

# CEO OF THE YEAR Awards

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# Alex Thurman: 'Phenomenal Year' for Glaukos

■ By PETER J. BRENNAN

ALISO VIEJO — A year ago, **Alex Thurman** forecasted that **Glaukos Corp.** would grow revenue in 2025 by 25% to between \$475 million to \$485 million.

The maker of the world's smallest medical device exceeded expectations.

"Glaukos had a phenomenal year in 2025," the chief financial officer told the Business Journal. "Total revenues for the year were a record \$507 million on the back of year-over-year growth of 32%."

By the end of 2025, the Aliso Viejo-based company had a 10-year revenue compounded annual growth rate that topped 20%, he said. Furthermore, the company experienced gross margin expansion over the course of 2025, with the fourth quarter "landing" at 85%.

Shares of the maker of a device implanted into the eye to treat glaucoma have risen by about 45% since hitting a 52-week low of

\$73.16 in October. At press time, the shares traded at \$105.89 and a \$6.2 billion market cap (NYSE: GKOS).

A year ago, Thurman won a Business Journal **CFO of the Year Award** in the public sector. After taking on the role in 2022, he built a financial infrastructure to serve 16 international direct sales markets and integrated a new ERP system. He also heads Glaukos' technology systems, making sure the company isn't hacked.

He eliminated all of Glaukos' convertible debt and unwound a portion of the associated hedge instrument, providing the company with a significant amount of cash.

"We continue to build our strong balance sheet, ending the year with \$283 million of cash and equivalents, with no debt," he noted last week.

In late 2023, Glaukos won approval for



Alex Thurman  
CFO  
Glaukos Corp.

**iDoseTR**, a revolutionary treatment for glaucoma.

"iDoseTR did \$136 million in sales in just its second year on the market and drove record revenues within our U.S. glaucoma franchise, which experienced year-over-year growth of 50%," Thurman said.

Company executives are excited not only about its potential for glaucoma, but they also believe it could eventually replace other eye-drop medications to treat problems like dry eyes and presbyopia.

Last year, it invested \$150.6 million in research and development, culminating in the U.S. FDA approval of **Epioxa**, which he called a transformative therapy for keratoconus, a sight-threatening corneal disease.

Thurman, who graduated from **Brigham Young University**, spent two years as a Mormon missionary in Uruguay.

"My wife and I continue raising our four kids (we are convinced you are never done with this) and specifically welcomed back our second oldest son from a two-year mission to Guatemala," Thurman said.

# Liyuan Woo: Preparing TOCA for the World Cup

■ By JOSEPH PIMENTEL

COSTA MESA — For **Liyuan Woo**, the opening of **TOCA Football Inc.**'s first U.S. **TOCA Social** venue in Dallas earlier this month was more than just the grand opening of a new location.

It was the result of behind-the-scenes work paying off just before the **2026 FIFA World Cup**.

Woo serves as the chief financial officer of the Costa Mesa-based soccer experience company, the largest operator of tech-enabled indoor soccer training centers in North America.

The new TOCA Social in Dallas is a 20,000-square-foot immersive soccer-themed entertainment and dining venue, similar to **Top Golf** but for soccer.

With two locations in London and one in Birmingham, it's expected to be the next step for the brand in the U.S., Woo told the Business Journal.

"We're continuing our growth trajectory," she said. "We've had success overseas. Dallas is our first step here, and it's a big one."

The Business Journal caught up with Woo, who won the **CFO of the Year Award** in the private company category last year.



Liyuan Woo

## Steady Growth

Woo stepped into TOCA in 2023 at a complicated time.

The company had grown quickly by acquiring indoor soccer facilities across the country, building a network of about 40 training centers. In 2023 alone, the company acquired 22 locations, Woo said.

But that growth brought challenges, she said, like different systems, inconsistent operations and pressure on profitability. When she came on board, Woo focused on tightening the business and improving efficiency rather than expanding further.

She is credited with restructuring the com-

pany's operations, synergizing the global overhead and helping secure a \$100 million Series F funding round and a \$20 million refinancing deal with **JPMorgan Chase**.

"We needed to digest the growth," she said. "So, the focus was improving the fundamentals and making sure the model really works."

A big part of this has been refining TOCA's membership-based training program, which can range from \$250 to \$300 a month.

Inside the facilities, players use machines that deliver soccer balls at different speeds and angles to help build skills through repetition. She said it's like tennis players using machine ball launchers to practice their stroke.

In a single one-hour session, soccer players can kick the ball 300-400 times in ideal conditions, far more than in a typical outdoor team practice.

TOCA's system can personalize and track performance, speed, accuracy and foot position, and give players measurable progress over time.

Woo said the approach has helped the company maintain steady growth of about 20% to 30%.

## The Next Phase

Woo said TOCA's goal is to reach beyond

young children and serious athletes.

The TOCA Social concept aims to attract a wider audience: families, casual players and even corporate groups looking for a new kind of night out.

The timing is in the company's favor.

Soccer's popularity in the U.S. continues to rise, with the 2026 FIFA World Cup and the **2028 Summer Olympics** in Los Angeles expected to bring even more attention to the sport. The company, which has a partnership with **Major League Soccer**, has two more TOCA Social openings soon — one in Monterrey, Mexico and another in Paris, France.

Woo said the company is also investing heavily in technology to support its next phase.

"What's really exciting is we have an AI-first mindset, and we want to move very quickly because speed does matter," she said. "We're building a scalable platform. It's about using technology and AI to simplify the business and create a better experience."

She said the goal is to be creative "with AI and other innovative technology to streamline and provide the best consumer experience."

"I think that's where we're putting a lot of energy in the next year," she said.

# Jared Callister: Following a Growth Pattern at QSC

■ By EMILY SANTIAGO-MOLINA

COSTA MESA — When **Jared Callister** pivoted his financial career in 2013 from taxes at **Deloitte** to a broader leadership role at **QSC LLC**, a maker of audio, visual and control products, he said he knew that the company had a bright future ahead.

"They had a solid history of growth, a strong ownership group, and a strong leadership group in place. I don't think those opportunities grow on trees," Callister, QSC's vice president of finance, told the Business Journal last May.

Since Callister joined the Costa Mesa-based firm, QSC has acquired several cloud-based businesses, increased its headcount to over 900 employees and opened multiple international operations—all which led to a \$1.2 billion sale to Atlanta-based **Acuity Inc.** in 2025 (NYSE: AYI).

QSC supplies high-performance loudspeakers, digital mixers, power amplifiers and cutting-edge AV systems to theme parks,

casinos and concert halls worldwide, serving customers from performers to event managers. Acuity, an industrial technology company that develops lighting and building management solutions, called the firm "a disruptor" in the industry at the time of the sale.

"We found that Acuity was also on the same growth pattern as us," Callister said.

In its first year under Acuity, QSC has proven to be a big driver of revenue and profit within a business segment called Acuity Intelligent Spaces (AIS).

"QSC is building the industry's most innovative full-stack AV platform that unifies data, devices, and a cloud-first architecture to deliver real-time action, experiences, and insights," Acuity Chief Executive **Neil Ashe** told analysts on a conference call to discuss fiscal 2025 results. "The addition of QSC has



Jared Callister  
VP of Finance  
QSC

evolved the geographic footprint of our AIS business, accelerating our multinational expansion."

QSC, short for Quilter Sound Co., reported \$535 million in total sales for 2024. For the fiscal year ended Aug. 31, 2025, AIS reported sales of \$472 million, for which QSC contributed \$429 million, according to the parent company's annual report.

The firm's revenue accounted for the majority of Acuity's rise as companywide sales climbed 13%, or \$505 million, to \$4.4 billion in fiscal 2025.

Callister, after winning the Business Journal's Rising Star Award at the **CFO of the Year Awards** in 2025, at the time said that QSC was "knocking on the door" for \$600 million in 2025, with a mission to eventually generate \$1 billion in revenue.

"In all reality, Acuity bought QSC for our talent, our people, our technology — many things that we have been successful at," President **Jatan**

**Shah** told the Business Journal at the **National Association of Music Merchants (NAMM) Show** in January.

"One thing that has to remain constant throughout all the decades is that focus on innovation and focus on technology to actually solve problems for people that we are serving," Shah said.

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# Andrew Guarni: Prepares Hoag for Major Opening

■ By YUIKA YOSHIDA

NEWPORT BEACH — **Hoag Memorial Hospital Presbyterian** is six months away from opening its long-awaited \$1.2 billion Sun Family Campus in Irvine, marking a major milestone for the second-largest hospital in Orange County.

Before the expanded campus opens in September, Hoag's Chief Financial Officer **Andrew Guarni** says he's focused on checking off key tasks.

Current priorities include hitting budget and cutting costs amid high gas prices.

"Everything that comes in a truck just got significantly more expensive," Guarni told the Business Journal.

Guarni won the Business Journal's **CFO of the Year Award** in the not-for-profit category last May for guiding the hospital through the transformative period.

He said that they're figuring out ways to buy

in advance, in bulk or cut better deals to save money and use that to reinvest in the hospital.

Additionally, officials are thinking of how to backfill volume at the Newport Beach hospital as more patients are expected to shift to Irvine.

"Those are the things that are really on my mind right now," Guarni said.

## Hoag Responds to Coverage Gaps

"2026 is going to be an interesting year," Guarni said.

"Not only because we're expanding and opening up a new hospital but because some of the regulations from the federal government are causing more to not have insurance."

Federal subsidies for the **Affordable Care Act** expired at the end of 2025 amid the government shutdown, causing premiums to more than double on average for enrollees this year, according to health policy nonprofit **KFF**.

An estimated 4.8 million people, as a result, are expected to go uninsured without the en-



hanced subsidies.

Guarni said that Hoag is working with organizations such as Orange-based insurer **CalOptima Health** to ensure that patients "get the care that they deserve."

He expects to see more patients at the **Melinda Hoag Smith Center for Healthy Living** located across **Hoag Hospital Newport Beach**. The nonprofit hub houses more than 35 agencies that provide services ranging from health education to legal aid for underserved communities.

"We'll be delivering more care and getting less reimbursement for it, so from a CFO perspective, that's something I have to consider as we build budgets and figure out other ways to make that up," Guarni said.

## Surgical Pavilion Opening in May

The expanded campus has progressively been taking shape on Sand Canyon and Alton Parkway since breaking ground in 2023.

Soon to be the largest structure in the new six-building campus is the 130,000-square-foot Surgical Pavilion, which will open in May, according to Guarni.

The facility, intended to meet rising demand for complex inpatient surgeries, will feature eight operating rooms with advanced robotic technology and a new critical care unit.

In total, there will be six new buildings within the expanded campus, including two hospitals dedicated to women's health and cancer and digestive health.

# Tony Dabbene: People Around You Make Success

■ By KEVIN COSTELLOE

ALISO VIEJO — IHI Power Services chief **Tony Dabbene** says success is "really more about the people you surround yourself with than you yourself."

Dabbene serves as both CEO and CFO of the Aliso Viejo-based company, which is a subsidiary of **IHI Corp.** of Japan. It is scheduled to be sold to **Kyuden International Corp.**, also of Japan.

The company's results have "proven us to be worthy of an investment by somebody else," according to Dabbene.

He was honored last May with a lifetime achievement award at the Business Journal's **CFO of the Year Awards**. During his career, he's also worked for companies such as **LG&E**



Tony Dabbene received CFO award from Matt Primeau of Conexus

## Energy, ExaDigm and Metalclad Corp.

The company provides operations and maintenance, asset management, technical and compliance services for the power generation industry.

IHI Power Services manages 31 power plants in the U.S., Dabbene says.

## More Than 500 Employees, 40 in OC

IHI Power Services has more than 40 employees at corporate headquarters out of a total workforce of more than 500.

Two months after he retired following a 40-plus-year career in finance and business, a friend in 2022 asked Dabbene to temporarily fill in as the chief financial officer of IHI Power Services. He has kept that role since then and added the CEO role as well.

"I'm still wearing both hats," he told the Business Journal on March 18. "I was hopeful that I'd only have one. But it's worked out, and it was best for the company that I continue to do that for a while."

He said that after the sale is final "we'll revisit."

## Excited about the sale

Dabbene says he and the staff are thrilled about the pending sale to Kyuden International.

"The acquirer is a great company to work for. They're as excited as we are about going forward," according to the CEO/CFO.

"We're looking to continue to grow. We're looking to continue to expand our business. We'll be much more aggressive as we go forward with our new partner," Dabbene says.

He was raised in New York City and came to Southern California for a job in 1978 with his wife and stayed.

"We don't really go back much," the Laguna Hills resident says. "We have family there but they'd rather come here."



## Quality of Earnings: The Critical Factor That Can Make or Break a Deal

When buying, selling or investing in a business, financial transparency is critical. Yet even detailed financial statements do not always reveal the full picture of a company's financial health. Uncovering the hidden risks, earnings quality and long-term sustainability of a buyer or seller are essential to make an accurate assessment of how a business should be valued.

This is why due diligence is a fundamental step in mergers and acquisitions (M&A). It allows buyers and sellers to identify potential risks before a transaction moves forward.

### The Role of Due Diligence in M&A

Due diligence refers to the collection of audits, tests, reviews and financial analysis used to verify claims made during a business transaction. The goal is to confirm the accuracy of financial information and uncover any issues that could impact valuation or deal terms.

For buyers, financial due diligence involves reviewing a company's historical operations, assets and liabilities. The process may also include reviewing audited or reviewed financial statements, tax returns, contracts, employment agreements and potential litigation risks. A key component is evaluating earnings before interest, taxes, depreciation and amortization (EBITDA).

Seller's may also perform due diligence on potential buyers to assess their financial capacity and strategic fit. This can help avoid surprises and strengthen negotiating positions.

During the due diligence process, many transactions rely on

a Quality of Earnings (QofE) report. This report provides an independent assessment of the accuracy, sustainability and reliability of a company's reported earnings. Unlike a financial statement audit, a QofE report analyzes the underlying drivers of a company's financial performance.

### The Value of a QofE Report

A QofE report evaluates whether a company's earnings are consistent and repeatable. Analysts begin by reviewing reported net income or EBITDA and then adjust those figures to account for factors that may distort financial performance.

These adjustments may include non-recurring events, transactions not conducted at fair market value, discretionary wages or bonuses, personal expenses recorded in the business, noncash compensation such as stock options and margins associated with lost customers. The result is an adjusted EBITDA figure that reflects normalized earnings and provides a clearer picture of expected performance going forward.

For buyers, this analysis helps validate the financial stability of the target company. For sellers, it provides support for the company's valuation and strengthens negotiations.

Financial audits ensure compliance with accounting standards, while QofE reports help reveal financial viability. Both are valuable but serve different purposes. When buying, selling or investing in a business, working with experienced accounting professionals can help ensure

transparency and identify the risks that could ultimately determine the success of a deal.



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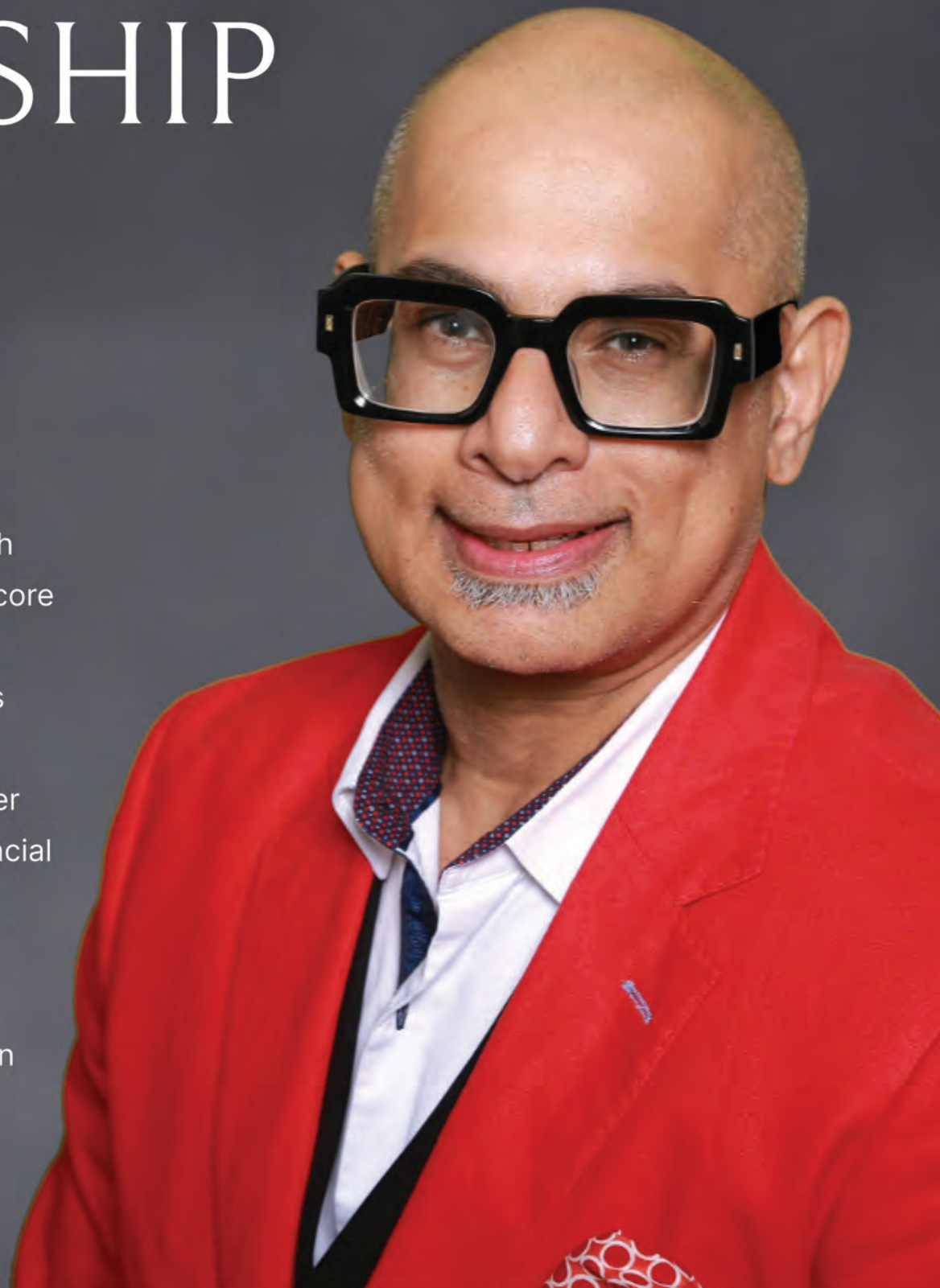
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# A CELEBRATION OF PROVEN FINANCIAL LEADERSHIP

It's our honor to shine a light on one of our own, Hiren Chandiramani, for his nomination for Orange County Business Journal's CFO of the Year Award.

In his tenure at Preferred Travel Group, Hiren has influenced and inspired growth with an unremitting commitment to our core values as a family-owned and operated hospitality business. He regularly breaks the mold of the traditional role, forming meaningful connections with our member hotels in addition to executing deft financial leadership, and always with a signature style that is purely Hiren.

Thank you, Hiren, and congratulations on this well-deserved recognition.





## Redefining the American Middle Market for the Modern Era

The transformation of the American middle market over the past 20 years is nothing short of remarkable.

What was once a market of 200,000 businesses, each with revenue of \$10 million to \$1 billion, has consolidated into a segment made up of fewer but more robust companies.

Today, the middle market consists of 125,000 businesses, each with revenue of \$30 million to \$10 billion. This cohort is far more resilient than the middle market of the past, and it represents a critical, upscale and profitable element of the \$30 trillion U.S. economy.

That transformation demands a quantitative reexamination of this vital segment.

### Middle market snapshot



As the transformation continues, firms that generate revenue of \$2 billion to \$5 billion will likely represent the sweet spot for growth in the near to medium term.

The middle market consists of eight subsegments, each with its own characteristics, access to capital and technological matrices.

We conducted a deep examination of these subsegments, as well as the structural changes that have taken place in the middle market since the 2007–09 financial crisis and pandemic-era economic disruptions.

In our estimation, the maturation of the middle market, like other segments of the American economy, reflects broad differences in size and scale of middle market firms, which have different qualitative and quantitative needs with respect to capital, technology and labor compared to smaller and larger businesses.

Middle market businesses have experienced significant changes in operational complexity over the past decade—and the rapid pace of change is likely to continue.

As such, it is imperative to redefine the middle market, ensuring that we understand the origins and catalysts of this operational complexity so that we can provide a roadmap to maximize enterprise value for these firms.

We must also consider that the middle and upper segments of the middle market are likely to experience faster growth compared to the smaller end, given their ability to integrate sophisticated technology into their operations as well as their greater access to private sector capital—both bank-driven and private equity funded.

Based on our research, middle market companies now generate more revenue at both ends of the spectrum, supporting our conclusion that the segment now comprises companies with annual revenue between \$30 million and \$10 billion.

This definition is in line with the significant economic expansion during the past decade and the American exceptionalism that has defined growth compared to other developed economies.

But it also means that the number of middle market companies has declined. Today, approximately 125,000 companies fit our new definition. This contraction is consistent with the consolidation of the U.S. market since the financial crisis and the pandemic, both of which had a major impact on market structure.

To better understand the middle market, we have divided it into eight subsegments, each accounting for about \$1.5 trillion to \$2.5 trillion in total revenue. Those subsegments are summarized in the following chart.

But revenue is just one element that defines these subsegments. We also look at labor, by leveraging data from the IRS, the U.S. Bureau of Labor Statistics (BLS), Bloomberg and Forbes. In all, the middle market employs 50 million people.

Our core assumption is that a strong correlation exists between a firm's employee count and its revenue. Using this relationship, we align employee data with revenue estimates based on the distribution of each metric.

### Middle market by segment

Segment	Revenue
8	\$7B to \$10B
7	\$4B to under \$7B
6	\$1B to under \$4B
5	\$500M to under \$1B
4	\$250M to under \$500M
3	\$100M to under \$250M
2	\$50M to under \$100M
1	\$30M to under \$50M

Source: Various government agencies; Bloomberg; RSM US LLP

For firms at the upper end of distribution, particularly public companies, the match is more precise because of the greater availability and reliability of financial data. Those firms have annual revenue between \$1 billion and \$10 billion.

For smaller firms, it is much less clear-cut. We match the labor and revenue data by comparing the distribution of firms across revenue and employment spectrums.

### Matching middle market business revenue to labor characteristics



We present that process in the accompanying chart. The multicolored bars show the distributions, with each block representing the number of firms. The top bar depicts the distribution across revenue thresholds.

