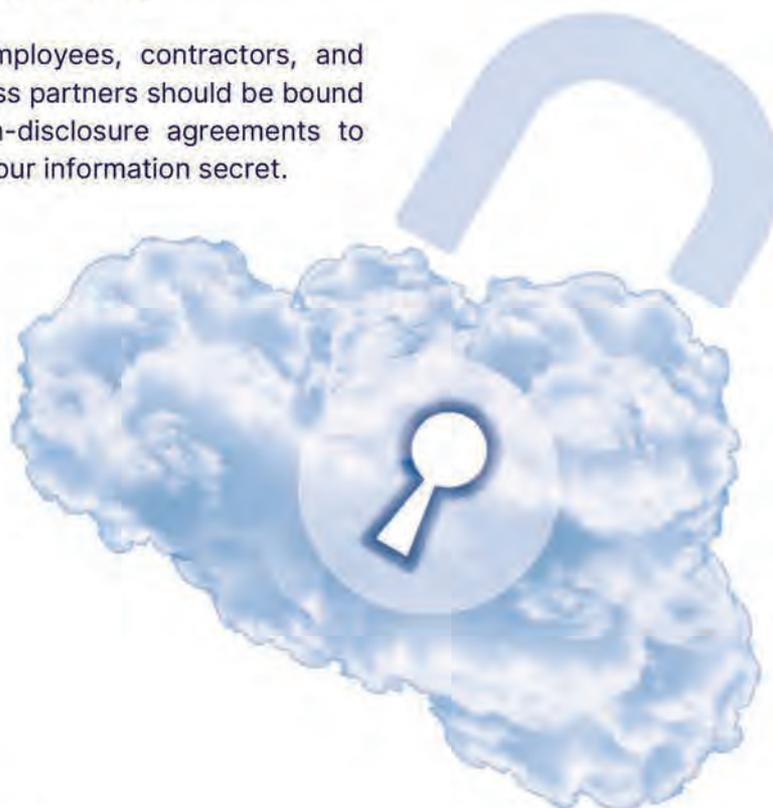
The top innovators and business managers should collaborate periodically, sharing valuable business improvements (like machine improvement) so the entire company can benefit.

If an innovation becomes public, such as a new product going to market where it can be copied, an IP lawyer can advise on the correct protections.

As it turns out, Tim does have IP he can identify. He just wishes he had gotten his IP lawyer involved sooner.

Contact Us

If you have any questions, feel free to reach out to our partner, Jeffrey M. Verdon, at **949-333-8152**.



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"I was born and raised in Japan, but I was reborn and reared in the U.S. at Cal State Fullerton."

- Ryutaro Ichihara

CSUF ALUMNUS TURNS PASSION FOR SOCCER INTO RESEARCH CAREER

Growing up in Japan, Ryutaro Ichihara's life revolved around soccer. His passion for sports led him to Cal State Fullerton's kinesiology program, where he collaborated with faculty experts to conduct research on the authenticity of sports in Western culture and how individuals with cerebral palsy experience physical activity.

The two-time CSUF alumnus presented his findings at multiple academic conferences, was named the university's 2024 Outstanding Graduate Student, and found his purpose in teaching sports philosophy.

Ryutaro and Ramadhan are just two examples of graduates who experienced Cal State Fullerton's commitment to advancing student success.

From admission to commencement, CSUF provides opportunities for Titans to pursue their passions, launch their careers and reach their fullest potential.

Learn more at fullerton.edu/opportunity



"Ever since I was in seventh grade, Cal State Fullerton has been an instrumental part of my life."

- Ramadhan Ahmed

BIOLOGY GRAD ACCEPTED TO 17 ELITE MEDICAL SCHOOLS

At Cal State Fullerton, Ramadhan Ahmed began working toward a career in health care, studying biological science and gaining hands-on experience through the innovative Bridges to Stem Cell Research program.

Ramadhan scored in the 97th percentile on the MCAT and was accepted to 17 top medical schools. He was offered 12 scholarships, including a full ride to Johns Hopkins University, where he now is a medical student.

Cal State Fullerton.



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INNOVATION HUB
at CAL STATE FULLERTON

FUELING TECH TO TRANSFORM OUR REGION

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To explore partnership opportunities, contact:

Mike Karg

mkarg@fullerton.edu

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Five Generations of Local Legacy

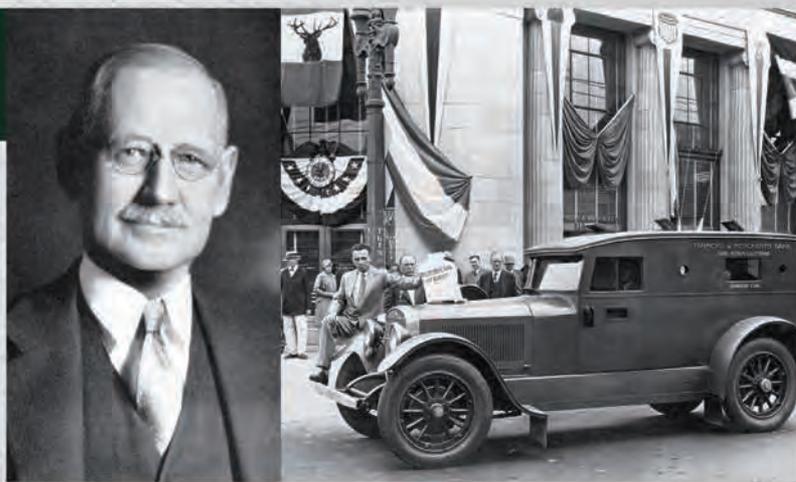
For nearly 118 years, Farmers & Merchants Bank has been managed by the Walker family, beginning with C.J. Walker, who solidified the family name by reassuring bank depositors that their money was safe at F&M Bank. His integrity has been the bedrock of the Walker family's commitment to safeguarding clients' money.

Today, Daniel K. Walker, fourth generation Executive Chairman of the Board, and his brother Henry Walker, CEO, oversee the bank through the lens of their great-grandfather C.J. They are joined at F&M by Christine Walker-Bowman and Nolan Nicholson, fifth generation Walker family, in carrying forward the Walker family legacy. "F&M has been a Walker family tradition, and seeing my children and grandchildren rise to the helm of these organizations, bringing with them a new level of business expertise is fulfilling on many levels for me. This is more than just a business for our family, it is part of our family culture and we take its success personally," said Ken Walker, third generation president.

What makes a family business different from other businesses?

1. Core Values

Family businesses tend to have a strong, cohesive company culture rooted in values, which enhance employee and customer trust and loyalty. F&M Bank was founded in 1907 on the values of Honesty, Integrity, the Home, the Church, and Service Above Self, values that endure today.



C.J. Walker,
F&M Bank Founder

C.J. Walker (center) at F&M Bank's
Main Office in Long Beach, Circa 1923

2. Stability

Family members are in it for the long-haul and the business is their legacy. F&M Bank's dedication to strong, sound, and conservative management and banking policies has enabled them to weather economic recessions, world wars, natural disasters, and interest rate volatility for nearly 118 years.



Three generations of leadership: Ken & Nancy Walker (3rd Gen),
Daniel Walker (4th Gen), and Gus Walker (2nd Gen)

3. Strength

Family businesses are known to show more commitment, with family members willing to make sacrifices for the sake of the business. The Walker Family worked around the clock alongside F&M employees, during the COVID-19 pandemic to help deliver PPP loans to small businesses, schools, and churches in need.

4. Service Above Self

Because family businesses tend to operate and invest in the communities where they live and work, they have strong local networks. F&M Bank facilitated more than \$4.2 million in support to hundreds of community organizations across SoCal in 2024.



Christine Walker-Bowman (5th Gen), accepting the Generational Legacy Award
from the Cal State University Fullerton Center for Family Business.

5. Local Decision Making

Family businesses tend to have fewer layers of management, enabling them to be more nimble when making decisions. F&M Bank's management team is local to Long Beach and Orange County. With locally-based decision makers in every branch, F&M Bank's size and hands-on approach makes them the perfect bank for businesses of all sizes.

