

# Excellence in <sup>YEARS</sup> 25 ENTREPRENEURSHIP Awards



**AWARD CEREMONY AT IRVINE MARRIOTT | MARCH 26, 2026**

**PAST ENTREPRENEURSHIP WINNERS SEE EXPANSION,  
SALES GROWTH**

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# Past Entrepreneurship Winners See Expansion, Sales Growth

It's been a year of change and growth for the winners of the Business Journal's 2025 **Excellence in Entrepreneurship Awards**.

One exec is expanding his tech company, one of **Microsoft's** top 150 partners globally, in Europe and the Middle East.

Another told the Business Journal that his highway safety

firm saw double-digit sales growth last year.

One exec and his wife gifted a significant amount to the City of Hope Campus Transformation Fund. **The City of Hope OC** dedicated an art gallery to him and his wife in recognition of their gift.

The Business Journal caught up with the 2025 EIE award winners to see what's changed since they received their

awards; profiles run below and on page 18.

The next Excellence in Entrepreneurship Award ceremony is scheduled for March 26 at the **Irvine Marriott**. The keynote speaker will be **Charlie Zhang**, 2025 EIE award winner and founder of **Pick Up Stix** and **Zion Enterprises**.

—Sara Shirazian

## Anthony Lee: Empowering Students at Westcliff

■ By JOSEPH PIMENTEL

IRVINE — As **Anthony Lee** stood in front of more than 70 university leaders and board members, the **Westcliff University** president and CEO took a deep breath before telling his senior leaders to slow down.

In previous years, the Irvine-based private institution focused so much on expansion—acquiring **Western State College of Law**, rolling out an AI learning partner, and recently opening a campus in Toronto—that it was now time to reflect and remind them of the importance of the student experience.

“If you want to scale successfully, you don't start with systems, you start with people,” Lee recalls telling his senior leaders.

Lee, who has led Westcliff since 2012, described that September retreat in San Clemente as a defining moment of the year. He said it was a chance to slow down, take stock and speak candidly about what worked and what didn't.

“We really were able to talk about all the things we had done so far this year,” Lee, who received the Business Journal's **Excellence in Entrepreneurship Award** last year, told the Business Journal during a recent interview. “We really had to make sure that we didn't lose sight of what was important for us, which is our mission to educate and empower students.”

### International Expansion

Lee said 2025 was a major year for Westcliff, with multiple initiatives including the



Anthony Lee  
CEO, President  
Westcliff University

launch of a nursing program, expansion into Canada and the opening of a new early learning venture, the **Westcliff Early Learning Academy**.

He said those moves were years in the making and that the university worked to avoid growing “too fast” by investing in people, processes and technology ahead of demand.

Internationally, Lee said Westcliff's approach in Toronto reinforced the importance of building locally rather than exporting a one-size-fits-all model.

He said the university collaborated with local government, employers and workforce stakeholders to shape programs aligned with regional needs, including a master's program in information systems and technology with

a cybersecurity focus. He also said Westcliff hired local leadership to run the campus—a decision he described as essential to the expansion's early success.

### Early Learning

Lee called the Westcliff Early Learning Academy in Irvine the most personally meaningful initiative he has undertaken. His own children, ages 6, 4 and 1, attend the school, which he described as a blend of Montessori, Reggio Emilia-inspired elements and nature-based learning.

Lee also highlighted a dual-language Vietnamese option, which he said reflects his family heritage and fills a gap for families seeking Vietnamese language instruction.

“It's a very unique curriculum, and my kids and our students are really enjoying it so far,” he said.

### Thriving Programs

Lee also discussed the continued integration of Western State College of Law, which Westcliff acquired in 2021.

He described the process as centered on “unity,” transparency and support for faculty and staff during change.

Lee said the law school is “thriving,” citing what he described as the highest bar pass rates in the school's history last February, surpassing all other ABA-approved law schools in the state for that session.

Looking ahead, Lee said he is energized by Westcliff's nursing program—which he said connects directly to community needs—and by the university's efforts to adapt to AI. He said Westcliff has developed an AI-enabled learning tool called the **Socratic Metric** and has piloted it for roughly a year and a half, with rollout to more than 1,000 students and hundreds of faculty, alongside what he called necessary guardrails for ethical use.

As Westcliff grows, Lee said the scale of its student body has changed how he views responsibility.

He said the university now represents students from more than 130 countries, and that the expanding footprint has raised the stakes for doing growth “the right way,” while never forgetting the student experience.

“Growth only matters if quality rises with it, and students feel the difference.” ■

## Charlie Zhang: Celebrates City of Hope, Gummies

■ By PETER J. BRENNAN

ALISO VIEJO — **Charlie Zhang**, who escaped Communist China 46 years ago, continues to show his appreciation for his adopted country, which has continued to honor him for his remarkable journey.

The **City of Hope Orange County** last May honored Charlie and his wife, **Ling**, with the dedication of the “Ling and Charlie Zhang Art Gallery” following their significant gift to the City of Hope Campus Transformation Fund.

“Charlie Zhang has lived the American dream—an against-the-odds journey that began in the hardship of a Chinese reeducation camp and has led to a life filled with family, purposeful days and the joy of giving back,” the hospital said in a statement. “Through it all, he has followed a few guiding principles: fierce ambition, a love of the arts and resounding hope.”

A year ago, after Zhang accepted his Business Journal award for **Excellence in Entrepreneurship**, he told the crowd, “God bless America.” It was a statement that combines two factors that Zhang believes helped him achieve success: the United States and God.

Zhang grew up in Shanghai, where his family ran a coffee roasting business until the communists threw his father in prison. His mother was a natural entrepreneur, teaching him that

“if you screw it up, fix it.” Zhang himself was sent to work for seven years in the countryside's rice paddies during the infamous Cultural Revolution.

He was able to get a visa to the U.S. as a student exchange musician. At 24, he arrived in Southern California in 1980 with \$20 in his pocket and a clarinet, full of dreams of becoming a professional musician. For 12 to 14 hours a day, six days a week, he worked in the kitchen of a Chinese restaurant where a hand injury dashed his musical ambitions.

“Being a dishwasher wasn't a waste of time—I studied what people didn't eat because I had to throw it away,” Zhang wrote in a 2019 Leader Board for the Business Journal.

When he met his wife Ling, an immigrant from Taiwan, she insisted he go to church, or she wouldn't marry him. Zhang became a Christian in 1985, the year he married Ling. The couple has two sons.

“Becoming a Christian was the right choice of my life,” Zhang said. “It's been a great journey.”

### From \$20 to \$50M

Zhang says his faith gave him confidence that he would survive as an entrepreneur. He started his own restaurant that eventually became known as **Pick Up Stix**. Zhang grew the



Ling and Charlie Zhang

chain to 85 restaurants before selling it to **TGI Fridays** in 2001.

“I came to America with \$20, and they gave me \$50 million!” he wrote in his Leader Board.

In the past year, he continued to actively oversee his **Zion Enterprises**, which has a real estate portfolio that includes the **Country Club Medical Plaza**, **Alcoa Storage**, **Centerpointe at Market** and the **Haven Airport Centre**. He also owns the building that houses **Bank Irvine**, which he helped launch in 2022 and serves as its chairman, serving recent Chinese immigrants.

In 2024, he founded Corona-based **Gummy Maker**, which provides a turnkey solution for making nutritional gummies, including white labels. Production has increased by 75%, Zhang said.

His company also includes property dear to

his heart, such as a church in San Juan Capistrano. The company purchased a building in Irvine that is the headquarters of the **Pacific Symphony**. They began **OC Music & Dance** to provide a “world-class facility” where people of all ages, experiences and cultures can enjoy the arts. Since **Richard Nixon** did so much to open U.S.-China relations, Zhang decided to honor the former president by serving as treasurer of the Nixon Foundation's board of directors, which oversees the **Richard Nixon Presidential Library and Museum**.

When asked about his achievements in the past year, Zhang said in an email that he and his wife Ling “celebrated the joyful arrival of their third grandchild—an important personal milestone that underscores the family values that guide his professional philosophy.”

“We need to set an example and a pattern for the next generation,” Zhang told City of Hope. “Maybe someone will say, ‘Charlie contributed to that,’ and want to do the same. Everyone can give on some level—this is what I've taught my children and grandchildren.”

Zhang will be the keynote speaker at the Business Journal's Excellence in Entrepreneurship awards event, scheduled for March 26 at the **Irvine Marriott**. ■

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# Julian Hamood: TrustedTech Expands Globally

■ By KEVIN COSTELLOE

IRVINE — **Julian Hamood** says his **TrustedTech** firm is now one of **Microsoft**'s top 150 partners globally, after the company exceeded its 2025 revenue expectations and continues to expand in Europe and the Middle East.

TrustedTech helps companies manage their journey with the software giant, with a focus on companies with workforces ranging from 250 to about 22,000 employees.

"We assist them with all the infrastructure as it relates to Microsoft," Hamood told the Business Journal on Feb. 6. That includes licensing, e-mails, security, cloud storage and app development.

Hamood, 34, won the Business Journal **Excellence in Entrepreneurship Award** last March.

TrustedTech's customers also include huge firms such as **Apple**, **Google**, **HP**, **NASA**, **Hilton**, **Kellogg's** and **RTX** (formerly Raytheon), according to the company's website.

Hamood says the company has more than 7,500 customers on monthly billing, while the total number of customers "that are active with



**Julian Hamood**  
Founder, Chief Visionary Officer  
TrustedTech

us" is 15,000.

TrustedTech was one of only 12 partners recently designated for Microsoft's primary support services.

## TrustedTech No. 12 Globally

Irvine-based TrustedTech, founded in 2017, is a **Microsoft Cloud Solutions Provider** and **Microsoft Solutions Partner** focused on simplifying software licensing and providing IT consulting services.

Hamood said Microsoft has "consolidated and cut tens of thousands of partners off the bottom."

"They're really just focusing on their top 150 partners globally," he said. "Luckily, we're up there."

He said TrustedTech is one of the top 15 Microsoft partners in the U.S. by revenue.

TrustedTech also provides technical support for Microsoft 365 and Azure.

## \$1B Annual Revenue Seen in Five Years

TrustedTech chalked up \$340 million in revenue in 2024 and reached about \$500 million last year, a year ahead of schedule.

Hamood is targeting \$650 million in revenue this year and \$1 billion over the next five years.

He says the global expansion is going "really well."

"We're currently serving the UAE and Saudi from our U.K. office," he said.

TrustedTech also has a physical office in Dubai in addition to its Irvine headquarters. The company is also active in France and Germany.

It has about 255 employees, with approximately 180 of them stationed in Orange County, according to Hamood

## AI Words of Caution

The company, like most firms these days, is integrating AI into its operations, but there are limits.

"In regards to having the entire sales team completely automated by AI, we're there we could do it, but you still need the humans," according to the TrustedTech founder.

Hamood has some words of caution about the industry's astronomically high capital expenditures for AI relative to expected revenue returns.

"It's pay the piper time," he said. "The revenues are not going to catch up to the capex from last year. I think there is going to be a little bit of retrenchment in the market."

Hamood, who is also TrustedTech's chief visionary officer, is a 2014 graduate of **California State University, Fullerton** with a degree in business, management, marketing and related support services.

His parents moved from Lebanon to Florida and then resettled in OC, where his mother also attended CSUF.

His resume includes just over three years as general manager at **My Choice Software** of Lake Forest. ■

# Todd Watts: Growing PatientFi in Fertility, Audiology

■ By YUIKA YOSHIDA

IRVINE — **Todd Watts**, co-founder and chief executive of healthcare fintech firm **PatientFi**, says he is building on the momentum that earned him the Business Journal's **Excellence in Entrepreneurship Award** last March.

Since PatientFi expanded its financing services for elective procedures into the fertility care space, Watts said they're now the category leader across fertility and IVF treatments.

"It proves we can take our solution, and it can work in a very different medical specialty," Watts told the Business Journal.

Sales last year grew more than 65%, driven in part by category expansion, particularly in fertility, according to Watts. In December, PatientFi announced a partnership with **Boston IVF**, a national fertility network with more than 24 labs across the U.S. and Canada.

Irvine-based PatientFi, founded in 2017, offers a point-of-sale technology platform that helps patients finance out-of-pocket healthcare expenses through monthly payment plans. Pa-



**Todd Watts**  
CEO  
PatientFi

tients can get approvals of up to \$50,000 within minutes.

The company, which has an emphasis on medical aesthetics with a network of 5,000 medical providers across the plastic surgery, medical spa and dentistry industries, began expanding into new specialty markets about two and a half years ago.

"We've always picked a specialty, put all of our focus on it until we reach a critical mass dominant physician, then we move on to the next one," Watts said.

## Targeting Audiology Next

PatientFi has identified audiology as another

specialty market to expand into.

Starting last year, it has onboarded nearly 1,000 audiology clinics.

"It's the perfect product market fit for us," Watts said. "We know that profile of borrower really well."

Similar to fertility, Watts said audiology is a primarily cash-pay market with few options to pay over time.

"You get a new hearing aid every five years and it's \$5,000 on average, so just like any of our other specialties, that's a really big number," he said. "Which means people, if they're not getting insurance coverage for it, can have a more affordable financing."

## Aesthetic Record Partnership

PatientFi announced another large partnership at the end of last year with **Aesthetic Record**, integrating its financing solutions into Aesthetic Record's practice management system, which is used by more than 9,000 clinics.

Through the partnership, practices can now offer PatientFi's payment plans alongside **As-**

**pire Galderma Rewards**, a free loyalty program that lets patients earn points for treatments across the Galderma portfolio.

Watts said that partnership represents a "key evolution" he believes will take place across the industry: financial technology platforms becoming fully integrated into business ecosystems.

"As a standalone platform, it's a lot harder to differentiate yourself because people don't want to go through the pain of using it, so integration makes it really easy," Watts said.

"Bright times are ahead" for fintech, according to Watts, due to reduced interest rates making it easier for lenders to make better offers to patients.

Regarding a potential exit, Watts said that the company is not actively pursuing anything right now, but that there are plenty of options for the future.

"I think we could sell the business or take it public—we've had a lot of inbound interest on both fronts, but for now, over the next two or three years, we'll keep growing and doing what we're doing," Watts said. ■

# Brent Kulp: Traffix is Not Slowing Down

■ By EMILY SANTIAGO-MOLINA

SAN CLEMENTE — Chief Executive **Brent Kulp** said 2025 marked a year of new company records for **Traffix Devices Inc.**, the highway safety firm his parents founded 40 years ago.

Traffix manufactures a catalogue of more than 200 different highway safety and security devices. Kulp took over the business in 2020, and his father **Jack Kulp** still sits on the board.

While Traffix does not disclose financials, Kulp told the Business Journal that the San Clemente-based firm saw double-digit sales growth last year. This was driven by products gaining traction in new industries, allowing Traffix to find and pursue new customers.

The company designs, manufactures and delivers more than 90% of its inventory in-house. Its portfolio includes barricades, delineators, safety apparel, signs and other traffic control and crash attenuation items.

Its newest device, released late last year, is the **Block Axess** vehicle mitigation system, designed to stop hostile vehicles from driving into

crowds at public events. It can be set up in about 14 minutes.

Kulp said it was originally developed in France and Traffix started manufacturing the product at its Iowa facility last year. He added that last year's tariffs activity helped Traffix move a lot of production back to the U.S. at its manufacturing facilities.

Existing products have also been driving demand, such as a truck-mounted attenuator called the **Scorpion**. The attenuator was designed to disable vehicles that might ram into larger trucks while protecting the drivers involved and the equipment.

Kulp, who received the Business Journal's **Excellence in Entrepreneurship Award** in 2025, noted that fire departments had begun purchasing the device to put on the back of their fire trucks when dealing with traffic-related incidents. The first responders have become a new market for Traffix, he said.

Another attenuator that saw a lot of activity last year was Traffix's **Delta** device, which is permanently mounted to concrete barriers at highway exits and designed to absorb the energy of a swerving vehicle and safely stop it.



**Brent Kulp**  
CEO/President  
Traffix Devices Inc.

The **Delta** product received state and federal approvals last year, which boosted sales, according to Kulp. The approvals come after Traffix's own round of crash-testing, of course.

"We smash a lot of cars," Kulp said of "perfecting" its crash-safety products.

## 40 Years of Expanding

Last year, the company also discovered new clients outside the highway safety industry that were using its products.

Kulp pointed to the firm's **Water-Walls**, a temporary crash barrier system, being on the

rise for more commercial applications. For instance, tech companies have purchased **Water-Walls** to place around data centers, according to Kulp.

Traffix has also used its line of safety apparel, a newer category that the firm has started to expand, to grow its client base, selling to municipalities and public utility companies.

The manufacturer is fielding requests from new companies for the outerwear, Kulp said. This led him to hire "a high-vis expert" in the field named **Jim Foster** to take the lead on growing that part of the business and keep up with demand.

This year marks Traffix's 40th anniversary and Kulp confirmed that the company has not been slowing down, compared to other manufacturers in the highway safety space.

Kulp added that he's seen a lot of consolidation in the industry with private equity firms buying both its customers and competitors. His plan is to keep the company family-owned and independently run for the foreseeable future.

"We're becoming an endangered species," Kulp said. ■

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# Relationships drive success in middle market banking.

By Bill Denny



## Bill Denny

Commercial Banking  
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Bill leads the Orange County-Inland Empire Commercial Banking business, overseeing business development and relationship management, and spearheading PNC's commercial banking growth in Southern California. Additionally, Bill and his team are deeply embedded in the communities they serve across the region, ensuring PNC plays a meaningful role in empowering both business and individuals.

Bill has worked in banking for over 20 years. Prior to joining PNC, he served as the Commercial Banking Market Leader in Orange County for Wells Fargo, and before that, Bill spent 10 years as a college football coach with stints at Arizona State University, University of California-Berkeley and Western Carolina University.

Bill is a graduate of Pacific Coast Banking School (PCBS) and the University of Washington's Executive Leadership Program. He earned a Master of Business Administration from Arizona State University and a Bachelor of Science in Accounting from The University of the Pacific.

## Orange County's middle market stands out within California's dynamic business landscape.

The region is home to a unique mix of industries, from healthcare organizations navigating regulatory approvals to construction firms managing supply chains to manufacturers driving innovation at scale. These businesses are responsible for job growth and for driving our local economy forward.

Due to this responsibility, all business decisions are deliberate, relationship-driven and rooted in long-term vision. CFOs and business owners are not just thinking about the next quarter, but about sustainability, succession and the legacy they are building. This is why banking relationships matter now more than ever.

At PNC, we believe strong banking relationships create better business decisions that keep businesses on track to achieve their long-term goals.