For example, the red block of the top bar represents the number of firms with revenue between \$30 million and \$50 million. The red block of the second bar represents the number of firms with between 100 to 249 employees. The third bar also represents the number of employees but uses a different source. (As stated earlier, we use employment data from both the BLS's Business Employment Dynamics database and its Quarterly Census of Employment and Wages.)

Following a similar process, we look at firms with larger revenue then summarize the result in the table below:

### Employment characteristics by segment

Segment	Total employment	Size by number of employees
8	3 million	7,000 to 25,000
7	4 million	5,000 to 18,000
6	5 million	1,500 to 15,000
5	6 million	1,250 to 1,500
4	6 million	1,000 to 1,250
3	9 million	500 to 999
2	9 million	250 to 499
1	6 million	100 to 249

Source: Various government agencies; Bloomberg; RSM US LLP

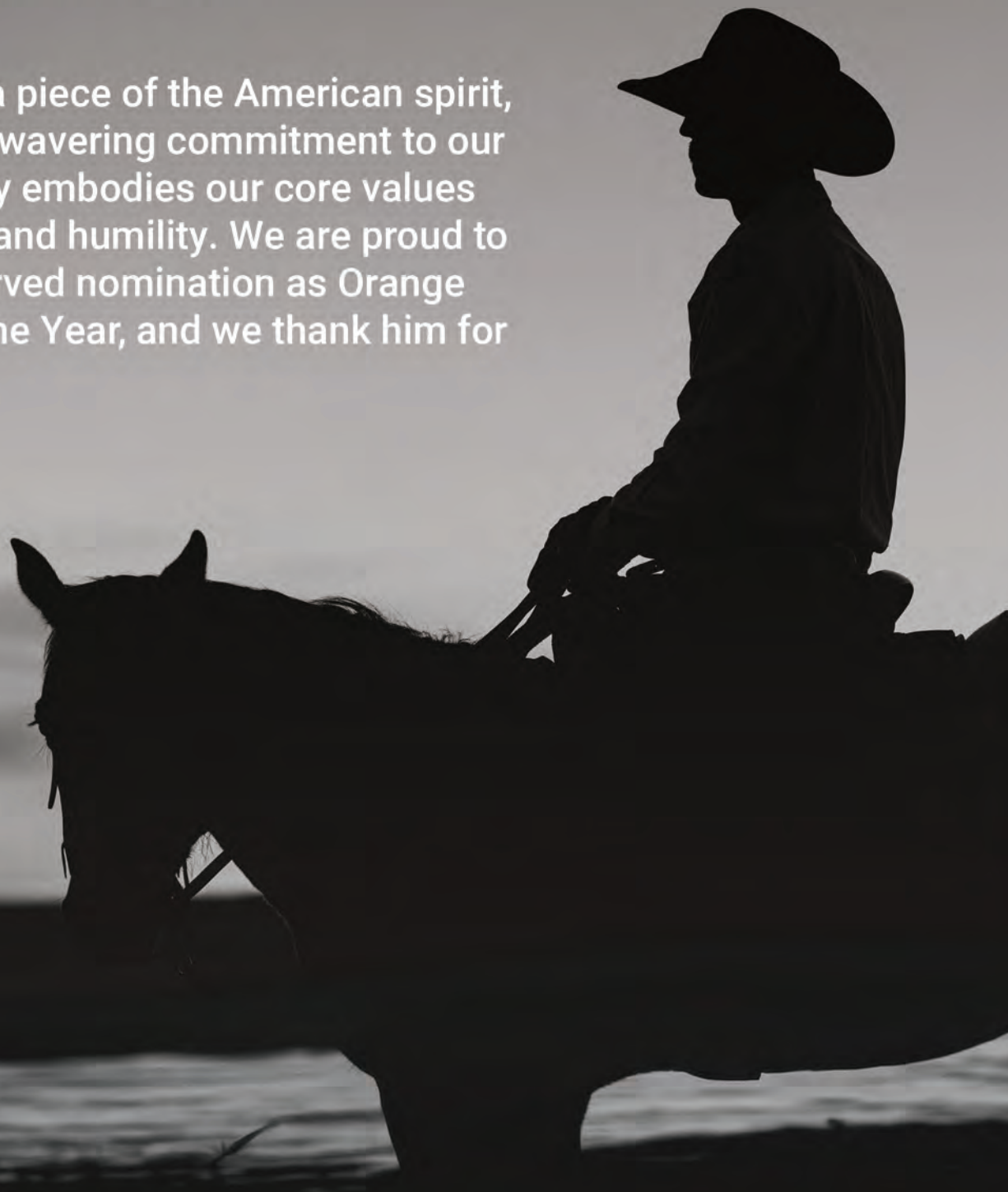
Contributors: Joe Brusuelas, Chief Economist and Dr. Tuan Nguyen, Economist

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# IN CELEBRATION OF JIM WATKINS

## CFO OF THE YEAR NOMINEE

At Boot Barn, our goal is to share a piece of the American spirit, one handshake at a time. In his unwavering commitment to our mission, our CFO Jim Watkins truly embodies our core values by leading with integrity, honesty, and humility. We are proud to congratulate Jim on his well-deserved nomination as Orange County Business Journal CFO of the Year, and we thank him for his dedication to Boot Barn.



*"I'm honored to receive this recognition, but this achievement belongs to the entire team at Boot Barn. I'm grateful to be part of a community filled with talented, hardworking people who care deeply about what we're building together. Our success is only possible thanks to our entire team of incredible partners."*

Jim Watkins, Chief Financial Officer, Boot Barn

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# When CFOs and bankers work closely together, the result is better decision-making

By Jarrod Ingle



## Jarrod Ingle

Regional President and  
Head of Corporate Banking  
Orange County-Inland Empire

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Jarrod Ingle leads the Orange County-Inland Empire market, overseeing business development, client relationships, and PNC's local philanthropic initiatives.

Additionally, as head of Corporate Banking, Ingle serves as the senior executive leading business development and relationship management for middle market and large corporate banking clients.

Ingle, who joined PNC in 2021, has over 30 years of experience in the financial services industry and has served in a variety of senior executive banking roles including as a market director for middle market banking for JP Morgan Chase as well as various leadership positions at Wells Fargo in commercial banking, equipment finance, and financial leasing.

In the community, Ingle is active in shaping the future of Orange County businesses and the cultural landscape by serving on the board of the Orange County United Way, the Orange County Business Council, and the Orange County Sports Commission. He also serves on the executive leadership council of the Hope Through Housing Foundation.

Ingle earned a Master of Business Administration in business finance from California State Polytechnic University and a Bachelor of Science in business finance from Iowa State University.

## Strong relationships. Smarter Financial Outcomes.

If you're a CFO today, you're not short on information. You have dashboards, forecasts, economic outlooks, and more data than ever before, and with all this information, your challenge is to decipher which signals matter, which are noise, and what to do next.

That's where a strong CFO-bank relationship can make a real difference.

Over the years, I've seen firsthand how the best CFOs use their banking allies not just for financing, but for collaborators in decision-making. As bankers, we sit close to the flow of capital across industries, company sizes, and economic cycles, seeing patterns form well before they show up in quarterly meetings. The CFOs we work with don't look to us for answers, but rather perspectives.

This is why a strong banking relationship matters. A transactional banking relationship delivers reports and products, but a strong relationship creates dialogue. It allows CFOs and bankers to speak candidly about what's happening beneath the surface, and the quality of insight improves when bankers understand not just the numbers, but the strategy, culture, and priorities of the organization they're supporting.

At PNC, we view ourselves as reliable collaborators to CFOs. Our experienced banking teams work side by side with finance leaders, building long-term familiarity that allows for candid conversations and more informed decision-making. Because PNC serves CFOs across a variety of industries, our bankers can bring relevant context to the table without losing sight of what makes each business unique.

For CFOs, this external perspective can be invaluable, and it gives CFOs another lens to use when communicating with CEOs, boards, and other stakeholders. Trusted bankers can play a meaningful role in that process by adding perspective, context, and experience drawn from beyond a single organization.

As we celebrate this year's CFO of the Year honorees, it's clear that the role continues to evolve. Today's top finance leaders understand that insight is sharpened through collaboration. When CFOs and bankers work closely together, the result is better decision-making.



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## How Companies Can Take Advantage of New Equipment Deduction Rules

The One Big Beautiful Bill Act (OBBBA) restores 100% bonus depreciation

Passed in summer 2025, the One Big Beautiful Bill Act (OBBBA) reinstated 100% bonus depreciation for assets placed in service after January 19, 2025, and made the rule permanent.

This creates significant tax planning opportunities for businesses of all sizes: invest \$10 million in an industrial robot, and you can now reduce your company's taxable income for the year by that full amount.

### How bonus depreciation works

Normally assets like machinery, vehicles and furniture must be depreciated over several years. Bonus depreciation accelerates this process, allowing businesses to deduct all or part of the purchase price in the year the asset is placed in service.

Under the OBBBA, the rule applies to qualifying assets with a recovery period of 20 years or less. Permanency simplifies planning and eliminates multi-year tracking.

### How to leverage the new law

**A tax lease.** There are several ways to take advantage of these provisions in the OBBBA. For companies whose taxable net income might not be sufficient to support taking the 100% bonus depreciation in a given year, there is a powerful alternative: leasing the new equipment through a financial institution vs. buying it. In this arrangement, known as a tax lease, the bank is the official owner of the equipment and gets the bonus depreciation. "The bank passes those savings to the company leasing the equipment in the form of lower payments," John Drake, national sales manager, Fifth Third Technology Finance, says.

Companies will often choose to lease specific types of assets, such as medical equipment, material handling equipment and information technology, all of which can become outmoded relatively quickly.

**A fair market lease.** To acquire these assets, a business can take advantage of a fair market value lease. "This provides options at the end of the lease to purchase the equipment for fair market value, extend the equipment while a decision is being made or return the equipment," Drake says. "Often the plan is to return the equipment and replace it with new to avoid technical obsolescence or an increase in maintenance costs." The financial benefits of a lease arrangement can be considerable.

Suppose the value of the leased equipment is \$1 million. Before the passage of the OBBBA, bonus depreciation would have applied to only 40% of that cost. With a 21% corporate tax rate, that would have resulted in a deduction worth \$84,000. But with the reinstatement of 100% expensing, the value of the deduction rises to \$210,000—and lease payments would drop by a commensurate amount.



Jacob Patridge

In considering how to use this rule change to your advantage now and in the future, it's essential to consult with your tax advisors," says Jacob Patridge, vice president and equipment finance representative, Fifth Third Bank.

**Other options.** Some companies may choose to use debt financing to acquire new equipment, allowing them to take advantage of the restored 100% bonus depreciation while determining how to best to use the resulting tax savings. But challenges can arise when capital expenditures significantly exceed taxable income.

If a business expects \$5 million in taxable income, for example, but plans \$15 million in qualifying purchases, taking full bonus depreciation could generate a \$10 million net operating loss or carryforward.

While carrying losses forward is permissible, considering a hybrid approach can provide balance. A company might finance a portion of the purchase and use a tax



lease for the remainder. This structure helps the business capture the benefits of bonus depreciation while reducing the risk of a large net operating loss. Additionally, when the lessor uses the depreciation benefit on the leased portion, lease payments can be reduced, improving cash flow and supporting flexibility for future investments.

### Taking advantage of other new tax rules

Another provision of the OBBBA affects business interest deductions, changing back from rules based on earnings before interest and taxes (EBIT) to a formula using earnings before interest, taxes, depreciation and amortization (EBITDA). "Many of the companies we advise or partner with, especially if they're private equity-owned, are very focused on EBITDA," says Patridge, who notes that EBITDA is the multiple by which such a business's performance is judged, and it's crucial for growing the value of the company.

In these and other situations, businesses need to work closely with their tax advisors to plan their investment strategies. Tax lease opportunities should be considered by companies with a focus on EBITDA growth. Depending on the assets being acquired, there are tax lease options that may be capitalized for book purposes. Regardless, the opportunities presented by the OBBBA are likely to be substantial.

"The new rules can help maximize your tax strategy and improve your cash flow, which gives you capital for other investments," Patridge says. "Whether that means more equipment, expansion, more people, automation or even just more cash, now you'll be in a better position to pursue your strategic goals."

### Planning ahead

The reinstatement of 100% bonus depreciation offers a powerful incentive for capital investment. Whether through purchasing, leasing or financing, businesses can use these rules to improve cash flow and support growth strategies. Consult your tax advisor to determine the best approach for your circumstances.

To learn more, contact Jacob Patridge at 949-217-1500 or [jacob.patridge@53.com](mailto:jacob.patridge@53.com).

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# Cash Is the New Growth

## The Playbook for AI Value, Working Capital Excellence and Deal-Ready M&A in a Higher-for-Longer World

CFOs operate in a distinctly Southern California crosscurrent: resilient innovation and deal appetite on one side, and persistent cost of capital pressure on the other. Rates have stayed elevated longer than many operating plans assumed, making “cash as a strategic asset” more than a tagline. At the same time, growth is uneven—strong in pockets like medtech, aerospace/defense supply chains and select software, while consumer-facing businesses and discretionary categories can swing sharply with sentiment.

Regional dynamics amplify the challenge. The Ports of Los Angeles and Long Beach—together handling roughly 40% of U.S. containerized imports—continue to influence inventory strategies and lead times across SoCal distribution and manufacturing. Labor remains structurally tight in many skilled roles, raising the bar for productivity. And elevated commercial real estate uncertainty keeps lenders and boards focused on liquidity, covenants, and downside resilience.

In this environment, CFOs who win do three things well:

### 1) Lead with “AI value,” not AI activity

Many finance teams have pilots—automated reconciliations, generative AI for commentary, and forecasting tools. The CFO opportunity is to make AI finance-grade and board-relevant by tying it to decisions and dollars.

Use cases that move CFO KPIs:

- Cash forecasting and variance explanation: Machine learning can incorporate seasonality, customer behavior, price/mix, backlog, and macro signals to improve forecast accuracy and shorten planning cycles.
- Collections prioritization: Predict which accounts are likely to pay late and recommend next-best actions (call cadence, escalation, dispute routing).
- Deductions and dispute analytics: Common in retail, distribution, and device supply chains—AI can classify root causes and accelerate recovery.
- Spend analytics and contract compliance: Flag price leakage, maverick spend and supplier consolidation opportunities.
- Close acceleration and anomaly detection: Detect unusual entries earlier to reduce rework and audit friction.
- Make it governable (and auditable): Enterprise adoption depends on trust—data lineage, access controls, model monitoring, and clear human oversight. CFOs should require: a one-page value case per use case (baseline, target, timing), defined ownership, and controls for any AI outputs used in external narratives or material accruals.
- Measure value weekly: If AI improves DSO by even a few days, reduces close time by two days, or avoids working-capital borrowing at today’s rates, the ROI is visible fast. Treat AI as a portfolio of short-payback investments, not a multi-year science project.

### 2) Working capital excellence becomes a funding strategy

In a higher-for-longer environment, trapped cash is expensive. The best performing companies treat working capital as a cross-functional operating system—not a quarterly finance metric.

- Set targets for today’s volatility
  - Set targets by customer segment, channel, and product family. A single DSO or inventory goal hides where cash is stuck.
- Remove friction across Order-to-Cash
  - Invoice speed and accuracy: Late or inaccurate invoices create self-inflicted DSO. Align shipment confirmation, milestone acceptance, and billing triggers.
  - Dispute prevention: Standardize reason codes; route issues to owners in sales, customer service, or ops with SLA discipline.
  - Collections capacity and segmentation: Replace “alphabet collections” with risk-based queues informed by payment behavior and dispute probability.
  - Cash application automation: Reduce unapplied cash and short-pay confusion through better remittance capture and matching.

- Make Payables and Inventory intentional levers
  - Payables: Stop silent early-pay habits. Use dynamic discounting only when the implied return beats your cost of capital.
  - Inventory: SoCal supply chain variability can tempt excess buffer stock. Use demand sensing, supplier reliability scoring and S&OP governance that balances service levels with cash.

The CFO’s role is to create transparency (dashboards that reconcile to the GL), enforce operating cadence (weekly reviews), and link incentives to cash conversion—not just revenue.



### 3) M&A readiness when growth is uneven: build transaction-grade finance

PwC’s Deals and integration guidance underscores a consistent point: in selective deal markets, value is won in diligence quality and integration execution, not in headline multiples. For Orange County, that often means adding capabilities, product adjacency, or specialized manufacturing—and portfolio reshaping to focus on core cash engines.

- Establish a credible baseline early
  - Document revenue recognition positions, backlog quality, churn/retention (where relevant), customer concentration, and margin drivers. Clean up “one-time” addbacks with evidence. A buyer’s confidence in your baseline is a valuation lever.
- Treat working capital as a deal model driver
  - Purchase price mechanisms and post-close adjustments often hinge on net working capital. Sellers who can demonstrate stable DSO, disciplined inventory turns and repeatable cash conversion reduce surprises—and protect value.
- Build a repeatable integration muscle
  - PwC’s integration playbooks emphasize Day 1 readiness, Day 100 momentum, and synergy tracking. CFOs should prebuild: a synergy scoreboard owned by finance, close/reporting integration plans (COA mapping, consolidation, controls), and TSA discipline for carve-outs with timelines and cost visibility.
  - Use AI to accelerate diligence and integration. AI-enabled contract review, document classification and anomaly detection can compress timelines and reduce risk—if data access, governance and security are designed up front.

### The bottom line for Orange County CFOs

When rates stay high and demand is choppy, the CFO playbook is clear: prove AI value in dollars, release cash through working capital excellence, and operate with transaction-grade discipline every month. That combination improves liquidity today and increases strategic options tomorrow, whether the next move is an acquisition, a divestiture, or simply outperforming through another uneven cycle.



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## How Middle Market Companies Are Preparing for the Year Ahead with Strategy, Investment, and Talent

By Colin Craver, Wells Fargo Commercial Banking Orange County, California, Market Executive

As we enter 2026, U.S. middle market companies are doing more than turning the page on last year—they are repositioning for growth. According to the National Center for the Middle Market's Q4 2025 Middle Market Indicator, [1] the sector closed the year with renewed momentum, posting year-over-year revenue growth of 11.7% and seeing 85% of companies report higher revenues for the year. That rebound, combined with renewed willingness to invest, sets the stage for a year defined less by recovery and more by opportunity.

While employment growth remained muted at 7.8%, below post-pandemic averages, the gap between revenue growth and hiring highlights a possible characteristic for 2026: innovation led growth. Middle market leaders are leaning into technology, capital discipline, and talent development to do more with existing resources.

The question for business leaders is no longer whether change is coming—it is how to lead confidently through it. Three priorities stand out as Orange County, California, based companies prepare for the year ahead.

### First, financial readiness has become a strategic advantage.

The NCMM data shows that companies are once again more inclined to invest incremental dollars back into the business rather than hold excess cash, signaling confidence in growth opportunities. In this environment, stress-testing balance sheets, modeling best- and worst-case scenarios, and ensuring credit structures

can flex with demand are no longer defensive exercises—they are essential tools for strategic decision-making. Businesses that understand their liquidity position and financing options will be better positioned to move quickly when opportunities arise.

### Second, innovation is shifting from experimentation to execution.

Artificial intelligence has emerged as the leading destination for investment dollars in the middle market, with 53% of companies planning near-term investments in intelligence tools—up sharply from mid-year. Digital transformation has also climbed the list of top strategic priorities as companies look to improve productivity and save time. In 2026, success could be determined by a company's ability to innovate with intention: integrating AI and automation into core workflows, aligning technology investments with measurable returns, and strengthening cybersecurity as digital exposure expands.

### Third, talent remains the linchpin of successful transformation.

Although companies report less difficulty finding qualified workers than in prior years, the need for upskilling has never been greater. As AI and automation reshape roles, investing in employee development is critical to sustaining productivity and engagement. Organizations with formal training programs consistently outperform peers, generating higher income per employee and stronger profit margins. In 2026, empowering employees with the skills to adopt new tools may be just as important as the tools themselves.

Taken together, the NCMM's Q4 2025 findings paint a clear picture of the year ahead. Despite uncertainty, the middle market is leaning into technology and focusing on strategic growth. Companies that strengthen financial readiness, innovate purposefully, and invest in their people should be well positioned to lead with confidence in 2026.



Colin Craver





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# Building a World-Class Finance Team in a Resource-Constrained Environment



By Justin Jessee, Founder and CEO of Impactful Resources

## Even with limited resources, leaders can create a powerhouse Office of the CFO by optimizing talent elasticity and density.

The labor market has been in a neutral state as leaders grapple with economic and geopolitical concerns. This market stagnation has caused compensation to plateau, making lateral moves a popular career transition for professionals in Orange County.

On a larger scale, the continuing accounting talent shortage has led to growing financial restatements and weaker internal controls. Bloomberg stated that in 2024, there were 340,000 fewer accountants than five years prior. Consequently, material weaknesses resulting from accounting talent deficiencies have increased for four consecutive years, with 60% of annual filings citing “jack of accounting talent/expertise” as a challenge in 2024<sup>1</sup>. This poses a few challenges:

**Challenge #1: Current employees face overwhelming workloads,** resulting in inaccurate reporting and missed deadlines.

**Challenge #2: Organizations can’t efficiently scale their workforce** to meet changing workload demands, especially during periods like year-end close or an annual audit.

**Challenge #3: Slowed hiring widens skill gaps** as teams miss out on current expertise and new perspectives, limiting their ability to innovate and meet business needs.

To navigate the changing labor market and the accounting talent crisis, CFOs must optimize their workforce for both short-term and long-term impact. **Finance leaders can maximize the ROI of their talent investments by growing talent elasticity and talent density.**

### Talent Elasticity: Agility in a Competitive Market

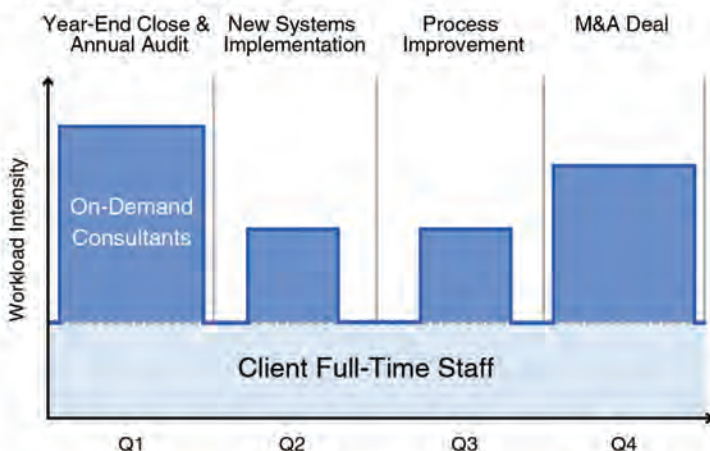
For finance leaders prioritizing cost efficiency, risk mitigation, and effective resource allocation, talent elasticity is an agile solution. Talent elasticity is an organization’s ability to quickly scale its talent resources up and down to adapt to different workforce demands.

$$\text{Talent Elasticity} = \text{Hiring Velocity} - \text{Hiring Friction}$$

An organization’s hiring velocity (speed of the hiring process) and hiring friction (inefficiencies hindering success) determine whether it can scale talent proficiently. Lower friction leads to faster scaling.