Today, F&M Bank remains one of California's strongest banks — and just as it was more than a century ago, they still exhibit a strong foundation built on character and concern for their employees, clients, and community. F&M Bank is a Member FDIC.



Built on Service, Driven by Heart: Malco Maintenance and Miracles for Kids

Families are the heart of any community. At Miracles for Kids, our mission is to improve the lives of families with critically-ill children, helping them achieve and maintain financial and emotional stability during their time of crisis. We are proud to have the support of family-owned businesses that reflect Orange County's values of hard work, determination, and compassion. Among them, the Malone family and their business, Malco Maintenance, Inc., stand out as an inspiring example of how family-run businesses can uplift those most in need.

Founded in 1984, Malco Maintenance began as Buddy Malone's handyman business and has since grown into a premier provider of property maintenance, construction, and lighting and electrical services—now comprised of six companies and over 200 employees. Led by Buddy and Katie Malone as CEO and CFO, their success is rooted in a deep commitment to service and, as Buddy calls it, "bringing people joy." It's a legacy that extends far beyond business operations. The Malone family's journey with Miracles for Kids began at one of our Surf & Paddle Summer Camps, where they helped build sandcastles and played in the water with children supported by our programs. In the years since, Buddy, Katie, and their family have become some of our most steadfast supporters, continually devoting their time, talent, and resources to the families we serve.

Malco is a key sponsor of our signature events, most recently supporting the 2025 Miracles Golf Invitational and Miracles



BUDDY AND KATIE MALONE AT 2024 NIGHT OF MIRACLES GALA



SUCCESS ROOTED IN SERVICE



2025 MIRACLES GOLF INVITATIONAL SPONSOR - MALCO

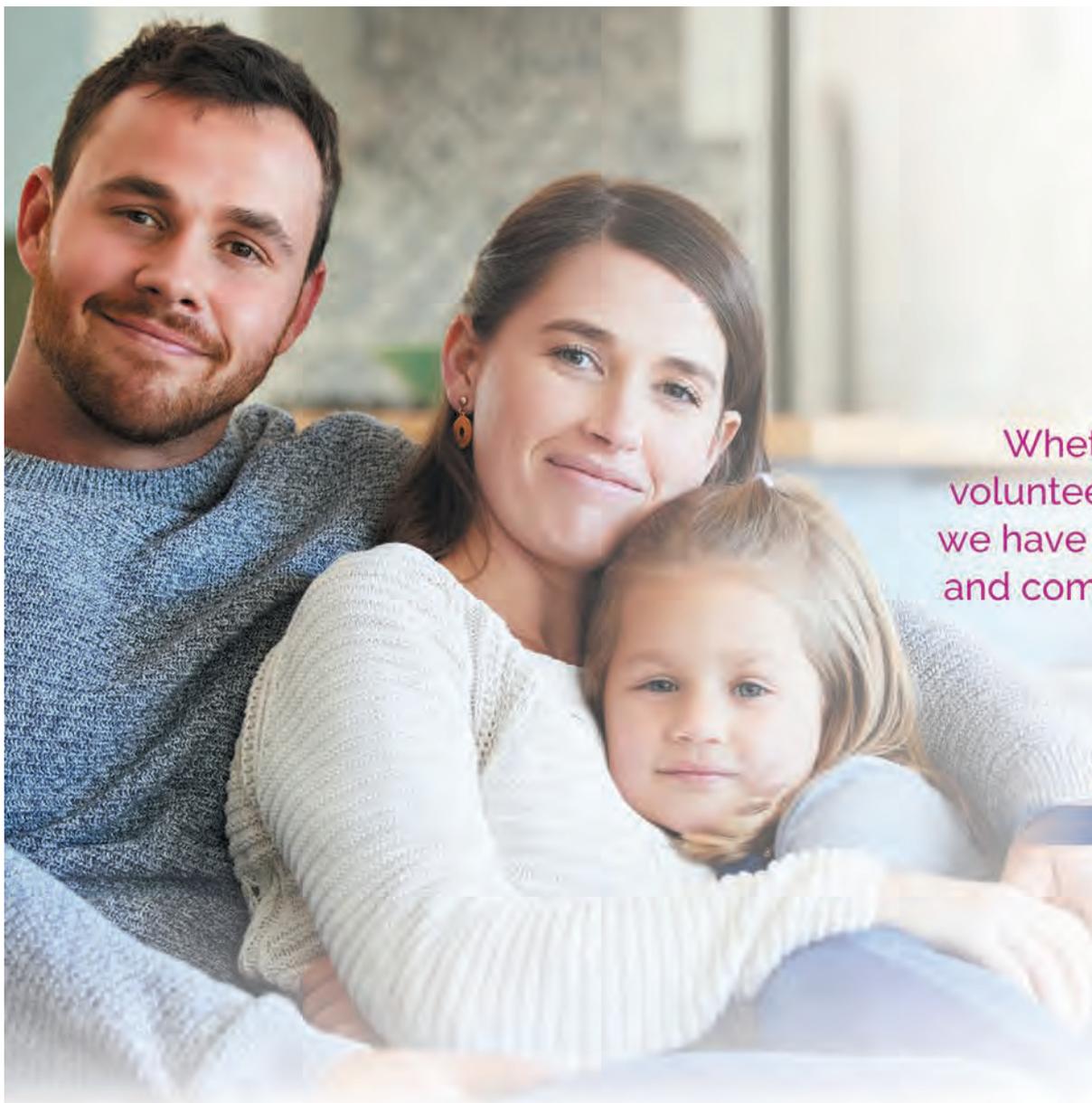
in Bloom Tea. They are also among the most generous supporters of our annual Night of Miracles Gala, helping to fund our core programs year-round. But their involvement goes far beyond event sponsorship.

Katie Malone is also a leading member of Miracles for Kids' philanthropic women's network, 360° Miracle, where her leadership and passion helps set the tone for the hundreds of compassionate women in the movement.

The Malone family and their companies play an active role in our Boost Program, which includes monthly and quarterly Boxes and Baskets of Miracles; care packages filled with household essentials and seasonal gifts that bring relief and joy to every family we serve. Whether through sponsoring over 400 coloring books for the Spring Basket of Miracles, hosting in-kind drives, or hands-on volunteering, the Malones continue to make a deep impact on the success of the program.

Family-owned businesses like Malco Maintenance are built on dedication, trust, and shared values. When those values are directed toward helping others, miracles become possible. The Malone family shows that running a successful business and making a difference are not mutually exclusive; they're deeply connected. As Buddy says: "Miracles for Kids has become part of our lives. We're blessed to be able to bring people joy, because that's what makes us happy—bringing people joy."

The Miracles for Kids Corporate Partner Program offers businesses the opportunity to make an impact through customized opportunities to engage employees, promote community leadership, and directly support families with critically ill children. To learn more about getting involved, contact Sandy Morales, Development Director, at 714-705-4541 or smorales@miraclesforkids.org.

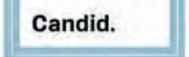


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Multi-talented IVC Grad Dreams Big

While Talla Khattat's educational path is not a simple or straightforward one, the Irvine Valley College (IVC) student and recent UCLA graduate is brimming with ideas, talent and sheer grit – traits which will most certainly help her forge a successful career.

The definitive renaissance woman, Talla, 22, has multiple career aspirations – travelling investigative journalist, pianist, composer, teacher and film producer – and one day aims to succeed at all five.

She certainly has the determination, creative bent and drive to do so. After the pandemic upended everyday life during her senior year of high school, Talla opted to study at IVC, where she took online coursework. “My initial time at IVC was essential – providing me with strong foundational writing skills, and teaching me the power of community.”

Earning her Associate's Degree in Communication Studies from IVC with honors, she transferred to UCLA through the University's Transfer Alliance Program (TAP), graduating with a Bachelor of Arts in Communication and a Film, Television & Digital Media Minor.

