



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.



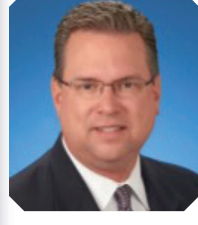
Jason Gwin - Market Executive, OC, City National Bank

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 Hammi 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.



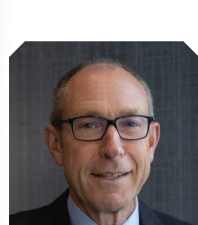
Thomas Lowrey - Senior Relationship Manager, PNC Bank

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.



Tevya Weinthal - Principal, Director of Sales, Marsh & McLennan Agency

Tevya 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.