On-demand interim consultants are the most effective way organizations can build talent elasticity. These professionals accelerate productivity on day one, all while remaining cost-efficient.

On-demand staff offer teams relief during periods of high-intensity workloads



Project-based consultants create long-term impact through executing time-sensitive assignments like ERP implementations and “quick-hit” process automations. Similarly, interim professionals help organizations rapidly boost capacity and capability during periods of increased workload demands. Cost-effective and agile, interim consultants accelerate month-end close, power M&A deals, and more.

Make the most of your talent investments by seeking interim consultants who embody these key traits:

- **Trusted Partner:** Leverage their subject-matter expertise to establish credibility, communicate effectively, and collaborate with key stakeholders.
- **Proactive:** Forecast future client needs and implement high-impact solutions.
- **Results-Driven:** Deliver specific, tangible impact for high-value projects.
- **Team Catalyst:** Empower internal teams through process improvements and help organizations retain expertise after they leave.
- **Triage Expert:** Quickly assess and prioritize critical activities, solve complex problems, and minimize disruption.

### Talent Density: Lasting Impact with Force Multipliers

CFOs can also increase leverage, bridge skill gaps, and position their teams for long-term success with talent density. Developed by Netflix alum Patty McCord, talent density is the amount of high-performing professionals compared to an organization’s total workforce.

$$\text{Talent Density} = \frac{\text{Amount of High-Leverage Professionals}}{\text{Total Workforce}}$$

To grow talent density, organizations must attract and retain high-leverage professionals known as force multipliers. These individuals have a compounding effect on your organization’s workforce, resulting in greater innovation and productivity.

$$\text{Talent Density Execution} = \text{Why} + \text{What} + \text{How} + \text{Who}$$

Start developing talent density by defining your why (organizational mission and needs), what (expected hiring outcomes), how (strategic human capital strategies), and who (force multipliers).

#### Why: Organizational Mission and Needs

Begin with clearly defining your mission. Next, examine your talent needs from both a top-down and bottom-up perspective. Examples include improving compliance and risk management, filling skill gaps, increasing productivity, meeting deadlines, and improving processes.

#### What: Expected Hiring Outcomes

Detail hiring outcomes like key deliverables, performance metrics, and ramp-up time (time to adjust to a new role).

#### How: Human Capital Strategies

Diagnose workforce skill gaps, define success, and deliver excellent hiring outcomes. Optimize the candidate experience to attract and engage top applicants. Finally, create an employer value proposition highlighting the opportunities and benefits employees can expect.

#### Who: Force Multipliers

Force multipliers create disproportionately higher impact through time savings, process improvements, risk mitigation, and strategic decision-making. They bridge skill gaps and future-proof workforces through driving insights, innovation, and collaboration. For example, they can implement new automation tools that free up bandwidth, allowing teams space to upskill and work on more impactful tasks.

### Impactful Resources: Execution. Redefined.

CFOs can overcome labor market challenges and maximize talent ROI by strategically building talent elasticity and density within their teams.

Locally owned and managed since 2012, Impactful Resources is a leading provider of accounting, finance, and IT resources based in Southern California. As a full-service human capital firm focused on supporting emerging growth and middle market companies, we help firms scale to meet the needs of rapidly changing market conditions. Whether the solution is a special project, interim backfill, or a permanent placement, Impactful Resources can satisfy a wide range of client needs. We’ll help you find your next force multiplier!



Justin Jessee is a hands-on human capital executive with 20+ years of experience in finance, accounting, IT, and business development. Justin is the Founder & CEO at Impactful Resources, establishing and overseeing the firm’s client engagements. Justin has worked, consulted, and managed engagements from start-ups to Fortune 100 companies on a broad range of strategic, operational, and financial projects.

For more information, please visit [www.impactfulresources.com](http://www.impactfulresources.com).

<sup>1</sup> Trends in material weaknesses. KPMG. (2024).



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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.

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CFO, IT and HR Talent Solutions  
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## 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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- Manager of Accounting
- Tax
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## Banking on the Team Approach

When a Southern California food manufacturer wanted to expand into the Southwest, they identified the best manufacturing and distribution sites near major rail hubs. While such logistical issues may not immediately suggest a bank's services, the company understood the value of interconnected decision-making.

They turned to City National Bank's Middle Market Banking team for advice. With quick, flexible and customized financing, the bank helped ensure a smooth expansion.

The Middle Market Banking team serves businesses and nonprofits between small businesses and large corporations, typically those with revenue between \$50 million and \$2 billion. These organizations have complex needs and larger budgets, and many are family-owned businesses focused on multi-generational growth.

City National's team includes experts with deep geographical knowledge in the tri-state area, the Carolinas and California. Team members offer specialized experience in verticals like food and beverage, healthcare, nonprofit management and other industries.

The division maintains close ties with personal banking, estate planning, wealth management and investment professionals, providing business owners access to succession planning and a holistic approach to their complex financial and personal decisions.

Clients reach out for various reasons. Growth-related issues, such as a new contract requiring more working capital, are common. In other cases, leadership transitions or ownership changes trigger the need for evaluation.

Real estate is another driver. A business leasing its space may explore financing to purchase a building. The need for capital often initiates a conversation that evolves into a deeper banking relationship. Leaders seeking stability contact City National because they need more than funds; they need to align financial structures with evolving strategies.

For example, when a healthcare company prepared to execute an Employee Stock Ownership Plan (ESOP), leadership required advice on multiple levels to ensure growth and employee security. The company's relationship manager served as a "quarterback," guiding experts in ESOP financing and healthcare to work alongside the client's internal team to strengthen the organization.

### Helping CFOs Navigate Volatility

The drive to optimize every resource is constant for CFOs, but that responsibility grows as a company expands. In recent years, CFOs have managed growth alongside tariffs, inflation, high interest rates and global conflicts. The Middle Market Banking team helps create certainty, allowing leaders to move from reactive to proactive strategy. Various tools provide stability despite volatile foreign exchange rates and material costs.

Consulting with the team to review revenue drivers and expenses—such as raw materials and office space—frees a CFO to focus on strategy rather than daily management. City National provides products that automate processes to improve cash flow, while bank staff assist with onboarding and training to create efficient systems. Middle Market clients can anticipate improved visibility into liquidity, access to capital structures aligned with operations and comprehensive transactional support.

### Nonprofit Management Support That Goes Beyond Business

Nonprofit leaders face immense pressure, often managing complex organizations with limited staff and resources. City National's Middle Market Banking division works alongside these organizations to strengthen financial infrastructure, support long-term sustainability, and enable leadership teams to focus on mission and impact.

For example, the team recently worked with a nonprofit school that had operated for decades but found itself without a bank following regional banking disruption. City National helped the organization establish a comprehensive banking

relationship and implement solutions to support fundraising, build its endowment, structure investments, and optimize working capital.

Their work with nonprofits extends beyond traditional banking. Because nonprofit organizations are deeply embedded in their communities, City National bankers serve as connectors—helping organizations access relationships, resources and expertise that support operational stability and long-term growth.

### Developing a Holistic Strategy for Success

Whether an organization is a growing business or nonprofit in transition, the strategy remains the same: bring together the Middle Market Banking team with accountants, tax advisors and attorneys. City National's team works with leadership to understand how cash moves across the organization while distinguishing between operating, reserve and strategic liquidity. They help align capital structures with growth plans and risk exposure, identify structural pressure points and reposition balance sheets to support strategic options.

The best outcomes occur when leaders work with professionals who understand the implications of every decision from a fresh perspective. The combination of City National's personalized regional approach and the backing of RBC—with its CAD \$2.4 trillion in assets and top-tier credit ratings of Aa1 from Moody's and AA- from S&P—provides a unique resource for middle market businesses and nonprofits.

**Contact the Middle Market Banking Team at City National Bank to discuss how we can help your organization succeed.**

**Chris Edmonds** is executive vice president of Middle Market Banking, where he leads strategy and execution across City National's middle market and client segments nationwide. In this role, he is responsible for driving business growth, deepening client relationships and guiding high-performing teams across key markets.



Edmonds has more than 20 years of experience in the financial services industry. In addition to his professional work, Edmonds is deeply involved in the community. He currently serves as treasurer for the Roundtable of Orange County and has held board and leadership roles with several nonprofit organizations, where he has focused on financial oversight, strategic planning, governance, and talent recruitment.

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## How artificial intelligence could reshape finance

The conversation around Generative AI (GenAI) has matured. The initial excitement is being replaced by an important question on many CFO's minds: How can businesses generate real, measurable value from this technology? As a steward of capital, CFOs may feel conflicted. Move too quickly, and they risk a misstep. Wait too long, and they risk falling behind.

This is a leadership imperative, and finding the sweet spot for measured adoption is a challenge. Stragglers could be at a significant disadvantage, as the cost of inaction is high.

### Seize the strategic advantage

Early movers are already reaping rewards. According to Deloitte's 2024 year-end State of Generative AI in the Enterprise report, nearly three-quarters of surveyed companies with advanced GenAI projects are meeting or exceeding their ROI expectations.<sup>1</sup> The message is clear: GenAI is a strategic asset.

However, a dose of realism is crucial. The path to full deployment is often dictated by the pace at which an organization can absorb change, not just the speed of the technology itself. The same report reveals that more than two-thirds of the surveyed organizations expect 30% or fewer of their GenAI experiments to scale in the near term, citing gaps in governance and employee education.

A CFO's role is often designed to chart a course that begins with small, tangible wins—like reducing business leakage through better analytics—while building toward the grander vision of an end-to-end process overhaul. This journey can liberate a finance team to become a true engine of growth.

### A roadmap to value creation

Navigating the path to successful GenAI integration typically involves a deliberate, foundational approach. Decisive action taken today can help build this foundation.

#### 1. Champion a culture of fluency and innovation.

A team should understand both the power and the pitfalls of GenAI. Trust can be built by communicating a clear vision: this technology should make people's jobs easier, not replace them.

#### 2. Master data.

High-quality data is the fuel for effective GenAI. Do not underestimate this challenge. Consider strategic partnerships with service providers who can help build the robust data governance framework necessary to scale with confidence.

#### 3. Align technology with strategy.

Assess the current technology roadmap. Where are the bottlenecks? Where can GenAI accelerate a company's capabilities? Engage actively with partners to ensure investments are purpose-built for future needs.

#### 4. Govern for growth and guardrails.

A strong governance model is non-negotiable, providing the framework to scale innovation while managing technical and ethical risks. This includes establishing clear controls and oversight to ensure accuracy and compliance.

### The time to lead is now

Practical applications for GenAI in finance are starting to deliver value. But the true transformation lies in leadership.

The CFO's role is to champion this change from the C-suite, fostering the collaboration and strategic vision necessary to succeed. The journey should begin with a clear strategy and a few well-chosen initiatives. There is an opportunity to generate significant returns on focused, strategic AI projects. The question is no longer if GenAI will reshape finance, but who will lead the charge.

### Looking for the right team to help you navigate the complexities ahead?

Deloitte is the team that can turn complexity into clarity. We bring the strategic insight and end-to-end capabilities to help you build your future, today.

### Contact



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### Endnotes

1. "The State of Generative AI in the Enterprise: 2024 year-end Generative AI report," Deloitte Development LLC, January 21, 2025.

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## Southern California Business Outlook

# BMO experts providing insights on the state's business and economic outlook.

Southern California enters the coming months with better visibility but a still-mixed operating environment. Stabilizing interest rates are providing a modest tailwind, helping companies across Los Angeles, Orange County, and San Diego plan with greater confidence. At the same time, growth remains constrained by a cooling labor market, elevated unemployment, and persistent affordability pressures. Momentum is concentrated in select sectors—including aerospace and defense, life sciences, and advanced manufacturing—while consumer exposed industries continue to face headwinds. Overall conditions are improving, but progress remains highly segmented.

This more uneven backdrop is shaping a more disciplined and selective approach among business owners. Most clients are not retreating, but they are proceeding selectively, prioritizing investments with clear productivity or revenue impact. Caution around consumer demand, labor availability, and cost structures remains elevated, particularly in Los Angeles, where job growth has lagged the broader region. AI adoption has become an increasingly important part of strategic discussions. While concerns around workforce disruption remain—especially in media and professional services—companies increasingly recognize that delayed adoption carries competitive risk.

Businesses positioning themselves well are focusing on targeted, high return initiatives. These include hiring specialized technical talent, modernizing operations, and selectively deploying AI to automate workflows, improve forecasting, and enhance customer engagement. In Los Angeles, renewed but still measured activity in entertainment production, along with demand for modern industrial space, is supporting opportunities tied to logistics and advanced manufacturing, even as consolidation and job losses continue to weigh on the broader media ecosystem. In San Diego, stronger labor market dynamics and sustained investment in life sciences, technology, and aerospace and defense are supporting continued R&D activity and innovation led growth.

Across the region, flexibility has become a defining characteristic of well-positioned companies. By contrast to earlier years, scenario planning has become more common, with leaders avoiding over commitment amid lingering uncertainty around consumer spending, housing, and labor conditions. Diversifying revenue streams, maintaining conservative leverage, and preserving strong banking relationships remain priorities. Importantly, AI adoption is increasingly paired with disciplined change management, with companies focusing on practical, near term use cases rather than experimentation for its own sake.

“ Southern California's recovery is improving but uneven, with growth concentrated in aerospace, life sciences, and defense as affordability and labor pressures persist.

Looking ahead to 2026, Southern California's diversity remains its core advantage, but recovery is expected to be gradual rather than broad based. High housing costs, slowing in migration, and uneven job creation will continue to cap near term growth, particularly in Los Angeles. Even so, stabilizing inflation, easing tariff pressures, and strength in innovation-driven sectors should support a steadily improving environment over time. Companies that remain focused, adaptable, and disciplined are best positioned to capture opportunities as conditions improve.



**Robert Luce**

Head of Pacific, BMO Commercial Bank



Scan to read about the labor market and housing affordability from BMO Chief U.S. Economist Scott Anderson, Ph.D.

To learn how BMO can support you and your business, contact our Orange County based teams.



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## Soaring High: Accounting and Finance Roles In High Demand Despite Changing Economic Landscape

The hurdle of an accounting and finance talent shortage continues to rise — and firms and corporations, alike, are fighting to stay in the race. With the demand for skilled professionals outstripping the supply, it's high time that companies turn their focus to both attracting new talent and keeping existing employees engaged.

### Understanding the Talent Shortage

Accounting and finance professionals have long been in demand. But in recent years, the gap between the required skilled workforce and available candidates has widened significantly. According to the U.S. Bureau of Labor Statistics, more than 300,000 accountants and auditors have left their profession in the past few years: the cause being a mixture of career changes and retirement. The problem of filling these open roles is being exacerbated by a shortage of new talent entering the field. We're seeing a near 9% decrease in accounting majors since 2012, according to the Association of International Certified Professional Accountants. And despite the instability of today's economy, the scarcity of skilled professionals has been simmering beneath the surface for some time now.

### Impact on Businesses and the Industry

The effects of the accounting and finance talent shortage can't be underestimated. Companies constantly grapple with the pressure to stay compliant with ever-changing regulations, perform detailed financial analyses, complete risk assessments and maintain strong financial reporting.

An understaffed team may lead to lower productivity, increased workloads for employees, longer hours — and ultimately an increased risk of burnout. This can result in diminished employee morale and engagement, which may further intensify the talent gap by contributing to higher employee turnover.

### Getting Creative to Attract New Talent

Employers need to think outside the box and adopt innovative strategies to attract new finance professionals. Here are some methods that have proven successful:

1. Broaden the talent pool by looking beyond the traditional finance and accounting candidates. Seek out applicants who possess strong soft skills — critical thinking, communication and a strong willingness to learn. Develop and pursue a more diverse hiring strategy that considers candidates from various educational backgrounds.
2. Take on temporary professionals. Employers continue to turn to consultants' specialized skill sets to complete key projects and temporary assignments. For hesitant businesses, this hiring approach also enables hiring managers to "try before they buy" for contract-to-hire or direct hire placements down the line.
3. Invest in flexible work arrangements. This can include remote work, job sharing or flextime to cater to changing employee preferences and enhance your organization's appeal to candidates seeking a better work-life balance.
4. Build connections with staffing and recruiting firms. Investing in additional partnerships, including universities and colleges, can help your company secure a steady pipeline of young talent who are both seasoned or can be trained to suit your business requirements.
5. Showcase your organization's commitment to professional development and continuous learning. Offering financial support for certifications, designations and further education can be a major draw for ambitious, career-focused candidates.

### Retaining Your Current Employees

Attracting new talent is only half the battle — retaining your skilled staff is equally essential to alleviate the challenges resulting from the talent gap. Here are some tips on retaining your employees:



1. Consider compensation. Even with the uncertainty of the employment landscape, salaries for accounting and finance professionals are trending upwards. Plus, with the climbing cost of living expenses, this isn't only a priority for incoming workers but current employees. That's why it's important that, in addition to base salaries, you consider providing financial incentives for exceptional performance, such as bonuses, stock options or profit-sharing plans.

2. Provide opportunities for growth and development. Enable your employees to grow within your organization by offering on-the-job training, skill development programs and regular performance evaluations. This not only helps them build their careers but also ensures that you'll have a reliable pool of talent ready to fill more advanced roles.

3. Embrace flexibility. Over the past few years, the working world has witnessed a remarkable shift as employees enthusiastically adopt flexible work schedules. Today, the irresistible allure of a hybrid work model is one of the primary factors keeping professionals loyal to their current companies. As we forge ahead in 2026, organizations must master the art of crafting sustainable flexible work arrangements to ensure their long-term success.

4. Make employee satisfaction a top priority. Regularly gauge your staff's happiness levels and be proactive in addressing any concerns. Consider implementing team-building activities, organizing company events and developing a mentorship program.

5. Foster a culture of recognition and appreciation, where employees receive positive, timely feedback on their work. By recognizing their efforts and contributions, you strengthen their loyalty and commitment to your organization.

In a world where numbers tell the stories of commerce, the scarcity of accounting and finance professionals is an unfolding problem that demands attention. Companies must wield effective strategies to attract skilled individuals, while keeping the loyalty of current professionals. How will you empower your business to tackle the talent drought head-on?

### About Century Group

Century Group is an award-winning recruiting and staffing firm that provides top-tier talent to start-ups, mid-market and Global 1000 enterprises on a direct-hire, temporary and temp-to-hire basis. We work one-on-one with candidates to match them with opportunities that are best suited for their qualifications. So, whether you're looking to hire — or looking for your next role — with our specialized focus, extensive talent network and 35 years of experience, we've got you covered.



The AGSM April Talent Forum provides employers the opportunity to meet graduate students in a relaxed networking environment



AGSM hosts Employer Roundtables throughout the year providing employers the opportunity to meet with talent in a small group setting

## Developing Leaders Who Drive Results

In today's market, a strong hire is only the starting point. Organizations need professionals who can think strategically, adapt quickly, and lead with integrity in complex and fast-moving business environments. At the A. Gary Anderson Graduate School of Management (AGSM) at the UC Riverside School of Business, we develop graduate talent prepared to meet those demands and deliver results from day one.

AGSM offers five STEM-designated graduate programs, including our nationally ranked MBA and specialized master's programs in Accounting, Business Analytics, and Finance. Our students bring advanced analytical capability, leadership readiness, and experience working across teams in applied, project-based environments.

**Partnering with Excellence** As your recruitment partner, AGSM connects employers with career-ready graduate talent prepared to contribute immediately. Whether you are building your talent pipeline or hiring your next generation of leaders, we offer multiple ways to engage:

- *Targeted Job Postings:* Promote opportunities directly to graduate students and engaged alumni through our dedicated recruiting portal.
- *Signature Events:* Host a virtual or in-person information session or

*participate in signature recruiting opportunities such as the Graduate Talent Forum to connect with candidates face-to-face.*

- *Executive Access:* Career Connection Luncheons provide the opportunity to meet and interview a curated group of students in a focused, professional setting.
- *Brand Building:* Establish a strong employer presence through classroom engagement, guest speaking opportunities, and partnerships with student organizations.

Ready to elevate your workforce? Our Employer Relations team, led by Lori Babigian, is ready to connect your organization with graduate talent ready to make an impact.

Connect with us at [business.ucr.edu/recruit](https://business.ucr.edu/recruit) and let's get started.



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For employer engagement inquiries, contact Lori Babigian, Director of Graduate Student Success, at [lori.babigian@ucr.edu](mailto:lori.babigian@ucr.edu)



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## Expert in the Loop: The Audit Model Mid-Market Companies Actually Need

By Sam Salty, CPA, Global Managing Partner, GuzmanGray

*The profession has embraced AI and global delivery. The question no one is asking loudly enough is whether senior expertise is still in the room.*

Artificial intelligence and global delivery models have reshaped audit execution. Firms have become remarkably efficient. However, improved efficiency does not translate to better judgement. Senior expertise still needs to be actively involved at the critical steps of the audit, not just for escalations or final sign-off. CFOs must ask, who on your audit team is engaged and exercising judgment throughout the process?

In technology governance, this principle is called human-in-the-loop. For organizations navigating a genuinely complex reporting environment, this isn't enough. The reality is the "human" in the loop needs to be an expert whose depth of experience matches the demands of the engagement.

### A Profession Under Structural Strain

The accounting talent pipeline has been contracting for over a decade. According to the AICPA's 2025 Trends Report on accounting talent pipeline, total accounting graduates fell to 55,152 in the 2023–24 academic year, a drop of 6.6% from the prior year, the third consecutive year of decline. Zoom out further and it is worse; total numbers have fallen nearly 30% over the last decade.

This squeeze is felt acutely at the senior levels. According to the Personiv CFO Pulse Survey 2024, 83 percent of financial leaders reported they could not find qualified accounting talent, up from 70 percent in 2022. Firms are competing for experienced talent from a pool that is simultaneously shrinking from the top as Baby Boomer partners retire and thinning at the bottom as fewer graduates choose the profession.