An active college student, she participated in multiple activities – writing for UCLA Total Wellness Magazine, joining UCLA's Film and Photography Society, serving as a Community Representative on the Resident Government Council and much more. Ultimately, she was selected to be the Communication Department's keynote speaker at her graduation ceremony in the Spring of 2024. “This was a huge honor. I was so proud to be a voice for my peers and acknowledge everyone's hard work, dedication and resilience, especially since we had all started our studies during the pandemic.”

Following her graduation from UCLA, Talla decided to continue her quest for knowledge and returned to IVC, enrolling in a series of career enhancing courses. The decision to re-enroll in IVC was an easy one. “IVC prepares their students with authentic experiences in the real world,” she says. “And IVC professors are fully involved in what they teach. They truly care about their students.”

Initially, she says, “I wanted to explore teaching, so I took an Intro to Elementary Education class to get a feel for what it's like to work in the classroom. The education course allowed me to gauge how I feel about teaching, providing hands-on experience in the field. I learned I love working with kids and want to teach something I am passionate about.”



With that in mind, she opted to transfer to IVC's Music Department – with the idea of one day sharing her expertise by teaching music. A native of Los Angeles and first-generation college student, she moved to Irvine with her family in elementary school and grew up taking classical piano lessons. Most recently, she began training with IVC professor Svetlana Smolina, a world-renowned piano performer, which led her to another passion: music composing. She recently composed her first orchestral piece, “Bullfrogs and Fairies,” and has been selected to perform at IVC's 2025 graduation ceremony. Additionally, Talla just learned she will be granted a scholarship to continue her studies at IVC. Now, she is working toward an Associate of Art's degree in piano performance, which she plans to complete this year.

Never one to remain idle, she continues to hone her writing and journalism prowess by working as a senior reporter and editor at Newsjunkie, a resource for journalists.

In her limited spare time, Talla dabbles in modern dance, modeling, yoga and food styling for film. She also loves watching animated movies, and one day dreams of combining her many talents to write, produce, direct, and compose her own animated film.

Composer. Piano Performer. Journalist. Teacher. Filmmaker. Whether Talla decides to pursue one professional path or many – by aligning her career choices with her significant creative talents, personal values and passions, she undoubtedly will succeed.

For more information go to www.ivc.edu/ewd

Inspiring success. Building futures.

Searching for that next successful addition to your team? Then Irvine Valley College is the right place to look. Well-poised for a strong future, our students are highly motivated and focused on excelling in their chosen fields.



Meet Talla Khattat

Passionate about exploring the advancement of journalism and the arts, Talla transferred from IVC to UCLA, earning a Bachelor of Arts in Communication. Now, she has returned to IVC to study education and music — and one day dreams of combining her considerable creative skills to work in the fields of journalism, film production and music performance/composing. By aligning her career choices with her many talents, personal values and passions, she undoubtedly will succeed!



Learn more at [ivc.edu/ewd](https://www.ivc.edu/ewd)



2025 FAMILY-OWNED BUSINESS AWARD NOMINEES

Advanced Real Estate Services Inc., Irvine*Richard Julian, Co-Founder**Paul Julian, President of Advanced Real Estate**Robb Cerruti, COO of Advanced Real Estate**Frank Holloway, Co-Founder**Danielle Holloway McCarthy, President of AMC**Scott DeMint, General Manager of R3 Construction*

Richard Julian and Frank Holloway founded Advanced Real Estate in 1982. Since then, they have built it into a fully integrated real estate investment company with in-house asset management, property management and construction services. Advanced Real Estate with its Partners own and operate over \$4 billion of real estate. This consists of over 12,000 apartment units all located in Southern California. Advanced's capital comes from its broad "friends and family" network of investors. Currently there are over 1,000 individuals who invest with Advanced. Through their proprietary investment strategy, they can unlock retirement funds for private investors allowing them to own part of large, profitable, institutional-caliber investments. Advanced is currently one of the largest owners and operators of apartments in Orange County. Due to the private and discretionary nature of their capital, Advanced can capitalize on acquisition opportunities when institutional buyers can't. This allows them to procure the most lucrative acquisitions for their investors. Advanced was the largest buyer of apartments in Southern California in Both 2020 and 2023. Those acquisitions were at prices well below the market for several years preceding and following.

**America Pro Design Inc., Newport Beach***Katie Lopez, Vice President**Pete O'Boyle, President**Julie O'Boyle*

America Pro Design (APD) was founded by Pete O'Boyle, a career construction professional specializing in award-winning tile and stone installation. In 2010, following the recession, O'Boyle expanded his vision by launching APD with his family's support. His youngest child, Katie, grew up learning the business and eventually assumed leadership. Under her guidance, APD expanded beyond its original focus to include wood replacement, waterproofing, stucco services, and more. Partnering with top structural engineers, APD has conducted over 2,000 balcony inspections throughout Southern California, developing efficient, reliable safety maintenance plans for property managers. The company's commitment to structural integrity led to expansion into seismic retrofitting, strengthening their expertise. This strategic growth has resulted in consistent revenue increases of 100-200% year over year. Today, APD operates in two specialized divisions: Asphalt and Concrete; and SB721 & SB326 Inspections, Waterproofing, Deck Repairs, and Seismic Retrofit, while remaining grounded in quality workmanship, family values, and faith.

**Antis Roofing, Irvine***Charles Antis, CEO**Dawn Antis**Arron Antis*

Charles Antis, founder and CEO of Antis Roofing, began his successful career in the roofing industry in 1984, after moving to Southern California from Provo, Utah where he attended Brigham Young University. Antis serves on the board of directors of the National Roofing Contractors Association; is a member of the The Roofing Industry Alliance for Progress; and serves on the board of directors and advisory councils for several non-profit organizations including Habitat for Humanity Orange County and Ronald McDonald House Orange County. In 2009, Sharon Ellis, president of Habitat for Humanity of Orange County, asked Antis to donate a roof and he immediately thought about that family. He quickly jumped at that opportunity, and since then they have donated the roof installation for every Habitat for Humanity of Orange County home-half a million dollars' worth. It has not only changed his life personally, but the way he thinks about business and success. That spirit of giving and social responsibility inspired Antis to look into what changes he could make throughout the entire company so that they could give while also keeping the company's success at the forefront (to enable all the give back work they do).

**AURA Accounting Solutions, Newport Beach***Brandon Kordower, Founder & CEO**Derek Kordower, COO**Daniel Simon, Executive Vice President*

AURA is a team of specialists that build your agency's rock-solid financial foundation. They use accurate insights to inform strategic guidance and sound business advice. In a nutshell, they tell you how your business is actually performing, and how to grow the bottom line. Many founders and CEOs gauge business performance on top-line revenue, or the bank balance. Cash-based accounting only considers the inflows and outflows of your bank and credit cards, nothing more. This is an unreliable performance indicator, whereas accrual accounting shows you what business activities are most (and least) profitable. AURA uses accrual accounting practices to unscramble your financials so you can stop relying on instinct and start relying on accurate data.

**Avodah Law Group, a PLC, Brea***Gahram Chao, Founding Partner**Ezra Han, Legal Assistant**Elizabeth Han, Legal Assistant*

Gahram Kang Chao is the founding partner of Avodah Law Group, a Professional Law Corporation. After graduating from USC Law School in 2001, Ms. Chao took a position at a

mid-sized litigation firm as a stepping stone toward her ultimate career goal of serving small to mid-sized businesses with their general and on-going legal needs. After practicing for 2.5 years, she started her own practice in Fullerton in 2005, and currently focuses on serving as outside general counsel to small to mid-sized businesses and their owners, as well as serving middle-class families in their basic estate planning needs (wills, family trusts, etc.). Her business law practice (currently located in Brea, CA) encompasses both business formations (forming LLCs & corporations for entrepreneurs) as well as providing business transactions, negotiations, contract review and drafting, assistance with buying & selling businesses (M&As), and business legal services on basic employment, real estate and IP issues to existing businesses.

**BABEN, Laguna Beach***Tamora Dorman, Co-Owner**Hanna Dorman*

Baben is a rapidly growing brand born from the shared passion of a mother-daughter duo for the beach and distinctive design. What began as a small business has evolved into a sought-after name in the industry, celebrated for its unique and high-quality products. The company's dedication to craftsmanship and creativity has earned it a loyal customer base and recognition from major retailers. Most recently, Baben was invited to sell on Free People's website, where its products have consistently sold out, reflecting strong demand and an expanding market presence. With a commitment to innovation and authenticity, the brand continues to make waves in the industry, proving that passion and vision can transform a small business into a thriving enterprise.