Our approach to middle market banking starts with understanding a company's needs, from what drives decision-making to where leadership wants to go next. We invest in long-term relationships supported by relationship managers with deep industry expertise who know Orange County well because they live, work and raise their families here.

We know that middle market leaders want partners who understand the nuances of their business, their industry and their risk profile. They value bankers who take the time to listen, ask the right questions and provide

perspective shaped by experience. At PNC, we work side by side with our clients, collaborating on strategy and priorities and bringing the right internal experts to the table to help turn goals into outcomes. A strong banking relationship is not only about access to capital; it's about having an advisor who can help anticipate challenges and identify opportunities before they arise.

We know that no two businesses are alike, even in the same industry. That is why PNC adopts a customized approach for each relationship. Our clients are not passed from team to team. They have a dedicated partner who knows their story and advocates for them across the bank — from treasury management and lending to private banking and beyond.

In Orange County, where businesses are resilient, innovative and deeply connected to their communities, relationships are the foundation of success. At PNC, we are committed to showing up consistently, thinking strategically and helping drive business forward.

So as CFOs and business owners look ahead to what's next, our role is simple: to be a steady, reliable influence for the long term.

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# Strategic M&A as a Catalyst for Entrepreneurial Growth

*Leveraging Strategic Transactions to Accelerate Scale, Access Capital, and Drive Competitive Advantage*



**Addison Adams, Esq.**  
Adams Corporate Law

For many business owners and leadership teams, the growth question today is no longer simply “how do we scale,” but “how do we scale in the right way, at the right time, and with the right partners.” Markets move quickly, competitive dynamics continue to shift, and building new capabilities organically often takes years. In some situations, relying on internal growth alone may not provide the speed, resources, or positioning needed to pursue the next phase of opportunity.

#### **M&A as Part of the Growth Playbook**

As a result, more founders view strategic transactions—acquisitions, mergers, and outside investment—as tools to help

move their businesses forward. A well-chosen acquisition can quickly add customers, talent, technology, or geographic reach. A merger can combine complementary strengths and create scale in a consolidating industry. A minority investment or recapitalization can provide growth capital while allowing existing leadership to retain operational control. In each case, the transaction serves as a way to build and reposition the company, often strengthening its long-term competitiveness and, in time, its attractiveness as a potential acquisition target.

These approaches show how strategic transactions can be used deliberately to accelerate growth, expand capabilities, and reposition a company for its next phase. For founders and executives, the focus is not simply on doing a deal, but on making the right move at the right time—one that aligns with long-term objectives and preserves the flexibility needed to continue building value.

As a boutique law firm focused on mergers and acquisitions and complex business transactions, Adams Corporate Law works with founders and executive teams as they evaluate these strategic options and consider how transactions can support long-term growth.

#### **Deal Structure and Long-Term Value**

Once a strategic opportunity is identified, attention naturally turns to deal structure. While valuation often dominates headlines, experienced business owners understand that the terms of a transaction frequently matter just as much as the price. Key considerations include:

- **Governance and control rights:** How strategic decisions will be made after closing, board composition, and protections for minority or rollover owners.
- **Rollover equity and management incentives:** The degree to which founders and executives retain ownership and remain aligned with future performance.
- **Earnouts and performance milestones:** How contingent payments are tied to growth targets and how those targets are defined and measured.
- **Tax treatment and consideration mix:** The impact of cash, equity, and debt on after-tax results and long-term economics.

Thoughtful structuring can preserve flexibility, align stakeholders, and support continued growth. Poorly designed terms, by contrast, can constrain decision-making and create friction long after the transaction has closed.

#### **Where Risk and Value Are Revealed**

Even transactions that appear straightforward involve layers of complexity, and it is during the due diligence phase that many of the most consequential issues first come into focus. This process is central to understanding both risk and value and often influences how a deal is ultimately negotiated and structured. Common areas of focus include:

- Customer and supplier contracts with change-of-control provisions.
- Regulatory and licensing requirements that may delay or condition closing.
- Intellectual property ownership and protection.
- Data privacy and cybersecurity practices.
- Employment, equity, and incentive arrangements affecting retention and alignment.
- Long-term commercial agreements and real estate commitments that shape operating flexibility.

Integration planning adds another dimension, raising practical questions about leadership continuity, culture, systems, and operational alignment. Together, these factors influence pricing, risk allocation, governance, and the company’s ability to execute its strategy after closing.

The quality of diligence and the guidance supporting it can shape outcomes for years to come.

#### **Supporting Growth Beyond the Deal**

In addition to advising on acquisitions, mergers, and capital transactions, many growing companies rely on Adams Corporate Law as an ongoing legal partner for complex commercial relationships and high-volume contract environments. Acting as an extension of the business, the firm supports leadership teams in managing long-term agreements, negotiating key partnerships, and proactively addressing risk—helping organizations remain focused on growth rather than reacting to issues after they arise.

#### **From Building to Realizing Value**

For many owners, strategic transactions eventually become part of a longer-term exit or succession plan. Preparing a company for a future sale—whether to a strategic buyer, private equity group, or well-funded management team—often begins well before the decision to sell. Strengthening contracts, clarifying governance, addressing legal and operational risk, and building a record of disciplined execution can increase optionality and enhance value when the time is right, allowing founders to transition from building the business to realizing the full value of what they have created.

#### **Your Strategic Legal Partner Across the Business Lifecycle**

Excellence in entrepreneurship is reflected not only in building a successful company, but in making sound strategic decisions at pivotal moments—recognizing when a transaction, investment, or sale can help shape the next chapter and approaching that decision with clarity and discipline. At those moments, experienced legal guidance can make the difference between a transaction that simply closes and one that is structured to support long-term value.

#### **We Close Deals**

Adams Corporate Law specializes in getting the deal done. Drawing on decades of experience advising founders and executive teams, our focus on closing deal after deal means our clients benefit from our experience getting around, over, or through problems to the final signature on the dotted line. To discuss how Adams Corporate Law can support your business and guide you through strategic transactions and future growth, **contact our team at (714) 619-9360 or visit us online at [www.adamscorporatelaw.com](http://www.adamscorporatelaw.com)** to learn more.



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## Celebrating Excellence in Entrepreneurship: Built by Entrepreneurs, for Entrepreneurs

By Ivo A. Tjan, CEO  
CommerceWest Bank

Entrepreneurship is not an abstract concept at CommerceWest Bank, it is part of our DNA. As a founder-led institution, we understand what it takes to build something from nothing: the uncertainty, the long hours, the personal risk, and the relentless belief required to turn an idea into a successful enterprise. That is why we are proud to support the OCBJ Excellence in Entrepreneurship Awards, honoring the visionaries who drive innovation, create jobs, and strengthen our communities.

At CommerceWest Bank, we believe entrepreneurs deserve more than a transactional banking relationship. They deserve a financial partner who truly understands their journey because we have lived it ourselves.

### A Bank Founded by an Entrepreneur

I founded CommerceWest Bank in 2001 with a clear conviction: entrepreneurs and growing businesses were underserved by traditional banking models. Too often, decisions were impersonal, inflexible, and disconnected from the realities of business ownership.

From day one, our mission has been different: To build a bank that thinks like an entrepreneur, moves with purpose, and puts relationships at the center of every decision.

That founder-led perspective remains central to who we are today. It is rare for a bank CEO to also be an entrepreneur, and that distinction shapes how we listen, how we problem-solve, and how we advocate for our clients.

### Human-Centric Banking in a Digital World

While many financial institutions pursue automation at the expense of relationships, CommerceWest Bank has chosen a different path. We embrace technology, but only when it enhances the client experience, never when it replaces human connection.

Our clients are not account numbers. They are founders, operators, and visionaries with unique challenges and ambitions. Every solution we deliver; whether a loan structure, treasury platform, or growth strategy is intentionally customized.

No two clients experience CommerceWest Bank the same way, because no two businesses are the same.

### Empowering Growth, Not Just Transactions

As a full-service business bank, we provide commercial banking, SBA lending,

working capital solutions, treasury management, and digital banking tools designed to support scale and efficiency.

But our role extends beyond products.

We serve as strategic partners offering guidance, insight, and access to resources that help entrepreneurs navigate complexity, seize opportunity, and grow with confidence. Our success is measured not by transactions, but by the success of the businesses we serve.

### Recognizing Those Who Inspire Us All

The Excellence in Entrepreneurship Award recognizes leaders who exemplify resilience, innovation, and impact. These individuals remind us why entrepreneurship matters, not only to the economy, but to the fabric of our communities.

CommerceWest Bank is honored to stand alongside these remarkable founders. Their determination mirrors the very values on which our bank was built.

### A Shared Journey Forward

CommerceWest Bank proudly supports the OCBJ Excellence in Entrepreneurship Awards and congratulates this year's winners and nominees. Your vision, perseverance, and success inspire us not just as bankers, but as fellow entrepreneurs.

Together, we are building businesses, strengthening communities, and shaping the future.

### Ivo A. Tjan, Chairman & CEO

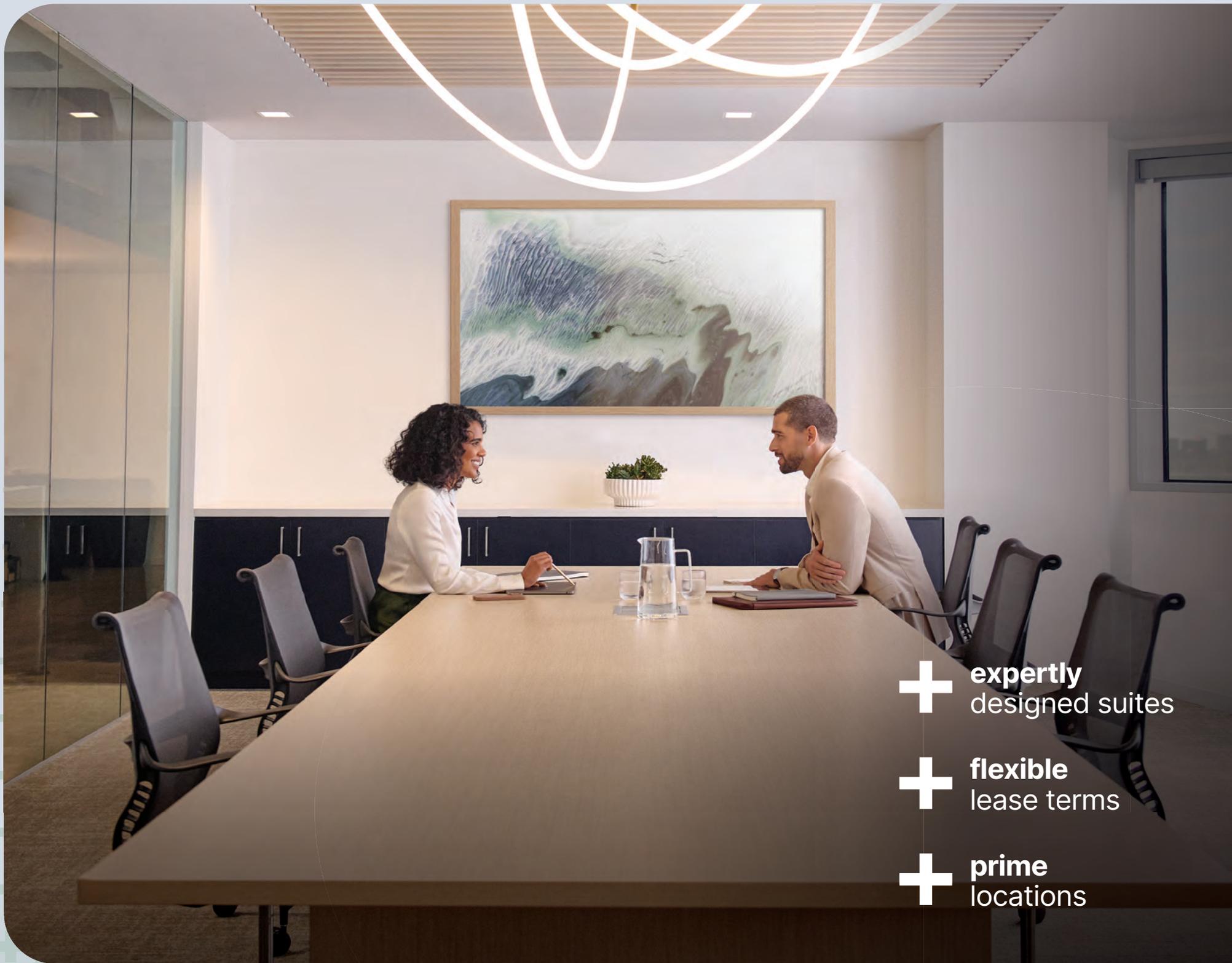
*Ivo Tjan is the Founder of CommerceWest Bank.*

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. He can be reached at [itjan@cwbc.com](mailto:itjan@cwbc.com) or (949) 474-5278.



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## Why Project Work is a Smart Move

**At Conexus we are hyper-focused on helping our candidates find employment that enhances their skills while keeping them relevant in this hyper-competitive marketplace.**

- Many times, as recruiters we come across outstanding candidates that are hesitant to take interim work while searching for their next “dream job”. Little do they know that by playing the waiting game, they are likely to diminish their stock value in the open market.

**Scenario:** You’re recently unemployed and looking for your next “perfect” job. You don’t want to take the “wrong” job and are really focused on Culture, Growth Opportunity, Company Stability, and a commute situation that fits your needs. You would rather wait than jump into something that might not be the right long-term fit. You may not realize it, but you are a perfect contender for INTERIM / PROJECT BASED work. Why is that?

### The facts are:

- The current unemployment rate for CPA’s and MBA’s in Southern California is less than 2%. **You are always more employable when you are working now as opposed to currently unemployed.**
- **What you thought was your “Dream Job” may change** as you explore industries you’ve never had exposure to and companies that you may never have imagined working in.
- Other candidates with your same credentials and skill sets are actively engaged in project work while simultaneously looking for a long term, salaried position and **they always have an edge in landing their next role over someone who is currently unemployed.**
- In taking a project – **you will be able to work in different industries more easily** as it’s common for clients to be much more flexible in hiring people with non-industry backgrounds. **This is tremendously valuable**

for our candidate as it can open entirely new career opportunities and an entirely new network of professionals, they may have never had the chance to meet prior.

- In taking a project- **you will be exposed to new software / ERP systems – another huge value add to set you aside from other candidates.**

• **In taking a project- there is always a high percentage chance you will be made an offer to take a fulltime job** – at that point you would also be able to make a *very informed decision* as to whether the company/culture/people and work is what you want to commit to long term. You are not obligated – but **you have the luxury of choosing after having seen first-hand the inner workings of the company.**

- **Ask yourself- what is the downside to taking project work?**

### In Summary:

It’s important to understand your options and how best to utilize your skills in a market that is always moving forward and hyper-competitive.

Think of your resume as a *House for Sale*. The more that house sits on the market, potential buyers start looking at that house as a problem house. Otherwise – it would have sold by now.

Conversely, candidates that sit for months at a time in between roles while looking for their next long-term role limit themselves significantly in comparison to candidates that are working on a temporary project while selectively looking for their “perfect” long term home.

Ultimately, the benefits of short-term consulting in between jobs far outweigh the negatives. Contact us directly to learn more about our interim roles and opportunities.

## Conexus is Latin for Connection; Joining Together; Combination

Making quality connections and joining people together are what we do, but we focus on consistently doing it better than our competition.

We are experienced search experts who believe that clients benefit by partnering with an innovative, ethical, dedicated, and collaborative firm. The Conexus team brings decades of experience conducting challenging searches, identifying, recruiting, qualifying, and delivering the best and most appropriate candidates for positions at all levels. Our clients call on us to deliver candidates for their Permanent, Temporary, and Special Project recruiting needs.

While many search firms manage their employees via quotas solely tied to volume, Conexus manages its professionals’ using metrics that measure quality and hold its team to a higher standard. They are designed around a pursuit for clients’ success and satisfaction in the Talent Acquisition process.

### **Conexus’ client focused metrics include:**

- Percentage of searches successfully completed: more than 90%.
- Percentage of clients that engage us for more than one search: nearly 100%.
- Average time to successfully complete searches:
  - Vice President and above: less than 60 days.
  - Experienced hire and middle management: less than 30 days.

### **Our keys to success include:**

- Functional and regional focus.
- Extensive training with some of the top trainers in our industry.
- A heavy investment in technology to minimize time wasted on administrative tasks.
- A strategic, organized, disciplined search process.

- Passionate, intelligent employees.
- A mantra of consistently putting clients’ needs first.

Let’s discuss how we can help you with the most important ingredient tied to your company’s future success: your future employees.

Locations: Irvine (949) 525-9802 | Glendale/Playa Vista (213) 289-3477  
|Conexusrecruiting.com | information@conexusrecruiting.com



**Mike Kelly**  
Partner/Co-Founder at Conexus  
CFO, IT and HR Talent Solutions  
Orange County



**Matt Primeau**  
Partner/Co-Founder at Conexus  
CFO, IT and HR Talent Solutions  
Orange County



## We are More Than Just a Resource. We Are Your Partner.

*At Conexus, we solve our clients' hiring needs using an innovative process and a high-touch approach.*

**When it comes to Top Talent, Conexus Delivers. Experience the Conexus Difference.**

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- Chief Accounting Officer
- VP of Finance & Accounting
- Controller
- Treasurer
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- Accounting
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- Technology VP & Director
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- Scrum Masters
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## How WethosAI is Dismantling the Meeting Industrial Complex

In 1957, English writer C. Northcote Parkinson coined the **Law of Triviality**. He illustrates it with a fictional firm's committee meeting to discuss two new projects: an atomic reactor and a company bike shed. The reactor is complex and expensive. Only a few experts understand it. Those who don't assume that those who work on it understand it (**Ambiguity Aversion**). People who are not experts don't speak up in order to avoid embarrassment, so it gets approved in two and half minutes.

But everyone has an opinion on bikes and bike sheds. Parkinson says, "The bike shed will be debated for an hour and a quarter, then deferred for decision to the next meeting, pending the gathering of more information." This is known as the Bike Shed Phenomenon: the time spent on any item will be inversely proportional to its cost and importance.

Peter Drucker, the father of modern management, famously noted that "**Meetings are a symptom of bad organization. The fewer meetings the better.**" Decades later, we've ignored his warning. Instead, we have built a **Meeting Industrial Complex** where the appearance of collaboration has replaced the actual work of collaborating. The 2024 Global Talent Trends report published by Mercer indicates that nearly 82% of employees are at risk of burnout, a figure that has escalated sharply despite the ubiquity of "productivity" tools.