### When Efficiency Outpaces Oversight

Into this gap have rushed two powerful forces: offshore delivery models and artificial intelligence. Global delivery centers deliver cost efficiency and scale. AI enables real-time anomaly detection and dramatic reductions in manual burdens. The profession's largest firms have focused heavily on AI, with over \$6.4 billion of investments announced in the last two years alone.

But investment in execution capability is not the same as investment in judgment, and the data suggests a growing gap. The UK's Financial Reporting Council found that the Big Four, as well as BDO and Forvis Mazars, have embedded AI-powered technologies into their audit processes without formally assessing its effect on audit quality. That finding is not an indictment of technology, rather it is a warning about governance and what happens when technology and efficiency move faster than oversight.

The PCAOB tells a related story in its 2025 Staff Update on 2024 Inspection Activities. When the PCAOB examined what drove quality improvements at firms in 2024, the four factors cited included more in-person work, more focused training, stronger national office resources, and better supervision and review. Better algorithms and more

automation were not on the list. Which raises a pointed question for any organization evaluating their audit relationship: how much expertise is actually present in yours?

### The Deficiency No One Advertises

A study published in 2025 in Contemporary Accounting Research offers a striking finding. Researchers analyzing PCAOB inspection deficiencies found that the only type of audit failure predictive of future financial misstatements at Big 4 firms is an auditor's failure to understand the client's accounting procedures or policies. If this issue occurs at the most

resourced firms in the profession, it says something structural about modern audit delivery. The knowledge that matters most isn't embedded in systems or processes; it's relational, not institutional. It lives in the professionals who develop the intimate knowledge of the business they're auditing.

This hidden risk in this system stems from a model that optimizes execution while spreading expertise thin. The problem is that this risk falls disproportionately on organizations that can least absorb it: fast-growing companies building their audit infrastructure, mid-market public or private companies with real complexity but without the scale to command attention at the largest firms, and nonprofits with few institutional resources operating under similar scrutiny as public issuers.

### What Expert-in-the-Loop Actually Looks Like

The concept is straightforward, but execution requires commitment. Expert-in-the-loop is the governance model that makes the modern tools of the profession trustworthy. It means that senior audit professionals are not just engagement partners available for escalation. In practice, the senior professional who signs the opinion also reviewed the revenue recognition judgment in week two, weighed in on the going-concern assessment in week five, and was the person in the room challenging the team on the reasonableness of a significant estimate. AI tools or offshore execution serve as force multipliers for that expertise, not substitutes. The result? A client's CFO or audit committee can have a conversation with a professional who knows their business, their risks, and their financials with the same depth they do, because they have been present throughout the work.

### The Model Built for This Moment

GuzmanGray was founded on the premise that mid-market public and private companies, growth-stage organizations, and large nonprofits deserve access to senior audit expertise historically reserved for the most complex engagements at the biggest firms. Our delivery model is built around the expert-in-the-loop principle: blending AI-assisted execution, global delivery partnerships, and the active, hands-on involvement of senior professionals at every critical juncture of the audit. For organizations that have complexity and expect an audit partner who matches their own depth of knowledge, that distinction matters more now than ever before.

GuzmanGray is an audit and assurance firm serving growth-stage, mid-market public and private companies, and complex nonprofit organizations. Learn more at [www.guzmangray.com](http://www.guzmangray.com).



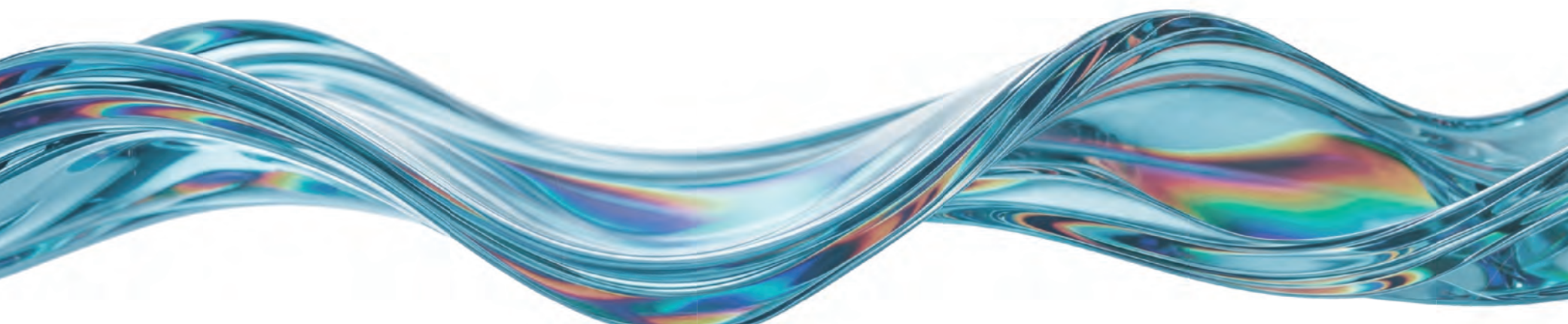
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## When Your Executive's Divorce Becomes Your Problem

### *A CFO's Guide to Subpoenas, Valuations, and Staying Out of the Crossfire*

You didn't go to business school for this. You survived earnings calls, survived the audit committee, survived that one quarter where everything went sideways and you somehow made the numbers work. But nothing in your CFO training prepared you for the Monday morning when your General Counsel forwards you a subpoena — and the company whose books you've spent years protecting is now exhibit A in your CEO's divorce.

Welcome to family law, CFO. Pull up a chair.

#### **It Happens More Than You Think**

High-earning executives get divorced. It is, statistically speaking, an occupational hazard of success. And when they do, their spouses — armed with capable family law attorneys — come looking for documentation. Not just personal bank statements. They want compensation records, equity schedules, bonus structures, deferred compensation agreements, board meeting minutes, and sometimes the business valuation you commissioned three years ago for a reason that had nothing to do with divorce court. Suddenly, your tidy corporate records are being read by a forensic accountant with a highlighter and a bad attitude.

The CFO who thinks this is someone else's problem is the CFO who hasn't gotten the subpoena yet.

#### **The Compensation Puzzle**

For most employees, income is straightforward. For your executives, it is anything but. Base salary is the easy part. The interesting — and contested — terrain involves stock options, restricted stock units, performance bonuses, deferred compensation plans, and the kind of creative arrangements that made recruiting the executive possible in the first place.

California family law treats compensation with surprising sophistication. The core question is deceptively simple: what portion of this compensation was earned during the marriage, and what portion was not? For a cash bonus tied to annual performance, the math is relatively clean. For a multi-year RSU grant vesting over four years straddling a separation date, the math gets complicated fast. Courts apply apportionment formulas — most commonly the time rule — to divide community and separate property interests in unvested equity. Your equity schedule, grant dates, vesting milestones, and plan documents will all be relevant. Incomplete or inconsistently maintained records invite scrutiny.

Deferred compensation presents its own complexity. Amounts deferred before marriage, during marriage, and the earnings attributable to each can become the subject of genuine dispute — particularly where the plan has been in place for many years. The CFO who can produce clean, complete historical records is doing their executive — and the court — a significant favor.

#### **When the Business Itself Is on the Table**

If your executive is also an equity holder — a founder, a partner, a significant shareholder — the divorce doesn't just touch their compensation. It potentially touches the business itself. California courts have the authority to assign a value to a privately held business interest, and that value becomes part of the marital estate subject to division.

This is where CFOs often feel the ground shift beneath them. A valuation conducted for estate planning, a buy-sell agreement, or an investor presentation was prepared under specific assumptions. Family law courts are not bound by those assumptions. A forensic accountant retained by the opposing spouse may apply a different methodology, use different normalization adjustments, and arrive at a number that would make your investment banker choke on his coffee.

Your existing valuations may be scrutinized, challenged, or used selectively. If you are ever asked to assist in preparing a valuation involving an executive who is amid — or contemplating — a divorce, loop in outside counsel before the engagement letter is signed. The purpose and timing of a valuation matters in ways that go well beyond the balance sheet.

#### **The Subpoena Situation**

At some point, the subpoena arrives — directed to the company, not the executive personally. Your General Counsel will lead the response, but the CFO is almost always in the room because the documents live in finance.

The company is a third party with rights, including the right to object to requests that are overbroad, unduly burdensome, or seek confidential proprietary information. Never produce documents informally or as a courtesy to an executive

— require proper legal process. And do not let the executive direct the company's response to a subpoena in their own divorce. The interests of the company and the interests of the executive are not the same.

#### **Staying Out of the Crossfire**

The CFO's goal is simple: fulfill the company's legal obligations accurately, protect legitimately confidential business information, and stay entirely neutral between the parties. Call outside counsel early, keep the response process clean and documented, and resist any pressure — from either side — to shade the records in a particular direction. Courts notice. Forensic accountants notice. And the CFO who gets pulled into a divorce proceeding as a witness rather than a records custodian will notice too — usually from the stand.

You didn't sign up for family law. But in Orange County, where executives are well-compensated, equity-rich, and occasionally human, it has a way of finding you anyway.

Paul J. Nelson is a Certified Family Law Specialist and founding partner of Nelson Kirkman & Levanger in Newport Beach. He focuses his practice on high-asset divorce and complex property division for executives, business owners, and high-net-worth individuals.

**Morgan R. Levanger** is a partner at Nelson Kirkman & Levanger whose practice is devoted exclusively to family law. He represents high-income earners and high-net-worth individuals in matters involving dissolution of marriage, complex property division, support, and custody.



Morgan is recognized for his meticulous preparation and command of the law, positioning each matter for early resolution or trial from the outset. His disciplined approach streamlines litigation and consistently achieves favorable outcomes — at the negotiating table or in court.

A skilled negotiator, Morgan integrates legal acumen with practical strategy, bringing clarity and composure to emotionally complex situations. He is a direct and effective communicator who keeps clients fully informed at every stage, translating complex legal issues into clear, actionable guidance.

Morgan's sophisticated understanding of family law and results-driven approach set him apart in the field. He is admitted to practice in California and Utah.

**Paul J. Nelson** is a Certified Family Law Specialist and founding partner of Nelson Kirkman & Levanger, a boutique family law firm in Newport Beach, California. With more than two decades of experience, Paul focuses exclusively on high-asset divorce, complex property and business division, spousal support, and custody matters for clients with significant net worth and financial complexity.



Paul is recognized for bringing the same preparation and strategic discipline to family law that his clients apply to their businesses. He assesses cases thoroughly from the outset — identifying key issues, marshaling the right resources, and positioning matters for early resolution or trial. His results-driven approach has earned him an AV Preeminent rating from Martindale-Hubbell and recognition as a Southern California Super Lawyers honoree for five consecutive years (2021–2025).

A thought leader in his field, Paul is the author of *The Dissolution Solution* (2023) and has contributed more than a dozen articles to the Orange County Business Journal on topics ranging from prenuptial agreements and business valuation to courtroom strategy and forensic accounting. His commentary has been sought by Forbes, Fortune, and the OCBJ, and he has been named to the OC 500 list for three consecutive years.

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# West region sentiment shows confidence is built on execution, according to new survey data

The middle market often sets the pace for what comes next in the U.S. economy. In KeyBank's latest Middle Market Sentiment Survey, 750 owners and senior executives from companies with \$10 million to \$1 billion in annual revenue shared how they view the year ahead. A meaningful share of that voice came from the West, offering a clear read on how middle market leaders in the region are balancing optimism with ongoing macro uncertainty.

## Company outlook remains strong

In the West, 77% of leaders rated their 12-month company financial outlook as excellent or very good. That puts the region near the top across the country. The Midwest ranks slightly higher at 78%, while the South and the West both sit at 77%, and the Northeast trails modestly at 75%.

This pattern shows the West is firmly participating in the same confidence cycle that is reflected across the broader middle market. Rather than waiting for certainty on interest rates, trade policies, or inflation, companies are managing what they can: boosting performance, investing where returns are clear, and pursuing growth with careful oversight.

## Economic outlook more cautious than company outlook

West respondents report a 51% excellent or very good outlook for the U.S. economy. That is meaningfully lower than the 77% who feel positively about their own company outlook, and that spread is instructive.

This suggests leaders are distinguishing between broader economic conditions and their own internal capabilities. Instead of depending exclusively on economic conditions to achieve success, the organization is prioritizing robust execution, irrespective of possible declines in demand or heightened market volatility.

## Confidence driven by tech upgrades, stronger supply chains, and talent stability

Among West respondents who rated their company outlook as excellent or very good, several drivers stand out as more pronounced than what you typically see in broad middle market summaries.

First, improvements in technology that are unrelated to automation or AI are strong. In the West, 61% of optimistic respondents cite this as a contributor to positive outlook. That suggests many firms are still capturing value from foundational upgrades.

Second, supply chain network strength is a major contributor in the West. In this cut, 55% cite supply chain network as a factor supporting positive outlook. That is notable because it points to improving confidence in logistics, sourcing, and fulfillment reliability. For sectors where lead times, inventory visibility, and supplier risk have been persistent constraints, a stronger supply chain picture can directly improve planning accuracy and customer responsiveness.

Third, talent attraction and retention are increasingly becoming a competitive advantage. In the West, 53% cite the ability to attract and retain talent as contributing to positive outlook among the most confident firms. That points to stabilization. When turnover eases and hiring becomes more predictable, leaders can utilize workforce planning as an operating advantage.

Taken together, these signals suggest West confidence is being built on practical foundations. The region's optimistic leaders are pointing to systems, supply chain stability, and talent conditions as the platform for growth.

## What this means for middle market leaders

The West data reinforces a theme that is increasingly consistent across the middle market. When company outlook is strong but economic outlook is mixed, leaders often rely on controllable levers.

For many West firms, that means:

- Continuing to modernize core technology, not just experimenting with newer tools.
- Improving supply chain conditions to tighten inventory strategy and reduce surprises.
- Investing in retention and capability building, so teams can execute without constant disruption.
- Maintaining the discipline to pressure-test assumptions in a planning environment where macro risks still exist.

It also suggests that West leaders are not treating optimism as permission to get sloppy. Confidence appears to be earned through execution, then reinforced by operational visibility.

To see the full set of findings across regions and topics, including capital access, cybersecurity and fraud, AI adoption, and M&A intent, download KeyBank's full Middle Market Sentiment Survey report at [key.com/commercial](https://key.com/commercial). It includes complete charts, deeper cuts, and actionable context for leaders planning their next moves.



Robert Besser is KeyBank's Southern California Market President. He leads the targeted growth strategy in the market and manages a high-performing team of senior Relationship Managers and Payments Advisors. Together, they provide trusted lending, treasury, and capital markets strategic advisory solutions to middle market companies across California and the Southwest. Connect with Robert directly at [Robert.Besser@key.com](mailto:Robert.Besser@key.com) or 310-744-2219.

Robert Besser  
Market President  
KeyBank



With a focus on understanding the unique dynamics of middle market businesses, KeyBank can help you navigate challenges and seize new opportunities with confidence. Our relationship-driven approach means that as the economy shifts, we stay focused on your success — not just for today but for years to come.

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**Erika Coniglio - Business Development Director, RSM US LLP**

Erika Coniglio, Director of Business Development at RSM US LLP, brings more than 25 years of experience in consulting and professional services, including over 17 years with RSM, where she works closely with C-suite leaders to connect organizations with solutions that support growth, risk management and long-term success. She plays a key role in expanding RSM's presence across Southern California, serving clients throughout Orange County and the Inland Empire across industries including technology, health care, manufacturing and business services. Coniglio is also an active leader in the regional business community and has been recognized by the Orange County Business Journal as a Top Woman in Finance.



**Devin Dickson - Managing Director, BMO**

Devin Dickson is the local Market Executive for BMO Commercial Bank. As a native of Orange County, he is passionate about helping local companies thrive by delivering tailored financial solutions that align with their strategic goals and long-term growth plans. Dickson holds a B.S. in International Business Management from Brigham Young University - Hawaii, and an MBA from Pepperdine Graziadio Business School. He resides in San Clemente with his wife and three children.



**James Gibson - SVP, Senior Relationship Manager, KeyBank**

James Gibson is an SVP, Senior Relationship Manager with KeyBank, where he is responsible for expanding and strengthening the bank's relationships with financial services partners and middle-market companies throughout Southern California, with a primary focus on Orange County, the Inland Empire, and San Diego. Based in Newport Beach, Gibson brings more than 20 years of experience in the regional financial services market, having built a career centered on advising growth-oriented companies and delivering tailored banking and capital solutions. Throughout his career, Gibson has developed deep expertise in commercial banking, lending, and relationship management, and is known for his collaborative, consultative approach with clients and professional partners. His longstanding presence in the Southern California business community has allowed him to cultivate a strong network across a wide range of industries, making him a trusted resource for companies navigating expansion, financing, and strategic growth.



**Jason Gwin - Market Executive, OC, City National Bank**

Jason Gwin is the Market Executive for City National Bank's Orange County and Inland Empire Commercial Banking Groups. His team consists of 9 Relationship Managers and a support staff consisting of credit officers and customer service associates. The team services over 150 commercial banking relationships with total loan commitments of \$2.0BB. Gwin has been in the commercial banking industry for 24 years focusing on the needs of both large corporate and middle market companies. Prior to joining CNB in July of 2019, Gwin managed the Commercial Banking Business for Wells Fargo serving customers in the greater South Bay and Mid-Counties markets. Gwin has a BS in Finance from Cal State Long Beach and an MBA from the University of Southern California. He lives in Laguna Niguel with his wife and 2 sons. Other personal interests include surfing, golfing, playing music and spending quality time with family. Gwin currently serves on the Board of the Orange County School of the Arts and has served on the Board of the Long Beach Symphony.



**Justin Jessee - Chief Executive Officer, Impactful Resources**

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



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

Steve Krenik is a Senior Vice President / Relationship Manager in the Orange County Institutional Client Group of U.S. Bank. He has been with U.S. Bank since April 2005. His focus is working with companies with revenues between \$25Million and \$1Billion and providing solutions which include: lines of credit, real estate financing, loan syndications, equipment financing, acquisition financing, asset-based lending, corporate card and other payment solutions, treasury management services, investments, merchant services, international needs, foreign exchange needs and more. Krenik is a Board & Executive Committee Member with the Orange County chapter of The Association for Corporate Growth (ACG). Krenik is also an active member of the ACG Awards Committee. Krenik is a Board Member and Executive Committee Member with Junior Achievement of Orange County. Junior Achievement is the world's largest, volunteer driven non-profit that provides students, grades K-12, with financial literacy, work readiness and entrepreneurship education. Krenik earned his Bachelor of Science in Finance from California State University Northridge. Krenik resides in Foothill Ranch, CA. He has been married to his wife Liz for over 30 years and has a daughter (24) and a son (22) who are both former Division 1 College Volleyball Scholarship Athletes.



**Gloria Lee - Client Relations Partner, Rutan & Tucker LLP**

Gloria Lee is the Client Relations Partner of Rutan & Tucker, Orange County's largest and premier full service law firm. She has over 20 years of experience working with technology, real estate, retail, healthcare, media, and hospitality companies and she is an early stage investor across each of these sectors. Lee serves as an independent board member of Hanmi Bank (NASDAQ: HAFC) and has invaluable operating experience as a co-founder of a biotech company and venture partner of an early stage tech fund. She is actively involved in the community and served on the national boards of CKA, LiNK and UC Berkeley School of Law Alumni Association. She also served at the President of OCAABA and the Southern California boards of Asia Society, AAAJ and Olive Crest. Lee earned two BAs and her MA with distinction from Stanford University and her JD from UC Berkeley School of Law.



**Thomas Lowrey - Senior Relationship Manager, PNC Bank**

Thomas Lowrey is a corporate relationship manager for PNC covering Orange County for middle market and corporate names. Lowrey has over 20 years of experience serving middle market and large corporate clients in the region. Prior to joining PNC in 2021, he was at Wells Fargo for 17 years serving in a Business Development and Regional Sales Manager capacity for their Commercial Bank. He holds a B.A. in Environmental Science and Policy from the School of Social Ecology at UC Irvine and a degree in Spanish from the CEPE program of the Universidad Nacional Autonoma de Mexico. Lowrey has been involved in various organizations during his banking tenure in Orange County including ACG, Octane, Forum for Corporate Directors, Orange County Business Journal and others. Lowrey was a NCAA champion in water polo at UCI and enjoys all outdoor water sports.



**Tim Meade - Director, PwC**

Tim Meade is a Director at PwC's Private Company Services practice, specializing in business development and relationship management in Southern California. With over 30 years of experience in business development—including 15 years in professional services—Meade has a strong track record of fostering new opportunities and leading winning teams at PwC. He collaborates with key service partners to deliver impactful solutions for major clients, leveraging his deep knowledge of industry needs. As the lead relationship executive for several high-profile clients, Meade ensures that client concerns are effectively addressed while guiding them toward innovative solutions. He is well-versed in PwC's comprehensive offerings and serves as the "voice of the client" within the firm's expert network. Known as a super-connector in the business community, Meade builds lasting relationships that drive success. Beyond work, Meade lives in Pacific Palisades with his wife and their 17-year-old daughter. He enjoys cars, cooking, and tackling home projects—even those that don't need fixing!



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

Paul O'Mara is a Senior Vice President at U.S. Bank managing a portfolio of middle market relationships in the Orange County Commercial Bank. He provides the bank's wide array of products and services to middle market clients in the Southern California Region. Prior to assuming his current role, O'Mara was Managing Director at Union Bank managing the Orange County Middle Market team. From July 2009 to October 2019, O'Mara was Regional Vice President at Wells Fargo Bank. O'Mara held a number of other positions at Wells Fargo over 20 years including Divisional Sales Manager where he managed a team of Business Development Officers covering the Midwest portion of the country. O'Mara spent 16 years at Continental Bank/Bank of America as a Market Executive for the middle market lending division in Chicago. O'Mara earned his Bachelor of Science degree in Finance from Eastern Illinois University, Charleston, IL. O'Mara is a member of the University of California-Irvine Chief Executive Roundtable. The Chief Executive Roundtable has become the gateway to mutually beneficial cooperation and knowledge transfer between the business community and the University. For the past five years, O'Mara has been a board member of the J.F. Shea Therapeutic Riding Center. The Shea Center is dedicated to improving the lives of people with disabilities through therapeutic horse-related programs. O'Mara is a Board member of the Forum for Corporate Directors (FCD). FCD promotes the highest standards of governance in forum where peer-to-peer relationships develop, and valuable insights are gained through outstanding programs.