**Big Purple Dot, Irvine***Roxana Davidoff, CEO**Aldo Sarmiento, Chief Technology Officer*

Based in Irvine, California, founded by tech entrepreneur Roxana Davidoff, the fast-rising software company Big Purple Dot was born from a clear vision: to simplify and supercharge the way mortgage and real estate professionals manage leads and engage clients. Identifying a major gap in the industry's ability to follow up efficiently and nurture prospects, Davidoff (CEO) alongside her brother Aldo Sarmiento (CTO) are making waves in the mortgage technology space with a platform that blends advanced CRM tools, real-time automation, and powerful data intelligence. What began as a tool to enhance internal workflow quickly evolved into a comprehensive platform adopted by major lenders, brokers, and real estate groups nationwide. At a time when the mortgage industry is under increasing pressure to improve efficiency and reduce costs, Big Purple Dot offers a critical edge. As a family-owned business deeply rooted in the community, the company credits Orange County for fueling its innovation and talent pipeline with visionary entrepreneurs, smart investors, and a tech-forward workforce.

**Bright Bread Company, Lake Forest***Angela Bright, Head Baker**Charisse Zakhour, Head Baker**Chloe Zakhour, Marketing**Kayla Zakhour, Marketing**Amber Zakhour, Marketing*

On December 22, 2018 the Zakhour family lost their beloved patriarch-the center of their universe-Gihad Zakhour. With his unexpected passing, finances quickly became an issue. Then, Charisse, who'd been working in the telecommunications field, lost her job at the beginning of the pandemic further adding to the family's economic uncertainty. With their finances in question, the family rallied together around the kitchen table one night and asked each other - what are we good at? What can we do? Baking was simply the only answer. They were going to need to make bread to raise dough. Mrs. Bright and Charisse had always wanted to go into business together and it seemed like the universe was telling them, 'now is the time'. Now, this inspiring family is known as the Bright Bread Company. They deliver authentic, delicious breads to their local community of South Orange County and have no plans of slowing down. Through leveraging their skills in baking, social media, marketing, customer service, communications and more, this family has been able to create something truly special. Grandma Bright, at the young age of 84, is finally getting her wish to have her own business and share her famous recipes, and the local community is just as thankful for the mouth-watering bread on their countertops.

**Burkhart Brothers Construction, Tustin***Bryan Burkhart, Founder & President**Mark Burkhart, Founder & CFO**Jennifer Burkhart, Director of Operations*

Since 2007 the Burkhart Brothers have specialized in high-end renovations and elite custom homes along the coast of Southern California. Both Bryan and Mark Burkhart are USC alumni and Newport Beach locals who pride themselves on strong company values founded on family. The increasing complexity and execution of high-profile projects have contributed to their prestigious reputation as builders of unsurpassed integrity and cutting-edge technology. The Burkhart Brothers have cultivated strong relationships with the tastemakers of the community, working closely with renowned architects, designers, dignitaries of the city, and major producers like HGTV. Most recently Burkhart was selected by Tarek and Heather El Moussa as the featured builder of the wildly popular HGTV series, the FLIP/OFF where Jen Burkhart effectively lead the charge to win as project manager during the filming of the build. Mark and Bryan hit another milestone when asked to grace the cover of Orange Coast magazine's Home issue as the "Gold Coast Kings" of building. 2024 was an incredible year for the Burkhart family finishing over 20 homes and hosting multiple chef-driven industry/ community events at their corporate headquarters.





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2025 FAMILY-OWNED BUSINESS AWARD NOMINEES

Calaca Mamas Cantina, Anaheim

Angela El Haj, Co-Founder
Mariam El Haj, Co-Founder

Sisters Angela and Mariam, born and raised in Orange County, grew up immersed in the restaurant industry through their parents, who owned multiple IHOP locations and Anaheim Pizza and Spaghetti Co. Though they initially pursued different career paths—Angela in business and psychology, Mariam in pre-med—their father's passing in 2009 brought them back to their roots. Alongside their mother, they expanded the family's IHOP franchises and took over Anaheim's Captain Kidd's, operating both until their mother's passing in 2019. Determined to honor their parents' legacy while forging their own path, Angela and Mariam launched Calaca Mamas Cantina in 2022, their first independently conceived restaurant. Drawing from their personal experience with grief, they built a space that celebrates Día de los Muertos and fosters connection through food and storytelling. With its vibrant atmosphere, sustainably sourced ingredients, and unique cocktail and mocktail program, Calaca Mamas has become a cultural and culinary destination. The restaurant's impact was nationally recognized when it was named one of FSR Magazine's Top 50 Restaurants in the U.S. in 2024.

**Cohn Nutrition Institute, Costa Mesa**

Dr. Howard Cohn, D.C., CEO & Founder
Dr. Christine Cohn, D.C., Co-Owner
Alexa Cohn
Kailee Cohn

For 35 years, Dr. Howard Cohn, D.C. founder of the Cohn Health Institute in Costa Mesa, has inspired patients to achieve their ultimate health through natural, holistic and alternative health care. His clinic is home to over a dozen holistic/alternative health practitioners where patients from local surrounding areas, and all over the world, visit the institute to receive specialized treatment. Within the past three years, Dr. Cohn created the BioStacking Summit, which has achieved international attention for its innovative approach to health & wellness education. And most recently, Dr. Cohn is launching his own wellness supplement company, Cohn Nutrition, founded on nature's four fundamental elements of Carbon, Oxygen, Hydrogen and Nitrogen (COHN). Over the past decades, Dr. Cohn has also held the title of co-founder & VP of Product Development for nutrition supplements at SeventPoint2 The Alkaline Company, and developed nutritional products for Seacret Direct under his title: Director of Product Development, chairman Science Advisory Board. As a Doctor of Chiropractic, Howard Cohn, has received numerous awards, certifications, and recognitions.

**Consolidated Contracting, San Clemente**

Tony Elias-Calles, President
Joseph Troya, CEO/Principal
Matt Elias-Calles, Project Executive
Shane Elias-Calles, Business Development
Ryan Kraemer, Superintendent
Alis Troya, Legal Counsel

Childhood friends who reunited after emigrating from Cuba, Tony Elias-Calles and Joseph Troya built a company founded on relationships, integrity, and family. Independent of each other, their families fled the communist Cuban regime in the 1960s. Both men pursued their education through the collegiate level and maintained side jobs in the construction industry. Though each traveled different career paths, they soon realized their avocation of entrepreneurship in the commercial construction industry. Elias-Calles purchased the company he was working for in 1989, and Consolidated Contracting was born. Four years later, Troya, now Elias-Calles' brother-in-law, joined him as his partner. It surprises no one who knows Elias-Calles or Troya that relationships are the cornerstone of their business; nor are Elias-Calles and Troya surprised that a strong dedication to this philosophy is key to their success. The desired objective to build relationships applies not only to clients but also to the loyal employees and valued subcontractors. Since 1989, Consolidated has provided expert, honest construction services in a range of core markets.

**Dragon Kim Foundation, Irvine**

Daniel Kim, Co-founder/Executive Director
Grace Tsai, Co-founder & Board Member

The Dragon Kim Foundation (DKF) was founded in 2016 by Grace Tsai and Daniel Kim in honor of their 14-year-old son Dragon, who was killed in an accident in 2015. Today, DKF offers two programs—the Music Program and the Fellowship Program—to give teens, regardless of socioeconomic background, opportunities to pursue what they enjoy and make positive changes. The Music Program provides free, high-quality afterschool music instruction supported by volunteer teen musicians along with instruments for underserved elementary school students in Santa Ana and the San Gabriel Valley. The Fellowship Program is a social entrepreneurship incubator that inspires, invests in and equips teens to develop skills to better their communities through service projects held across California, Nevada, and Arizona. They receive business and leadership training, a mentor, and a grant of up to \$5,000. In 2024, DKF directly served 16,274 individuals and logged 17,989 volunteer hours.