Stuart McClure

### Meetings are Broken: The Trap of Synchronous Chaos

The modern knowledge worker is trapped. According to Microsoft's Work Trend Index report, we spend upwards of 57% of our time in meetings, emails, and chats, leaving only a meager fraction of the day for the creative, deep work we were actually hired to do.

We expect teams to make high-stakes decisions, yet we deny them the one resource required to do so: **time**. Preparation has become a luxury. We expect employees to jump from a budget review to a new product innovation decision with zero cognitive transition time.

It isn't just a collection of relatable meeting tropes; it's a map of the hidden tax on every synchronous hour we spend. While we attempt to collaborate, we are simultaneously battling the 'Hippo effect' (Highest Paid Person's Opinion), navigating cultural time zone barriers, and losing 'Introverted Brilliance' to the loudest voice in the room.

And yet, somehow, we have accepted this as the "new normal" and the standard for modern collaboration.

We aren't just wasting time; we are actively suppressing the deep work and diverse perspectives required to solve complex problems.

At WethosAI, we believe this trajectory is unsustainable. It is not enough to make meetings shorter or agendas clearer. We need to eliminate the necessity of the meeting itself.

We asked ourselves, **how can decisions that take weeks to schedule time, review past work, and evaluate trade-offs be made in minutes instead?**

### Enter Brainstorms & Meeting Simulator: Your Calendar's Reset Button

This is the driving force behind our new features, **Brainstorms** and **Meeting Simulator**. A Brainstorm is a Generative AI "**decision space**" designed not to optimize your calendar, but to clear it, and still move work forward with high-quality decisions. The Meeting Simulator propels you a few meetings into the future so you are closer to the making of the decision than staring at white space.

#### 1. Democratizing Meeting Prep

In a typical Meeting Industrial Complex environment, thorough preparation is a luxury reserved for those with the lightest calendars. Most participants arrive at meetings having barely skimmed the agenda, leading to sessions that are spent "catching up" rather than deciding.

Wethos Brainstorms democratizes this process by using **XO, your AI Digital Chief of Staff**, to provide every team member with the necessary context, past work summaries, and relevant trade-offs. This ensures that everyone, not just the most prepared, starts the deliberation from the same high-level jumping-off point.

#### 2. Ending the Scheduling Lag

The fundamental flaw of the traditional meeting is the "requirement of presence." To move a project forward, we assume we must gather everyone in the same digital room at the same time. This creates "scheduling lag", weeks lost trying to find a thirty-minute window where five calendars align.

Wethos Brainstorms dismantles this dependency through XO. XO acts as an asynchronous engine of alignment. Because XO knows your team intimately, including how you work, how you think, and what your goals are, it can facilitate progress without requiring everyone to be online at once.

#### 3. Deliberation Without the Fatigue

In a traditional meeting, the loudest voice often wins. In a Wethos Brainstorm, the best idea wins. By moving the process to an asynchronous, AI-facilitated decision space, we give every team member the space to think deeply before contributing. XO synthesizes these inputs, identifying patterns and friction points before you ever hit "record" or "join."

#### 4. Escaping "Chat for Chat's Sake"

Communication tools like Slack and Teams masquerade as collaboration tools, but they are often just distraction engines. They created a different kind of "meeting," one that never ends. They create an illusion of work, while robbing us of precious time for critical thinking. Brainstorms are different. They are goal-oriented environments where XO keeps the team focused on the output, not just the transcript.

#### A New Standard for High Performance

We are entering an era where "busy" is no longer a badge of honor. It's a red flag for inefficiency. By turning weeks of talk into minutes of action, Wethos isn't just giving you a new way to work, we keep moving work forward while giving you your day back.

**The "Meeting Industrial Complex" is powerful, but it isn't permanent. It's time to start working again.**

Source Citations:

- Mercer 2024 Global Talent Trends
- Microsoft Work Trend Index 2023: Will AI Fix Work?



**Eliminate**  
**useless**  
**meetings**

 **WethosAI**

# 5 Essential Lessons for Entrepreneurs

By Beth Adkisson, Vistage Master Chair

Entrepreneurship is often portrayed as a solo pursuit—a founder pushing forward on instinct, grit, and sheer will. But after years of working alongside CEOs and business owners, a different pattern becomes clear: Long-term success isn't about having all the answers. It's about how leaders face reality, how they grow people, and how they continue to grow themselves as the business evolves.

After more than two decades coaching CEOs in Orange County, I've seen what separates entrepreneurs who scale from those who stall. The most successful leaders consistently practice five behaviors:

## 1. They Face Reality Fast

One of the most common challenges that entrepreneurs face isn't lack of effort or intelligence—it's delayed reality. As leaders gain authority, they often lose access to unfiltered input. People soften messages. Bad news arrives late. And before long, leaders find themselves reacting to problems instead of getting ahead of them.

Isolation narrows perspective. When you're too close to your own assumptions, blind spots grow. Decisions start to reflect what feels familiar rather than what's actually happening. And when change shows up—as it always does—it's easy to respond emotionally or defensively instead of thoughtfully.

Entrepreneurs who face reality fast do something different. They don't wait for disruption to force clarity. They actively look ahead. They ask, "What's changing? What am I not seeing? What happens if I'm wrong?" They study trends, pressure-test their thinking, and confront uncomfortable truths early—while there's still time to act.

This is where trusted peers matter. In a confidential peer group, leaders can speak candidly, hear perspectives they wouldn't otherwise encounter and anticipate what's coming over the horizon. Facing reality isn't about pessimism. It's about preparedness—the ability to respond rather than react.

## 2. They Invest in Their People

Entrepreneurs who scale successfully understand that growth doesn't come from personal heroics. It comes from building capable, aligned teams. If everything still runs through the founder, scale will always be fragile.

Investing in people means more than hiring smart talent. It means developing leaders, building trust, and creating clarity so the organization can operate without constant intervention. When leaders fail to do this, they become the bottleneck. Decisions slow. Accountability weakens. Execution suffers.

Strong teams create leverage. They reduce friction, improve decision quality and allow founders to focus on the work only they can do. Growing people isn't a soft priority—it's a strategic one.

## 3. They Think Long Term and Execute Daily

The best entrepreneurs hold two things at once: a long-term vision and disciplined daily execution. They resist the temptation to react to every short-term disruption. Instead, they stay anchored to their vision.

Good leaders don't confuse urgency with importance. They bring structure to decision-making so choices are grounded in clarity rather than instinct alone. Financial discipline plays a critical role here. Growth can mask risk, particularly during expansion.

## 4. They Stay Relentless About Learning

Every stage of growth demands a different version of the leader. The skills that got an entrepreneur started are rarely the same skills required to scale.

A sales-driven founder may need to deepen operational or financial fluency.



In a confidential peer group, leaders can speak candidly, hear perspectives they would not otherwise encounter, and anticipate what's coming over the horizon

An operational leader may need to strengthen go-to-market thinking or people leadership. The moment leaders stop learning, they risk becoming a constraint.

The most effective entrepreneurs treat learning as a continuous discipline. They stay curious, ask better questions, and seek input from peers who have faced similar challenges.

**5. They Lead with Courage, Consistency, Accountability, Trust and Care** Leadership isn't just about strategy or execution. It's about how leaders show up—especially when conditions are uncertain.

Courage shows up in facing hard truths. Consistency creates stability. Accountability builds trust. Care creates environments where people feel safe to contribute and grow.

When leaders combine clear decision-making with humility, learning, and trusted relationships, organizations become more resilient. Teams align more easily. Growth happens with less friction.

The image of the lone entrepreneur is outdated. The leaders who scale successfully face reality fast, invest in their people, think long term while executing daily, stay relentless about learning, and lead with integrity.

When entrepreneurs lead this way, businesses scale—and people thrive.

“ Leaders who understand their financial reality have far more freedom to act decisively. Thinking long term doesn't mean moving slowly. It means making today's decisions with tomorrow in mind. ”

### Beth Adkisson

Beth Adkisson is a Master Chair with Vistage Worldwide, the world's largest CEO coaching and peer advisory organization. Since February of 2001, she has been on a mission to empower CEOs, executives, and the next generation of leaders to achieve their fullest potential. She facilitates peer advisory groups of CEOs, conducts personalized one-to-one coaching sessions, and fosters an environment where top executives can thrive. She has also served as the past President of the Orange County Chapter of NAWBO (National Association of Women Business Owners), on the board of Laura's House, inspiring hope and empowering change to end domestic violence, and on the board of WHW, helping the underserved and unemployed.

# VISTAGE

# WHAT WORLD-CLASS CEO COACHING LOOKS LIKE



## **Beth Adkisson**

Vistage Chair since 2001  
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Congratulations to Orange County's own **Beth Adkisson** for reaching the greatest height in CEO coaching.

Recipient of the **2025 Vistage Don Cope Memorial Award**, the most prestigious honor in executive coaching, Beth embodies everything it represents — a leader of leaders who gives freely, serves deeply, and elevates everyone around her.

Beth's thriving peer advisory groups are a masterclass in excellence and empathy. For 25 years, she has earned the trust of hundreds of business owners and top execs — by listening carefully and asking tough questions that guide them to better outcomes. Consistently stepping in and stepping up, she is equally valued by her fellow Chairs.

Thank you, Beth, for your world-class dedication to business leaders, Orange County, and our entire Vistage community.



# VISTAGE

[VISTAGE.COM](https://www.vistage.com)

Vistage is the world's largest CEO coaching and peer advisory organization. Since 1957 we've been guiding CEOs and owners of small and midsize businesses to greater success. It's why Vistage member companies average 21+ years, while most U.S. businesses fail within five. Today, 45,000 members in 40 countries turn to Vistage to become better leaders who drive better outcomes.

# CONTROL THE CHAOS BEFORE IT CONTROLS YOU

In high-net-worth divorce, structure—not emotion—decides the outcome.

By Paul Nelson, Esq



**In Orange County, wealth is rarely simple.** It is layered, illiquid, and intertwined with operating businesses, private equity interests, deferred compensation, trusts, and real estate portfolios that resist tidy spreadsheets. When that kind of complexity enters a dissolution, the issue is not the noise. It's the architecture.

For founders and senior executives, the first strategic decision is often procedural: public courtroom or private judging. Private judging offers discretion, scheduling control, and continuity. Instead of waiting months between hearings, the matter moves with pace and purpose. If you're used to closing material issues before lunch, that kind of control feels familiar.

And it matters, because chaos doesn't get better on its own.

In complex divorce, the real exposure is not always the headline valuation. It is liquidity pressure, tax acceleration, or temporary orders that quietly shift leverage. In Lamoreaux, temporary orders can land quickly—and they can move money faster than people expect. A poorly timed ruling can disrupt operations. A tracing dispute can recharacterize assets. Fiduciary duties between spouses—often overlooked in better times—can create liability long before anyone uses the word “dissolution.”

This is where disciplined asset intelligence matters. Forensic accounting is not theatrics; it is pattern recognition. Compensation structures, carried interests, phantom equity, earn-outs, and intercompany loans require precise

analysis. The better question is rarely “What is this worth?” It's “What does this control?” In high-net-worth cases, control is currency.

Control of voting rights and management authority often outweighs raw dollar figures. Preserving decision-making authority can be the difference between maintaining enterprise value and watching it erode under uncertainty. I've watched businesses lose momentum not because the valuation was wrong, but because control was. A business built over decades should not be destabilized by temporary orders or preventable missteps.

Trial readiness remains decisive leverage. In substantial estate matters, the party prepared to try the case negotiates from strength. Calm preparation changes the room. It reduces posturing and clarifies risk. Most high-asset cases resolve—but they resolve differently when litigation is not a bluff and everyone understands the exposure.

There is a quiet irony in divorce among successful entrepreneurs: the discipline that built the enterprise must now be applied to untangling it. The same precision once used to scale a company must be deployed to preserve it.

With intelligence, preparation, and procedural control, even complex cases can be managed. That approach isn't marketing; it's the standard for a Certified Family Law Specialist (State Bar of California Board of Legal Specialization) handling substantial estates.

In Orange County, control may be the most valuable asset of all.

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**PAUL NELSON, ESQ.**

**Paul Nelson** is the founder of **Nelson Kirkman Family Law Attorneys**, a premier California firm specializing in high-net-worth divorces. **Certified by the State Bar of California Board of Legal Specialization in Family Law**, Paul brings extensive courtroom experience and a deep command of California family law to every case. His strategic approach and relentless advocacy have earned him a reputation for securing exceptional results for business owners, entrepreneurs, and high-earning professionals navigating complex divorce proceedings.

Recognized among the legal elite, Paul holds the prestigious **AV Preeminent rating from Martindale-Hubbell**, boasts **twenty five-star ratings on Avvo**, and has been consistently

honored by **Super Lawyers**.

A thought leader in the legal community, Paul's insights have been featured in **Forbes**, **Fortune**, and the **Orange County Business Journal**. He is also the author of the **Amazon best-selling book, *The Dissolution Solution***, which provides a strategic roadmap for high-asset divorces.

Paul is an active member of the **Orange County Bar Association**, the **State Bar of California**, and the **J. Reuben Clark Law Society**.

With a practice built on discretion, precision, and results, Paul ensures his clients emerge from their legal battles positioned for success—both personally and professionally.

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# MEET THE JUDGES!



## **Addison K. Adams - Attorney, Founder, Adams Corporate Law Inc.**

Addison K. Adams is the founder and principal attorney of Adams Corporate Law, a boutique law firm specializing in mergers and acquisitions and corporate dealmaking. With three decades of legal experience, he is a trusted advisor to business owners, executives, and investors navigating complex corporate transactions. His practice focuses on M&A, finance, corporate structure, compliance, and major commercial contracts. Adams was a founding equity partner of a nationally recognized securities boutique representing public and private businesses. He has served as outside general counsel to companies throughout California, advising on growth strategies, exit planning, and risk management. Known for his practical, solutions-oriented approach, Adams is committed to helping clients close deals efficiently—true to the firm's reputation as Lawyers Who Close Deals. Adams holds a B.S. in Finance from the University of Arizona and a J.D. from the University of San Diego School of Law.



## **Victor Guerrero - President & Chief Operating Officer, Infinity Bank**

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



## **Matt Klingbeil - Senior Vice President Relationship Manager, Commercial Banking, PNC Bank**

Matt Klingbeil is a senior vice president relationship manager with PNC Bank's Commercial Banking Group in Orange County, CA. Klingbeil has over 20 years of industry experience working in commercial banking and lending in Southern California, and he holds a Bachelor's Degree in Economics from the University of Wisconsin-Madison. Klingbeil assists his clients with their commercial lending and banking needs by offering customized solutions to help them meet their financial goals. Klingbeil was born and raised in Northeastern Wisconsin, where he still has family that he visits frequently. He has been a resident of Huntington Beach since 2006, where he lives with his wife and two daughters. Klingbeil is an avid sports fan (of all Wisconsin-based teams) and a live music enthusiast, and he is actively engaged in giving back to the community by volunteering his time to local non-profits and community events.



## **Margita Labhard - Senior Director of Philanthropic Strategy, Orange County Community Foundation**

Margita Labhard is a forward-thinking, strategic leader with over 20 years of experience developing innovative business plans, models, and operational capabilities to help organizations achieve their growth objectives. Labhard is a proven visionary with the ability to motivate staff and drive organizational change. Her roles have spanned business development, business and product management, and management consulting across the higher education, retail, and the nonprofit sectors. In her current role as senior director of philanthropic strategy, Labhard builds awareness of OCCF's charitable services with individuals, families, corporations, nonprofits, and the professional advisor community in Orange County. She leads a development team who advise donors on their charitable and planned giving options, accept complex appreciated illiquid assets, and establish charitable funds for long-term strategic giving. Labhard's favorite part of her role is matching donor passions to solutions in the community through OCCF's services. Labhard earned an MBA in Marketing and a Bachelor of Arts. She is a certified Foresight Specialist from the Institute for the Future and a certified Lean Six Sigma White Belt. Labhard grew up in Minneapolis, Minnesota and now lives in Dana Point, California. When not working she can be found outrigger canoeing on the southern California coastline, swimming, biking, gardening, and exploring new cultures and cuisine when traveling. Labhard is fluent in Greek and French.



## **Gordon S. MacLean - Partner, RJI International CPAs**

Gordon S. MacLean is a partner and the Director of Audit Services at RJI International CPAs. He joined RJI in 2011 after a 20-year career with KPMG LLP, including seven years as a partner, and 4 years with a large regional CPA firm in Orange County. He specializes in audits and reviews of privately held and publicly traded businesses in the hospitality, manufacturing, technology, medical device, real estate, distribution, not-for-profit and professional services industries. MacLean also has significant experience managing clients with multiple locations and clients with international reach. Some of MacLean's specific clients over the years have included: CKE Restaurants, Winchells Donuts, Santa Barbara Restaurant Group, In-N-Out Burger, Bacara Hotel, American Honda Motor Co., United States Filter Corporation, Discount Tire Centers, JSerra Catholic High School, St. Anne School, BAX Global, In-N-Out Burger, Surfrider Foundation, Taller San Jose, Bircher Development, Sybron Dental, and Taller San Jose Hope Builders.



## **Ryan Milne - Partner, Conexus**

Ryan Milne is a partner at Conexus. With over 20 years of experience placing high-impact executives in fast-growing and emerging companies across the United States, Milne has dedicated his career to the art of identifying leadership capable of scaling complex enterprises. A specialist in human capital, he is deeply passionate about partnering with business owners who embody the relentless work ethic that defines Orange County's unique business landscape. Milne maintains that true success is measured far beyond the P&L; he advocates for a leadership philosophy that prioritizes family values and the fundamental responsibility of advocating for one's employees. As a seasoned entrepreneur, Milne launched an executive search and consulting firm in 2020. After successfully scaling the organization, he orchestrated its sale three years later to Conexus, a national firm backed by private equity partner MidOcean. Beyond this recent exit, Milne's sales and personnel leadership has been instrumental in three other strategic sales within the industry, providing him with a profound understanding of the founder's journey from inception to acquisition.