### **Sean Phillips - Senior Vice President, Fifth Third Bank**

Sean Phillips is a Senior Vice President and Team Leader for Fifth Third Bank's Commercial Banking office in Orange County where he brings over 22 years of experience to the market. He joined Fifth Third in 2025 to support expansion efforts in the region and is responsible for leading a team, new business development, ongoing client management and representing Fifth Third Bank in the community. Phillips previously worked for Wells Fargo for 20 years where he held various leadership roles in Commercial Banking across Southern CA. He earned a Bachelor's degree in Finance from Angelo State University in Texas. Phillips has been married for 20 years with three children and has lived in the Laguna Niguel area for the past 18 years. He enjoys spending time with family, traveling, staying active outdoors and volunteering in the community.



### **George Plazola - Senior Vice President, Flagstar Bank**

George Plazola is responsible for originating new client relationships and managing existing corporate and middle market clients at Flagstar Bank. He provides senior debt and financing solutions, along with a full suite of banking services including foreign exchange, trade finance, treasury management, and investment management. His focus is on delivering tailored financial solutions that support clients' strategic and operational needs. Plazola has more than 25 years of experience in commercial banking and credit. Prior to joining Flagstar, he spent the majority of his career at MUFJ Union Bank / U.S. Bank, most recently as a Senior Vice President and Relationship Manager serving client relationships throughout Southern California. Earlier in his career, Plazola held senior credit roles at Union Bank, delivering credit solutions to clients across Southern California. He began his career as a credit analyst at Union Bank, developing a strong analytical foundation through extensive underwriting experience and participation in the bank's formal credit training program.



### **Matt Primeau - Partner and Founder, Conexus**

Matt Primeau has over 16 years of Executive Staffing Leadership and Recruitment Experience. Prior to Conexus, Primeau served as co-founder and partner for Citadel CFO, helping clients and candidates find the right match for their strategic business hiring needs and career path objectives. Having started his career placing interim and interim-to-hire CPAs and MBAs and degreed accounting and finance professionals, Primeau then shifted to placing direct hire finance and accounting professionals and passive candidates at the Manager, Director, VP, and C-Levels. Prior to Co-Founding Citadel, Primeau managed both direct hire and interim practices for large human capital companies where he served as branch manager, practice director and managing director all within the Finance and Accounting Staffing space. In addition, Primeau spent the prior eight years before starting Citadel CFO as Director of Business Development for Beacon Resources, serving as a key member in helping the company grow from a start-up to one of Orange County's fastest-growing companies for five years in a row according to the Orange County Business Journal. Primeau graduated from Washington State University with a Bachelor of Arts degree from the Edward R. Murrow School of Communication. He resides in Newport Beach, CA with his wife and two sons.



### **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.



### **Sam Salty - Global Managing Partner, GuzmanGray**

Sam Salty is a certified public accountant with over 25 years of experience in the accounting field and a master's degree in business administration who is passionate about providing high-quality assurance and advisory services to his clients. Salty is currently a partner at GuzmanGray, a full-service CPA firm that specializes in audits and tax compliance for corporations, pass-through entities, and individuals globally. GuzmanGray values integrity, professionalism, and excellence, and strives to deliver solutions that meet the needs and expectations of their clients. Salty enjoys working with a diverse and talented team of accountants, advisors, and consultants who share his vision and mission of creating value and impact for their clients and communities. Before joining GuzmanGray in December 2023, he was a partner at Baker Tilly US, a leading advisory, tax, and assurance firm, for over 11 years. There, he oversaw the planning, execution, and review of audit engagements for a variety of industries and sectors. He also developed and maintained strong relationships with his clients and stakeholders, ensuring compliance with accounting standards, laws, and regulations. In addition, Salty contributed to the firm's growth and development by mentoring and coaching junior staff, participating in business development initiatives, and providing thought leadership and insights on emerging accounting issues and trends.



### **Jesse Sanchez - Managing Director and Senior Relationship Manager, Flagstar Bank**

Jesse Sanchez joined Flagstar in 2025 as a Managing Director and Senior Relationship Manager within the Flagstar Corporate and Regional Commercial Banking division in Newport Beach, California. In this role, he is responsible for growing and managing a complex portfolio of corporate and middle-market clients, while partnering with internal teams to deliver the bank's full suite of financial products and services. Prior to joining Flagstar, Sanchez spent 12 years at U.S. Bank in a series of progressive roles across corporate and commercial banking. During this time, he developed an expertise in understanding complex client needs, structuring tailored financial solutions, and navigating a wide range of industry sectors. He brings over a decade of experience, backed by a proven track record in advising clients, delivering strategic financial solutions, cultivating long-term relationships, and driving business growth. A proud U.S. Marine Corps veteran, Sanchez served five years on active duty. He was a founding member and Chapter President of the U.S. Bank Proud to Serve Business Resource Group, which led initiatives to support veterans and their families. He credits his military service with instilling the core values he lives by today, commitment, integrity, and accountability. These principles continue to shape his professional approach and guide the way he serves clients with purpose and dedication. Sanchez earned his Bachelor of Science in Accounting from the Leventhal School of Accounting and a Bachelor of Science in Business Administration from the Marshall School of Business at the University of Southern California.



### **Barnaby Wang - Managing Director, Century Group**

Barnaby Wang is a Managing Director and 10th year President's Club Recruiter for the Orange County Executive Search practice at Century Group. He holds more than 22 years of experience in specialized Finance, Accounting, and HR staffing focused on executive search, permanent placement services, and temporary staffing. Prior to joining Century Group, Wang had worked at two international publicly-traded staffing firms in three major metro markets: Orange County, Los Angeles, and San Francisco. Wang has been a board member of the Orange County Chapter of the Institute of Internal Auditors (IIA) since 2011 and is currently a governor. He graduated from UCLA with a Bachelors of Art Degree in Psychology and has served as President of the UCLA Alumni Network in Orange County.



### **Teva Weinthal - Principal, Director of Sales, Marsh & McLennan Agency**

Teva Weinthal serves as the Principal and Director of Sales for the Business Insurance Division at Marsh McLennan Agency (MMA), based in the Orange County office. Weinthal is the driving force behind the development and implementation of sales strategies to meet revenue targets, overseeing the sales team, fostering key client relationships, and ensuring the satisfaction of both prospective and existing clients. Weinthal also keeps a keen eye on industry trends and developments, actively identifying new business opportunities for MMA, which may involve the creation of new products or services to ensure MMA's continued competitiveness and long-term growth. Weinthal has nearly two decades of invaluable experience in the insurance field, making him a seasoned expert in his roles. His insurance journey began with MMA in 2005, and over the years, he has cultivated a loyal client base, primarily within the technology and life science sectors. His deep understanding of the unique challenges and needs of these industries has solidified his reputation as a trusted advisor to his clients. Before joining MMA, Weinthal spent eight years gaining first-hand experience in the technology sector, providing him with profound insights into the ever-evolving tech landscape. Additionally, Weinthal has earned the designation of AAI (Accredited Advisor in Insurance). Weinthal's expansive career and deep industry knowledge underscore his significance in the field of business insurance and make him extremely valuable to MMA.



### **Lisa Westhafer - Senior Vice President, Fifth Third Bank**

Lisa Westhafer leads the marketing efforts for Fifth Third Bank's Commercial Banking office in Orange County as Senior Vice President, focusing on serving clients in the market with revenues between \$20 million to \$500 million. Westhafer assists privately run companies with their financing, treasury management and capital market needs. Westhafer has been in the financial services industry for over 25 years. Previous to entering into the banking field, she worked for both the Walt Disney Company and Arthur Andersen. A Southern California native, Westhafer is married, has a 12-year-old son, and lives with her family in Nellie Gail. She earned her degree in business from the University of Washington and holds a CPA designation (currently inactive) and is Series 7 and 24 licensed. When not working or spending time with her family, Westhafer enjoys traveling, scuba diving, interior design and cooking.



### **Melissa Wong - Executive Director, Wells Fargo Bank**

Melissa Wong is an Executive Director for the Wells Fargo Commercial Banking team, overseeing Business Development for companies headquartered in Orange County. Over her 13 year tenure at the bank, she has held various roles across the platform—beginning her career as an analyst, moving into relationship management for several years, and completing a rotation in the loan workout and restructuring group before taking her current role. Wong partners with privately held and sponsor backed companies generating \$25 million to \$1 billion in annual revenue, helping them achieve strategic financial goals through tailored commercial and corporate banking solutions. In addition to her middle market focus, she works closely with real estate investors and commercial real estate investment firms, delivering customized financing structures across diverse property types. Her cross functional experience and market knowledge position her as a strategic resource for clients navigating growth, liquidity, and capital needs.

## CFO of The Year Award Nominees

**Kameron Au-Stout, CFO***Wood Smith Henning & Berman LLP, Aliso Viejo*

When Kameron Au-Stout joined WSHB, the firm was 13 years old with just 13 offices. Over the next 12 years, through her leadership, WSHB expanded to 43 offices and increased revenue by 300%. Beyond the traditional responsibilities of a CFO, Au-Stout has consistently led at the intersection of technology, analytics, and finance. She designed and implemented advanced analytical tools that provided insights the firm had never previously accessed, enabling leadership to gain clear visibility into operations and quickly identify and resolve problem areas. With more than 30 years of experience in legal finance management, Au-Stout brings deep knowledge of law firm operations and the development of strong, reliable internal controls. In addition to her finance and accounting expertise, Au-Stout is also an accomplished programmer who regularly designs and builds custom software and automated processes used across the firm on a daily basis. She also serves as the firm's resident SQL expert, further strengthening WSHB's data-driven decision-making culture.

**Andrew Aw, CFO***Precision Finance AI, Los Alamitos*

Andrew Aw is a co-founder and Chief Financial Officer of Precision Finance AI. In this capacity, he brings 20 years of global public and private company experience to oversee all aspects of finance and accounting, HR, legal, and operations. Aw also serves as the team's subject matter expert and partners closely with his colleagues on product development. Precision Finance is a venture-backed AI-powered application that transforms unstructured financial documents into structured and analyzable data. The company's first product automates diligence workflows to enable rapid analysis of deal documents against institutional investor checklists and investor-specific templates. The company was founded in June 2024 with the vision of operating an AI-first organization. The team of five leverages AI agents significantly to enable performance output equivalent to five full-time employees each or an aggregate of 25 employees. Since formation, the team has developed significant proprietary technology across document pre-processing, semantic taxonomy engine, intelligent data room, canonical model, and an AI model optimizer.

**Sandra Beaver, CFO***Lyra Health, Burlingame*

Sandra Beaver joined Lyra as Chief Financial Officer in June 2025 from her role as CFO at Evolus, a publicly traded medical aesthetics company. Prior to her three years at Evolus, she served as Senior Vice President of Finance at Experian, with both North American and global responsibilities. She spent the majority of her career at International Game Technology PLC, a publicly traded global gaming company. Beaver holds a bachelor's from the Isenberg School of Management at the University of Massachusetts Amherst.

**Boris Berezovsky, CFO***SKB Cases, Orange*

Boris Berezovsky is the first Chief Financial Officer of SKB, a private equity-backed manufacturer headquartered in Orange County with operations in Mexicali, Mexico. Joining immediately after the transaction, he helped define the post-deal value-creation plan and built the Finance and IT functions to execute it. He recruited and developed a bi-national team, established a disciplined planning and capital-allocation process, and strengthened working-capital and cash management to fund growth priorities. As a strategic partner to the CEO and COO/President, Berezovsky helped reshape the company's go-to-market approach, including building new sales and marketing organizations and supporting the company's rebranding and reintroduction to the market. As the CFO and Head of IT, he led the implementation of a new ERP system, taking the company live in a record time of six months and creating a scalable platform for faster decisions, tighter execution, and profitable growth. His focus is on aligning people, processes, and systems to drive measurable performance and increase enterprise value.

**Omar Besiso, CFO***LEHR, Orange*

Omar Besiso serves as Chief Financial Officer of LEHR, the nation's leading emergency vehicle upfitter specializing in police, emergency, utility, and security fleet solutions. Since joining LEHR in October 2024, Besiso has orchestrated the strategic integration of seven acquisitions, transforming independent operations into a unified national platform with over 30 locations across 14 states. Under Besiso's financial leadership, LEHR has achieved remarkable growth, expanding from approximately six to 30 locations while scaling to nearly 600 employees. The company now manages over 730,000 square feet of facility space and upfits approximately 15,000 vehicles annually for first responders and government agencies nationwide. Besiso successfully transitioned all acquired companies from cash to GAAP accounting and completed a clean financial audit within three months of the initial acquisitions—a testament to his operational excellence. His strategic implementation of enterprise systems including Salesforce, Business Central, and Power BI has positioned LEHR for continued expansion.

**Brad Biddle, CFO***XR, LLC, Huntington Beach*

Brad Biddle is a result driven Senior Executive with more than 25 years of progressive experience in financial management of manufacturing and distribution companies in the high-tech and consumer products industries. He is a proven leader working with Board of Directors, Banking Institutions, and Attorneys. Biddle holds a CPA with an established record of success. He is also a nominee for Chief Financial Officer of the Year by the Orange County Business Journal in 2012, 2014, 2015, 2021, and 2025.

**Hilton Blieden, CFO***SBE Electrical Contracting Inc, Irvine*

SBE Electrical Contracting ("SBE" or the "Company") is a leading full service electrical contractor serving multi-family, data center, and other commercial clients in California. The Company initially focused on data centers and solar and gradually expanded into multi-family given strong demand for housing in Southern California. Today, SBE is one of the largest union electrical contractors serving multi-family in Orange County and offers a complete spectrum of Electrical, networking, and solar services from pre-construction planning, design, and engineering to project management and execution. SBE saw revenue growth from 2023 to 2024 of over 101% and 2025 in line with 2024. 2025 SBE bid double the volume of 2024 and the current potential for 2027 would be to exceed all prior years. SBE is headquartered in Irvine, CA and serves customers throughout the Orange and Los Angeles counties. The Company is supported by a team of 100 and 200 employees, including union employees (primarily electricians) and non-union employees (management and office staff).

**Benjamin Brewster, CFO***Pathway Capital, Irvine*

Benjamin Brewster joined Pathway in 2018 and is the Chief Financial Officer of corporate financial operations. He oversees the financial and accounting administration of Pathway and its related entities, the tax compliance for Pathway's legal entities and funds of funds managed by Pathway, and Pathway's valuation department. He also chairs Pathway's Valuation Committee. Prior to joining Pathway, Brewster worked as a managing director in the audit department of KPMG LLP, where he was responsible for overseeing the financial statement audits of SEC-registered investment advisers, private equity funds, hedge funds, senior debt funds, and other closed-end alternative investment funds. He also has experience performing audit and attestation services for various financial institutions, including publicly traded banks, broker-dealers, business-development companies, and specialty purpose acquisition companies. Brewster received a BA in economics from Brigham Young University and is a certified public accountant (inactive).

**Rodney Burris, President & CFO***Care Partners, Irvine*

Care Partners was established in 2016 with a vision of bridging the gap for patients between the acute and post-acute care settings. The Company employs a client-centered model to provide personalized care and in-home supportive services facilitated by a team of experienced executives, geriatric care managers, and personal care attendants on a 24/7 access basis. Rodney Burris received his Bachelor of Applied Science degree in Resource Management with a minor in Business Management from Troy State University in 2005. Although a natural leader, Burris honed his leadership skills as a member of the United States Army from 2001 to 2009 where he was honorably discharged. Burris has been married to his amazing wife, Christina Burris since 2001. They met when Christina was stationed with the United States Marine Corp. in Augusta, Georgia. Together, they have a wonderful twenty-year-old son named Vin. While Christina and Vin serve as the primary inspiration behind Burris' drive to positively impact and change the world, the memories engrained in his character are of those who have cared for him and loved him through his most frightening moments. These serve as his deep-rooted purpose and calling in life.

**Hiren Chandiramani, CFO***Preferred Travel Group, Newport Beach*

Based in Newport Beach, California, and owned by the Ueberroth family, Preferred Travel Group serves as the parent organization for an elite collection of brands including Preferred Hotels & Resorts, Historic Hotels of America, and the eco-conscious Beyond Green. With a global footprint spanning 90 countries and representing over 1,300 unique properties, the company leverages a network of 400 travel experts across 35 offices to deliver high-level consultancy, revenue management, and integrated marketing services. Hiren Chandiramani played a pivotal role in shaping the company's modern portfolio, spearheading the debut of the I Prefer Hotel Rewards program and launching specialized divisions like PTG Consulting. His vision for sustainable tourism was particularly influential, leading to the creation of the Beyond Green brand and the implementation of the group's inaugural 2024 Climate Action Plan. This strategic leadership culminated in a landmark year for the company in 2025, during which the group added 80 new properties—marking its strongest growth period since 2019.

**Brian Chi, CFO***Fidelity Bancorp Funding, Costa Mesa*

Fidelity Bancorp Funding, Inc. (the "Company") is a commercial real estate brokerage and direct lender. In 2025, the Company experienced a 46% increase in funding volume and increased its funding capacity 140% with a \$300 million commitment from a leading asset management company through its interval fund. Additionally, the Company has expanded its ability to provide private credit investment opportunities to qualified investors through establishing relationships with registered investment advisors.

**Mike Cody, CFO***iHerb, LLC, Irvine*

Mike Cody, CPA is the Chief Financial Officer of iHerb, a global e-commerce leader in vitamins, supplements, and wellness products serving customers in 180 countries. Since joining iHerb, Cody has led a significant financial transformation, guiding the company to sustained profitability, free cash flow, and a strong balance sheet. In 2025, iHerb recently reported generating over \$2.8 billion in net sales, the highest in company history. Cody improved capital allocation discipline and enhanced liquidity through the successful refinancing of the company's asset-based lending facility and term loans. He also provided steady



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## CFO of The Year Award Nominees

financial leadership during a major geopolitical disruption, helping the company recover from the sudden loss of approximately 20% of revenue following the exit from Russia. Under his leadership, the finance organization has been strengthened through improved controls, accounting rigor, and scalable processes to support iHerb's continued global growth.

**David Cosgrove, CFO***Fulham, Hawthorne*

David Cosgrove is a seasoned corporate finance executive and strategic leader with extensive experience guiding finance functions in private equity-backed and publicly traded companies. He is currently Chief Financial Officer at Fulham Co., Inc., where he leads financial strategy, reporting, and operational planning for a global manufacturing organization. Cosgrove's career spans a diverse set of industries, including manufacturing, field services, consumer packaged goods, energy, aerospace, and life sciences, giving him a broad perspective on financial leadership in both growth and restructuring environments. He has a track record of building strong finance teams, strengthening internal controls, and aligning financial operations with strategic company objectives. Before his current role, Cosgrove held senior finance leadership positions at companies with complex operational and reporting needs, often in high-growth or transitional phases. His background also includes experience in investment banking and financial services, enhancing his ability to partner with private equity sponsors, boards of directors, and executive leadership on capital strategy, M&A evaluation, and performance optimization.

**Bryan Cotter, CFO***Human Touch, Long Beach*

Bryan Cotter has been the CFO of Interactive Health, Inc. since 2018. As of 2025, he also took over the role of COO. Interactive Health, Inc. is a privately held company located in Long Beach. It has two wholly owned subsidiaries: Human Touch, LLC, which is one of the largest and well-known brands of robotic massage chairs in the United States. The other wholly owned subsidiary is Relax The Back Corporation, which owns the franchise rights to a chain of 60 retail stores catering to health and wellness and ergonomic furniture solutions (massage chairs, sleep, home office). Interactive Health, Inc. employs close to 100 employees. The Human Touch brand has experienced rapid growth over the past 5 years in the direct-to-consumer channel, including having a large presence at Costco and 300% increase in the B2B/Gym space. Although Human Touch experienced large increases in tariff expense in 2025 due to 100% of our product coming from Asia, the company managed to increase contribution margin by over 20% versus 2024 due to tariff mitigation strategies, sales channel optimization, and cost cutting measures. The Relax The Back business also experienced greater than 25% growth in profits year over year due to increased operational efficiencies and a focus on stronger margins.

**Keith Crider, Vice President of Finance and Process Transformation***PepsiCo, Laguna Beach*

PepsiCo is a leading global food and beverage company, renowned for its iconic portfolio of beloved brands that include Pepsi-Cola, Mountain Dew, Gatorade, Lay's, Doritos, Cheetos, Quaker, and Tropicana. Headquartered in Purchase, New York, PepsiCo operates worldwide, manufacturing, marketing, and distributing a diverse range of convenient foods and refreshing drinks enjoyed by consumers more than one billion times daily across over 200 countries. As one of the world's largest companies in its sector, PepsiCo reported net revenue of approximately \$93.9 billion for fiscal year 2025, with around 306,000 employees globally. The company has demonstrated steady performance amid economic challenges, achieving organic revenue growth of 1.7% in 2025 while focusing on productivity savings, brand innovation, and strategic acquisitions such as Poppi (prebiotic soda) to capture high-growth segments like functional beverages and snacks. Notable recent milestones include surpassing 2025 nutrition targets for sugar and sodium reduction a year early, advancing regenerative agriculture across millions of acres under its pep+ (PepsiCo Positive) sustainability strategy, and affirming a positive 2026 outlook with expected organic revenue growth of 2-4%. PepsiCo continues to prioritize innovation, shareholder returns, including a 4% dividend increase, and long-term resilience in a dynamic market.

**Andy Dahl, VP Corporate Controller***Edwards Lifesciences, Irvine*

Andy Dahl is Senior Vice President, Corporate Controller, and Principal Accounting Officer for Edwards Lifesciences, the world's leading global structural heart innovation company driven by a passion to improve patient lives. Edwards achieved \$5.4 billion in annual sales during 2024, up 9% year-over-year on an underlying basis and completed a \$4.2 billion sale of its Critical Care product group. Dahl is responsible for global accounting and reporting, providing leadership and functional oversight for technical and HQ accounting, external reporting, finance activities across global business service centers, indirect sourcing, and strategic acquisitions and divestitures. Before joining Edwards in 2024, Dahl worked for Medtronic as Vice President, Global Assistant Controller. Also at Medtronic, Dahl led the Enterprise Risk Management function within Global Treasury and served as Director, Corporate Audit. Early in his career, Dahl spent 11 years working for Arthur Andersen and Deloitte followed by his service as chief audit executive for Polaris Industries. Dahl earned a Bachelor of Arts degree in Accountancy from the University of San Diego. Originally from Minneapolis, Dahl currently lives in Southern California with his wife and their three children.