**Elephant Signage & Display Int, Mission Viejo**

Alex Karasyk, Strategy & Communications Executive
Kateryna Karasyk, Cofounder & Managing Director

With nearly 30 years of industry experience, Elephant Signage & Display, Intl. has established itself as a leader in custom signage solutions, fabrication, and professional installation. The company was originally founded in Donetsk, Ukraine, in 1995, as Elephant Project Management Company and quickly became a key player in the visual industry. As a

co-founder of the Ukrainian Association of Visual Industry, the company contributed to setting industry standards while being a proud member of ESF (Europe), ISA (USA), and ICSC (International Council of Shopping Centers). Today, operating as Elephant Signage & Display, Intl., the team continues to excel as a member of ISA, CSA (California Sign Association), and the Mission Viejo Chamber of Commerce. With over 300 major projects successfully completed, the company is recognized for precision, durability, and innovation. Their expertise spans across retail, corporate branding, financial institutions, entertainment, and healthcare sectors, providing clients with high-quality, long-lasting signage solutions that enhance brand visibility and impact.

**Garden Grove Shell #1, Garden Grove**

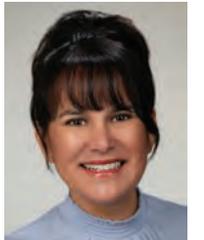
Joe Hu, Business Owner
Alice Hu, Owner
Wendy Hu, Assistant Manager
Amy Hu, Assistant Manager
Mary Hu, Assistant Manager

Joe Hu and his family have built a thriving, family-owned business rooted in hard work, dedication, and strong values. In 1993, they acquired the Shell gas station on Chapman Avenue in Garden Grove and transformed it into a top-performing operation known for its exceptional service and efficiency. Their hands-on approach—directing traffic, assisting customers, and supporting employees—ensures every interaction is personal and welcoming. Beyond their business success, Hu is a Garden Grove Chamber of Commerce board member, mentoring aspiring entrepreneurs and helping others navigate the challenges of business ownership. The Hu family is also committed to giving back, actively supporting local events that strengthen their community ties. Through their unwavering commitment to service, innovation, and operational excellence, Joe Hu and his family continue to set the standard for business leadership while making a lasting impact on Garden Grove.

**Graphics 360, Santa Ana**

Sonya Roeser, President
Chris Roeser, Vice President

They believe great printing is more than just ink on paper—it's about bringing ideas to life. As a family-owned business, they take pride in the relationships they've built over the years, partnering with nonprofits, schools, and large corporations throughout Orange County. Their growth has come largely through word-of-mouth, a testament to the trust their clients place in them. They are passionate about what they do, especially when it comes to color and detail. Every project that comes through their doors receives the same level of care and attention, combining modern technology with the values that matter most—quality, reliability, and exceptional service. For them, printing isn't just a job; it's a craft. Whether it's helping a nonprofit spread its message or a business make a lasting impression, they are honored to be part of their clients' success.

**Hal Hays Construction Inc., Riverside**

Hal Hays, Founder & Co-Owner
Kirby Hays, Co-Owner, President & CEO
Crystal Hays, Business Development Manager
Heath Hays, Superintendent

Hal Hays Construction is a Riverside based, full-service, self-performing general contractor with a proven track record in managing mission-critical projects. With roots built on integrity and innovation, the company specializes in civil construction, utility management, traffic control, vacuum truck operations, equipment hauling, heavy equipment rental, and electrical contracting. Under the guidance of founders Hal and Kirby Hays, this family-owned business has grown significantly, combining time-honored traditions with modern practices to deliver excellence on large-scale projects. Backed by a dedicated team of over 240 employees, Hal Hays Construction leverages vertically integrated capabilities—from heavy civil and infrastructure to logistics and equipment rental—to serve high-profile clients in aerospace, utility, defense, and Fortune 500 sectors. HHCI is recognized for its commitment to quality, safety, and sustainability, earning numerous awards and making a lasting impact on the communities it serves through strategic partnerships and philanthropic initiatives.

**Happy Photos Media, Costa Mesa**

Margie Lin, Owner
Xuong Do, Photographer
Mirabella Do, Marketing
Kingston Do, Operations

Having serviced over 1600+ families and businesses over the last 23 years, Happy Photos strives to give the highest quality in terms of photos and videos that everyone will cherish for a lifetime! They are conveniently located across the street from South Coast Plaza and are happy to serve all the diverse communities from Los Angeles all the way down to San Diego and out as far as Las Vegas if needed. Capturing memories of someone's special wedding day or being at a corporate awards functions, they make sure all the photos are bright, vibrant, and tell a beautiful story of the day, so everyone who wasn't there can be there and everyone who was there can relive the day over and over again.

**Histologics LLC, Anaheim**

Martin Lonky PhD, Co-Founder
Stewart Lonky MD, MBA, Co-Founder, Board of Directors
Neal Lonky MD, MPH, Founder and CEO, Board Chairman
Naomi Lonky RNP, Administrative Lead

Histologics LLC was founded in 2010 with the patient care experience in



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mind in an era of "Value Based Care". Its main founder and inventor of the multi-patented Kylon® fabric brushes, Dr. Neal Lonky, (former Elected Southern California Permanente Medical Group Board Director) successfully proved through evidence-based research the novel sterile, single use, multi patented Kylon® tissue removal brushes and finger-controlled devices allow for a more compassionate biopsy or wound debridement patient experience, allowing for more compliance. This is in contrast to existing devices are reusable steel instruments must be processed and may pose cross contamination to the "next" patient. Histologics LLC has transformed cervical biopsy and wound debridement and removed the fear of the procedures, providing a more patient friendly, safe, and compassionate new standard of care. Two million procedures have been done in the USA to date due to this profitable company and thus many lives saved.

I AM Movement LLC, Irvine

Donnella Andraos, Co-Founder, Co-Owner & Coach
Timorei "Timi" Spaulding, Co-Founder, Co-Owner & Coach
Brian "Blue" Spaulding, Coach
Michael Andraos, Technical Support & Handyman
Wyatt Andraos, Videographer & Editor
Tiana Andraos, Web Editor



I AM Movement (IAM) is a gym for adults with special needs and the elderly in Irvine, California. Owned and operated by a mother/daughter duo, its mission is to use fitness and friendship to create a community. IAM's largest program is a non-combative boxing class for people with Parkinson's disease. Parkinson's is a disease without a cure, yet studies indicate that targeted exercise challenging its symptoms helps slow their progression so people can live fuller lives longer. Drills focus on cardio, posture, gait, finger dexterity, hand/eye coordination, voice activation, balance, memory, fall safety/recovery, multi-tasking, and fun. IAM also offers personal training for adults with autism. The adaptive boxing/Muay Thai workouts include elements of daily living, such as decision-making, speaking in complete sentences, using money, multitasking, and memory recall. IAM is the West Coast regional training and certification center for future boxing coaches in the fight against PD. IAM Movement's mission is to empower and inspire adults with special needs so they can be their own heroes.

Image Perfect Laser, Newport Beach

Teresa Cadwallader, Owner
Bill Cadwallader, Co-Owner

Teresa Cadwallader's extensive medical background includes Pediatrics, Oncology, and Intensive Care. She also has years of business experience with medical equipment and sales management. She is highly trained and expert with all laser technologies and treatments offered by Image Perfect Laser.



ISYS Solutions, Brea

Alysha Loumakis-Calderon, President & CEO
Lyndsi Loumakis, Vice President, Finance and Business Services
Lorika Loumakis, Vice President, Leadership and Culture Development
Tanya Loumakis, Vice President, Case Management
Joe Archibald, Vice President and COO, Careersmart Learning Division
Richard Calderon III, Finance Specialist



ISYS Solutions Inc., founded in 1998, is a multi-generational, family-owned company serving the workers' compensation, healthcare, and education industries. With two distinct divisions—ISYS Case Management, a premier provider of onsite medical case management, and CareerSmart Learning, a national provider of online continuing education—ISYS operates across several states, including California, Arizona, Texas, and beyond. Built on the principles of quality, timeliness, and customer service, ISYS grew from a one-room office into a thriving, mid-sized company without incurring debt or outside investment. Rooted in strong values and a "Hug Your Customer" philosophy, the company emphasizes relationships, integrity, and service. Today, ISYS is led by second-generation family and non-family leaders, many of whom have grown within the organization. With a culture that values character, growth, and community impact, ISYS celebrates long-term employee milestones and continues to reinvest in its people and purpose. Now in its 27th year, ISYS remains committed to excellence and meaningful impact.