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

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



## **Ivo A. Tjan - Chairman, President & Chief Executive Officer, CommerceWest Bank**

Ivo A. Tjan is the Founder, Chairman, President & Chief Executive Officer of CW Bancorp and CommerceWest Bank, a publicly traded full-service commercial bank with a distinctive vision and culture dedicated exclusively to serving the business community. Tjan founded the Bank and successfully led its Initial Public Offering in 2001, making it one of the few banks in California to go public under founder-led leadership. Headquartered in Irvine, CommerceWest Bank partners with businesses across California, providing strategic banking solutions with a digital-first, relationship-driven approach. Tjan's banking career began with leadership roles at Eldorado Bank, Home Savings of America, and Great Western Bank, where he gained broad expertise across commercial banking disciplines before launching CommerceWest Bank. He has been widely recognized for his leadership and entrepreneurial achievements, including being named a 2025 LA Times CEO Honoree, one of Orange County's Most Influential Business Leaders on the OC500 and OC50 Lists by the Orange County Business Journal, and recipient of the Robert Ross Founders Award from the Muscular Dystrophy Association (MDA). He was also recognized as one of Vivid Magazine's Top 10 Asian American Entrepreneurs and listed among OC Metro's "Hottest 25 People in Orange County." Tjan earned his Bachelor of Arts in Business Administration from California State University, Fullerton. Beyond his corporate leadership, he is deeply engaged in community and industry organizations. He currently serves on the Board of Working Wardrobes and is an active member of the Young Presidents' Organization (YPO), CEO Affiliation Group, American Bankers Association, Bank CEO Network, and The Pacific Club. His prior board service includes California State University, Fullerton; New Majority; Marconi Foundation; The Children's Museum; CASA Advisory Board; and the ABA Government Relations Committee. A strong believer in giving back, Tjan actively supports a wide range of charitable and nonprofit organizations throughout Southern California, combining his entrepreneurial success with a commitment to community impact.



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

Jeffrey M. Verdon is the Chair of the Asset Protection Planning Group of Falcon Rappaport & Berkman, LLP, a NY based full-service laws firm. Verdon is based in the Newport Beach, CA office, whose practice is focused on integrated estate planning with asset protection for affluent families and successful business owners. Verdon is the author of Estate Planning for Women Only, now in its 4th edition; a regular speaker to professional organizations and financial conferences and have published over 25 articles with Kiplinger.com and a regular contributor to the Orange County Business Journal.

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## 2026 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

**Albright, Yee & Schmit, APC, Newport Beach***Clifton W. Albright, President & Founding Partner*

Clifton W. Albright is the President of Albright, Yee & Schmit, APC (AY&S), a California-based law firm formed in 1982. AY&S specializes in providing legal representation for employment, labor, and tort defense to governmental and private entities. Albright was appointed to the Industry Trade Advisory Committee on Small and Minority Business (ITAC11) by former President Barack Obama and former President Donald Trump. Albright travels to Washington, D.C. to meet with government officials on international trade and trade relations. Albright was selected by his peers for Inclusion in The Best Lawyers in America (2023 - 2026) in the area of Litigation - Labor and Employment. He was a recipient of the 2023 FAME Church LA 'Law & Justice Award' and recognized among the LABJ's 2023 and 2024 Leaders of Influence: Litigators & Trial Attorneys. In 2017, Albright was named 'Lawyer of the Year' by the Greater Los Angeles African American Chamber of Commerce. Best Law Firms® recognized Albright, Yee & Schmit, APC as a 'Metropolitan Tier-1 law firm' in Litigation - Labor & Employment since 2024.

**Almquist Development + Investment, San Juan Capistrano***Dan Almquist, CEO & President*

Dan Almquist is the Founder, Chief Executive Officer, and President of Almquist Investment + Development, a vertically integrated real estate investment, development, and operations firm recognized for creating highly successful experiential retail and mixed-use destinations throughout Southern California. Almquist has led the development of multiple landmark projects, including River Street Marketplace in San Juan Capistrano, 22&Beach in Stanton including Rodeo 39 Public Market, The Groves in Whittier including Rodeo 72 Public Market, The Swanner House, and the upcoming Canopy at the Great Park in Irvine. These projects have helped redefine experiential retail and have become community gathering places in the cities in which they serve. Known for his visionary yet hands-on leadership style, Almquist partners closely with municipalities, entrepreneurs, chefs, and creatives to deliver purposeful developments. He is a member of ICSC, serves as Board Chair of Foster All, Board Member for Otra Mas, Board Member for Harbor Point Church, and Member of El Viaje de Portola and Rancheros Visitadores. Almquist holds a BA from UC San Diego and an MBA and Master of Real Estate Development from USC.

**Alpha Motor Corporation, Irvine***Edward Lee, Founder & CEO*

Alpha Motor Corporation is an American electric vehicle company headquartered in Irvine, California, focused on the development and manufacturing of electric vehicles. Founded in 2020, the company has introduced a modular platform-based electric vehicle product lineup led by the Wolf electric truck series, designed to support multiple vehicle variants and use cases. Alpha Motor is currently advancing from development into controlled-volume manufacturing. In 2025, the company initiated limited custom vehicle production while preparing for broader manufacturing activity through strategic partnerships. To date, Alpha Motor has recorded more than 85,000 preorder indications, reflecting sustained consumer interest and growing brand recognition among U.S. consumers as it advances toward commercialization. Alpha Motor's engineering, manufacturing methodology, and technology development are designed to support scalable, cost-efficient production, with a focus on domestic industrialization and supply-chain localization. The company emphasizes U.S.-based engineering and production planning to improve manufacturing resilience, product quality, and long-term sustainability while supporting the transition to zero-emission transportation.

**Antis Roofing & Waterproofing, Irvine***Charles Antis, Founder & CEO*

A well-respected roofing expert, entrepreneur, humanitarian, and master storyteller, Charles Antis is one of the most trusted names in the roofing industry nationwide and a sought-after speaker, panelist, podcast, and radio show guest. He is the Founder and Chief People Awakener of Antis Roofing & Waterproofing, a leading Southern California-based roofing and waterproofing company that celebrated its 35th anniversary in 2024. As Antis often says, "For over 35 years, we've been keeping families safe and dry." Over the past several years, Antis has experienced significant growth, with revenue nearly doubling from \$17 million in 2022 to \$30 million in 2025. Antis has served on more than a dozen national and local boards, including the National Roofing Contractors Association, helping co-initiate the national roofing adoption program benefiting all 165 Ronald McDonald Houses. Through Habitat for Humanity Orange County, Antis has donated every roof since 2009—supporting over 93 families and more than \$1.5 million in in-kind contributions. With a spirit of giving, Antis inspires employees, partners, and the community to turn business success into a legacy of impact.

**Apex Space & Defense Systems, Irvine***Tracy Glende, CEO*

In January 2023, Tracy Glende took over as CEO of a Private Equity roll up company, APEX Space & Defense Systems, lead by Charger Investment Partners of El Segundo, California. With headquarters in Irvine, CA, APEX currently has five locations across the United States with a specific focus on space launch vehicle applications, autonomous military vehicle applications (land, marine, and airborne) as well as satellite and critical communications infrastructure applications. From September 2021 through December 2022, Glende took some much-needed time off from being a full time-CEO and did various consulting engagements with a number of Private Equity firms and startup companies, including Charger Investment Partners and aviation startup, Turbine Aeronautics. From 2015 – 2021, Glende served as CEO of Valence Surface Technologies, the largest independent Aerospace & Defense Special Processing business in North America. Headquartered El Segundo, CA, Valence operated 10 manufacturing facilities located in major Aerospace hubs across the United States.

**Aptiva Care Management, Rancho Santa Margarita***Marc Friedman, Owner & Managing Director*

Aptiva Care Management, founded in 2016, is committed to providing expert guidance, steadfast advocacy, and compassionate support for individuals and families navigating complex medical challenges—including traumatic brain injury, dementia, stroke recovery, behavioral health



concerns, and other serious crises. Driven by entrepreneurial vision, Marc Friedman pioneered an innovative "hospital at home" program that delivers the full spectrum of hospital-level care in the comfort of patients' homes, while surrounded by loved ones. In recent years, Aptiva has partnered closely with The Side House Foundation, a non-profit organization offering vital assistance to countless individuals and families. Through medical care, counseling, essential supplies, and ongoing support, the Foundation helps people manage the complexities of the healthcare system with dignity and resilience. Friedman also created Your Brain Made Simple, an engaging and educational presentation raising awareness about dementia disorders and strategies to slow disease progression. By translating complex brain science into accessible knowledge, Your Brain Made Simple empowers individuals, caregivers, and healthcare professionals with practical tools to improve the lives of those affected by cognitive decline.

**Austin Taylor, Inc., Irvine***Ron Viggiano, President*

With over 35 years of experience Ron Viggiano has become the area's premier clothier by asking the right questions and understanding the clients' wants and needs to help guide them into creating distinctive and personalized wardrobes. Using creativity and contemporary styling details, he has built a loyal following of successful business leaders in Orange County.

**Beetz Eats, Santa Ana***Beeta Mohajeri, Founder & CEO*

Beeta Mohajeri is the Founder and CEO of BeetzEats, a fast-growing performance-focused food company serving elite athletes, executives, and high-performance households. BeetzEats delivers high-protein, clean meals through private-chef services, curated meal prep, and a new smart-vending platform that places fresh, nutrient-dense meals in gyms, training centers, and corporate spaces. The company now produces thousands of meals each month and operates with a lean team supported by a network of culinary partners across the region. Under Beeta's leadership, BeetzEats has posted strong year-over-year growth driven by demand from professional sports clients and health-driven consumers. Recent milestones include expanding into automated retail, securing partnerships with training facilities, and building a direct-to-athlete pipeline that has positioned the brand as a trusted food partner in competitive sports. Mohajeri's focus on quality sourcing, no seed oils, and performance nutrition has set a high standard in her category. She continues to scale the company while keeping a strong emphasis on product consistency, service, and measurable client outcomes.

**Beyond Fifteen Communications Inc, Irvine***Lauren Ellermeyer, Co-Founder & President*

As Co-Founder and President of Beyond Fifteen Communications, Lauren Ellermeyer is recognized for building high-impact agency partnerships and driving sustainable growth through strategic leadership. She plays a central role in shaping the agency's new business strategy, pairing long-term vision with an active, hands-on approach that fuels innovation and results. Ellermeyer's leadership philosophy centers on collaboration, talent development, and forward-thinking communications. With deep expertise across public relations, social media, and integrated marketing, she has helped evolve Beyond Fifteen from an entrepreneurial startup into a nationally respected agency. Her ability to anticipate industry shifts and implement scalable, results-driven strategies has elevated the agency-client relationship, creating partnerships rooted in trust, transparency, and measurable impact. Today, Beyond Fifteen supports clients across healthcare, technology, consumer packaged goods, energy, education, and more, with a fully distributed team spanning the U.S. Under Ellermeyer's leadership, the agency continues to set itself apart in a competitive market—delivering meaningful growth for clients while redefining what modern agency leadership looks like.

**beyondGREEN biotech, Inc., Santa Ana***Veejay Patell, Founder & CEO*

Veejay C. Patell is the Founder and CEO of beyondGREEN Biotech, Inc., a U.S.-based manufacturer specializing in plant-based, certified-compostable consumer and commercial products. Under his leadership, beyondGREEN has grown into one of Orange County's most progressive sustainable manufacturing companies, producing millions of U.S.-made bags, liners, cutlery, cups, straws, and custom injection-molded items annually. The company operates a vertically integrated, technology-driven facility in California, supported by a diverse team responsible for extrusion, blown film, molding, converting, and automated packaging operations. Since launching beyondGREEN, Patell has overseen significant expansion across retail, e-commerce, municipal, and private-label channels, while establishing partnerships with major national retailers and long-term commercial clients. His leadership has guided the company through major milestones, including scaling new product lines, broadening manufacturing capabilities, and securing multiple sustainability-focused contracts. Before founding beyondGREEN, Patell built entrepreneurial experience through ventures such as EZY-KUP in Ahmedabad and has been recognized with multiple regional entrepreneurship and leadership awards. His work reflects a commitment to accessible sustainability, U.S. manufacturing, and long-term innovation.

**BioPhotas, Inc, Tustin***Patrick Johnson, Founder, Chief Innovation Officer & Executive Chairman of the Board*

Patrick Johnson is the Founder, Executive Chairman, and Chief Innovation Officer of BioPhotas Inc., as well as the inventor of the award-winning Celluma SERIES of light therapy devices. With an extensive background in the medical device industry, Johnson saw the potential for bringing the significant therapeutic benefits of Low-Level Light Therapy affordably to the masses, leading to the founding of BioPhotas and the development of 18 different Celluma devices so far. Johnson's innovation is responsible for more patents, more awards, and more medical indications-for-use than any other low-level light therapy device in the world. Prior to founding BioPhotas, Johnson served as the Executive Director of the World Bed Project, a humanitarian organization formed to provide emergency relief to those left homeless by the 2010 earthquake in Haiti. His leadership experience includes 10 years with Pro-Dex, Inc., a publicly held medical device manufacturer, serving in the roles of Chief Business Development Officer, CEO and President, and Board Member. Johnson has worked his entire career in Orange County, leading several early-stage, turn-around and mature manufacturing companies.



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## 2026 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

**Butcher's House, Costa Mesa***Jeffrey Offer, Chef & Owner*

Chef Jeffrey Offer opened his first restaurant, Butcher's House, at Costa Mesa's SoCo Collection in December 2021. Offer's menu is centered around dry-aged meats and rustic brasserie-style dishes representative of his hometown Toulouse in the south of France. In the weeks following its opening, the restaurant has already garnered critical acclaim. Born and raised in the South of France, Offer discovered his culinary inspiration at a young age and has kept a laser-focused vision of creating a life for himself in America. His storied culinary career spans over a decade across three continents. As a classically trained French chef, Offer brings more than 12 years of experience in cooking, kitchen logistics, and operations management to the opening of his first restaurant, Butcher's House. For Offer, Butcher's House is more than an homage to his culinary roots; it is the fulfillment of his lifelong American dream.



What began as a one-woman operation has evolved into a high-impact consulting team known for bridging regulatory rigor with practical solutions—delivering projects that protect both community well-being and the natural environment.

**CSUF Center For Entrepreneurship, Fullerton***John "JJ" Jackson, Retired, CSUF Professor and Director of the Conrey Center for Entrepreneurship*

John "JJ" Jackson lead the Conrey Center for Entrepreneurship at CSUF for 22 years. The center is a hub that supports student- and community-led startups through curriculum, mentorship, and applied consulting projects. Under his leadership, the Center and its Startup Incubator have helped launch and support more than 100 early-stage ventures, positioning CSUF as a regional engine for innovation and small-business growth. Jackson also founded The BirdDog Group, a boutique marketing and sales consultancy focused on helping small and mid-sized firms scale through digital strategy, market positioning, and revenue-focused business development. Across these roles, he has grown programs that engage hundreds of students and entrepreneurs annually, expanded partnerships with industry and community organizations, and secured recognition for CSUF's entrepreneurship initiatives throughout Southern California. Notable milestones include establishing a seed investment fund, Titan Angels, to back promising startups emerging from the CSUF ecosystem and authoring multiple books on niche and digital marketing that inform the Center's practitioner-focused approach.

**Cal Flavor, Sunset Beach***Sammy Perricone, Marketing & Brand Director*

Sammy Perricone, a third-generation business leader at the helm of Cal Flavor, is paving the way of the future for the family owned and operated produce company. The luxury produce brand innovator that has brought unique avocados and patented guavas to kitchens, restaurants, and grocery retailers across California, Perricone's unparalleled experience has been a driving force behind the company's success. Prior to Cal Flavor, Perricone helped develop and successfully sell another branch of the Perricone brands, Perricone Farms, which was the nation's largest producer of fresh squeezed citrus juices. Driven to see Cal Flavor remain the ultimate luxury fruit brand in California's kitchens, Perricone is focused on elevating access to their prized avocados and guavas. Rising above competitors as a result of the high quality and fresh access to Cal Flavor (no avocado or guava travels more than 100 miles from farm to table), Perricone works diligently to curate the brand's vibe. Looking to the future, Perricone's vision is unfolding, with more produce items launching in the Cal Flavor portfolio in 2026.

**Diversified Waterscapes Inc., Laguna Niguel***Maria Angel, CEO*

For over 39 years, Diversified Waterscapes, Inc. has been a leading provider of lake management services and aquatic treatment products, serving Southern California and beyond. With teams operating from three locations, the company restores and maintains complex aquatic environments for golf courses, property management firms, municipalities, and public parks. The company's roots trace back to the post-Vietnam War era. Patrick's father, Maria Angel's father-in-law, was working for a company that developed an environmentally responsible aquatic product. When the company shut down, he asked for permission to continue using the formulation he had helped create. They agreed. He went on to use that product to clean, restore, and heal lakes, long before sustainability became an industry standard. At just 13 years old, Patrick was trained by his father in the science behind aquatic management and was regularly left in charge of properties while his parents traveled. While Patrick's father passed down deep technical expertise, he was not a businessman. That changed when Patrick met Maria. Maria brought sharp entrepreneurial instinct and business discipline; Patrick brought unmatched scientific and technical expertise. Together, they built Diversified Waterscapes from nothing, no capital, no safety net, into a million-dollar enterprise. Nearly four decades later, they remain married and still working side by side at ages 63 and 66, continuing to grow the company they built from the ground up.

**Chups Mom2Mom, Anaheim***Sami Skoruz, CEO & Co-Founder*

Sami Skoruz founded Chups Mom2Mom, which is unique in the restaurant industry by empowering moms and women. At Chups Mom2Mom, every dish is a heartfelt creation by a Local Mom—rooted in tradition, powered by passion, and cooked with love. Chup's mission is simple yet powerful: To share the warmth of authentic Indian home-cooked food with the world. What Makes Us Special? At Chups Mom2Mom, food isn't just prepared – it's crafted by talented Local Moms using time-honored family recipes passed down through generations. Each dish carries the essence of authentic Indian cooking, lovingly made and delivered fresh to your table. Chups Promise to You Real Home-Cooked Foods: Every meal is made with the same love and care you'd find in your own mom's kitchen. Healthy & Honest Ingredients: Cold-pressed oils, organic produce, and absolutely zero preservatives. Delicious Variety: From Rich Vegetarian Curries and Wedding-style Biryani to dosa batters and iconic Indian street food, we cater to every craving. Fast, Hot Delivery: Fresh meals delivered to your doorstep within 30 minutes.

**Doing Good Works, Irvine***Scott Henderson, Co-Founder & CEO*

Scott Henderson is the Co-Founder and CEO of Doing Good Works, an Irvine, CA-based social enterprise that fosters the purpose of business to transform lives and connect communities. The organization functions around its two wings: DGW Branded (social-impact promotional products agency that supports company CSR and ESG goals), and Foster Greatness (their 501c3 nonprofit dedicated to transforming the lives of young people that emancipate out of foster care). Since its inception in 2015, Henderson has led Doing Good Works into a team of 30 individuals, with 50% having experienced foster care, that has scaled to yearly revenue nearing the 8-figure mark, landing DGW on the Inc 5000 list twice amongst many other business accolades.