**Amy Dickerson, CFO***REGENESIS, San Clemente*

Amy Dickerson is the Chief Financial Officer of Regenesis, an environmental remediation company that has been eliminating exposure risks from PFAS and other contaminants in groundwater for over three decades. In this role, she oversees the financial management of Regenesis, including all financial reporting and transparency. She also leads global operations for the U.S. and EU, and manages numerous departments, including accounting, finance,

customer service, and human resources. Since joining Regenesis over a decade ago, Dickerson's leadership has been pivotal to the company's growth. She recently managed the implementation of an Enterprise Resource Planning (EUR) system to streamline operations and improve internal efficiency. She also oversaw the establishment of Regenesis' new manufacturing facility in Gallatin, TN, enabling the company to bring all manufacturing in-house. She also launched an ongoing company-wide mentoring program to foster internal talent development.

**Kim Early, CFO***Willdan, Anaheim*

For more than a decade, Kim Early has served as Chief Financial Officer of Willdan, a publicly traded engineering and energy efficiency company headquartered in Anaheim. Over that time, Early has become far more than a traditional CFO, he is widely regarded as a true operational partner to CEO, Mike Bieber, helping to guide strategy, execution, and culture across the organization. Early has played a direct role in scaling operations, aligning financial strategy with execution, and driving performance at the division level. Since joining Willdan, Early has supported the company's growth from approximately \$150 million in annual revenue to nearly \$700 million today, helping the organization scale responsibly while maintaining financial discipline and governance expected of a public company. His leadership has been particularly impactful during periods of volatility, including successfully steering the company through a significant downturn during the COVID-19 pandemic. Through disciplined cost management, strategic prioritization, and steady leadership, Early helped Willdan navigate unprecedented uncertainty while positioning the business for recovery and continued growth.

**Shawn Edwards, CFO***Tenant, Inc., Irvine*

Tenant, Inc. is a high-growth software business that provides a robust ecosystem for property management and revenue optimization for self-storage operators. Tenant, Inc. is based in Irvine with roughly 150 employees and is approaching \$20 million of annual revenues with approximately 1,500 facilities operating on its platform. Shawn Edwards was brought into Tenant, Inc. to professionalize the accounting and finance team to become more of a strategic partner to the organization and to prepare the company for future rounds of institutional funding. In a short span of time, Edwards has rebuilt the accounting/finance team and provided intelligent instrumentation for the business to appropriately manage and accelerate growth. Edwards has been a member of FEI and ACG. Edwards is a routine networker in the OC business community attending multiple events for finance executives and building relationships in a 1:1 environment.

**Martin Elliott, CFO***Go Rentals, Newport Beach*

Martin Elliott is the Chief Financial Officer of Go Rentals, a leading transportation provider headquartered in Orange County, serving high-end travelers through premier hospitality, aviation, and destination partnerships nationwide. Since joining Go Rentals, Elliot has focused on strengthening financial discipline, scalability, and strategic decision-making to support the company's continued growth and premium brand positioning. With more than two decades of financial leadership experience, Elliott has served as CFO of several prominent privately held and consumer-facing organizations, including Spanx and MGA Entertainment, where he led enterprise-wide financial planning, capital strategy, and operational transformation initiatives. His background also includes senior strategy and business planning roles at Mattel and The Walt Disney Company, giving him a rare blend of financial rigor and consumer-centric strategic insight. Elliott is recognized for building high-performing finance teams, implementing data-driven forecasting and reporting frameworks, and partnering closely with executive leadership to drive sustainable growth. His leadership style emphasizes transparency, accountability, and aligning financial strategy with long-term business objectives.

**Nathaniel Fasnacht, Head of Finance & Accounting***CODAN US Corporation, Santa Ana*

Nathaniel Fasnacht is the Head of Finance & Accounting at CODAN US Corporation, a medical device manufacturer with approximately \$50 million in annual revenue. He leads the company's finance, accounting, and systems functions, working closely with operations to drive profitability, strengthen cash flow, and support scalable growth. Since joining CODAN, Fasnacht has spearheaded multiple value creation initiatives, including identifying new sourcing strategies projected to deliver \$2.5 million in annual savings and championing automation investments that substantially reduced manufacturing labor costs. He also led the implementation of Microsoft Dynamics 365 to modernize financial operations and introduced working capital KPIs that unlocked more than \$4 million in cash from inventory and receivables. Under his leadership, the company reduced its annual audit timeline by 46%, improving reporting speed and lowering external costs. Previously, Fasnacht served as VP of Finance and Interim CFO for a private equity owned global business, where he completed two acquisitions and drove margin expansion through pricing and cost initiatives. He holds a Bachelor of Business Administration in finance from the University of Georgia and a Master of Business Administration from the University of Southern California.

**John Finnucan IV, CFO***FirstElement Fuel, Irvine*

John Finnucan IV is the Chief Financial Officer of FirstElement Fuel, Inc. He joined the company in November 2023, bringing disciplined financial leadership to support its next phase of growth. As CFO, he leads capital raising, transaction planning and forecasting, cash management, investor reporting, and team development. In his first year, Finnucan IV closed a new \$25 million capital raise with a strategic investor and implemented improvements to cash management, financial reporting, and internal controls. He also established trusted

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## CFO of The Year Award Nominees

relationships with the Board, investors, and founders to secure buy-in for key initiatives and additional capital and negotiated successful outcomes with debtholders and external stakeholders. In year two, he negotiated with debtholders to secure six-month and three-month extensions of debt maturity dates, enabling the company to continue discussions with a potential new investor. He navigated a challenging due diligence process while managing liquidity—extending the company's runway by six months—culminating in the successful completion of a nine-figure transformational investment from a global automaker.

**Ann Fong, CFO***Z Supply, Costa Mesa*

Ann Fong is a seasoned finance executive with deep expertise in operational leadership, capital strategy, and mergers and acquisitions. At Z SUPPLY, she oversees a 567,000-square-foot warehouse and distribution center and manages a workforce of more than 450 employees, driving operational efficiency and scalable growth across the organization. She has led complex debt restructurings, including unitranche loans and credit facilities totaling up to \$100 million, strengthening balance sheets and positioning companies for long-term success. Fong also brings significant M&A experience, including the sale of BB Dakota to Steve Madden, Ltd. in 2019 and the sale of Paul Frank Industries to Saban Capital Group in 2010. Additionally, she managed acquisitions at Incipio Group, including brands such as Skullcandy and Griffin Technology. In recognition of her leadership, she was named "Rising Star CFO of the Year" in 2015 by the Orange County Business Journal.



and accounting organization and led a companywide transformation of the financial infrastructure. He strengthened controls and governance, established disciplined KPI reporting, and implemented the company's first enterprise-wide operating plan. These initiatives embedded financial rigor and positioned the business for a strategic sale process focused on maximizing shareholder value. Navigating a challenging M&A environment and shifting priorities, Hersh's leadership drove record results, including more than 30% net sales growth and over 75% EBITDA growth. He independently sourced and closed a private debt financing that enabled the largest shareholder dividend in company history, while simultaneously delivering more than 500 basis points of EBITDA margin expansion, improved working capital efficiency, and stronger cash conversion. Prior to PSD, Hersh served as CFO of Super73 and held senior finance roles at PepsiCo, building on earlier experience in investment banking and private equity focused on branded consumer businesses.

**Eileen Hill, Vice President of Finance***Pinnacle Petroleum, Inc., Huntington Beach*

Eileen Hill serves as Vice President of Finance at Pinnacle Petroleum, a national, woman-owned fuel and energy solutions provider headquartered in Huntington Beach, California. Since joining the company in June 2022, Hill has applied more than 30 years of experience in accounting, taxation, mergers and acquisitions, and international tax strategy to support Pinnacle's financial operations and strategic growth. Pinnacle Petroleum, in business since 1995, offers comprehensive petroleum products and services and operates in 27 states across the United States with a growing portfolio of commercial, government, and industrial clients. The company has experienced strong post-pandemic expansion, with revenues approaching the half-billion-dollar range and sustained year-over-year growth, reflecting both operational resilience and increasing market demand. Before Pinnacle, Hill held senior financial leadership roles at A.T. Cross, Wings Capital Partners, Carros Sensors/Crouzet and began her career with Ernst & Young. She also contributes to community and educational efforts, including financial mentoring and board service.

**Richard Greene, President & CFO***Clever Care Health Plan, Huntington Beach*

Richard Greene serves as President and Chief Financial Officer at Clever Care Health Plan, a Huntington Beach-based culturally sensitive and competent Medicare Advantage health plan that gives members access to care that is delivered in their own language and provides benefits that blend Eastern and Western medicine practices. Notably, the health plan announced 50 percent growth during the 2026 Annual Enrollment Period from 30,000 members to 45,000 members across Southern California. In his role, Greene drives strategic investment initiatives, contributes to Clever Care's exceptional growth, allows the company to follow through on promises to investors, and maintains its unwavering commitment to member-focused care. Greene brings over three decades of financial and operational experience in the healthcare industry in Orange County. Prior to joining Clever Care, he served as COO and CFO at AppleCare Medical Management (part of Optum). His deep expertise also comes from holding CFO titles at PacifiCare Dental and Vision, Monarch HealthCare, and Arcadian Management Services. Greene earned his MBA from Chapman University and his bachelor's degree in business administration from California State University, Fullerton.

**Larry Gwilt, CFO***Orange County Rescue Mission, Tustin*

Larry Gwilt serves as Chief Financial Officer for Orange County Rescue Mission (OCRM) and Hurtt Family Health Clinics, bringing nearly four decades of experience in for-profit accounting and finance to two of Orange County's most impactful nonprofit organizations. OCRM is one of the largest nonprofit providers of essential services and life-changing programs for homeless men, women, children, and military veterans, operating with 107 employees and a \$28.3 million budget, all with private funding and zero debt. Under Gwilt's financial leadership, the organization operates in a dynamic, entrepreneurial manner while maintaining strong fiscal discipline and accountability. Over the past year, OCRM achieved 9% revenue growth, a 26.3% increase in volunteers, and a 35.4% increase in the number of clients served. Gwilt has strengthened interdepartmental collaboration, improved operational performance, and brought more accounting services in-house—allowing a greater share of donor dollars to go directly to programs. These gains support major organizational and program milestones and expansions each year. Most recently, these include expanding bed capacity for single women and mothers with children and launching a free-to-the-client tattoo removal clinic to remove barriers to employment. The organization's capacity for growth demonstrates Gwilt's ability to align financial strategy with measurable mission outcomes.

**Taylor L. Hoang, Executive Vice President & CFO***Farmers & Merchants Bank, Newport Beach*

Taylor L. Hoang, a Certified Public Accountant, assumed her role as F&M Bank's first female Chief Financial Officer in January of 2024 after serving as F&M's Senior Vice President and Senior Financial Officer since 2008, where she held responsibility for the Bank's financial reporting, budgeting and planning, among other financial management functions. She joined F&M in 2007 as First Vice President and previously held financial management positions at Wyle Laboratories and Hawthorne Savings and was a senior audit manager with KMPG LLP. She succeeded John W.H. Hinrichs, a past recipient of the OCBJ CFO of the Year Lifetime Achievement Award, after his retirement and nearly 60 years of service to F&M Bank. Hoang has since overseen the implementation of an enhanced regulatory financial framework required due to F&M's transition to a regional banking organization in 2023. This framework has resulted in strengthened bank capital, liquidity, and risk management. F&M Bank has seen over 200% asset growth since Hoang joined the team, now at over \$11.62 billion.

**Sam Hung, CFO***Capital Gains Financial Services, Orange*

Sam Hung is the Chief Financial Officer of a boutique wealth and tax advisory firm headquartered in Orange County, California. The firm is distinguished by its fully integrated approach to financial advisory services, providing comprehensive tax planning and investment management under one unified strategy. The firm specializes in advising multi-generational families, delivering a high level of personalized service focused on tax efficiency, wealth preservation, and the orderly transfer of assets across generations. Its client-centric philosophy emphasizes thoughtful planning, disciplined execution, and long-term alignment between financial goals and tax strategy. Together with his emeritus partner, Paul Seig, Hung's firm prepares more than 1,200 households annually and manages approximately \$200 million in assets under management. Through this integrated advisory model, he has led the firm to sustained year-over-year growth and long-term client relationships.

**Eric Hammes, CFO***Envista Holdings Corporation, Brea*

Eric Hammes is the Chief Financial Officer of Envista Holdings Corporation. He leads the company's global corporate Finance organization, including FP&A, Accounting, Investor Relations, Treasury, Internal Audit and overall financial Governance. He joined Envista in August 2024 and previously served as VP, Corporate Financial Planning and Analysis at Rockwell Automation. He also spent over 25 years at 3M holding numerous financial and operational leadership roles including SVP Controller and Chief Accounting Officer, CFO of 3M, Health Care Business Group, EVP of Business Transformation & IT, and EVP, Enterprise Operations. In less than two years at Envista, Hammes has reshaped both the culture and capability of the Finance organization and delivered transformational improvements in business performance and capital structure. His leadership has elevated operational execution, team engagement, and shareholder value. Hammes launched Envista's Modern Finance initiative, with tenets centered on standardization, digitalization, and capability building across the global Finance team. Under his direction, Envista established new centers of excellence around the world, driving significant efficiency, quality, and scalability in financial processes.

**Christie Israel, CFO***UC Irvine Foundation, Irvine*

Christie Israel is a distinguished financial executive with more than 25 years of experience spanning public accounting and nonprofit higher education and was recently promoted from Foundation Controller to Chief Financial Officer of the UC Irvine Foundation. She oversees financial reporting, regulatory compliance, endowment accounting, and investment operations for a top-tier public research university with a global donor base and complex financial portfolio. Israel is a trusted strategic partner to university leadership and external investment managers, ensuring strong governance, fiscal discipline, and long-term financial sustainability. During her tenure, Israel has played a central role in stewarding the Foundation's financial operations, most notably through UC Irvine's recently concluded \$2 billion fundraising campaign, the largest in Orange County's history. Under her financial leadership, the UC Irvine Foundation's endowment supports critical investments in cutting-edge research, innovative teaching, public service, and community engagement, contributing to UC Irvine's \$8 billion annual economic impact on California and reinforcing the university's role as a statewide engine of innovation and public good.

**Andy Hersh, CFO***PSD Underwear, Irvine*

Andy Hersh joined PSD in late 2024 as the company's first CFO, overseeing finance, accounting, and strategic planning for a global underwear and loungewear business operating through a diversified omnichannel platform. Upon joining, Hersh built a high-performing finance

**Nate Janzen, CFO***Magnolia Foods, Mira Loma*

Nate Janzen is a strategic CFO within the food industry. He started his career in investment banking doing mergers and acquisitions in the food, beverage, and agriculture industries at Lazard. After five years at Lazard, he went on to join a former client, Del Real Foods, where



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Colin Craver

Managing Director

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CFO of The Year Award Nominees

he served as VP of Finance and Purchasing. After five years helping to profitably grow Del Real, Janzen joined sister company, Magnolia Foods, the largest independent manufacturer of tortillas in Southern California, as CFO. During his four years as CFO, he has helped the Company to become cash flow positive following the pandemic and is focused on driving future organic and acquisitive growth. In addition to his CFO role, Janzen helped Magnolia's owner on the acquisition of a fresh sausage manufacturer where he oversees the business for the family office owners and serves as CFO. Outside of Magnolia, he serves as a Board advisor and operating partner to Lometa Capital Partners.



**Tucker Johnson, CFO**

*EnergyCAP, San Juan Capistrano*

EnergyCAP is the leading energy and utility management platform, a system of record and action supporting mission-critical workflows and driving real ROI. As CFO, Tucker Johnson has helped scale the company through a period of sustained, profitable growth while building the financial and operational foundation for long-term value creation. In 2025, Johnson led EnergyCAP through another year of strong performance, delivering 25% ARR growth and 21% employee growth while expanding gross margins by four points and improving EBITDA by 65% year over year. Under his leadership, the business achieved rule-of-45 performance while continuing to invest in scalable systems, disciplined cost management, and operational excellence. In parallel, Johnson helped build the infrastructure and leadership rigor needed to support continued scale in 2026 and beyond, positioning EnergyCAP for sustained growth, margin expansion, and customer impact.



**Maja Karabeg, Chief Accounting Officer**

*Liberty Dental Plan, Tustin*

Maja Karabeg is a cornerstone of Liberty Dental Plan's executive leadership, having served the organization for over 22 years. As Employee Number 9, she has been the financial architect behind the company's explosive evolution from a \$50 million regional player to a \$1 billion revenue powerhouse. Under her guidance, membership skyrocketed from 17,000 to over 8 million members, and a single entity expanded into a complex portfolio of 20 companies. As specialist in scaling and transformation, Karabeg led the 2006 financial system implementation and spearheaded multiple efficiency initiatives with BCG.



Her resilience and institutional knowledge are unmatched; she successfully navigated the company through five CFO transitions in three years and played a pivotal role in the 2022 majority stake sale to Welsh, Carson, Anderson & Stowe. Currently serving as the Chief Accounting Officer and CFO for all regulated subsidiaries, Karabeg balances high-level strategy with a passion for team development. Her tenure is defined by an unwavering

commitment to financial rigor, operational excellence, and sustainable growth.

**Stephen Keim, CFO**

*Optima Tax Relief, Santa Ana*

Stephen (Steve) Keim is Chief Financial Officer of Optima Tax Relief, the nation's largest tax resolution firm. As CFO, he leads enterprise financial strategy and operations—FP&A, accounting, compliance, and risk—helping power sustained double-digit growth and building the financial infrastructure required to scale. An experienced operator, Keim specializes in transforming finance organizations within businesses that interact closely with government agencies, streamlining complex processes, tightening controls, and improving cycle times, forecasting accuracy, and decision support. Prior to joining Optima as CFO, Keim served in interim CFO and senior finance leadership roles, guiding organizations through turnarounds, integrations, and operational transformations. Earlier in his career, Keim was a management consultant with Bain & Company in Los Angeles and worked in financial advisory services, where he developed deep expertise in strategic planning, value creation, and data-driven execution. He holds the CFA and CPA credentials and has degrees from UC Berkeley, University of Southern California, and Arizona State University.



**Nick Khalili, CFO**

*Cornerstone Dental Specialties, Irvine*

Cornerstone Dental Specialties Inc. aka Cornerstone Group set out over 25 years ago to answer these questions. How do we deliver a dental endodontic service through a unique platform that is simple, better and faster? How could a practice serve its associate, its referral, and most importantly, their mutual patients more effectively. The answer was combining state-of-the-art technology, collaborative treatment planning methods, and algorithms honed by many talented clinicians over hundreds of thousands of cases. We are not only serving other major Dental Service organizations but also expanding into acquiring small practices throughout the US to be able to create a streamlined treatment for our patients. Cornerstone Group and its leadership team have been noted in many conferences.



**Ed Kirnbauer, CFO**

*Identiv, Santa Ana*

Ed Kirnbauer serves as Chief Financial Officer at Identiv, Inc., a global leader in RFID- and BLE-enabled Internet of Things (IoT) solutions. He was appointed CFO in August 2025, after serving as Identiv's Vice President, Global Corporate Controller since November 2015. With more than 30 years of financial leadership experience, Kirnbauer has held senior finance roles at numerous public companies, where he has established a strong track record of driving initiatives focused on





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Shaku Nitturkar

CFO of The Year Award Nominees

increasing shareholder value. At Identiv, Kirnbauer plays a key role in advancing the company's vision and growth strategy. He played a pivotal role in completing the transition of all manufacturing from Singapore to a state-of-the-art facility in Thailand. This milestone meaningfully lowered the company's cost structure and expanded non-GAAP gross margins from 9.3% in Q3 2024 to 19.1% in Q3 2025. Kirnbauer is a Certified Public Accountant and began his career at KPMG LLP. Kirnbauer holds an M.B.A. from DePaul University's Charles H. Kellstadt Graduate School of Business and a B.S. in Accounting from Illinois State University.

**Francene LaPoint, CFO**

*Concordia University, Irvine*

Francene LaPoint brings more than 25 years of distinguished experience leading complex finance and accounting organizations across highly regulated environments. She began her career earning her Certified Public Accountant license in 1998 while at PricewaterhouseCoopers LLP, where she built a rigorous technical foundation that continues to inform her leadership today. In January 2025, LaPoint joined Concordia University Irvine as its new Chief Financial Officer, bringing with her deep expertise in financial stewardship, governance, and strategic planning. In this role, she is entrusted with guiding the university's financial strategy as it prepares to surpass a \$100 million annual operating budget while continuing to expand its mission across Orange County and beyond. Most recently prior to Concordia, LaPoint served as Senior Vice President and Chief Accounting Officer at Citizens Business Bank, where she oversaw all aspects of accounting and financial reporting for a highly regulated financial institution. Her responsibilities included preparation of financial materials for the governing board, the Securities and Exchange Commission, and other regulatory bodies, as well as leading the implementation of new accounting standards, strengthening internal controls, and developing enterprise-wide accounting policies and procedures.



**Jennifer Laird, CFO**

*Miller Castings, Whittier*

Jennifer Laird serves as the CFO for Miller Castings, Inc., an investment casting foundry that manufactures high-quality castings for aerospace, military, and commercial markets. In her roles as CFO, she leads the organization's finance and risk management functions and is an active member of the Board of Directors. With extensive experience in high-growth private companies, Laird has successfully driven financial, governance, and technology transformations that strengthen operational infrastructure and position the organization for sustained growth. She has led key initiatives to secure improved financing, optimize insurance structures through captive and alternative risk strategies, and implement systems that enhance financial reporting and transparency. In addition, Laird has led process improvement efforts



across the organization, while actively supporting safety initiatives and fostering a strong ESOP-driven culture. She is recognized as an operationally focused leader who is passionate about developing those around her and translating complex financial data into clear, actionable insights that empower decision-making at every level of the business. Laird is also known for her collaborative leadership style and strategic mindset, partnering closely with organizational leadership to align financial strategy with long-term business objectives. Her ability to balance disciplined financial oversight with forward-looking innovation has played a key role in strengthening organizational resilience and driving sustainable value creation for shareholders and employee-owners.

**James Liu, Vice President of Accounting, Controller, Treasurer, & Principal Accounting Officer**

*Insight Molecular Diagnostics, Irvine*

James Liu is the Vice President of Accounting, Controller, Treasurer, and Principal Accounting Officer at Insight Molecular Diagnostics (IMDX), a pioneering diagnostics technology company whose mission is to democratize access to novel molecular diagnostic testing to improve patient outcomes. Liu began his career at BDO, gaining auditing and accounting experience with publicly traded life science and biotechnology companies. He joined IMDX in July 2021 as SEC Reporting & Compliance Manager, quickly expanding his role to lead the accounting department of six, oversee month-end close processes, and prepare all SEC reports. As head of accounting and finance, Liu guided the company through a transition from approximately 130 employees to fewer than 50 while maintaining sustainable cash burn and operational control. He implemented enhanced budgeting processes, reporting visibility, and financial controls to support growth. He is excited to help lead IMDX as they prepare for FDA submission and the commercial launch of their GraftAssureDx transplant monitoring test kit in 2026, positioning the company for its next phase of growth.