Kamryn Whitney Court Reporting, Irvine

Kamryn Villegas, Owner
Whitney Kumar, Owner
Kathleen Keala, Office Manager
Lori Johnson, Calendar department
Lynne Anderson, Calendar department



Kamryn Villegas & Whitney Kumar, co-founders of KW Court Reporting and identical twin sisters, started the company in 2013 and grew it into a multi-million-dollar company. Working out of their homes and starting families, they turned the company into one of the most revered and respected court reporting agencies in California. Their company works with the biggest law firms in Southern California and has covered many high profile cases. They have been featured on podcasts as leaders in legal technology; featured in magazines; do public speaking engagements, and they are active in promoting their profession. Villegas & Kumar have been invited into the exclusive Forbes Business Council four years in a row.

Les Amis Restaurant & Lounge, Fullerton

Jinan Montecristo, Owner & Operator
Juan Carlos Rosas
Oliver Montecristo

In November 2009, Joyce and Majed, along with their daughter and son-in-law, Juan Carlos, set out to continue what has become a cherished family tradition—bringing the heart of Lebanese cuisine to a new community. Drawing from Joyce's exceptional culinary talent and



their daughter's passion and vision, the family aimed to offer something truly special to the vibrant and diverse city of Downtown Fullerton. Just eight months later, on July 31, 2010, Les Amis opened its doors, introducing guests to authentic Lebanese cuisine. Since then, Les Amis has remained committed to serving fresh, natural, and flavorful dishes, each prepared with the same care and love as if they were being served at home. For the family behind Les Amis, food is a heartfelt passion, and every dish is crafted to create a memorable dining experience. Guests are welcomed into a warm, inviting atmosphere that offers a true escape to the Mediterranean.

Main Electric Supply Company LLC, Santa Ana

Scott Germann, CEO
Derek Germann, President
Ryan Germann, Pricing Analyst
Kelsey Germann, Switchgear Project Manager



Scott Germann joined Main Electric Supply Company, LLC in 1999 when it operated out of a single location in Los Angeles, CA. In 2011, Germann acquired ownership of the company. Today, the company has expanded into 18 locations throughout the Western US. 2024 marked a milestone year when the company achieved over \$1 billion in revenue, making Main Electric Supply Company, LLC the largest independent electrical distributor on the West Coast. The company is very much a family operation with Scott's three children, Derek, Ryan and Kelsey all taking on major roles in the company.

Nifty Package Co Inc, Orange

Michelle Hensley, CEO
Elizabeth Hartman, Gift fulfillment
Noah Hartman, Inventory and shipping
Hosea Hartman, Inventory and shipping
Kendra Vivireto, Onsite gift wrapper/gift fulfillment and Nifty creative
Danielle Hartman, Graphics



Michelle Hensley has made an art out of gift-giving. The idea for her business, Nifty Package Co, arrived when she needed it most. Her journey, from losing her husband to cancer to creating a heartfelt gifting business, has inspired many and provided an outlet to use her talents to spread joy. What started as a purpose-filled endeavor in 2015 at the age of 51 blossomed into a poignant side-hustle success story - one gift at a time. Now, a full-fledged career, she curates gourmet gift baskets and provides luxury gift wrapping services that impresses even the most distinguished clientele and recipients! When Too-Faced Cosmetics called and asked for a large-scale gift-wrapping design, she was off and running! Nifty Package Co. offers luxury and corporate gifts and the largest mobile gift wrapping service nationwide. Hensley's gift wrapping clientele includes names like Warner Bros., Discovery, Kim Kardashian, Kanye West, Justin Bieber, Hailey Bieber, Meta, Van Cleef & Arpels, Mont Blanc, Hugo Boss, Versace, Ferragamo and Coach, as well as numerous homes and companies.

Patterson Autos, Tustin

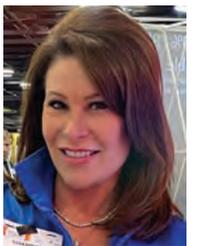
John Patterson, Owner & President
Conner Patterson, Content Creation & Social Outreach
Julie Patterson, Co-Founder, Special Events & Ongoing Community Growth



Patterson Autos received the First Ever Mazda National award for "Community Hero, reflecting charitable and community involvement. They are the first automotive dealership to be on Orange County Register's TOP WORK PLACES and continued to be, for multiple years. First ever (Non-Luxury Brand) to be OC's TOP AUTO Dealership (over the California's #1 Luxury-make dealership). He recently accepted another industry first, this year, as his dealership became the first and ONLY Mazda dealer in California to be selected for the Top Accolade, the coveted "President's Award" from Mazda. And when Hyundai needed someone to sit in with "Good Morning America" to talk about the rapidly changing EV Market, they contacted Patterson to take the interview. KIA approached Patterson to open two stores in Orange County as a result of the industry leading reviews received, by customers regarding his dealerships regularly. Impacting lives through organizations such as Orange County Rescue Mission, Ronald McDonald House Charities, Home Aid, Autism Speaks, Didi Hirsh Mental Health Services and local educational initiatives are ongoing areas of passion for the Pattersons.

Positive Beverage, Newport Beach

Shannon Argyros, CEO / Founder
George Argyros Jr., Deceased
Shannon Argyros, CEO
George Argyros III



Shannon Argyros, is the CEO of Positive Beverage. Positive Beverage is a beverage company that uses natural ingredients in their energy and immunity boost beverage. The company has stayed the course of using natural ingredients, and has expanded to Target, Kroger, Walmar, Pavilion's and other stores throughout the USA. Positive Beverage received Female Owned Certification and WOSB certification.

Precision Wallcovering & Painting, San Juan Capistrano

Chad Horn, Partner & GM
Allan Horn, CEO



Precision Wallcovering & Painting is a multi-generational family-owned business who takes pride in family legacy and craft. Their core values start with continuous improvement and the Horn Family takes great pleasure in seeing the team grow and succeed in their personal lives. They do this with a training path to help each person develop their skills to be a bigger part of the company. The next core value is quality, and they strive for the highest quality in service and work, from the leadership, in the office and in the field. Lastly, loyalty to the team; They have some employees who have been with the company for over 20 years and they have seen them grow into management roles and become a huge part of team.



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Primary Freight, La Palma

John Brown, CEO

Kathy Hogan, President

Karana Brown, Accounting staff

Chris Figueroa, Director of Domestic Division

Christina Breier, Export Procurement Senior Analyst



John Brown is the CEO & president of Primary Freight Services, leading the company with over 25 years of experience in global logistics and supply chain management. Since founding Primary Freight in 1998, Brown has been instrumental in transforming it into a premier provider of end-to-end freight solutions. Under his leadership, the company has expanded its global reach, strengthened its strategic partnerships, and implemented cutting-edge logistics technologies. Brown's expertise in supply chain optimization, operational efficiency, and customer-centric service has positioned Primary Freight as an industry leader. He has successfully navigated complex market challenges, ensuring the company's resilience and growth. A firm believer in innovation and continuous improvement, Brown has integrated EOS and NINETY to enhance organizational performance and accountability. Beyond his role at Primary Freight, Brown is committed to fostering a strong company culture focused on teamwork, integrity, and service excellence. His dedication to industry best practices and client success continues to drive the company forward.