**Community Health Initiative of Orange County, Santa Ana***Georgina Maldonado, Executive Director*

Georgina Maldonado is the Executive Director of the Community Health Initiative of Orange County (CHIOC), a nonprofit founded in 2006 that now employs 14 staff that provide health access, enrollment assistance, and community education to tens of thousands of Orange County residents each year. Under her leadership, CHIOC has evolved from a smaller initiative into a recognized countywide leader in outreach, benefits navigation, and culturally responsive services. In 2024, the organization reached over 20,000 individuals through in-person outreach, completed more than 33,600 care coordinations for 1,638 clients, and engaged more than 509,000 people through digital communications. Maldonado recently spearheaded CHIOC's social enterprise, an innovative revenue-generating model that licenses Health Access Assistants as certified insurance agents. This initiative strengthens the local enrollment workforce while creating a sustainable financial pathway for CHIOC's long-term stability. Her leadership is marked by strategic partnership-building, a commitment to bilingual and community-rooted services, and a forward-thinking approach to organizational growth. Maldonado's entrepreneurial vision continues to expand CHIOC's impact and drive direct, consequential change in healthcare access for underserved families across Orange County.

**Eden Financial, Aliso Viejo***Nycole Freer, Founder & CEO*

Nycole Freer is the Founder and CEO of Eden Financial, an independent financial planning and investment advisory firm based in Orange County, California, serving clients nationwide. Founded in 2023, Eden Financial was built entirely from the ground up with a mission to provide clear, ethical, and values-driven financial guidance through comprehensive planning and hands-on implementation. Under Freer's leadership, the firm has grown organically to over \$20 million in assets under management and 60 client households, achieved without transitioning or acquiring clients from a prior firm. Eden Financial specializes in investment management, retirement planning, tax-aware strategies, estate planning coordination, and comprehensive risk management for professionals, business owners, and families navigating complex financial decisions. A Certified Financial Planner™ professional, Freer is known for her client-first approach, transparency, and ability to simplify financial complexity while delivering long-term results. In addition to leading Eden Financial's growth, she is active in the Orange County business community, supporting financial education initiatives and mentoring entrepreneurs. Her leadership reflects a commitment to sustainable growth, operational excellence, and meaningful impact for both clients and the community.

**CoreViva, Newport Beach***Alan Alexander, MD, CEO & Co-Founder*

CoreViva has developed the fastest, most accurate, most comprehensive whole-body MRI to detect cancer and 100s of other conditions. To date (3 months of opening), we have already detected 17 cancers (14 early stage), 4 brain aneurysms, fatty liver disease, heart disease, reproductive organ issues, along with many other conditions. Every patient we have scanned, from age 18-92 has had a musculoskeletal issue that was unknown. Our goal is to help everyone live a longer healthier life through preventive screening. We are headquartered in Newport Beach where we have our flagship clinic.

**Crain Consulting Inc., Orange***Talitha Crain, CEO*

Crain Consulting Inc. is a woman-owned environmental consulting firm based in Southern California, specializing in complex regulatory compliance under CEQA/NEPA, hazardous materials management, and sustainable redevelopment. Founded by Talitha Crain, a former state regulator turned entrepreneur, the firm has quickly become a trusted partner to public agencies and private developers navigating California's most demanding environmental frameworks. Since its inception, Crain Consulting has achieved remarkable growth—expanding its client base across multiple school districts, municipalities, and large-scale infrastructure projects—while maintaining a reputation for precision, integrity, and political acumen. The company's expertise in environmental permitting, construction response strategies, and material reuse programs continues to set new standards for efficiency and accountability.

**EPD Solutions, Irvine***Jeremy Krout, CEO*

Jeremy Krout is the Founder and President of EPD Solutions, Inc., a Southern California-based land-use, environmental-compliance, entitlement, and development and construction management advisory firm serving both public and private clients. With over 20 years of experience in urban and environmental planning, project management, and real estate development, Krout leads a firm that supports regionally significant and complex initiatives across many sectors. Under his leadership, EPD Solutions has grown steadily, tripling in size and scope, guiding projects ranging from infill residential and affordable housing to master-planned communities, utility-scale solar, and industrial redevelopment. The firm's recent work in Orange County, including major mixed-use, recreation, housing, and redevelopment projects, demonstrates its expanding footprint and strong reputation for creative entitlement strategy, team leadership, and community-conscious outcomes.

**Esperto Medical, Irvine***Aditya Rajagopal, Cofounder, CEO & Chairman of the Board*

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Ivo Tjan, Founder & CEO

## 2026 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Aditya Rajagopal, PhD is the CEO, Board Chairman, and Cofounder of Esperto Medical, Cofounder and Board Director at Chromacode, Inc., Cofounder of Wisdom Biosciences, Chairman of the Board at Camena Biosciences, among other companies that he has founded and contributed to in the past. Rajagopal's creativity, vision, and drive have allowed him to advance many scientific fields ranging from multiplex PCR technologies for oncology, infectious disease, and vector-borne diseases, cardiovascular physiology, oncology diagnostics, among others. He has over 60 patents. All companies he has founded were based on his fundamental research.



#### Events by Jamie Lyn, Laguna Hills

*Jamie Lyn Byerlee, Owner & Founder*

Jamie Lyn is the Founder and Owner of Events by Jamie Lyn, an Orange County-based event planning and design firm producing elevated weddings, milestone celebrations, and corporate events—from executive offsites to brand-facing experiences—delivered with intentional design and flawless production. With 23 years in the industry, she leads a boutique, owner-led business with a talented, high-performing in-house team and a worldwide network of vetted creative partners, allowing the company to scale smoothly for complex, multi-day and destination programs. Recent growth has been driven by increased demand from both private and corporate clients, expanding the firm's destination portfolio and corporate services while sustaining strong referral and repeat-client momentum. Known for calm leadership and meticulous standards, Lyn oversees every phase—from creative conceptualizing and budget strategy to vendor management, timelines, and on-site execution—delivering polished guest experiences and measurable peace of mind. Her mission is simple: celebrate each client's story with originality, precision, and lasting impact.



#### Exfluentia, Rancho Santa Margarita

*Cameron Jonsson, CEO & Founder*

Cameron Jonsson is the Founder and CEO of Exfluentia, a leading healthcare technology company transforming how healthcare brands engage and empower providers. Under his leadership, Exfluentia supports over 90,000 healthcare providers worldwide, with a significant portion of that impact driven by brand partners headquartered in Orange County. An Orange County native with more than 20 years of experience as an entrepreneur, Jonsson has founded and scaled technology-driven businesses at the intersection of healthcare, technology, and marketing. Jonsson, a University of California, Irvine alumnus, remains deeply engaged in the Orange County startup ecosystem, mentoring entrepreneurs, and supporting local nonprofits. Exfluentia was recognized with Octane's 2025 Best Enterprise or B2B Technology Innovation Award, reflecting Jonsson's commitment to building scalable, impactful platforms that create lasting value for healthcare organizations, providers, and the communities they serve.



#### FBFK Law, Irvine

*Todd Friedland, Managing Partner, California*

FBFK Law, a purpose-driven business law firm built on bold ideas and real relationships, has surpassed 100 full-time team members, marking a significant growth milestone and underscoring its position as one of the most distinctive firms in the legal industry. This growth reflects more than scale. With a 50 percent increase in headcount in 2024 alone, the milestone signals momentum rooted in purpose. FBFK Law has been built with a clear goal: to create a joyful, people-first firm where attorneys, professionals, and clients can thrive together. Our Irvine office has grown to 31 attorneys and professional staff. With 75 attorneys and 46 professional staff firm-wide, FBFK Law's continued expansion shows that The FBFK Way is not only aspirational but sustainable. Growth at FBFK Law has been intentional and client-centered. With offices in Dallas, Houston, Austin, and Orange County, California, and plans to expand into San Diego and Los Angeles, the firm prioritizes proximity, collaboration, and meaningful relationships within the business communities it serves.



#### Flying V Group, Newport Beach

*Robb Fahrion, CEO*

Robb Fahrion is the CEO and Cofounder of Flying V Group, a performance-driven digital marketing headquartered in Newport Beach, California. Since its bootstrap founding in 2016, Flying V Group has scaled rapidly, evolving from a boutique agency into a multi-brand platform. Under Fahrion's leadership, Flying V Group has grown to 35 full-time employees and has built one of the most sophisticated SEO/GEO systems in the industry, anchored by proprietary frameworks like the Weak Spots Methodology and Web Page Unit Economics. Fahrion's contrarian stance on inbound marketing and his early adoption of Generative Engine Optimization (GEO) have positioned the firm at the forefront of inbound search transformation. His commitment to people-first leadership, ROI accountability, and deep client trust has made Flying V Group one of the fastest-rising players in performance marketing today.



#### Forge Media Group, Lake Forest

*Matthew Givot, CEO*

Matthew Givot is the Founder and CEO of Forge, where he combines over 25 years of entrepreneurial experience with deep insights from the communications and creative industries to drive innovation at the intersection of AI and brand strategy. Before founding Forge, Givot spent over a decade working with industry leaders including National Geographic, Disney, Epic Games, and top-tier agencies worldwide. This experience gave him firsthand insight into what drives communications success and the obstacles that can limit growth and client impact. Since founding Forge in 2020, Givot has grown the company to a 22-person team generating \$6.4 million in annual revenue. The company has more than tripled in size, achieving over 100% year-over-year revenue growth. Under his leadership, Forge has earned multiple Orange County Business Journal recognitions, including #1 Fastest Growing Small Private Companies, #10 Best Places to Work: Small Companies, and Fastest Growing Private Companies two consecutive years. His leadership extends beyond traditional agency work through Forge Media Labs, an innovation incubator focused on AI applications for brand awareness and SEO optimization.



#### Foster Love, Brea

*Danny Mendoza, CEO*

Danny Mendoza is the Founder, CEO, and Board Chair of Foster Love, a national nonprofit based in Orange County that has grown into one of the most impactful organizations serving youth in foster care. Since launching the organization in 2008, Mendoza has led it through continuous expansion, growing its full-time team to over 50 employees and reaching more than 200,000 foster youth each year through innovative programs, academic support, and essential services. Headquartered in Brea, Foster Love has become a recognized force in both direct service and national advocacy, collaborating with foundations, corporations, and policymakers to create meaningful and lasting change. In 2024, the organization celebrated a major milestone by serving its one millionth child. That growth reflects Mendoza's sustained leadership and his ability to scale mission-driven work into measurable nationwide impact. Under his guidance, Foster Love continues to grow in reach, visibility, and influence while remaining grounded in its commitment to ensuring dignity and opportunity for every child in foster care.



#### Go Rentals, Newport Beach

*Kaye & Kavous Gitibin, Cofounders*

Go Rentals was established in 1995 with seven cars and now has grown to over 300 locations across the country serving successful families by providing white glove car rental experiences. Go Rentals is the only company specializing in providing five-star services at private airports, FBOs, luxury hotels, equestrian communities, and serving sport & entertainment communities. Go Rentals is a hospitality company happens to rent cars.



#### Golden Coast Escrow, Tustin

*Sheila Alvarez, CEO*

Sheila Alvarez is the Chief Executive Officer of Golden Coast Escrow, Inc., a women-led, Southern California-based escrow company specializing in residential, commercial, refinance, and investor transactions. Founded in 2014, Golden Coast Escrow has grown into a trusted partner for real estate professionals across Orange County, Los Angeles, San Diego, and the Inland Empire, known for its ethical standards, transparent pricing, and personalized service. Under Alvarez's leadership, the company has experienced consistent growth while expanding its service offerings to include complex transactions such as 1031 exchanges, probate, foreclosures, wholesaling, and creative financing structures. Alvarez has built a strong internal culture centered on education, accountability, and client advocacy, resulting in long-standing relationships with top-producing agents, lenders, and investors. Beyond operations, Alvarez is recognized for elevating the escrow industry through visibility, education, and community engagement. Her leadership has positioned Golden Coast Escrow as both a reliable transactional partner and a respected brand within the Southern California real estate ecosystem.



#### Idea Hall, Costa Mesa

*Rebecca Hall, President & CEO*

Rebecca Hall founded and leads Idea Hall, a nationally recognized creative communications agency committed to championing good locally in Orange County and nationwide. Through an integrated marketing model that brings branding, public relations, marketing, and advertising together under one roof, Idea Hall partners with organizations that want to lead with purpose and measurable impact. Under Hall's leadership, the agency has worked with some of Orange County's most established commercial real estate businesses, as well as nonprofit organizations addressing some of the region's most pressing challenges, including workforce development and mental health. For more than two decades, Hall has earned a reputation as one of Orange County's most successful female entrepreneurs. She attributes her success to staying ahead of industry shifts, continuously innovating, and building long-standing, trust-based relationships.



#### il Girasole, Costa Mesa

*Antonio Bevacqua, Managing Partner & Founder*

Chef Antonio Bevacqua is the visionary restaurateur behind Orange County's hottest modern Italian restaurant il Girasole. Born from a lifelong vision to translate the essence of Italy through flavor, creativity, and heart, il Girasole is seed oil free and focuses on locally sourced, sustainable and ethically responsible ingredients. From farm to table, Bevacqua infuses intention into every decision that is made to create a memorable impact in each diner's experience. Earning decades of experience through collaborating with the finest hospitality groups, Bevacqua is proud to see his restaurant embody the balance between innovation and authenticity, alongside the refinement and warmth of Italy and California. Each dish reflects Bevacqua's belief that cuisine is a language of place and emotion, crafted with intention, guided by seasonality, and expressed with soul. Passionate about giving back to the beloved OC community, il Girasole has created partnerships with CASA OC, Susan G. Komen, and The Hub OC that have created priceless new opportunities to support those in need.



#### Inspired Art Wine, Costa Mesa

*Karen Nguyen, Founder & CEO*

Karen Nguyen is a dynamic executive, entrepreneur, and educator with a successful track record in corporate, start-up, and non-profit environments. Using her more than 20 years of experience as a marketing leader and business owner, Nguyen is passionate about implementing practical strategies that drive incremental tangible (revenue) and intangible (branding) growth through her business ventures and corporations as a corporate consultant. As a serial entrepreneur in the arts/entertainment and wine industry, Nguyen grew her first business, Inspired Art Wine, to over 35,000 customers worldwide and more than 250 corporate clients since 2016. In 2018, Nguyen founded Inspired Somm, where she brings an entertaining, informative, and modern approach to wine education aimed at Millennials and Generation Z markets. In the same year, Pour Fine Art launched featuring Nguyen's classic contemporary art. Clio-nominated, her work can be seen publicly at her gallery in Costa Mesa, World Trade Center, galleries, John Wayne Airport, City Hall, and exhibitions internationally. In 2021, Inspired Vineyards launched featuring a collection of art-inspired wine produced in Napa Valley.





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## 2026 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

**KEI Concepts, Huntington Beach***Ivy Ha, Co-CEO*

As Co-CEO of Kei Concepts, Ivy Ha plays an instrumental role in leading one of Orange County's most forward-thinking and culturally dynamic restaurant groups. Headquartered in Little Saigon, Kei Concepts is recognized for its boundary-pushing culinary concepts, including SÚP Noodle Bar, VOX Kitchen, NEP Café, KIN Izakaya, INI Ristorante, ROL Hand Roll Bar, and, most recently, QUA. Under Ha's leadership, the group has grown to more than 1,000 employees and continues to expand with both neighborhood favorites and destination-driven dining experiences. Her strategic mindset, commitment to community, and deep cultural insight have helped shape Kei Concepts into more than just a hospitality brand—it's a cultural platform where storytelling, innovation, and food intersect. Ha is passionate about empowering young talent, championing women in leadership, and fostering meaningful connections through hospitality. With an eye on both business growth and social impact, she continues to drive Kei's mission of bridging communities through the universal language of food.

**KEI Concepts, Fountain Valley***Viet Nguyen, Executive Chef & Co-CEO*

Helmed by Viet Nguyen, Kei Concepts is a trailblazing culinary group based in Little Saigon, Orange County, recognized for restaurants such as SUP Noodle Bar, VOX Kitchen, NEP Café, KIN Izakaya, INI Ristorante, ROL Hand Roll Bar, Kei Coffee House, and QUA Dining. These unique eateries combine technology and artistry to craft unparalleled dining experiences. With a mission that extends beyond culinary excellence, Kei Concepts fosters a vibrant community, champions startups, and promotes arts, all through the unifying power of pan-Asian cuisine. As the group's founder, CEO, and executive chef, Nguyen is passionate about connecting diverse communities through the universal language of food—an ethos evident across all his concepts. Nguyen sees each restaurant as a canvas for this mission, where the culinary creations are not just dishes but cultural ambassadors.

**Labor Law Center, Santa Ana***Cathleen Caruso, CEO*

Cathleen "Cat" Caruso is a seasoned CEO and general manager with over 20 years of experience leading and scaling consumer, e-commerce, and manufacturing businesses across both Fortune 500 and private equity-backed environments. Most recently, Caruso served as CEO of Labor Law Center, a HR Compliance e-commerce platform serving over one million customers nationwide. When she joined, the company was a fast-growing, founder-led business; under her leadership, it scaled to more than \$25 million in revenue, grew 75% over under three years, doubled EBITDA, and expanded into the business into Canada. Caruso built the company's first professional leadership team, led full digital transformation (Magento 2.4, HubSpot, NetSuite), strengthened manufacturing capabilities, and drove significant margin expansion through insourcing, demand planning, and operational rigor. Her work positioned the business for a successful exit to The Riverside Company, marking a major milestone in the company's growth trajectory. She brings deep expertise in P&L ownership, team building, digital strategy, and scalable operational excellence.

**LEHR, Anaheim***Daniel Hamm, CEO*

Daniel Hamm is the CEO of LEHR, a national leader in emergency vehicle products, upfitting and service with over 1,000 employees, 30 locations, and 300 service technicians. Hamm is an accomplished CEO with a background in operating and building platforms after completing over 30 acquisitions and part of Four Successful PE Backed Platform Exits. He is the former Chief Executive Officer of Frontier Service Partners, Resi HVAC/Plumbing platform, which was successfully sold to Apex Service Partners, responsible for leading vision, strategy, and driving growth. As Founding Chief Financial Officer of Champions Group, Resi HVAC/Plumbing platform, Hamm scaled and then led the platform's successful sale in 2020 and was responsible for producing industry leading profit margins and Integrating Acquisitions. Hamm holds an MBA and BA from California State University.