**Gary Lu, CFO**

*Biomerica, Inc., Irvine*

Gary Lu, CPA, serves as Chief Financial Officer of Biomerica, Inc., a publicly traded diagnostics company dedicated to advancing global health through innovative, patient-centric solutions. With over 20 years of experience across public and private companies, Lu leads Biomerica through complex financial, operational, and commercialization initiatives during a pivotal stage of its growth. Under his leadership, Biomerica strengthened its liquidity and balance-sheet position through disciplined capital management, supporting strategic execution and operational stability. Lu has played a central role in expanding the commercialization of the inFoods® IBS diagnostic platform, advancing it through physician adoption and direct-to-consumer channels. He also helped drive the



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Measure Twice, Cut Once: Engineering Deal Certainty in a Volatile Market

The old construction adage—measure twice, cut once—has taken on a new meaning in the world of M&A. Energy and credit market recalibrations, tariff changes, and global impacts have made structuring the purchase price for affected businesses difficult to determine for both buyers and sellers. For today's CFO, the mandate is clear: you are no longer just validating a valuation; you are architecting the resilience of the transaction itself from LOI to closing and beyond.



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

When visibility into future performance is clouded by market volatility, transaction terms must do the heavy lifting. We are seeing a marked increase in contingent consideration and milestone-based payments—mechanisms designed to bridge the gap between buyer caution and seller expectations. However, these “bridges” are only as strong as the language used to build them.

The risks of imprecise deal-making were recently underscored by a pivotal Delaware Supreme Court ruling (*J&J v. Fortis*). In that case, the court declined to require a buyer to pursue alternative approval pathways for an earnout milestone because those pathways were not explicitly defined in the agreement. The takeaway is a stark warning for the modern executive: once a deal is signed, the outcome is governed strictly by the negotiated text—not by how circumstances evolve or how “fair” a result may seem post-closing.

Because outcomes hinge entirely on these definitions, the financial assumptions often shaped by the CFO—around performance, valuation, and execution—must be translated with precision into the final governing deal structure. This is where strategic finance meets disciplined legal design.

Adams Corporate Law works closely with CFOs, founders, and executive teams to ensure that high-level financial strategy is reflected in clear, enforceable deal terms. By focusing on disciplined transaction design, our team helps companies navigate today's market realities to complete deals intended to perform as expected long after the ink has dried. For expert guidance on structuring your next transaction, contact Adams Corporate Law at (714) 619-9360 or visit [adamscorporatelaw.com](http://adamscorporatelaw.com).



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## CFO of The Year Award Nominees

company's reimbursement strategy, including securing a PLA code and supporting the establishment of a national Medicare payment rate, materially reducing commercialization risk and expanding patient access. In parallel, Lu optimized the company's product mix, improved cost structure and cash sustainability, and modernized financial systems, forecasting, and analytics to enhance decision-making and scalability. Beyond Biomerica, Lu is the founder of Forge Optima, a registered 501(c)(3) nonprofit focused on helping students and early-career professionals identify career pathways through structured curriculum and mentorship.

**Duncan McIntyre, CFO***Field AI, Irvine*

Since joining Field AI, Duncan McIntyre has transformed the organization from a 30-person technical team into a 200-strong global powerhouse. He masterfully orchestrated a \$300 million fundraising effort, curating an elite investor syndicate that includes Jeff Bezos, Nvidia, Samsung, Intel Capital, Temasek, Canaan Partners, and the Emerson Collective, alongside industrial leaders like BHP. His financial leadership has been a catalyst for explosive commercial growth, driving topline bookings at a 6x clip compared to his starting tenure and expanding the deal pipeline tenfold in just one year. Beyond capital, he has matured the company's executive infrastructure through a comprehensive senior leadership build-out and a successful international expansion into Japan and Singapore. This operational scaling culminated in the launch of a new global headquarters in Irvine, which features state-of-the-art robotic demonstration facilities. By balancing aggressive enterprise account acquisition with fiscal rigor, he has turned Field AI into a dominant force in autonomous robotics, proving himself to be an indispensable strategic partner in the company's journey from a technical startup to a global industry leader.

**Scott Mehlberger, CFO***Westcliff University, Irvine*

Scott Mehlberger is the Chief Financial Officer of Westcliff University, serving more than 8,000 students and nearly 1,300 faculty/staff members across Orange County and globally. In this role, he oversees finance, accounting, financial aid, procurement, and facilities, ensuring the university's long-term financial health and operational excellence. Before joining Westcliff, Mehlberger served as CFO for West Coast University and American Career College, bringing extensive higher education experience. His early career includes leadership roles at Gap Inc., and the Walt Disney Company, where he developed a strong foundation in financial planning, process improvement, and service-driven organizational strategy. Mehlberger holds an MBA from Pepperdine University and a Bachelor of Science in Business Administration from San Diego State University. Recognized for his strategic yet personable leadership style, shaped by professional and personal experience, Mehlberger adheres to the ethos of putting people first—from guests while he worked at Disney to Westcliff's students today—Mehlberger champions a student-centered approach while supporting Westcliff's mission to expand access to U.S. higher education within the community of Orange County and globally.

**Suman Mookerji, CFO***Ducommun, Costa Mesa*

Suman B. Mookerji is a seasoned finance executive with a distinguished track record of strategic leadership, value creation, and operational excellence in the aerospace, defense, and industrial sectors. He currently serves as Senior Vice President and Chief Financial Officer at Ducommun Inc., where he is a key member of the executive leadership team responsible for driving financial performance, strategic growth initiatives, and long-term shareholder value. Mookerji was appointed CFO in May 2023, adding the roles of Controller and Treasurer to his portfolio while continuing to lead the company's corporate development and investor relations functions. In this capacity, he provides financial and strategic stewardship for a complex global business delivering innovative electronic and structural products for leading commercial aerospace platforms, mission-critical defense programs, and niche industrial applications. Since joining Ducommun in March 2017, Mookerji has held progressively senior roles, including Vice President of Strategy, Acquisitions & Integration and Vice President of Corporate Development & Investor Relations, demonstrating his ability to align strategic vision with disciplined execution.

**Danielle Nagao, CFO***Radiant Health Centers, Irvine*

Danielle Nagao serves as CFO of Radiant Health Centers, a mission-driven healthcare organization providing essential services to communities across Orange County. Over her three-year tenure, Nagao has been a transformative financial and strategic leader during a period defined by significant healthcare disruption and the lasting operational and reimbursement impacts of the post-COVID era. She has delivered steady vision, fiscal discipline, and forward-thinking strategy that have strengthened Radiant's long-term sustainability. Under Nagao's leadership, Radiant has achieved measurable financial stability and operational growth, positioning the organization to responsibly expand services and enhance access to care. She has successfully navigated an increasingly complex administrative, regulatory, and political healthcare environment while maintaining a strong commitment to mission-aligned financial stewardship. Nagao brings a rare combination of technical financial expertise, strategic foresight, and collaborative leadership. Her ability to translate complex financial realities into actionable strategy has empowered teams, strengthened governance, and driven accountable decision-making across the organization. A trusted executive partner and culture builder, Nagao is highly deserving of this recognition by the Orange County Business Journal.

**Kate Nguyen, CPA, Vice President, Corporate Controller***Montrose Environmental Group, Inc., Irvine*

Kate Nguyen started her career at Price Waterhouse Coopers in financial audit where she attained her CPA and spent six years rising in the ranks to Assurance Manager. For the next 9-plus years, Nguyen has worked in Public Companies serving on the Accounting and Technical Reporting areas of the business. Most recently, in the last two years,



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Congratulations to *Ann Fong* on her nomination for the Orange County Business Journal's 2026 CFO Lifetime Achievement Award.

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Ann Fong, CFO/COO, Z SUPPLY





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<p>January 2026</p>  <p><b>\$400 Million</b> <i>Senior Notes Due 2029</i></p> <p><b>\$600 Million</b> <i>Senior Notes Due 2033</i></p> <p><b>Joint Bookrunner</b> KeyBanc Capital Markets</p>	<p>December 2025</p>  <p><b>\$1 Billion</b> <i>Senior Secured Credit Facilities</i></p> <p><b>Co-Documentation Agent</b> KeyBanc Capital Markets</p> <p><b>Treasury Services</b> KeyBank</p>	<p>October 2025</p>  <p><b>\$7 Million</b> <i>Senior Secured Credit Facilities</i></p> <p><b>Sole Lender</b> <b>Treasury Services</b> KeyBank</p>	<p>October 2025</p>  <p><b>\$80 Million</b> <i>Senior Secured Credit Facility</i></p> <p><b>Joint Lead Arranger</b> <b>Joint Bookrunner</b> KeyBanc Capital Markets</p> <p><b>Treasury Services</b> KeyBank</p>	<p>September 2025</p>  <p><b>\$1.25 Billion</b> <i>Senior Secured Credit Facilities</i></p> <p><b>Co-Documentation Agent</b> KeyBanc Capital Markets</p> <p><b>Treasury Services</b> <b>FX Services</b> KeyBank</p>	<p>September 2025</p>  <p><b>\$750 Million</b> <i>At-the-Market Offering</i></p> <p><b>Sales Agent</b> KeyBanc Capital Markets</p>
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## CFO of The Year Award Nominees

Nguyen has been promoted steadily from Director of Reporting and Technical Accounting to Assistant Corporate Controller to Vice President Corporate Controller at Montrose Environmental Group, a Publicly Traded Environmental Services Company with topline revenues over \$800 million.

**Tim Olaerts, VP Corporate Controller**

*Alteryx, Irvine*

Tim Olaerts is Vice President, Corporate Controller at Alteryx, an AI-enabled data analytics platform with global operations across the Americas, EMEA, and Asia Pacific. Since joining Alteryx in 2019, Olaerts has been a driving force behind the company's financial scale and transformation, helping guide the organization through a period of rapid growth as annual recurring revenue expanded from \$200 million to over \$1 billion and global headcount grew to approximately 2,000 employees. Most notably, Olaerts played a central leadership role in Alteryx's \$4.4 billion take-private transaction, overseeing complex purchase accounting, the recapitalization of approximately \$2 billion of debt, and the transition to sponsor-driven reporting and governance models. In parallel, he architected and executed a multi-year finance transformation initiative, modernizing systems, implementing automation, transitioning to a global BPO model, and delivering meaningful cost efficiencies. His leadership has helped position Alteryx for long-term profitable growth, achieving coveted Rule of 40 performance and double-digit EBITDA growth in 2025. Prior to Alteryx, Olaerts held senior finance and accounting leadership roles at Cotality (formerly CoreLogic) and Niagara Bottling, and spent 10 years in the audit practice at PwC.

**Jennifer Olson, CFO**

*Apriem Advisors, Irvine*

Apriem Advisors is a fiduciary wealth management firm headquartered in Irvine, California, overseeing more than \$1.4 billion in client assets. Serving high-net-worth individuals, multigenerational families, foundations, and institutions, the firm specializes in long-term planning, wealth strategies, and transparent client service. Over the past year, Apriem has achieved year-to-date growth of over 20 percent and maintained a remarkable client retention rate exceeding 98 percent, reflecting strong client trust and enduring relationships. Founded on a commitment to strategic, personalized wealth management, Apriem has expanded its offerings to include comprehensive investment management, retirement planning, tax-efficient strategies, and multigenerational legacy planning. The firm has also strengthened its compliance and operational frameworks, including rigorous adherence to Global Investment Performance Standards (GIPS). As Chief Financial Officer, Jen Olson, CFA®, CFP®, CIPM®, AIF®, oversees corporate finance, human resources, compliance, and investments, playing a key role in the firm's strategic decision-making and cultural leadership. Her guidance has been instrumental in supporting Apriem's growth, operational excellence, and continued reputation as a trusted partner to sophisticated clients.

**James Pearson, Vice President Finance**

*THE RINKS (The Rinks Foundation + Irvine Ice Foundation), Irvine*

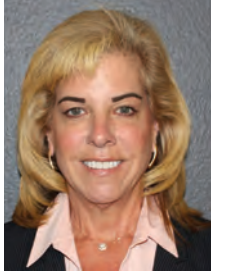
The Rinks is a premier operator of hockey and skating facilities in Southern California, offering a wide range of recreational and competitive ice sports programs. Established in 2009 in

partnership with the Anaheim Ducks, the organization manages multiple ice and inline skating venues, including locations such as Anaheim ICE, Lakewood ICE, Poway ICE, Yorba Linda ICE, Irvine Inline, and Great Park Ice & FivePoint Arena. The Rinks provides public skating, learn-to-skate classes, youth and adult hockey leagues, figure skating programs, curling, group events, and more, serving participants of all ages and skill levels across its facilities. Since its launch, The Rinks has expanded its footprint to include multiple ice and inline facilities, most recently enhancing the Great Park Ice & FivePoint Arena in Irvine — a large, multifunction skating complex that also serves as a practice site for the Anaheim Ducks and Olympic ice skaters. The organization continues to grow program offerings and participation levels, with a significant presence in youth hockey development and community skating events.

**Anna Ricardo, CFO**

*Merical, LLC, Anaheim*

Anna Ricardo serves as the Chief Financial Officer for Merical, LLC, bringing over 30 years of experience in the pharmaceutical and supplement industries. She specializes in manufacturing finance, driving strategic oversight and maximizing results and profitability for MeriCal. Since joining MeriCal, she has been instrumental in driving Top Line improvements by 35% YOY in 2025 and improving bottom line flow through by 254% YOY. She has keen insights and industry knowledge, resulting in granular analytics which in turn have created a focus and driven direct labor utilization and operational efficiencies. Prior to joining MeriCal, Ricardo held roles at International Vitamin Company, Gilead Sciences and Abbott Laboratories, where she led both strategic and turnaround efforts, significantly increasing revenue and driving cost reductions. Ricardo holds a Bachelor of Arts degree in Business Administration with an emphasis in Finance from California State University in Fullerton, CA. She is passionate about business partnership and being a strategic partner in a highly competitive manufacturing environment. Ricardo was also honored as a 2025 Business Angel, sponsored by PNC and the Angels baseball organization and was acknowledged as a 2025 OCBJ Business Woman of the Year.

**Bradley Riegler, CFO**

*Harvey & Company LLC, Newport Beach*

Brad Riegler joined Harvey & Company, the leading buy-side acquisition search and advisory firm, in 2020 and was appointed its Chief Financial Officer in 2024. He oversees the finance, accounting, human resources and administration of Harvey & Company and its investment entities. Harvey & Company has grown substantially since Riegler has joined; both in the number of initiated buy-side transactions and in total revenue. In his role as CFO, Riegler is very proud to be a part of the team that has helped the firm be named an Orange County Top Workplace for five years straight and has helped support the scale of the business with headcount increasing over 60% during his tenure. Prior to joining Harvey & Company, Riegler, who is a licensed CPA (inactive), has worked in both public company and private equity backed environments and began his career in public accounting, working at PwC in Orange County.



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**Rodney Burris**  
*Chief Financial Officer*

*The Care Partners Team proudly congratulates Rodney on this well-deserved nomination. Your leadership and vision have strengthened our mission of "Bridging the Gap in Healthcare." We are honored by your dedication and inspired by your commitment to excellence.*



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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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## CFO of The Year Award Nominees

**Susan Sagheb, COO & SVP of Finance***Junior Achievement of Southern California, Costa Mesa*

Susan Sagheb serves as Chief Operating Officer and Senior Vice President of Finance for Junior Achievement of Southern California (JA SoCal), an organization with 26 dedicated professionals serving students across the region. Since joining JA SoCal in April 2025, Sagheb has focused on strengthening organizational efficiency, financial stability, and infrastructure to support sustainable growth. A key priority has been improving the effective use of the Orange County and Southern California CRM across administrative and development functions, enabling better data-driven decision-making, donor engagement, and operational coordination. During a period of restricted funding, Sagheb also emphasized cash flow management and financial discipline to ensure continuity of mission-critical programs. Under Sagheb's financial leadership, JA SoCal has experienced significant balance sheet growth, with net assets increasing from under \$3 million in 2020 to more than \$10 million, supported in part by transformational philanthropic investments, including a major donation from MacKenzie Scott. The organization has expanded program services throughout Southern California, with a particular emphasis on Orange County and the Inland Empire, regions with heightened student need.

**Jake Schreiber, CFO***Cannon Building, Placentia*

Jake Schreiber is the Chief Financial Officer of Cannon Building, a privately held general contractor that serves healthcare, life science, commercial, and institutional clients throughout Southern California. Cannon Building operates in a highly regulated, capital intensive construction environment where financial discipline, risk management, and credibility are critical to success. Schreiber earned his MBA from UCLA Anderson School of Management and has seven years of CFO experience. Since joining Cannon Building, he has taken a hands-on approach to financial leadership and focused on stabilizing the company's financial foundation, while positioning it for responsible growth. Schreiber acts as a strategic partner to ownership and operations, translating complex financial data into actionable insight and helping leadership evaluate risk before commitments are made. His role extends beyond traditional accounting into operations, governance, compliance, systems integration, and long-term planning, supporting Cannon's leadership transition and future growth while protecting the company's financial health and reputation. He is an invaluable member of the leadership team and Cannon Building overall.

**Eleanor Schultz, CFO***Haskell & White LLP, Irvine*

Eleanor Schultz is the Chief Financial Officer of Haskell & White LLP, an independently owned public accounting firm serving middle-market and growth-oriented companies with complex and highly technical accounting, audit, and tax needs. The firm has experienced sustained revenue growth and has expanded to more than 120 professionals, with offices in Irvine and San Diego and team members serving clients across the United States. As CFO, Schultz oversees accounting, finance, human resources, recruiting and firm administration. She plays an integral role in the firm's strategic planning and collaborates closely with the partners to

scale operations while preserving the culture that defines the organization. With more than 25 years of cross-functional leadership experience, Schultz has implemented financial controls, operational processes, and reporting structures that improved efficiency, supported profitability, and positioned the firm to manage growth effectively. Her leadership aligns financial strategy with operational decision-making, ensuring the firm can continue investing in people, technology, and client service while maintaining long-term stability.

**John Scott, CFO***Angry Chickz Inc., Sherman Oaks*

John Scott is a distinguished financial executive with over three decades of expertise in financial management, strategic planning, and operational leadership. Currently serving as the Chief Financial Officer (CFO) at Angry Chickz, Scott plays an instrumental role in shaping financial strategy and driving growth in a dynamic and fast-paced environment. Scott's previous roles include serving as CFO for Yoshinoya America and holding various leadership positions at Mountain Mike's Pizza, Pieology Pizzeria, and BJ's Restaurants. His extensive career in the restaurant industry began at the age of 16, and by 20, he was managing a pizza restaurant. While transitioning to the finance sector during his college years, Scott has always maintained a deep appreciation for the hard work and dedication each team member contributes to providing guests with exceptional service. Scott's career is marked by his commitment to operational excellence, financial integrity, and strategic growth, making him a valuable asset to every organization he serves.

**Kris Sennesael, CFO***Western Digital, Irvine*

Kris Sennesael is the Chief Financial Officer of Western Digital, a global leader in data storage solutions serving hyperscale, enterprise, and consumer markets. Western Digital is an S&P 500 company, generating over \$10 billion in revenue, and employs over 40,000 people worldwide. As CFO, Sennesael oversees the global finance organization, including accounting, financial planning and analysis, tax, treasury, internal audit, investor relations, and corporate real estate – while driving operational excellence, profitable long-term growth and shareholder value. Sennesael is a global, hands-on leader with a strong semiconductor and tech background and has deep experience across the U.S., Europe, and Asia. Prior to Western Digital, Sennesael served as CFO at Skyworks Solutions, where he drove strategic direction and scaled the business through organic and inorganic growth. His previous roles include serving as CFO at Enphase Energy and Standard Microsystems, as well as leadership positions at ON Semiconductor, AML Semiconductor, and Alcatel Microelectronics. Sennesael holds a bachelor's and master's degree in economics from the University of Ghent, Belgium, as well as an MBA from the Vlerick Business School.

**Marc Serrio, CFO & Administrative Officer***Gem-Pack Berries, LLC, Irvine*

Marc Serrio is CFO of Irvine-based Gem-Pack Berries and has been instrumental in financing

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## Fit for Work Expands Workplace Wellness Services



Tony Martinez

Fit for Work, an Orange County based corporate wellness company founded by Tony Martinez, is expanding its in office and remote training programs after two years of measurable success at Catalyst, an Irvine company committed to strengthening employee well-being and long-term performance.

The company's model focuses on integrating fitness and wellness directly into the workday, helping reduce common barriers such as time constraints and inconsistent participation that often limit traditional wellness initiatives.

At Catalyst, Fit for Work operates directly within the office by building and managing an on-site gym, allowing employees to participate in one-on-one personal training sessions without leaving the workplace.

Since integrating Fit for Work into their operations, Catalyst employees have participated in one-on-one personal training sessions, guided mobility work, and individualized nutrition support, all delivered during the workday to support consistency and participation. The program is designed to meet employees where they are, offering scalable options for both in office and remote team members.

These initiatives have contributed to noticeable improvements in productivity, team morale, and employee retention across the organization, while also

encouraging long term lifestyle changes among employees.

Beyond daily training and wellness sessions, Catalyst employees have also taken part in optional group activities, including Spartan Race events, internal fitness challenges, and weekly pickleball meetups, which have contributed to stronger engagement and participation throughout the program.

"After 18 months, the impact has been unmistakable: significant improvements in employee biometrics, overall health, energy levels, and progress toward personal goals," said Pat Burcher, President of Catalyst. "Our employees, spanning ages 20 to 75, consistently praise the program and view it as one of the most valuable and unique benefits our company offers."

As companies continue to prioritize employee well-being and retention, workplace integrated wellness programs are becoming an increasingly important component of overall business strategy.

Fit for Work is now exploring opportunities to bring its hybrid corporate wellness model to additional companies across Orange County, offering on-site training, remote coaching for distributed teams, and flexible wellness solutions tailored to each workplace.

More information is available at [getfitforwork.com](http://getfitforwork.com).