Pro-Tech Design & Manufacturing, Santa Fe Springs

Pam McMaster, CEO

Aaron Swanson, President

Jeff Swanson, Vice President

Shane Swanson/Validation Technician



For 45 years, PRO-TECH Design & Manufacturing has been providing packaging, assembly, and sterilization services to some of the largest medical device companies in the world. Started by Pam McMaster in her family room in 1980, McMaster was one of the first woman-owned businesses in the industry. Today, the company has grown to include three locations (Southern California, Minnesota, and Texas) and over 200 employees. Since founding the company, McMaster has been joined by her sons, Aaron Swanson (President) and Jeff Swanson (Vice President), and her grandson, Shane Swanson (Validation Technician). One of the hallmarks of the company is a "Customer First" approach, doing whatever it takes to meet the needs of each customer individually, and building long-term partnerships. With that in mind, McMaster's original customer is still a customer 45 years later! McMaster and PRO-TECH are committed to giving back to the local communities in which they operate, and they support Children's Hospitals in each of their locations, including Children's Hospital of Orange County.

Rancho Mission Viejo, San Juan Capistrano

Richard O'Neill Sr.

Marguerite "Daisy" O'Neill

Alice Avery-O'Neill

Richard Jerome O'Neill

Donna O'Neill

Anthony R. (Tony) Moiso, Chairman and Chief Executive Officer

Jeremy Laster, President

Marc Lamkin, Senior Vice President of Community Development

Trina Moiso Lamkin, Vice President Family Office



Jeremy Laster is the president of Rancho Mission Viejo. He took over the reins of the family business in 2022 after previously serving as executive vice president and chief operating officer. He is responsible for the daily management of all Rancho Mission Viejo enterprises, including larger scale master-planned community development, land management (The Nature Reserve at Rancho Mission Viejo), ranching and farming, commercial properties, and investments. Laster has overseen the development and operation of more than two million square feet of commercial real estate assets, over 2,500 apartment units and the planning and construction of the Village of Rienda, the newest and most attainable village of new construction homes ever offered on The Ranch. Rienda has experienced robust sales and no signs of letting up with more than 1,350 homes sold or reserved since opening in April 2022. This summer, the third phase of Rienda will open with 175 new homes, representing the largest lot sizes offered on The Ranch to date. In early 2026, the newest Village on The Ranch, Gavilán Ridge, will open with 326 single level living homes exclusively for 55+ residents, representing the largest number of single level living homes in a master planned community in Orange County.

Regal Court Reporting, Santa Ana

Stephanie Leslie, Co-Founder

Isaiah Leslie, Co-Founder



Regal Court Reporting launched in 2007 and is one of the last 100% court reporter-owned, steno-only firms in California. Led by husband-and-wife team Isaiah and Stephanie Leslie, they have curated a team of esteemed professionals who provide an unparalleled level of precision and quality in each of the cases they work on. Isaiah and Stephanie's complementary skills forged the company's distinctive identity-dedicated to fulfilling the comprehensive needs of any law firm with the personalized touch and care inherent in a family-owned business. Simultaneously, they are advocates for the future of their profession, contributing to the court reporting community through education and advocacy. Throughout the years, the twin pillars of Customer Care and Court Reporter Care have compelled them to adapt to evolving landscapes in California and nationwide. This adaptation includes embracing new and improved technologies for depositions, hearings, motions, trials, and arbitrations. Regal Court Reporting continually expands its services, incorporating advancements such as Trial Technology and remote deposition e-suites, empowering clients to manage their legal matters more efficiently.

Rodrigo's Mexican Grill, Orange

Rod Fraser, CEO & President

Melinda Fraser

Suzie Bohning

Rodrigo's Mexican Grill, a third-generation family-owned business, has proudly served quality Mexican cuisine in Orange County since 1972. With 10 locations, Rodrigo's is dedicated to bringing families together for delicious meals. Celebrating over 52 years of flavorful traditions, Rodrigo's continually evolves its menu while prioritizing both new and loyal guests. Committed to using locally sourced ingredients, the Fraser family blends multi-generational recipes with exciting seasonal specials. 10 locations, including Orange, Tustin, HB, Laguna Hills, Anaheim, Anaheim Hills etc.



Sea Pointe Design & Remodel, Irvine

Lauren Mills, President

Andy Shore, Owner

Sally Shore, Fixture Specialist

Trent Shore, Director of Finance

Collin Shore, Estimator



Sea Pointe Design & Remodel, a family-owned company, has been transforming Orange County homes since 1986. Starting as a small general contractor, they recognized the need for a streamlined remodeling process, evolving into a full-service design/build firm. Today, with over 65 employees, including designers, project managers, architects, and craftsmen, they provide comprehensive in-house services. Driven by a commitment to creating "forever loved homes," Sea Pointe has garnered prestigious national and local awards, including Top 500 and Best of OC, consistently ranking #1 in kitchen and bath remodeling. Their dedication to quality and client satisfaction has solidified their reputation as a leading design/build specialist.

Shopoff Realty Investments, Irvine

Bill Shopoff, President & CEO

Cindy Shopoff, Executive Vice President



William A. Shopoff is the founder, president and chief executive officer of Shopoff Realty Investments, as well as numerous affiliated entities. He has more than 45 years of real estate and investment experience, including extensive expertise in the acquisition, development, and sale of new and redeveloped residential and commercial properties throughout the United States, as well as partnership structure, debt placement, venture capital and investment underwriting. Mr. Shopoff has overseen the acquisition of more than 1,000 properties on behalf of the various business entities managed by Shopoff Realty Investments, including in excess of 8,000 apartment units (fee or mortgage loans) and the entitlement of more than 15,000 lots or units of land suitable for single-family or multifamily development, as well as millions of square feet of commercial projects. Additionally, he has undertaken numerous development projects, including high cube logistics buildings, hospitality, apartments, luxury condominiums and single family build to rent product.

Starch Creative / Starch Fabrication, Costa Mesa

Brandon Ball, CEO

Ted Dobson, Partner



Brandon Ball is a husband, father, entrepreneur and creative visionary behind Costa Mesa's Starch Creative who believes that success is built on the foundation of strong relationships - in his business, community and life. Ball's professional journey began with the skate fashion icon Vans, where he worked his way up from a retail associate to head of global environmental design and retail marketing. Ball oversaw the brand's meteoric rise in marketing project volume from \$300 million to \$3 billion but wanted to simplify amplifying his creative impact. In 2015, Ball founded Starch Creative, a full-service retail and experiential design agency, recognized among Adweek's Fastest Growing Agencies. Expanding with Starch Fabrication to integrate build and fixture capabilities, Starch transforms creative concepts into dynamic brand experiences for Adidas, Amazon, Vans, Coca-Cola, Hot Wheels, The North Face and more. Now, with operations in Orange County, Portland and a New York satellite office, the Starch team thrives on a culture of creativity, collaboration and purpose to make a lasting impact.

Surf City Print, San Juan Capistrano

Mark McNabb, Owner/CEO

Cameryn Ciaramitaro, Account Manager

Brynne McNabb, Account Manager

Jennifer McNabb



Mark McNabb has been an "ideas man" since the 80's. He started off in the sales department with big name brands like Frito Lays and Campbell's Soup, before eventually moving to Oakley to spearhead their marketing department in sports. He loved the fast paced environment travelling with sports teams and getting sunglasses on the professionals, but still he wanted to spend more time with his family. In order to do that, he implemented one of his ideas. He started a company called Toolshed, similar to Underarmour, learned more about the apparel industry, and then began working in the marketing collateral industry. He started Surf City Print, a print, promo, and apparel company in 2016, and promptly made two of his best hires with his twin daughters. Throughout his career, McNabb has prioritized relationships and connections, always keeping his family at the forefront.

Taqueria Hoy!, Santa Ana

Rafael De Anda, Founder & Chairman of the Board

Christian De Anda, President

Raphael De Anda, Vice President

Rafael H. De Anda is from Arandas, Jalisco, Mexico, and owns Taqueria Hoy, 4 Copas



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Organic Tequila (the World's First Organic Tequila), and Divertido Tequila. He came to the US in the 1970s and started working picking cabbages and for a lathing company in Anaheim. In 1980, he opened his first taqueria, and today, he owns three in the cities of Orange, Santa Ana, and Anaheim, with a 4th coming in Tustin soon. He also operates a food truck at all Anaheim Ducks and Orange County Soccer Club home games. He built 4 Copas into a global brand spreading to over 20 states within the US and abroad in Italy. In 2023, he created Divertido Tequila, which has spread to over 10 states and counting. He is a loving husband to Terry, his wife of over 30 years, and a loving father to his two sons, Raphael and Christian, and his new daughter-in-law, Maya.