**Los Sundays Tequila, Founder & CEO***Mitchell Hayes, Costa Mesa*

Los Sundays was founded in 2017 and has grown grass roots from self-distribution, delivering tequila to local bars from the back of the founder's car in Orange County to a national brand now partnered with the biggest distributors across the USA. In a highly saturated and expensive industry to compete in, Los Sundays and its small team have achieved 70% growth in 2025 and are scaling into some of the country's largest chain retailers. The company sets itself apart with creative marketing and an apparel line to accompany its tequila that is a category first in spirits, selling millions DTC and to some of the country's leading apparel chains including PacSun and Revolve. Their approach to this industry is completely unique from their competitors putting them on the radar of the biggest global spirits companies and to partnerships with industry leaders such as Anheuser Busch and Southern Glazers Wine and Spirits.

**Managed Direct Response, Irvine***Pat Mercuri, Founder & President*

Pat A. Mercuri is a serial entrepreneur with over 25 years of experience founding, scaling, and successfully exiting multiple companies in the direct marketing and services industries. He built Managed Direct Response into a leading Orange County marketing firm, serving national clients across mortgage, nonprofit, and automotive sectors. Mercuri has overseen the production and mailing of more than 80 million lead-generating campaigns and is recognized for pioneering data-driven direct response strategies. He has successfully grown businesses through multiple economic cycles, creating lasting enterprise value through strong leadership, operational discipline, and innovation.

**MCDA CCG, Inc., Anaheim***Michael Rash, CEO*

Mike Rash is the Founder and CEO of MCDA CCG, Inc., a company that has seen tremendous growth and success under his leadership. With over 20 years of operations and finance

leadership experience, Rash is a highly experienced and skilled executive. He is known for his hands-on, roll-up-the-sleeves leadership style, and is never afraid to get involved and tackle any challenge head-on. He specializes in transforming business operations into world-class enterprises, particularly in manufacturing and aerospace sectors. Additionally, his expertise in cybersecurity ensures that his clients' businesses remain secure in today's rapidly evolving digital landscape. His business was recognized as a Top Financial Services & Advisory Firm by regional and national industry publications and as the Best Business Management & Financial Services Firm in 2025 by the Wealth and Finance Magazine. Thanks to his expertise and dedication, MCDA CCG has expanded to serve clients around the world. Rash enjoys working with companies from any industry and is committed to helping each and every one of his clients achieve their goals.

**Mountain View Services, Inc (MVS, Inc.), San Bernardino***Eric Goodman, President & CEO*

Eric Goodman, who began in sales and progressively advanced in his career at MVS, Inc. going back over 27 years, acquired the company, which was established in 1986 and whose doors opened in 1988, from the original owner in 2021. MVS, Inc. was established as a leading supplier of groceries, medical supplies, janitorial supplies, nutritional supplements, incontinent supplies, durable medical equipment, OTCs, personal supplies, safety and facility supplies, linens, and office supplies to healthcare facilities in Southern California. He also acquired Chem-Pak, a janitorial supply company founded in 1987, in 2023 to expand offerings. MVS, Inc.'s target market is six bed or fewer residential care facilities, homeless shelters, battered women facilities, and children displacement facilities from Santa Barbara County down to the Mexican border. Another smaller arm of the company provides medical supplies to individuals nationally through e-commerce. "Our mission is to provide healthcare facilities with the products and services of the highest quality, so they can provide care to the residents they serve." —Eric Goodman

**My Mountain Mover, San Clemente***Amanda Desuacido, CEO*

Amanda Desuacido is the visionary CEO of My Mountain Mover, a rapidly expanding healthcare outsourcing and virtual assistant company focused on transforming the way medical practices operate. Under her leadership, My Mountain Mover has grown from a small startup into a trusted partner for hundreds of medical offices nationwide, providing access to more than 1,500 highly trained virtual medical assistants who support over 500 healthcare practices across the United States. The company specializes in matching HIPAA compliant, EHR trained virtual professionals to roles that range from medical billing and scheduling to clinical documentation and administrative coordination, helping practices reduce operational strain and save on staffing costs. My Mountain Mover has achieved significant milestones including industry recognition with multiple Stevie Awards for excellence in leadership and workplace culture. Desuacido's commitment to people first values and innovative growth strategies has driven remarkable company expansion while maintaining high client satisfaction and a strong team culture.

**Nakunj Inc, Irvine***Pramod Kunju, CEO*

Pramod Kunju is the Founder and CEO of Nakunj Inc., a boutique Data Analytics and Artificial Intelligence consulting and staffing firm based in Southern California. Nakunj Inc. has steadily grown under Kunju's leadership, expanding its offerings across data strategy, cloud modernization, AI transformation, and IT talent solutions. Recent milestones include launching executive-level AI training programs, adding new enterprise clients across healthcare, finance, and public sector domains, and initiating development of dedicated office and training facilities to support the company's continued growth. A respected entrepreneur and community leader, Kunju serves as Co-Chair of the Global Pan IIT 2026 Conference, a premier international event expected to host more than 2,500 global innovators and industry leaders. He is also a Board Member and Past President of the Asian Business Association of Orange County (ABAOC), where his longstanding contributions to the business community earned him the organization's Lifetime Achievement Award. Kunju's commitment to innovation, mentorship, and regional economic development continues to position Nakunj Inc. as a rising force in California's technology and entrepreneurial ecosystem.

**Northwestern Mutual - Orange County, Irvine***Ian Gordon, Managing Partner*

Ian Gordon is the Managing Partner of Northwestern Mutual - Orange County, a leading financial services company that secures and strengthens the financial futures of Americans and their loved ones. Leading the office since 2023, Gordon has been steadfast in his mission to attract top-tier talent, nurture the growth of advisors, develop the next generation of leaders, and build a greater presence in the community. His efforts have grown a team of 110 financial professionals, who manage over \$10 billion in assets and have been instrumental guiding clients on their journeys to financial security. Gordon's unwavering focus on cultivating a culture of abundance showcases his dedication to the company's success, as he empowers individuals to unlock their full potential.

**OC Growth Advisors, Mission Viejo***Marla Noel, President*

As founder of OC Growth Advisors, Marla Noel works with business owners and their employees to improve focus and processes for growth and greater profitability. She has run several successful organizations, including one she sold in 2015 for 15 times EBITDA. Noel has served on multiple non-profit boards as well as two for-profit Boards. She is also a chapter chair for WPO, Women Presidents' Organization, which is an international organization of women business owners. Noel's clients range from service industries to construction to manufacturing, in the \$2 million to \$50 million range. Her clients say she helps keep them focused on the business, versus working in the business. Her 14 years in Vistage and 11 years in WPO have trained her to be continuously looking for tools to help the businesses run more efficiently. She wants her clients to enjoy their business until they wish to sell or transition the business to employees or children. In addition to Noel's work life, she enjoys traveling to various parts of the world.





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2026 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

**OC Solar, Irvine**

*Vincent Curcie, CEO*

Vincent Curcie is a driving force behind OC Solar, a leading Southern California solar and roofing contractor specializing in premium residential energy solutions. Under Curcie's leadership in operations and administration, OC Solar has grown into a thriving organization of approximately 65 employees, delivering high-quality solar installations, energy storage systems, and advanced roofing products, including the Tesla Solar Roof, one of the most premium roofing systems available. Since 2017, the company has doubled in revenue year after year, sustaining rapid growth even during historically low seasons for the solar industry. Curcie has played a central role in building the structure that supports this growth by strengthening operational systems, improving internal performance, and ensuring teams stay aligned and accountable as the business scales. He believes efficiency is essential, but that reputation and relationships are just as critical, consistently prioritizing a customer-first approach that helps OC Solar maintain strong satisfaction and 5-star ratings. Curcie's entrepreneurial mindset, discipline, and commitment to continuous improvement have positioned OC Solar as a trusted and resilient leader in clean energy and home electrification across the region.



and bring more voices to the table.

**Optima Tax Relief, Santa Ana**

*David King, CEO & Founder*

Founded in September 2011, Optima Tax Relief began accelerating its growth by 2014 through continuous product innovation and reinvestment in the business. From an initial team of five employees, the company expanded to nearly 700 at its peak, serving exclusively U.S. consumers. Over 15 years, Optima has grown revenue to approximately \$140 million and earned national recognition, including the International Torch Award. Key innovations include products like Optima Tax Shield, which proactively monitors for Tax ID theft. Customer Service is a foundational pillar of Optima's success, designed to deliver confidence and relief from the first interaction through the resolution of complex tax cases. Since July 1, 2023, the front-line service team has supported one of the largest expansions in company history. Annual return volume increased from about 30,000 in 2023 to over 40,000 in 2024, with 2025 projected to add another 10,000 returns. Despite this growth, call answer rates remained above 91%, well above industry benchmarks. Operational investments further strengthened performance. In 2025, new high-speed mail, scanning, and OCR automation increased monthly document processing from 7,244 to more than 53,000 items and reduced queue fail-overs by 65%.



**OC World, Santa Ana**

*Manuel Gomez, Co-Founder & Producer*

OC World continues to be Orange County's only nonprofit multimedia company. We produce award-winning programming for more than 15 million households on the KLCS-PBS station (and with over 130,000 YouTube views). The company launched five years ago and has quickly become embedded into the community with a stellar list of advisory committee members, sponsors and underwriters, and guests hosts including Pulitzer Prize-winning journalist Rick Reiff, seasoned media professional Steve Churm, former U.S. Ambassador Gaddi Vasquez, and President-CEO of Orange County Community Foundation Shelley Hoss. Guests have included California Attorney General Rob Bonta, Orange County Sheriff Don Barnes, Orange County District Attorney Todd Spitzer, and former NFL quarterback Todd Marinovich. Programs have included The Ecology Center of San Juan Capistrano, Giving Days in Orange County (LA Press Club National Arts & Entertainment awards nominee), El Sol Science & Arts Academy, and The Power and Awe of Music (Orange County Press Club's "Real O.C." award winner).



**Outshine Public Relations, Newport Beach**

*Talia Samuels, Founder & President*

Named one of the "Best PR Agencies in America" by Forbes, Outshine Public Relations specializes in restaurant, hospitality, and culinary public relations. Founded by Talia Samuels in 2015, her agency has represented an all-star roster including James Beard Award-winning and Michelin-starred chefs, AAA Five Diamond-awarded properties, and new-to-market culinary brands. With deep roots in the hospitality industry, she has a passion for supporting hoteliers, restaurateurs, chefs, and food and beverage brands through her creative storytelling verticals. Recognized for her poise, tenacity, and integrity, Samuels is a force in her field. Her company, Outshine Public Relations, is a full-service agency providing public relations, social media management, photography, videography, and digital marketing.



**ON ITS AXIS, Costa Mesa**

*Shelley Iocona, Founder*

Shelley Iocona is the quintessential "woman in tech"—an innovator, builder, and advocate for the under-voiced. With an early career spanning engineering and product roles for global technology organizations, Iocona brought her technical foundation into entrepreneurship by founding ON ITS AXIS, an award-winning innovation consulting firm known for practical strategy, modern delivery, and inclusive leadership. Across her work, Iocona is recognized for translating complex challenges into actionable solutions that help organizations innovate responsibly, grow sustainably,



**Paulus Group (Paulus Engineering Inc), Anaheim**

*Zach Lewis, President*

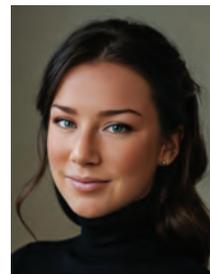
Raised in an entrepreneurial household, Zach Lewis started working in his parents' traffic control & contractor supply business at the age of 12. Upon entering the workforce full-time in 2012, Lewis helped grow and eventually sell the company in 2015 to Traffic Management Inc. He then spent the next 8.5 years directing & transforming service-based organizations to exceed their growth goals and deliver long-term value to stakeholders throughout the US. Lewis joined Paulus Group in October of 2023. Established in 1983, Paulus Group was Southern California's premier family-owned wet-utility construction specialist and needed an experienced leader to help the company through its next phase of growth. Aligning the vision of the owners to an actionable strategic plan, Lewis and team have since delivered annual revenue growth exceeding 30% YoY, improved safety incident rates by 52%, and achieved field employee retention of 92%. Entering 2026, Paulus Group's more than 90 team members are positioned for continued growth in Southern CA and expansion opportunities beyond.



**Piano For Kids, Laguna Niguel**

*Morgan Simmsgeiger, Founder*

Morgan Simmsgeiger founded Piano For Kids at age 19 after identifying a clear gap in accessible, high-quality piano education for children. What began as solo instruction rapidly evolved into a structured, in-home music education company serving families across Orange County. By age 23, she had: Built and managed a team of 15 instructors and 1 assistant manager; Served over 250 families through a fully in-home lesson model; Created a tiered instructor system that paired younger students with vibrant instructors as students progressed. She also engineered a recital system designed for quality and retention, hosting up to three recitals across two days while capping each at under 20 performers. This preserved student confidence, kept families engaged, and prevented burnout, an uncommon level of operational maturity for a young founder. Piano For Kids became known not just for instruction, but for experience, consistency, care, and a business model that benefited students, instructors, and families alike.



**PKShukla.com, Villa Park**

*Pradip Shukla, CEO*

PKShukla.com and affiliated BestCEOAdvisor.com consult with entrepreneurial firms at all stages—business plan, inception, growth, succession planning, going public, and liquidation. Expert speaking, training, and consulting services tailored to meet each organization's unique needs are offered. Insights and services are provided that drive individual, group, and organizational growth and enhanced efficiency. Dr. Shukla serves on Boards of Directors and Advisory Boards of for profit and non-profit organizations. Dr. Shukla is listed in the Who's Who In Consulting, the Who's Who in the World, was recognized as Best and won the First Place "Best Advisor Award" from all domestic and global chapters of C-E-O.org. In 2026 he received The Best South Asian American CEO Advisor/Corporate Director Award. Dr. Shukla is currently assisting several client firms. In the past, he served on the Advisory Board of StudentBusinesses.com co-founded by Harvard University Alumnus Vivek Ramaswamy. Dr. Shukla served on the advisory board of Advanced Predictive Analytics, Inc. and served with Dr. Arthur Laffer. Dr. Shukla was selected to receive a Marquis Who's Who in America Lifetime Achievement Award.



**Power Pulse EMS Training, Santa Ana**

*Devon Belanger, CEO*

Devon Belanger is the Founder and CEO of EMS Power Pulse, a high-growth fitness enterprise redefining wellness in Southern California. Utilizing cutting-edge Wiemspro technology, Power Pulse delivers medically-backed, 20-minute Whole-Body Electrical Muscle Stimulation (WB-EMS) protocols that provide the efficacy of a two-hour workout. Since its 2025 launch, the company has seen exponential growth, scaling from a boutique startup to a premier health destination with over 70 recurring clients in its first six months. This momentum culminates in



**Congratulations Pramod Kunju on your Excellence in Entrepreneurship Award Nomination**

**Pramod Kunju**  
CEO, NAKUNJ Inc



# CONGRATULATIONS, **VINNIE CURCIE**

2026 EXCELLENCE IN  
ENTREPRENEURSHIP NOMINEE



The OC Solar family is proud to celebrate our founder and CEO, Vincent “Vinnie” Curcie, on his nomination for the Orange County Business Journal’s 2026 Excellence in Entrepreneurship Award.

Since founding OC Solar in 2016, Vinnie has built one of Southern California’s most trusted names in residential solar energy — growing the company from a small team in Irvine to more than 100 employees serving thousands of homeowners across the region. His commitment to transparency, quality craftsmanship, and putting customers first has earned OC Solar top ratings on every major review platform and the trust of thousands of Orange County families.

A member of both the Tesla Pro Council and the Angi Pro Council, Vinnie’s leadership has positioned OC Solar as the go-to partner for homeowners seeking energy independence through premium solar and battery storage solutions from Tesla, QCells, Enphase, REC, and Panasonic.

This nomination reflects what our team has always known: that Vinnie’s vision, integrity, and relentless drive to do right by every customer are the foundation of everything we do.

## LET’S TALK SOLAR

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## 2026 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

February 2026 with the opening of a flagship studio in Santa Ana—a landmark partnership with Superior Wellness. As the first facility of its kind in Orange County, this center integrates elite EMS performance with advanced biohacking, AI diagnostics, and clinical rejuvenation. A veteran of the Women's Royal Air Force with 30 years of global leadership experience, Belanger has trained royalty and A-list celebrities. Her foresight in bridging the gap between clinical longevity and functional fitness has established EMS Power Pulse as a leader in the OC entrepreneurial landscape.

**Powerhouse+Co., Orange**

*Kristin Daher, Founder & CEO*

As Powerhouse+Co. celebrates a decade in business this year, Kristin Daher continues to lead the agency to steady revenue growth and impressive client diversification, while providing a happy, healthy agency culture where employees thrive. Since founding Powerhouse in 2016, Daher has continually advanced its standing as one of Southern California's premier communications firms. She has strategically reimagined the agency's approach to PR, influencer, and social media programs, leveraging innovation and thought leadership to allow client stories to shine. Beyond her role in growing the agency, Daher has fostered a transformative culture defined by creativity, development, and achievement. In many ways, she has molded Powerhouse in her own likeness. It's an upbeat, innovative, high-energy workplace where brainstorming yields equal parts productivity and laughs, unique personalities are always welcome, and collaboration is ubiquitous. Led by Daher's vast professional network and the agency's best-in-class reputation, the company recently diversified its roster with new clients in the venture capital and real estate industries, along with exciting brand work in the agency's specialty categories of franchise, technology, restaurant, and CPG.

**Profit Recovery Partners (PRP), Santa Ana**

*Donald Steiner, Founder & CEO*

Donald Steiner founded Profit Recovery Partners in 1997 and currently serves as CEO. Since the firm's inception, Steiner has managed the growth of PRP and expanded its impressive base of clients to include FORTUNE 1,000 companies and an assortment of middle-market companies. He built the firm on core values centered around serving the client first and created a culture dedicated to achieving the impossible by finding a better way. PRP's accumulative savings for its clients have now surpassed \$11 billion. Before starting PRP, Steiner spent over a decade in the office equipment industry holding sales management and executive positions at FKM Copier Products where he was instrumental in growing revenue. Earlier, he worked for Canon in a variety of sales roles. Steiner is also the founder of the Two Masters Wine Club and Steiner Innovations as well as the maker of the infant sunshade "Sweet Baby Shade." He holds a Bachelor of Arts degree from Loyola Marymount University and is a nine-year Board of Regents member. Steiner currently serves on the boards of the Emeril Lagasse Foundation, Keep Memory Alive (Cleveland Clinic Lou Ruvo Center for Brain Health), the Kurt Warner Foundation, and Orange County School of Arts (OCSA).