Thank you,  
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CFO of The Year Award Nominees

and building the nation's second largest marketer/distributor of fresh berries with over \$1 billion annual revenue. He helped lead the 2023 acquisition of industry pioneer Well-Pict Berries and recently helped lead a substantial follow-on financing that will support Company growth well into the future. A visionary and strategic executive, Serrio has more than 30 years of CFO experience with CPG/food industry leaders including Ready Pac Foods, Kate Somerville Skincare, Del Real Foods, and 4Earth Farms. Serrio previously held financial management roles with Taco Bell Corp. (then PepsiCo) and Disney. He has led several M&A transactions, and is expert at corporate financing, strategic and operating planning, building high performance teams, and turnarounds. Serrio earned his MBA and BS degrees in Finance and Business Economics from USC.



**Brian Shea, CFO**

*Athletes First, Laguna Hills*

Brian Shea spearheaded a modernization of the back office for Athlete's First. He successfully migrated the organization from a localized physical server environment to a cloud-based ecosystem (MS SharePoint), integrating Slack and Salesforce to unify communication. He orchestrated a comprehensive upgrade of NetSuite, including the implementation of direct-to-bank API connectivity for real-time visibility. Led the full-scale implementation of Ramp, replacing legacy AMEX cards, and streamlining the entire travel and expense workflow. Shea developed sophisticated forecasting models that provide granular clarity on profitability at both the department and individual agent levels. Expertly manages critical banking relationships and debt covenants, ensuring the fiscal health required for continued expansion. As the steward of Finance, HR, and IT, he has bridged the gap between strategic goals and tactical teamwork. He overhauled the HR onboarding process, ensuring that the firm's infrastructure matches the caliber of its talent. This operational excellence supports a roster that saw 30 clients reach the Pro Bowl this year alone. Since the firm's founding in 2001, and following the 2023 investment from General Catalyst and Mosaic, Athlete's First required a financial leader with Shea's expertise to lead them to their next phase of growth.



**Stephen Sheer, CFO**

*Hybrid Apparel, Cypress*

Stephen Sheer leads all financial functions at Hybrid Apparel, including financial planning and analysis, accounting, reporting, treasury, risk management, compliance, capital structure, and strategic growth initiatives. He serves as a key strategic partner to the executive leadership team and Altamont Capital, aligning financial strategy with long-term value creation across a complex, multi-brand organization. In addition to his role at Hybrid, Sheer provides Operating Partner-level CFO support to Altamont Capital Partners, assisting across its portfolio with financial leadership, transaction execution, and organizational development. He has a bachelor's degree in accounting and a bachelor's degree in finance from the University at Buffalo. He is a certified public accountant (inactive) and previously



coached girls basketball for elementary and middle school students.

**Randolph Siwabessy, CFO & Senior Vice President, Finance and Value Based Care**

*UCI Health, Orange*

Randolph Siwabessy provides financial leadership over the academic and clinical enterprise of UCI Health and UC Irvine School of Medicine, encompassing a wide range of responsibilities. His primary functions include overseeing business and finance for the UCI Health academic health system, its physician enterprise, and the UC Irvine School of Medicine, with direct oversight of financial accounting and reporting, financial planning and analysis, government reimbursement, payor contracting and strategy, population health management and value-based care, revenue cycle management, and supply chain management and care at home platform. Additionally, he serves as executive for the UCI Health Accountable Care Organization. Siwabessy's strategic thinking has contributed to a historic expansion of the county's only academic health system. It opened its sixth hospital, UCI Health — Irvine, in December 2025. Its seventh hospital, the UCI Health — Irvine Rehabilitation Hospital, opens this summer. The facility will be structurally designed in all units for the needs of patients receiving acute inpatient rehabilitation care for stroke, amputations and other injuries and conditions.



**Brittany Slater, CFO**

*OrangeTwist, Newport Beach*

OrangeTwist is a leading aesthetic treatment shop for body, face, and skin, headquartered in Newport Beach with 24 locations primarily across the Western U.S. Brittany Slater joined OrangeTwist as Chief Financial Officer in 2020, where she has played a key role in scaling the business and strengthening its financial foundation. Her focus has been on supporting disciplined growth, operational excellence, and long-term value creation through strategic expansion and investment. Slater has secured equity investment from two private equity partners in 2023, led a minority equity investment from a strategic publicly traded company, expanded the company from 11 to 24 locations through a combination of de novo development and acquisitions, delivered 32% total sales growth and 17% same-store sales growth in 2025, and professionalized financial systems, processes, and teams to improve unit economics and support scalable growth.



**Nicole Smith, CFO**

*Tripepi Smith, Ladera Ranch*

Tripepi Smith is an Orange County-based marketing, technology, and public affairs firm serving for-profit, nonprofit, and public agencies. By blending marketing expertise with technological innovation, the firm empowers agencies to leverage digital platforms to achieve their communication goals effectively. Tripepi Smith provides a comprehensive range of content creation services, including collateral development, photography, video production, email marketing campaigns, website design, and more. Experiencing consistent annual growth of 20 percent, the firm now employs a talented team of 80 professionals dedicated to delivering impactful results. Serving over 200 clients including major California cities such as Yorba Linda, Lake Forest, and Malibu, Tripepi Smith stands out among private consulting firms for its industry experience, recognition, and strong commitment to community engagement and meaningful communication. Under Nicole Smith's leadership, the firm not only drives client success but also fosters positive social impact, making it a deserving candidate for recognition in innovation and community contribution.



**Brent Stringham, CFO**

*Lantronix, Irvine*

Brent Stringham has served as Chief Financial Officer of Lantronix, Inc. since January 2025, following more than a decade in the corporate controller and chief accounting officer roles. During his tenure, he has helped drive the company's growth from \$45 million to more than \$120 million in revenue, successfully integrating five acquisitions over the past six years, leading the transition to full SOX compliance, and overseeing the implementation of a new ERP system. Stringham brings deep institutional knowledge and seasoned financial leadership to the CFO role, with a focus on strategic cost management, operational efficiency, and disciplined financial planning. Prior to joining Lantronix, he held financial leadership positions at Iteris, Inc., Netlist, Inc., and Ernst & Young.



**Mark Sweetman, CFO**

*SA Recycling, Orange*

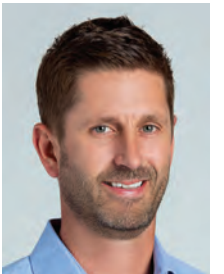
Mark Sweetman is the CFO of SA Recycling, one of the world's largest metal recyclers. As a member of SA's executive team since 2007, Sweetman has overseen the exponential growth of SA through extensive M&A activity. With over seventy acquisitions to date, SA has become the largest metal recycler in the USA with over 3,700 employees at 150 locations in 15 states. This rapid growth has brought many challenges, from developing financial systems for a niche industry, managing cultural integrations, ensuring compliance with multi-state regulations, etc. Sweetman seeks to overcome these challenges by creating a collaborative and supportive culture within a strong team and he is proud that virtually all of SA's management have long tenure with the company. One of Sweetman's most significant accomplishments is securing the finance for approximately \$1.5 billion in acquisitions, with traditional debt, from a syndicate of banks over the years. Sweetman is a Fellow of the Chartered Institute of Management Accountants.



**Jesse Timmermans, CFO**

*Revolve Group, Inc., Cerritos*

Jesse Timmermans currently serves as the CFO of REVOLVE, leading all aspects of finance, accounting, treasury, and risk management. Timmermans joined REVOLVE in 2017 and led the company through its IPO in June 2019. Revolve Group, Inc. (NYSE: RVLV) is the next-generation fashion retailer for Millennial and Generation Z consumers. As a trusted premium lifestyle brand and a go-to online source for discovery and inspiration, REVOLVE delivers an engaging customer



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CFO of The Year Award Nominees

experience from a vast yet curated offering of apparel, footwear, accessories, beauty, and home products. The dynamic REVOLVE platform connects a deeply engaged community of millions of consumers, thousands of global fashion influencers and more than 1,000 emerging, established and owned brands. Prior to Revolve, Timmermans served as the CFO of Jobalign, a mobile first technology and marketplace startup located in Seattle. Prior to Jobalign, Timmermans spent 10 years at Blue Nile in a variety of finance roles, most recently as VP of Finance and Controller. Timmermans also serves on the board of Open Water, a non-profit organization serving veterans and first responders through fellowship, mentorship and open water experiences.

**Jake Tucker, Chief Accounting and Investment Officer**

*Thomas James Home, Aliso Viejo*

Jake Tucker has played a significant role in reimagining Thomas James Homes from a custom builder into a production minded, scalable company supported by stronger processes, controls, and automation. His work has helped drive a broader shift in how the business operates, bringing greater structure, consistency, and financial discipline to core functions that are critical for growth. He has been especially impactful in cleaning up accounting practices, strengthening operational finance, and improving the rigor of acquisition underwriting, helping create clearer visibility, better decision making, and a more repeatable operating model. Through this combination of strategic thinking and hands on execution, Tucker has helped position TJH to operate more efficiently and effectively as it continues to scale as the nation's largest single lot builder.



**Ryan Vance, CFO**

*Zone 4, Orange*

Ryan Vance is an accomplished Chief Financial Officer and corporate growth leader with more than 20 years of experience guiding middle-market companies through scale, transformation, and complex transactions. He currently serves as Chief Financial Officer of Zone 4, an Orange County-based, private-equity-backed provider of automated storage, material handling, and warehouse installation solutions for retail, e-commerce, and grocery sectors. Under his leadership, Zone 4 earned the Orange County 2023 Association for Corporate Growth Business "Spotlight" Award. Over the past four years, Vance has played a central role in nearly tripling revenue to just under \$100 million while maintaining EBITDA margins above 10 percent. He also supported headcount growth from 46 to 122 employees and led the acquisition and integration of a multi-million-dollar installation business. Throughout his career, Vance has driven revenue growth, EBITDA expansion, and operational discipline across consumer products, manufacturing, technology, and construction companies. His experience includes acquisitions, carve-outs, integrations, and exits to private equity sponsors and strategic buyers. Over the past three years, he has also served on two advisory boards, helping emerging companies unlock value with greater speed.



**Drew Vollero, CFO**

*Reddit, San Francisco*

Drew Vollero is the Chief Financial Officer at Reddit, a global online community with hundreds

of millions of weekly users and one of the largest archives of human conversation on the internet. As CFO, Vollero oversees Reddit's global Finance organization, including accounting, financial planning and analysis, tax, treasury, audit, sales finance, procurement, and investor relations. Since joining Reddit in 2021 as its first CFO, Vollero has built and scaled the company's financial infrastructure to support rapid growth and its transition to a public company. Under his leadership, Reddit successfully completed its IPO in 2024 and has since delivered multiple consecutive quarters of strong business performance, helping scale the company globally. Before Reddit, Vollero served as CFO of Allied Universal, the world's largest private security company, and as the first CFO of Snap, where he built the finance function and helped lead one of the largest technology IPOs of its time. Vollero holds a B.A. in Mathematics and Economics from Yale University, magna cum laude, and an M.S. in Management from Oxford University.



**Jim Watkins, CFO**

*Boot Barn, Irvine*

Jim Watkins began his career at EY where he worked 12 years in Irvine, CA and in Munich, Germany. After more than 2 years as VP, Corporate Controller and Principal Accounting Officer at Mindspeed Technologies, Watkins joined Boot Barn in 2014 to assist in Boot Barn's IPO. Since then, he has worked in a variety of finance, accounting, and investor relations roles at Boot Barn and was promoted to CFO in 2021. Under Watkins's leadership as CFO, Boot Barn has nearly doubled its store count to 530 stores, more than doubled sales to an estimated \$2.2 billion, expanded merchandise margin more than 600 basis points, and more than tripled earnings per share.\* Boot Barn now operates stores in 49 states across the country and in addition to the ~\$2 billion of retail store sales, generates more than \$200 million of online sales. Boot Barn's stock price has appreciated ~70% during his time as CFO. Watkins is also a father of five, an accomplished athlete, and a strong supporter of his family, church, and community. \*Growth from the year ended March 2021 through estimated results for the fiscal year ending March 2026.



**Mike Willis, CFO**

*Karman Space and Defense, Huntington Beach*

Mike Willis is the Chief Financial Officer of Karman Space & Defense. Willis holds more than 15 years of progressive experience in finance and operations management. He is responsible for overseeing the organization's financials activities, which includes maintaining a strong control environment and the development of streamlined financial reporting and forecasts to support future growth. Willis possesses domestic and international finance experience in Aerospace, Automotive and Energy segments. Prior to joining Karman, Willis was most recently with Precision Castparts Corp as the Director of Finance within the Forgings Division, responsible for 14 businesses across five countries. Willis is a Certified Management Accountant (CMA) and obtained his Masters of Business Administration from Pennsylvania State University. Additionally, he received his Bachelor of Science in Business Administration – Finance from the University of Oregon.



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As CFO of one of the world's leading specialty retailers for health and wellness, **Mike Cody** sets the standard for modern financial leadership.

He has strengthened the company's financial foundation with disciplined strategy, sharpened operational rigor, and steady guidance through complexity and constant evolution. Under his leadership, finance is not just a function—it is a force for resilience, growth, and long-term value.

**Congratulations, Mike, on this well-deserved recognition.**



## CFO of The Year Award Nominees

**Wesley Wilson, Partner, Chief Investment Officer & CFO***Avanath, Irvine*

As Partner, CFO & CIO, Wesley Wilson has been instrumental in shaping Avanath Capital Management, a multifamily owner and operator that primarily focuses on affordable and workforce housing, into the impactful and influential investment management firm it is today. Since joining Avanath in 2016, he has played an integral role in strategically growing the firm's portfolio from approximately \$500 million to more than \$4 billion in assets under management. He is responsible for overseeing all strategic execution of Avanath, which currently owns and operates more than 15,000 units across more than 50 cities throughout the country, as well as crafting its strategic plans for growth. Wilson successfully leads the firm in investments, finance, strategy, and fundraising. His achievements include spearheading Avanath's first open-ended fund. With commitments from foreign and domestic institutional investors, Avanath continues to invest in improving, preserving, and adding to the country's affordable and workforce housing stock and making a positive impact in residents' lives. In 2025, Wilson architected a groundbreaking venture called Brighthaven, which doubled the units under management of Avanath and paves the way for Avanath to become the first national property management provider for affordable housing.



achieved over 100% revenue growth, reflecting strong market demand and the company's expanding national footprint. This growth has been driven by continued product innovation, operational scalability, and a customer-focused approach that supports salon owners at every stage of their business. A recent milestone includes the company's most successful flagship product launch to date, further strengthening its position within the industry. Beyond manufacturing, Whale Spa Inc. is committed to advancing the professional nail community. The company has hosted free educational courses for nail technicians, providing valuable training and resources to help elevate industry standards. Through sustained growth, innovation, and community engagement, Whale Spa Inc. continues to empower salon professionals nationwide.

**Todd Yoder, CFO***Shimmick Construction, Irvine*

Todd Yoder is the Executive Vice President and Chief Financial Officer of Shimmick (Nasdaq: SHIM), a leading provider of complex infrastructure solutions specializing in water, electrification (Ports, Airports, Municipal), and mission critical electrical (data center, advanced manufacturing); founded in 1990 in Hayward, California, and now headquartered in Irvine, the firm employs 1,200 people and generated \$480 million in 2024 revenue. Since joining Shimmick, Yoder has been instrumental in the transformation of the business, notably recording core project topline growth of 6% year-over-year and gross margin up 67% ending YTD Q3 2025, while growing backlog (\$754 million ending Q3 2025) for the first time in two years, and recorded the first positive adjusted EBITDA in four quarters, positioning the business well for continued growth in the years to come. Shimmick was upgraded to buy on January 5, 2026, for the first time since going public in 2023. Prior to Shimmick, Yoder served as Executive Vice President and Chief Financial Officer at Shikun & Binui (S&B USA), where he managed the financial organization for a multibillion-dollar global leader in complex P3 and design-build projects.

**André Wright, CFO***Verify, Inc., Costa Mesa*

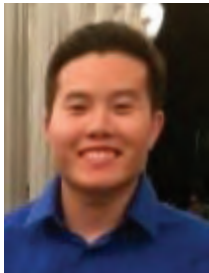
André Wright is the Chief Financial Officer (CFO) of the Verify Group, the global leader in supplier performance management solutions. Wright is responsible for all areas of Finance & Accounting, Information Systems, Technology, Compliance, Corporate Development, Legal, and Strategic Projects & Initiatives. Since 2007, Wright has been working in close partnership with Verify Shareholders, Board of Directors, Operations, Service Delivery, and Technology groups, enabling critical business projects and strategic business planning. Prior to his role at Verify, Wright worked at Ernst & Young (EY), managing assurance, due diligence, and acquisition engagements for Allergan, BJ's Restaurants, The Irvine Company, Ambassadors, and other publicly traded and middle market companies. Wright also serves on the Board of Directors of OnSite Waste Technologies and Merge Opportunities, as well as a Board Advisor to Technossus and Excel Packaging. Wright earned his Masters in Accountancy from the University of Notre Dame and has been an active member in Vistage's Chief Executive group since 2012. Wright is from Rio de Janeiro, Brazil and is passionate about developing the bright minds of the future as a youth club soccer coach.

**Allen Zakharin, CFO***Catalyst Creative Group, Irvine*

Catalyst Creative Group is a leading provider of apparel to some of the biggest retailers in the world, including Walmart, Target, Sams, Costco, Tilly's, and other well-known retailers. Catalyst has consistently posted year over year revenue growth, built on a foundation of quality products and excellent customer service. With a portfolio of private label, licenses, and owned-brands, Catalyst has scaled their operations to deliver best-in-class service in an increasingly competitive and challenging environment. With strong teams in place and retailer relationships growing strong each year, Catalyst leverages its elite levels of design, development, and sourcing to deliver high-performing products to a diverse group of retailers and markets. 2025 closed out another year of double-digit growth and that trend is expected to continue as the market seeks out high-performing partners that put their customers first. Allen Zakharin's accomplishments include scaling brands from start-up to >\$100M efficiently and profitably, delivering a profitable business in 2020, executing on a 3-year strategy to grow margin by >1,000bps, and elevating his fellow partners to be margin-first.

**Andrew Yang, Finance Manager***WhaleSpa, Huntington Beach*

Whale Spa Inc. is a leading manufacturer of nail salon furniture and professional salon supplies, dedicated to providing salon owners with a centralized, end-to-end solution for their business needs. The company designs and produces high-quality, innovative products that balance functionality, durability, and modern design to meet the evolving demands of the beauty industry. Since 2020, Whale Spa Inc. has



**COMING JULY 20TH**

**THE INDISPENSABLES!**

**2026**

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# Congratulations 2026 Nominees!

## PUBLIC COMPANY

- Biomerica** Gary Lu
- Boot Barn** Jim Watkins
- Ducommun Incorporated**  
Suman Mookerji
- Envista Holdings Corporation**  
Eric Hammes
- Identiv** Ed Kimbauer
- Karman Space and Defense** Mike Willis
- Lantronix** Brent Stringham
- Shimmick Construction** Todd Yoder
- Western Digital** Kris Sennesael
- Willdan** Kim Early

## PRIVATE COMPANY

- Angry Chickz** John Scott
- Apriem Advisors** Jennifer Olson
- Athletes First** Brian Shea
- Avanath Capital Management**  
Wesley Wilson
- Capital Gains Advisory Corp**  
Sam Hung
- Care Partners At Home** Rodney Burris
- Catalyst Creative Group** Allen Zakharin
- EnergyCap, LLC** Tucker Johnson
- Fidelity Bancorp Funding** Brian Chi
- FieldAI** Duncan McIntyre
- FirstElement Fuel Inc** John Finnucan IV
- Fulham** David Cosgrove
- GEM Pack Berries** Marc Serrio
- Go Rentals** Martin Elliott
- Harvey & Company LLC**  
Bradley Reigler
- Haskell & White LLP** Eleanor Schultz

- Human Touch** Bryan Cotter
- Hybrid Apparel** Steve Sheer
- iHerb, LLC** Mike Cody
- LEHR** Omar Besiso
- Magnolia Foods** Nate Janzen
- MeriCal, LLC** Anna Ricardo
- Miller Castings** Jennifer Laird
- Optima Tax Relief** Stephen Keim
- Orange Twist** Brittany Slater
- Pathway Capital** Benjamin Brewster
- Pinnacle Petroleum Inc** Eileen Hill
- Precision Finance AI** Andrew Aw
- Preferred Travel Group**  
Hiren Chandiramani
- PSD Underwear** Andy Hersh
- Regenesis** Amy Dickerson
- SA Recycling** Mark Sweetman
- SBE Electrical Contracting Inc**  
Hilton Blieden
- SKB Cases** Boris Berezovsky
- Tenant, Inc.** Shawn Edwards
- The Rinks** James Pearson
- Tripepi Smith** Nicole Smith
- Verify Inc.** Andre Wright
- Westcliff University** Scott Mehlberger
- Wood Smith Henning & Berman LLP**  
Kameron Au-Stout
- XR, LLC** Brad Biddle
- Zone 4** Ryan Vance

## NOT-FOR-PROFIT ORGANIZATION

- Concordia University Irvine**  
Francene LaPoint
- Hurtt Family Health Clinic/**

- OC Rescue Mission** Larry Gwilt
- Junior Achievement of Southern California** Susan Sagheb
- Radiant Health Centers**  
Danielle Nagao
- UCI Health** Randolph Siwabessy

## RISING STAR

- Alteryx Inc.** Tim Olaerts
- Cannon Building** Jake Schreiber
- Clever Care Health Plan Inc.**  
Richard Greene
- CODAN US Corporation**  
Nathaniel Fasnacht
- Cornerstone Group** Nick Khalili
- Edwards Lifesciences** Andy Dahl
- Farmers & Merchants Bank**  
Taylor L. Hoang
- Insight Molecular Diagnostics**  
James Liu
- Liberty Dental Plan** Maja Karabeg
- Montrose Environmental Group, Inc.**  
Kate Nguyen
- PepsiCo** Keith Crider
- Thomas James Home** Jake Tucker
- UC Irvine Foundation** Christie Israel
- WhaleSpa** Andrew Yang

## LIFETIME ACHIEVEMENT

- Lyra Health** Sandra Beaver
- Reddit** Drew Vollero
- Revolve Group, Inc.** Jesse Timmermans
- Z Supply** Ann Fong



### Master of Ceremonies

**Murray Rudin**

Managing Director,  
RLH Equity Partners

RLH EQUITY PARTNERS

### Dinner & Awards Program

May 12, 2026

6:30 p.m. – 8:30 p.m.

Tickets\*: \$350 / Table of 10: \$3,150



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