The Tea House on Los Rio, San Juan Capistrano

Damian Orozco, CEO & Owner
Allan Niccola, Co-Owner
Claudia Niccola, Co-Owner



Damian Orozco is the CEO of the Tea House on Los Rios, a nationally recognized brand known for its elegant charm, exceptional service, and timeless afternoon tea experience. Orozco's leadership has propelled the Tea House beyond its local roots, earning national recognition, including features on Bravo and other media outlets. Before taking the helm, Orozco built a strong foundation in public accounting at Deloitte, where he gained invaluable financial and business expertise. However, his passion for hospitality and commitment to his family's legacy led him to leave corporate finance to expand and elevate the Tea House brand. As he steps in to take over the business from his grandparents, Orozco is dedicated to preserving its rich history while implementing modern strategies to grow its influence. In 2024, he was sworn in as a board member of the San Juan Capistrano Chamber of Commerce, further solidifying his role in local business development. His vision continues to uphold the Tea House's legacy while making it a premier destination on a national scale.

The Phillips Group, Anaheim

Andrew Phillips, Chief Growth Officer
Laura Phillips, CEO
Robert Phillips, Former President



Andrew Phillips co-founded The Phillips Group with his wife Laura in September 2021, acquiring Phillips Accountancy Corporation. The Phillips Group is a boutique healthcare-focused accounting firm known for its technology-driven, proactive approach. As chief growth officer, Phillips ensures the firm's continuous growth through strategic partnerships, enhanced client and employee experiences, and innovative technologies. Before entering accounting, Phillips served as a medic in the Army and worked as an Emergency Medical Technician. He transitioned to accounting for a more family-friendly schedule but retained his passion for working with people. His leadership experience includes serving as director of Interns & Volunteers at the Newport Beach Film Festival. Phillips supports several organizations, including The Priority Center (where he serves as a Board Member), P.A.T.H., Second Harvest Food Bank, The Little Red Dog, and the American Red Cross.

The Rand Group, Newport Beach

Paul Rand, Managing Director, Partner
Joel Rand, Managing Director, Partner



The Rand Group is a team of experienced financial advisors. They serve as personal CFOs, dedicated to helping individuals and families, small business owners, female investors, and corporate executives successfully navigate financial decisions. Whether you are beginning a wealth management journey, or further down a financial planning path, they want you to understand all your options and feel confident in your financial security.

Totten Tubes Inc., Azusa

Greg Totten, Co-President
Paul Totten, Co-President
Susan Totten, Director, Totten Family Office
Kim Blincoe, Financial Analyst
Mike Totten, Inside Sales Rep
Cory Totten, member Board of Directors
David Totten, Chairman of the Board
Jeff Totten, member, Board of Directors
Tracy Totten, member, Board of Directors
7 additional family members are shareholders but not working for company or on the board



Totten Tubes has been a trusted steel tubing and pipe supplier since 1955, specializing in structural steel tubing, mechanical ERW tube, and ASTM pipe products. Over the decades, the company has evolved alongside the industry, becoming a recognized expert in hollow structural sections (HSS), seamless products, and multiple ASTM/API pipe lines. Known for offering one of the largest and most diverse inventories in the market, Totten Tubes sources unique and hard-to-find steel tube sizes from manufacturers around the world. With a robust selection that includes jumbo HSS, custom structural tubing, and specialty-dimension pipe products, Totten Tubes provides tailored solutions for a wide range of industries. Their advanced processing capabilities, attention to detail, and customer-focused approach ensure even the most complex orders are handled with precision and care. Totten Tubes continues to lead with value, service, and expertise, making it a go-to partner for steel tubing and pipe needs across North America.



Dr. Neal Lonky MD, MPH, CEO

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2025 FAMILY-OWNED BUSINESS AWARD NOMINEES

Tru By Hilton Norco, Norco
 Nina Patel, CEO
 Dipak Patel, CEO
 Rajan Patel, CFO



Ms. Nina Patel migrated to the US at the age of 10. At the age of 19 her parents purchased their first hotel in which she was fully involved in running. When she married Dipak they shared the common vision of owning and building hotels. They purchased multiple properties while raising their three daughters and son in Yorba Linda. After acquiring and running three motels, their vision of building a hotel became a reality with the birth of Tru by Hilton.

U.S. Alliance Group, Rancho Santa Margarita

Fadi Cheikha, Chief Executive Officer
 Kim Cheikha, Board Director
 Julia Cheikha, SV Specialist
 Jake Cheikha, Risk and Marketing Specialist
 Jaden Cheikha, Referral Partner Enterprise Manager
 Sheri Mahoney, Chief People Officer
 Joanie Mahoney, Partner Relations Manager
 Matt Mahoney, Account Executive



Born in Lebanon during its Civil War, Fadi Cheikha, CEO of US Alliance Group Inc. (USAG), grew up in a multilingual household, earned dual degrees in Business Management and Economics, and by the age of 20, immigrated to the U.S. to pursue the American dream. He founded USAG, a leading merchant services company, providing solutions to businesses of all industries and sizes under a "One-Stop Shop" philosophy to enhance their overall efficiency. USAG has received nearly two dozen awards, including recognition as a "Top Workplace," "Large Business of the Year," and a leader among "Fastest-Growing Private Companies." Cheikha himself has been honored as an Ernst & Young Entrepreneur of the Year finalist, featured in C Level Focus's 10 Most Admired CEOs, and received the MWAA's Industry Achievement Award in 2024. Beyond business, Cheikha is passionately involved in philanthropy through his nonprofit, Aiden Whisper, engaging in service projects and providing financial aid to local and global communities. As the Title Sponsor for Rancho Family Fest, USAG underscores its commitment to community engagement.

Venture Strategic Inc., Irvine
 Jeffrey Corless, President & CEO
 Victoria Corless, Director of Finance & Human Resources



Founded by Jeff and Victoria Corless, Venture Strategic has grown into one of Orange County's most respected full-service strategic communications, marketing, and public affairs firms. The firm was established to provide high-impact messaging, stakeholder engagement, and public affairs strategies that help businesses, organizations, public agencies, and nonprofits navigate complex challenges and fortify their brand. With an emphasis on innovation and results-driven strategy, Venture Strategic has advised Fortune 500 companies, healthcare organizations, and public policy initiatives, shaping influential campaigns and initiatives. Victoria and Jeff have played essential roles in building the firm's operational structure, fostering a strong company culture, and ensuring sustainable growth. The firm's ability to craft compelling narratives and execute high-profile campaigns has led to long-standing partnerships with major corporate, government, and political clients. Today, Venture Strategic continues to expand its influence, helping organizations achieve brand distinction, public trust, and policy impact while maintaining its roots as a family-owned business dedicated to client success.

Villa Park Landscape, Orange

Javier Reyes, President
 Javier Reyes Jr, Vice President
 Bianca Clay, Landscape Designer
 Valerie Hernandez, Director of Marketing



Javier Reyes is the president of Villa Park Landscape, a premier landscaping company known for its commitment to excellence, sustainability, and innovation. Under his leadership, Villa Park Landscape has solidified its reputation as a trusted industry leader, delivering high-quality landscape design and maintenance services throughout Southern California. With a strong commitment to client satisfaction and operational excellence, Javier has been instrumental in driving the company's growth, broadening its service offerings, and cultivating a culture of professionalism. His strategic vision has guided Villa Park Landscape through 38 years of steady expansion, ensuring sustained success without compromising quality or the client experience. Throughout his tenure, Villa Park Landscape has been recognized for its dedication to quality craftsmanship, sustainable practices, and superior customer service. Javier's leadership continues to inspire innovation and operational excellence, ensuring the company remains at the forefront of the landscaping industry.



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