**RAJ Capital and Revitate, Newport Beach**

*Lisa Bhathal Merage, Founder, Managing Partner & Chief Impact Officer*

Lisa Bhathal Merage serves as Co-Founder and Managing Partner of RAJ Capital. The Newport Beach based firm is the alternative asset platform of the Bhathal Family Office and includes the Revitate investment management platform. Merage serves as Governor of the Portland Thorns (NWSL) and Portland Fire (WNBA). Along with her family, Merage is a Co-Owner of Sacramento Basketball Holdings, which owns the Sacramento Kings of the NBA, the Stockton Kings of the G-League, MiLB's River Cats, Golden 1 Center and Downtown Commons entertainment and sports district. She previously served as CEO of RAJ Swim, the Bhathal family's 50-year-old women's swimwear business. During her tenure, the firm successfully sold to private equity in what remains the largest private equity buyout in the swimwear industry. She was honored as the 2012 Mercedes Benz Fashion Week Swim Presents "Designer of the Year," and 2015 Modern Luxury magazine "Altruist of the Year." Merage has a passion for philanthropy and currently serves on the board of the UC Irvine Langson Orange County Museum of Art and was Vice Chair of OCMA.

**Regal Court Reporting, Santa Ana**

*Stephanie Leslie, Founder*

Stephanie Leslie is a visionary voice in the court reporting industry. Founding Regal Court Reporting in 2007 alongside her husband Isaiah Leslie, the award-winning firm remains one of the last 100% court reporter-owned, steno-only firms in California. A champion for maintaining the integrity of the industry while recognizing the need for strategic and tactical evolution to take place, Leslie has served extensively on the California Deposition Reporters Association board as a District representative and as President. She has also led impactful presentations at national conferences for industry organizations such as NCRA, Cal DRA, and NVRA and been a guest contributor for publications such as the Daily Journal. Recently tapped by Major League Baseball, Leslie covered press conferences for six games across three states, protecting the record for history and legacies. Investing in future generations through mentorship, Leslie believes industry sustainability requires the collaboration of current and future court reporting professionals. Through her leadership and foresight, Leslie has positioned Regal Court Reporting as the premier firm in California to acquire other independently owned court reporting firms.

**Revive Real Estate, Irvine**

*Dalip Jaggi, COO*

Entrepreneur, technologist, and passionate business leader sum up the core of Dalip Jaggi, co-founder and COO of Revive Real Estate, a PropTech company with a goal to democratize house flipping. Since its 2020-inception, Revive has since transformed renovations into wealth-building strategies for homeowners in an effort to keep homeownership alive and well. Jaggi's tie to real estate began when he served as the CTO for Rich Uncles, the first privately held real estate investment trust (REIT) for unaccredited investors. Rich Uncles enjoyed a successful exit in 2017 and went public in 2022 as Modiv (NYSE: MDV). Jaggi's career started early on during college when he started an engineering studio, Devise Interactive. This is where his passion for technology came from where he built technology for several startups. Devise Interactive had an exit in 2018 to Vincit, a publicly traded international engineering studio. But

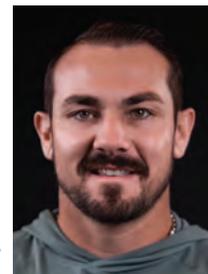


throughout it all, Jaggi remains family-centric, recently a father, and continues to live in Orange County, saying it is "the best place to live."

**Rocket Group, Westminster**

*Victor Rancour, CEO*

Victor Rancour, CEO of Rocket Group, leads a dynamic organization purpose-built to acquire and grow HVAC and plumbing companies across multiple markets. His most significant achievement has been the creation and expansion of Rocket Group, which now operates 11 distinct HVAC, plumbing, and home services brands across the United States including Arizona, Texas, Florida, Washington, and others. Almost two years ago, Rancour founded Rocket Group with his brother, which has rapidly expanded through strategic acquisitions. The company targets businesses with strong local reputations, preserving existing leadership while providing marketing expertise, technological advancements, and operational systems. Rancour's innovative acquisition model allows these brands to maintain their identity while leveraging economies of scale in equipment purchasing, marketing resources, and technical training. Through his leadership, Rocket Group has transformed how home service businesses operate, creating a platform that enables local companies to grow while maintaining their unique identity and connection to their communities.

**Rockwell Capital Group, Glendale**

*Loran Armstrong, COO*

Loran Armstrong has been the Chief Operating Officer of Rockwell Capital Group since 2019. Armstrong is a dynamic leader known for driving operational excellence and ensuring the seamless execution of the firm's strategic goals. With a proven track record of optimizing processes and delivering superior financial services, Armstrong has played an instrumental role in positioning Rockwell Capital Group as a leading force in the accounting and bookkeeping industry. As COO, Armstrong oversees the firm's day-to-day operations, ensuring efficiency, accuracy, and adherence to the highest industry standards. With over 15 years of experience in the financial sector with such roles as a Senior Tax Case Analyst and Senior Tax Specialist, Armstrong has led numerous initiatives that have enhanced the firm's service delivery, fostered innovation, and improved client satisfaction. Under Armstrong's leadership, Rockwell Capital Group has seen significant growth, expanding its services and client base, while maintaining its commitment to personalized financial solutions. As someone who thoroughly understands the client experience, Armstrong is highly regarded for his ability to balance operational efficiency with strategic foresight.

**Rodriquez Wealth Management, Newport Beach**

*Jesse Rodriquez, President*

Jesse Rodriquez is the Founder and President of Rodriquez Wealth Management, an independent, fiduciary wealth advisory firm based in Newport Beach. Established in 2020, the firm has experienced substantial organic growth, expanding its multigenerational client base with a strong emphasis on retirees and business owners navigating significant liquidity events. As sole owner, Rodriquez has intentionally maintained independence by declining private equity and institutional ownership, ensuring truly unbiased, client-first advice. With nearly three decades of experience, Rodriquez began his career at nineteen and went on to become the top individual producer in both the Manhattan Beach Merrill Lynch office and later the flagship UBS Newport Beach office. At Rodriquez Wealth Management, he leads a high-performing team of six carefully selected professionals, all dedicated to delivering a comprehensive "family office" experience for high-net-worth families across generations. Rodriquez has been named one of Forbes' "Best-In-State Wealth Advisors" from 2018-2025 and holds the CFP®, CPWA®, CRPC®, and CDFA® designations—reflecting his deep commitment to ongoing education and staying at the forefront of wealth management knowledge to deliver the highest level of advice to his clients.

**Ship & Shore Environmental, Inc., Signal Hill**

*Anoosheh Oskouian, President & CEO*

In the 25 years since its inception, Ship & Shore Environmental has emerged as a prominent provider of cutting-edge clean air technologies dedicated to enhancing our air quality and environmental well-being. Anoosheh Oskouian, serving as the President and CEO, guides the overall corporate strategy encompassing engineering, product development, sales, and fabrication. Oskouian advocates for a harmonious coexistence between sustaining the manufacturing industry and preserving clean air and environment. Ship & Shore's commitment to excellence has garnered numerous awards, recognizing its impactful contributions to clean air and sustainability initiatives. Oskouian is the only Iranian female CEO in the environmental industry. Her knowledge and experience with combustion equipment such as thermal oxidizers, catalytic oxidizers, boilers, burners, carbon, and zeolite adsorption, etc. is primary to her business. In addition, waste heat recovery and energy consumption reduction is an integral part of each engineered solution.

**SKB Cases, Orange**

*John Saxon, CEO & Chairman*

John Saxon, CEO and Chairman of SKB Cases in Orange, built a world-class leadership team by hiring two C-suite executives, multiple VPs, and a General Manager, while expanding operations through new hiring in Mexico. Under his leadership, SKB achieved AS9100 certification in just five months—far faster than the typical 24-month timeline—becoming the only U.S. case manufacturer with this certification. He also led a full ERP transformation to modernize operations. In just 12 months, Saxon transformed a founder-led business into a cutting-edge, 21st-century organization positioned to scale in a complex, tariff-driven environment.

**SoSheBuilds, Newport Beach**

*Karla Talisse, Founder*

Karla Talisse is a construction strategist, business-development leader, and founder of SoSheBuilds—a consultancy that helps contractors and developers win more work through government-contracting guidance, strategic positioning, and visibility. With roots in hands-on construction and a deep understanding of small-business challenges, she blends technical expertise with strategic marketing to help companies grow,



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compete, and succeed in public-sector and commercial markets.

**South Coast Conservatory, Laguna Niguel**

*Jena Minnick-Bull, CEO & Director*

Jena Minnick-Bull, Owner of South Coast Conservatory (SCC), is deeply committed to Elevating Arts Education! SCC is a premier performing arts education institution, dedicated to nurturing creativity and artistic excellence in Orange County. With a dedicated team of 42 employees, including six administrative staff and 36 accomplished faculty members, SCC delivers comprehensive training across dance, aerial arts, music, and theater. The Conservatory recently experienced significant strategic growth through the successful acquisition of V&T Dance, expanding its reach and program offerings. Furthermore, a key partnership with Saddleback Community College reinforces SCC's commitment to bridging high-quality arts education with higher learning opportunities. SCC's commitment to its students and community was recently recognized by several prominent entities, including CA Assemblymember Laurie Davies and City Council Member Stephanie Oddo. The institution was also proudly named a "Company That Cares" by the Orange County Business Journal, underscoring its profound impact and dedication beyond the classroom. SCC is shaping the next generation of artists and cultural leaders.

**Spice Girl Sauces LLC, Santa Ana**

*Shachi Mehra, COO & Executive Chef*

Chef Shachi Mehra is a celebrated chef and entrepreneur whose leadership has helped shape Orange County's modern dining landscape. As Executive Chef and Partner of the award-winning ADYA restaurant, she has redefined Indian cuisine with a bold, contemporary approach, earning consistent recognition from Eater LA and regional media. In 2021, Chef Mehra expanded beyond restaurants to launch Shachi's Spice Girl Sauces, taking on the complex and capital-intensive world of consumer-packaged goods—an entirely different business model. She successfully navigated product development, shelf stability, regulatory requirements, and the challenge of securing the right co-packer, overcoming significant operational and financial barriers to bring her vision to market. The brand continues to grow, with new flavors and refreshed packaging launching later this year. Chef Mehra's expertise is sought nationally. She serves as South Asian Consulting Chef for The Fairmont Princess in Scottsdale and The Regent Santa Monica, extending her influence into luxury hospitality. A Chopped champion and James Beard Foundation Legacy Network Advisor (2024–2025), she is a committed advocate for women-owned businesses.

**StarQuiz, Irvine**

*Alp Cizem, CEO & Co-Founder*

StarQuiz is an AI-powered formative assessment platform that helps educators identify student misconceptions in real time—before it's too late to intervene. Co-Founded by twin brothers Alp Cizem (CEO) and Cem Cizem (COO), alongside CTO Andrew Dimarogonas, StarQuiz evolved from their previous venture Huxli, which served over 350,000 college students. The company is backed by Chapman University's Leatherby Center for Entrepreneurship and received a \$50,000 CalOSBA Innovation Grant after multiple competitive pitch rounds. StarQuiz has been featured in Fox News, CBS, KSNT, and EIN Presswire for its work in AI-powered educational technology. In 2025, StarQuiz completed its first university pilot at Chapman University, demonstrating statistically significant improvements in student learning outcomes. The platform now serves higher education institutions across the United States, with a focus on large gateway courses where early intervention matters most. Cizem was previously the youngest nominee for OCBJ's Innovator of the Year award in 2024.

**StarQuiz, Irvine**

*Andrew Dimarogonas, Chief Technology Officer*

StarQuiz is an AI-powered formative assessment platform that helps educators identify student misconceptions in real time—before it's too late to intervene. Co-Founded by twin brothers Alp Cizem (CEO) and Cem Cizem (COO), alongside CTO Andrew Dimarogonas, StarQuiz evolved from their previous venture Huxli, which served over 350,000 college students. The company is backed by Chapman University's Leatherby Center for Entrepreneurship and received a \$50,000 CalOSBA Innovation Grant after multiple competitive pitch rounds. StarQuiz has been featured in Fox News, CBS, KSNT, and EIN Presswire for its work in AI-powered educational technology. In 2025, StarQuiz completed its first university pilot at Chapman University, demonstrating statistically significant improvements in student learning outcomes. The platform now serves higher education institutions across the United States, with a focus on large gateway courses where early intervention matters most. Alp Cizem was previously the youngest nominee for OCBJ's Innovator of the Year award in 2024.

**Sterling Public Relations, Corona del Mar**

*Paula Steurer, Founder*

Sterling Public Relations is known for curating innovative strategies and marketing solutions that empower their clients with a competitive edge. Serving clientele in niche and saturated industries for the last 18 years, Sterling Public Relations has become an in-demand firm for brands and entrepreneurs throughout California. The firm's signature white glove, concierge style approach has been cultivated by Founder and entrepreneur Paula Steurer and it plays a pivotal role in helping clients achieve elevated results with real impact. Founded by Steurer in 2008, the firm offers full-service branding, marketing, and public relations services for clients in industries including wealth management, real estate, business development, med spas and aesthetics, nonprofits, hospitality, fitness, and more. Leading with heart, Steurer's devotion to nonprofit works drives the company's commitment to representing organizations including The Drake Gives, The Literacy Project, Sherman Library & Gardens, and Casa Youth Shelter. Earning a reputation as a trusted authority among entrepreneurs and executives, Steurer's vision and insights have been shared in the spotlight at national conferences for Mindbody, Vizio, Oracle, and the HFA Conference.

**STJ Consulting, Lake Forest**

*Scharrell Jackson, CEO*

Scharrell Jackson is the Founder and CEO of STJ Consulting, a boutique business consulting firm that helps organizations strengthen financial



performance, operational execution, and leadership effectiveness. With more than 35 years of executive-level experience in finance and operations, she launched STJ Consulting to deliver practical, high-impact solutions for growing companies and mission-driven organizations. The firm operates with a lean, high-performing structure and collaborates with a trusted network of specialists to scale services based on client needs. In recent years, STJ Consulting has expanded its footprint through increased demand for executive coaching, leadership development, and strategic advisory support, helping clients improve decision-making, streamline operations, and build stronger teams. Jackson is also the founder of Leadership in Heels, a leadership movement and nonprofit institute that elevates women and emerging leaders through mentoring, speaking engagements, and leadership programming. Known for her results-driven approach, Jackson continues to build a purpose-led enterprise that strengthens businesses while developing the next generation of confident, values-based leaders.

**Stretto, Irvine**

*Jonathan Carson & Eric Kurtzman, Co-CEOs*

Recognized as industry innovators by Goldman Sachs, Ernst & Young, Entrepreneur Magazine and Inc. Magazine, Jonathan Carson and Eric Kurtzman leveraged their expertise as former corporate restructuring attorneys and award-winning entrepreneurs to create Stretto. Through opportunistic M&A activity and a culture of innovation, they have grown the company by identifying and entering new markets that serve legal and financial professionals. As entrepreneurial partners for more than two decades, Carson and Kurtzman share a vision and passion for building new solutions for the bankruptcy and legal services industry. They established Irvine-based Stretto to create an unparalleled portfolio of services for attorneys, consumer and corporate bankruptcy professionals, and fiduciaries that streamline legal and financial matters for all involved parties. As its first step in empowering clients with artificial intelligence (AI), Stretto launched the first generative AI communication and research platform designed specifically for chapter 11 bankruptcy cases. Carson and Kurtzman identify new ways to serve the legal services industry and remain focused on streamlining the administrative aspects of legal transactions for companies, professionals, and individuals.

**Sunday Brunch Agency, Huntington Beach**

*Rachel Svoboda, CEO & Founder*

Rachel Svoboda is a visionary marketing strategist and serial entrepreneur, best known as the Founder and CEO of Sunday Brunch Agency, a female-owned, fully remote marketing firm she launched in 2016. Under her leadership, Sunday Brunch Agency has grown into a trusted partner for more than 500 independently owned brands, businesses, and organizations across Orange County, the U.S., and internationally, delivering integrated marketing rooted in strategy, creativity, and results. Beyond Sunday Brunch, Svoboda has founded and co-founded multiple ventures spanning investment, consumer products, political marketing, and education, reflecting her passion for scalable growth and innovation. She is also a co-founder of Apex Financial Partners, supporting early-stage and emerging businesses. A committed mentor, philanthropist, best-selling author, and single mother of two, Svoboda is driven by ethical leadership, economic empowerment, and building businesses that create lasting impact.

**SYBTEK INC., Aliso Viejo**

*Sam Namiranian, Chief Executive Officer*

SYBTEK INC. is a dynamic small business founded in 2024, specializing in Information Technology services with a focus on Managed Service Provider (MSP) solutions and advanced surveillance infrastructure. Headquartered in Orange County, SYBTEK INC. delivers comprehensive IT support, network security, and monitoring systems tailored to meet the evolving needs of businesses across diverse industries. Since its inception, SYBTEK INC. has experienced steady growth, expanding its client base and service offerings to include cutting-edge surveillance technologies and proactive IT management strategies. The company prides itself on delivering reliable, scalable solutions that enhance operational efficiency and security for its customers. Notable milestones include the successful deployment of integrated surveillance systems for multiple commercial clients and the launch of a 24/7 remote monitoring service, positioning SYBTEK INC. as a trusted partner in technology-driven business solutions. With a commitment to innovation and customer satisfaction, SYBTEK INC. continues to build a strong reputation in the IT services sector.

**Syntiant, Irvine**

*Kurt Busch, CEO*

Tech veteran Kurt Busch is building Orange County's next great AI company. He and his co-founders launched Irvine-based Syntiant in 2017 with an ambitious vision: make AI a seamless, always-available interface between people and technology. At a time when AI largely lived in the cloud, Syntiant bet on intelligence at the edge, closer to people where they live, work, and play. The company solved the challenge of delivering advanced AI in size-, power- and cost-constrained devices by developing purpose-built, ultra-low-power silicon and an optimized pipeline for creating high-quality machine learning models for edge applications. Today, Syntiant has deployed more than 100 million Neural Decision Processors™ and ML models worldwide, alongside billions of MEMS microphones and sensors powering embodied AI for speech, audio, sensor, and vision applications. Under Busch's leadership, Syntiant has grown to \$250 million in annual revenue and accelerated expansion through strategic acquisitions, including Pilot AI Labs in 2022 and Knowles Corporation's Consumer MEMS Microphones business last year, building a full-stack platform spanning sensors, silicon, and software. Syntiant recently marked a major milestone with the opening of its world-class manufacturing and R&D campus in Penang.

**The Busch Group, Irvine**

*Tim Busch, Chairman*

Tim Busch is a businessman, lawyer, and Catholic philanthropist based in Orange County, California. He has been married to his wife, Steph, for 40 years, and together they have two children, Garrett and Mackenzie, and eleven grandchildren. Busch is Chairman of the Busch Group, a family of companies that includes a law firm, a hotel management and development company, a winery, and several faith-based nonprofit organizations. Tim and Steph have been active members of Legatus



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since 1990. Together with Fr. Robert Spitzer, S.J., they co-founded the Magis Institute and the Napa Institute, and Busch also co-founded the Napa Legal Institute with John Peiffer. Longtime advocates of Catholic education, Tim and Steph co-founded St. Anne Catholic Elementary School in Laguna Niguel in 1992 and JSerra Catholic High School in San Juan Capistrano in 2003. In recognition of their generosity, The Catholic University of America named its business school the Tim and Steph Busch School of Business and Economics. Busch is widely recognized for his leadership at the intersection of faith, culture, and public life through his longtime chairmanship of the Napa Institute.

**The Drake Gives, Laguna Beach**

*Alec Glasser, Founder*

Visionary entrepreneur and philanthropist Alec Glasser founded Laguna Beach's iconic The Drake restaurant in 2019. In 2021, he launched The Drake Gives, a nonprofit dedicated to providing underserved public-school students with instruments and music instruction, giving them access to the transformative power of music. Under Glasser's leadership, The Drake Gives is committed to ensuring that all children—regardless of socioeconomic circumstances—can learn, create, and find belonging through music. To date, the organization has raised more than \$750,000, impacting over 17,000 local students. Believing deeply in music's ability to drive social change, Glasser fully endowed the Alec Glasser Center for the Power of Music & Social Change at UC Irvine's School of Social Ecology in 2024. Grounded in a bold vision to use music as a catalyst for healing, learning, and unity, the Center is developing impactful programs, global partnerships, and research initiatives—including an undergraduate course The Power of Music and an annual Glasser Scholarship Program, which provides ten students with \$10,000 each as they incorporate music into their future professional paths.



**The Lukes Network, Aliso Viejo**

*Jay and Anna Lisa Lukes, Co-Founders*

The Lukes Network operates at the intersection of business growth, public policy, and community impact: delivering elite-level performance in highly-competitive and highly-regulated environments throughout southern California. TLN is a purpose-driven entrepreneurial firm that helps organizations grow sustainably while achieving measurable social and economic impact. TLN integrates fundraising and capital strategy, strategic communications, public affairs, sustainability, and data-driven storytelling into a single, results-oriented business model. TLN's business partners consistently cite TLN's speed, precision, integrity, and ability to perform under extreme time constraints and pressure as differentiators that directly translate into wins. TLN's work directly supports: Real estate development and affordable housing; Workforce development and job creation; Health care; Energy and clean technology; Education; Technology; The Arts; Stronger public-private partnerships across Orange County and all parts of southern California.



**The Zandbergen Group, Laguna Beach**

*Bart Zandbergen, Founder & CEO*

Recognized for his innovative approach to architecting True Wealth portfolios, Bart Zandbergen launched The Zandbergen Group to serve clients going through life transitions at all stages. With over 30 years of experience, Zandbergen discovered that real wealth consists of a complex dynamic where finances only play a limited yet distinct role. The Zandbergen Group's signature philosophy centers on True Wealth tenets including health, peace of mind, service to others, relationships, and the legacy one leaves behind. Zandbergen believes that the things money can't buy and death can't take away are often the invisibles that have a priceless value which are achieved through earning, investing, and living with intention. Inspired to bring his vision and philosophy to others within his industry and the community at large, Zandbergen will be releasing his first book in 2026, that is rich with True Wealth wisdom and actionable tools. Recognized by Forbes and Advisor Hub as a top wealth advisor in California, Zandbergen holds a CFP designation, Life/Health/Disability Insurance license, and is a Certified Divorce Financial Analyst.



**Tungsten fka Kofax, Irvine**

*Reynolds Bish, CEO & Chairman*

Tungsten Automation Corporation (formerly Kofax) is a global provider of AI-powered workflow automation and intelligent document processing (IDP) software that helps organizations digitize, understand, and orchestrate document intensive processes, from document capture, and extraction to workflow and agentic AI orchestration and analytics. Tungsten recently accelerated its cloud-first roadmap and expanded generative-AI capabilities to help its customers reduce manual work, improve compliance, and streamline document intensive processes. The company achieved major milestones with its 2024 rebranding, 40th anniversary in 2025, and was recognized as a Leader in Gartner's 2025 Magic Quadrant for Intelligent Document Processing as well as other analysts including IDC. This reflected its strong execution, vision, and customer focus across banking, insurance, healthcare, supply chain, and government agencies. For example, Tungsten customers include 8 of the 10 largest global banks and 7 of the 10 largest global insurers. Headquartered in Irvine, California, Tungsten has over 2,200 employees in 32 countries supporting more than 25,000 customers worldwide directly and through an ecosystem of over 850 resellers. Since 2022 the company has been privately held primarily by Clearlake Capital, TA Associates, and employees.



**U.S. Alliance Group, Rancho Santa Margarita**

*Fadi Cheikha, CEO*

Fadi Cheikha, CEO of U.S. Alliance Group Inc. (USAG) and ECS Payments, has driven innovation for over 30 years across a diverse venture portfolio. He immigrated to the U.S. at age 20 from war-torn Lebanon, bringing a global, multicultural perspective that shaped his journey. Beginning his career with humble roots as a gas station attendant, Cheikha has since built and scaled businesses across financial services, technology, real estate, investments, and nonprofits. USAG is a leading fintech company that houses the entire payment ecosystem under one

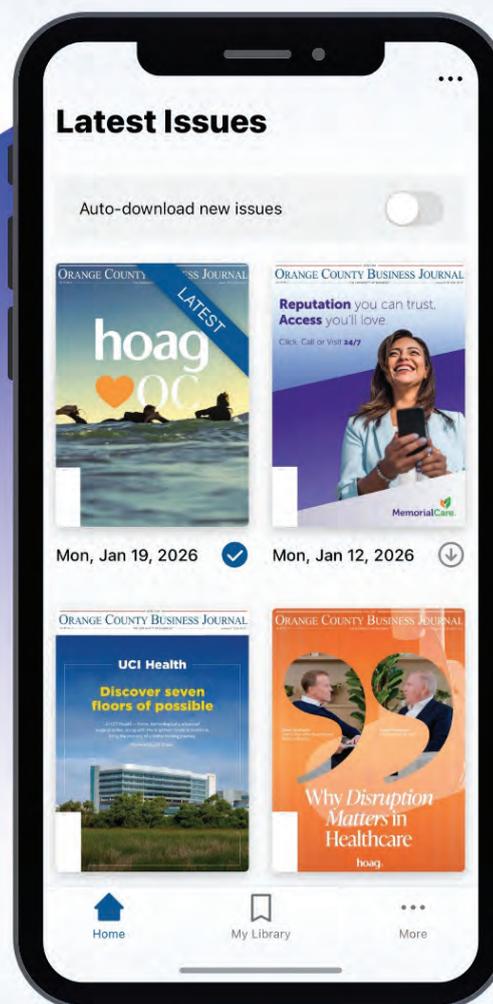


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roof, delivering end-to-end merchant services nationwide, including card processing, ACH, check, ATM, and integrated lending solutions. Over the past five years, USAG has doubled in size, with more than 80 employees. In 2023, Cheikha launched Aiden Technology, which has expanded from 4 to 14 employees and drives proprietary payments innovation across the organization. Cheikha's leadership has earned USAG over 4 dozen industry recognitions, along with individual honors such as a Forbes feature and inclusion in the OC 500 Directory of Influence.

**Vasonics, Corona**

*Ramy Albany, Founder & CEO*

Vasonics is at the forefront of transforming healthcare through innovative medical solutions. Our mission is to protect patients from preventable complications. Since our founding, we have focused on intravenous therapy, the most common procedure worldwide. We believe every line saved is a life saved. By leveraging breakthrough technology and insights, and collaborating with healthcare professionals, we aim to create efficient and effective products that set a new standard of care. We are committed to developing solutions that reduce costs, empower healthcare providers, enhance patient care, and improve outcomes. Driven by a passion for innovation, we partner with industry leaders to address real-world challenges. At Vasonics, we envision a healthier future where advanced medical solutions lead to better outcomes for all.



**Vortex Doors, Irvine**

*Kristin Slyker, CEO*

Vortex Doors, headquartered in Irvine, CA, is a leading provider of commercial and industrial door services, specializing in repair, maintenance, and replacement services for various types of doors. Founded in 1937, the company has grown significantly, with a focus on customer satisfaction and a commitment to quality service. In the past 3 years, Vortex Doors has grown from 34 to 82 national service centers and more than doubled the number of service crews to over 500. Vortex has been recognized as one of America's Top 100 Most Loved Workplaces the past two years and is a training leader in the door services industry having now opened two national training centers, one in Irvine and one in Fort Worth, TX, and a modern customer service certification program. Today, Vortex serves over 65,000 customers with an average 4.9 Google review across locations and a Net Promotor Score >65. The company has grown financially by 115% in the past three years and is currently earning >\$300 million in annual revenues.



**Well Connected Chiropractor, Mission Viejo**

*Elizabeth Hoefler, DC, DCCJP Chiropractor Founder*

Dr. Elizabeth Hoefler, DC, DCCJP, is the founder and CEO of Well Connected Chiropractic in Mission Viejo, CA, a specialized practice focused on Blair Upper Cervical care. Since establishing the practice in 2019, Dr. Hoefler has grown annual revenue from \$350,000 to \$1.4 million and expanded her team from 3 to 18 employees. The practice's physical footprint has nearly tripled, moving from 1,263 square feet at founding to

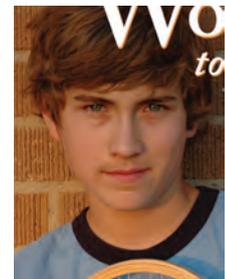


3,700 square feet in 2025. She has served over 3,000 patients, with her reputation now attracting clients from around the world. Dr. Hoefler holds a Diplomate in Cranio Cervical Junction Procedures and has served as a Certified Blair Technique Instructor since 2012. Her leadership within the profession is extensive: she currently serves as President of the Blair Upper Cervical Chiropractic Society and Chair of the House of Delegates for the California Chiropractic Association. She previously served as President of the California Chiropractic Association (2022-2023) and holds faculty positions at Palmer College of Chiropractic, Life Chiropractic College West, and Southern California University of Health Sciences.

**Worthy to Win, Ladera Ranch**

*Joey Johnson, Performance Coach*

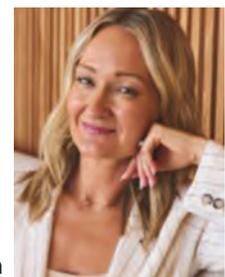
Joey Johnson is an Orange County-based entrepreneur, performance coach, and founder of Worthy to Win, a mindset development company serving competitive athletes, teams, and organizations nationwide. With more than 20 years of experience in elite tennis training and performance psychology, Johnson has built a scalable business that integrates mindset development with high-performance training principles drawn from competitive sport. Worthy to Win delivers impact through private coaching, live training programs, digital courses, webinars, and national speaking engagements, reaching thousands of athletes from junior competition to collegiate and professional levels. Johnson is the author of Worthy to Win and has worked with world-class athletes, including a former ATP world No. 1 in doubles. Recent company growth has been driven by expanded digital offerings, increased demand from collegiate and professional organizations, and a growing presence in leadership and performance education. Prior to founding Worthy to Win, Johnson worked in corporate America in the financial and medical sales industries. His diverse background and extensive speaking and training experience uniquely position Worthy to Win at the intersection of sport, leadership, and personal development.



**Z Supply, Costa Mesa**

*Mandy Fry, CEO*

With more than 20 years of award-winning experience as a brand leader in the apparel industry, Mandy Fry joined Z SUPPLY, LLC in 2019 as president and partner. She has overseen the growth and refinement of the brand, launching three new divisions—Z Lounge, Z SUPPLY Eyewear, and Z SUPPLY Denim launching in 2026—and building best-in-class teams to support 70% top-line growth since her arrival. Fry spearheaded the expansion of Z SUPPLY's proprietary B2B wholesale platform, shopB2Z, delivering a curated digital experience for more than 3,000 retailers. She also led the company's move to a larger, innovative headquarters and, in 2023, introduced the Z SUPPLY Shop Collective—an in-store boutique concept now featured in 25 locations nationwide, with continued expansion planned. Beyond brand growth, Fry founded The Z SUPPLY Foundation in 2021. To date, it has raised \$1.5 million, awarding more than 78 college scholarships in art, design, and marketing, while supporting organizations such as Make-A-Wish Orange County and Miracles for Kids.



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[www.OCWorld.org](http://www.OCWorld.org)



**LEHR**

LEHR proudly congratulates **Daniel Hamm** on his nomination for the **2026 Excellence Awards**. Your leadership, innovation, and dedication continue to make a meaningful impact.

**Daniel Hamm, MBA**  
CEO, LEHR

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# CONGRATULATIONS 2026 NOMINEES!



Albright Yee & Schmit, APC / **Clifton W. Albright**  
 Almquist Development + Investment /  
**Dan Almquist**  
 Alpha Motor Corporation / **Edward Lee**  
 Antis Roofing & Waterproofing / **Charles Antis**  
 Apex Space & Defense Systems /  
**Tracy Glende**  
 Aptiva Care Management / **Marc Friedman**  
 Austin Taylor Inc. / **Ron Viggiano**  
 Beetz Eats / **Beeta Mohajeri**  
 Beyond Fifteen Communications Inc. /  
**Lauren Ellermeyer**  
 beyondGREEN biotech Inc. / **Veejay Patell**  
 BioPhotas Inc. / **Patrick Johnson**  
 Butcher's House / **Jeoffrey Offer**  
 Cal Flavor / **Sammy Perricone**  
 Chups Mom2Mom / **Sami Skoruz**  
 Community Health Initiative of  
 Orange County / **Georgina Maldonado**  
 CoreViva / **Alan Alexander, MD**  
 Crain Consulting Inc. / **Talitha Crain**  
 CSUF Center For Entrepreneurship /  
**John "JJ" Jackson**  
 Diversified Waterscapes Inc. / **Maria Angel**  
 Doing Good Works / **Scott Henderson**  
 Eden Financial / **Nycole Freer**  
 EPD Solutions, Inc. / **Jeremy Krout**  
 Esperto Medical / **Aditya Rajagopal**  
 Events by Jamie Lyn / **Jamie Lyn Byerlee**  
 Exfluentia / **Cameron Jonsson**  
 FBFK Law / **Todd Friedland**  
 Flying V Group / **Robb Fahrion**  
 Forge Media Group / **Matthew Givot**

Foster Love / **Danny Mendoza**  
 Go Rentals / **Kaye & Kavous Gitibin**  
 Golden Coast Escow / **Sheila Alvarez**  
 Idea Hall / **Rebecca Hall**  
 il Girasole / **Antonio Bevacqua**  
 Inspired Art Wine / **Karen Nguyen**  
 KEI Concepts / **Ivy Ha**  
 KEI Concepts / **Viet Nguyen**  
 Labor Law Center / **Cathleen Caruso**  
 LEHR / **Daniel Hamm**  
 Los Sundays Tequila / **Mitchell Hayes**  
 Managed Direct Response / **Pat Mercuri**  
 MCDA CCG Inc. / **Michael Rash**  
 Mountain View Services Inc. (MVS Inc.) /  
**Eric Goodman**  
 My Mountain Mover / **Amanda Desuacido**  
 Nakunj Inc. / **Pramod Kunju**  
 Northwestern Mutual OC / **Ian Gordon**  
 OC Growth Advisors / **Marla Noel**  
 OC Solar / **Vincent Curcie**  
 OC World / **Manuel Gomez**  
 ON ITS AXIS / **Shelley Iocona**  
 Optima Tax Relief / **David King**  
 Outshine Public Relations / **Talia Samuels**  
 Paulus Group aka Paulus Engineering Inc. /  
**Zach Lewis**  
 Piano For Kids / **Morgan Simmsgeiger**  
 PKShukla.com / **Pradip Shukla**  
 Power Pulse EMS Personal Training /  
**Devon Belanger**  
 Powerhouse+Co. / **Kristin Daher**  
 Profit Recovery Partners (PRP) / **Donald Steiner**  
 RAJ Capital and Revitate /  
**Lisa Bhathal Merae**

Regal Court Reporting / **Stephanie Leslie**  
 Revive Real Estate / **Dalip Jaggi**  
 Rocket Group / **Victor Rancour**  
 Rockwell Capital Group / **Loran Armstrong**  
 Rodriquez Wealth Management /  
**Jesse Rodriquez**  
 Ship & Shore Environmental, Inc. /  
**Anoosheh Oskouian**  
 SKB Cases / **John Saxon**  
 SoSheBuilds / **Karla Talisse**  
 South Coast Conservatory / **Jena Minnick-Bull**  
 Spice Girl Sauces LLC / **Shachi Mehra**  
 StarQuiz / **Alp Cizem**  
 StarQuiz / **Andrew Dimarogonas**  
 Sterling Public Relations / **Paula Steurer**  
 STJ Consulting / **Scharrell Jackson**  
 Stretto / **Jonathan Carson & Eric Kurtzman**  
 Sunday Brunch Agency / **Rachel Svoboda**  
 SYBTEK INC. / **Sam Namirianian**  
 Syntiant Corp. / **Kurt Busch**  
 The Busch Group / **Tim Busch**  
 The Drake Gives / **Alec Glasser**  
 The Lukes Network / **Jay and Anna Lisa Lukes**  
 The Zandbergen Group / **Bart Zandbergen**  
 Tungsten Automation fka Kofax / **Reynolds Bish**  
 U.S. Alliance Group / **Fadi Cheikha**  
 Vasonics / **Ramy Albany**  
 Vortex Doors / **Kristin Slyker**  
 Well Connected Chiropractor /  
**Elizabeth Hoefler**  
 Worthy to Win / **Joey Johnson**  
 Z Supply / **Mandy Fry**

## Luncheon & Awards Program

March 26, 2026  
 12:00 p.m. - 2:00 p.m.  
 Tickets\*: \$225 / Table of Ten: \$2025



## Reservation Information

Visit [www.ocbj.com/events](http://www.ocbj.com/events) or  
 contact Elyana Torres,  
 Signature Events Manager at  
 949.664.5065 or [torres@ocbj.com](mailto:torres@ocbj.com).



## Keynote Speaker

**Charlie Zhang**

Philanthropist & Founder  
*Pick Up Stix & Zion Enterprises*  
 2025 EIE Award Winner

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