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FAMILY OWNED BUSINESS AWARDS

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Jeremy Laster: Guiding Rancho Mission Viejo's Next Chapter

■ By JOSEPH PIMENTEL

RANCHO MISSION VIEJO — **Jeremy Laster**, president of **Rancho Mission Viejo LLC**, says there are some perks to holding a top executive job.

"People laugh at my jokes and answer my phone calls now! Ha," he joked to the Business Journal.

Laster, president since 2022, recently became chief executive officer of the 143-year-old company, which won a Business Journal **Family-Owned Business Award** last year.

"He has already proven to be one of Orange County's great business leaders, and we are confident in his leadership as he guides the company into its next chapter," said **Don Vodra**, vice chairman of **The Rancho Mission Viejo (RMV)** board, in a news release.

Laster will now oversee all parts of the family-owned company, from community development and land management to ranching, farming and commercial investments, company officials said.

He steps into the chief executive role while executive chairman **Tony Moiso** continues to shape the company's long-term vision. The property has been in the hands of the **Moiso, O'Neill** and **Avery** families since 1882.



The Next Chapter

The leadership change comes at an important time for the 23,000-acre Rancho Mission Viejo community, known as **The Ranch**, as development reaches the midway point and enters its later stages.

The Ranch, one of the last master-planned developments in Orange County, has already built several communities, like **Ladera Ranch** and newer villages such as **Rienda**, where over 1,500 homes have sold since 2022. When finished, the plan includes about 14,000 homes and around 5 million square feet of non-residential space.

Officials previously told the Business Journal that about 5,000 to 6,000 homes have already been built.



Jeremy Laster
CEO, President
Rancho
Mission Viejo

"As we look ahead, over the next 15 to 20 years, we can see the finish line of **The Ranch** plan," Laster said in an interview. "There is a significant amount of transition ahead... and an opportunity to help craft the next chapter of the Rancho Mission Viejo story."

The company has long operated under a balance of development and conservation, with roughly 75% of its land or roughly 17,000 acres, preserved as open space and the remainder planned for housing and commercial uses.

Laster said keeping that balance remains a key part of the company's strategy, and he's proud of its ongoing work with **The Nature Reserve at Rancho Mission Viejo**.

Housing Affordability

Laster also takes on the CEO role at a time when housing is more challenging, and affordability is a major concern for buyers.

It's an issue that remains "at the forefront of our minds, and we think about it every day," he said.

"Each decision we make takes affordability into account and we consistently ask ourselves, 'How will this impact affordability?' We have

to!" he said.

He added that the company is exploring a mix of approaches, from smaller and more efficient home designs to emerging technologies that could reduce costs over time.

He said they are also working on other affordability ideas they believe could be game changers.

"Stay tuned," he teased.

A Company Man

Even with the size of the company, Laster says the personal side of the work is what motivates him most.

Laster and his family live in Rancho Mission Viejo, and he commutes to work, passing through another part of **The Ranch**.

He said watching daily life in the neighborhoods the company helped build and its impact, from families enjoying a day at the parks to kids going to school, reminds him of the purpose behind their work.

"I want people to love living in Rancho Mission Viejo and be proud that they live here," Laster said. "I want residents to recommend it to their friends and family."

For Laster, who started as a project manager in 2001, this promotion is both a milestone and an opportunity to continue building on his and the company's work.

"It seems like just yesterday I was the youngest person at every meeting," he said. "Now, I've been around the longest." ■

Consolidated Contracting: Shooting for Excellence and Profitability

■ By EMILY SANTIAGO-MOLINA

SAN CLEMENTE — **Consolidated Contracting** in 2025 surpassed \$100 million in annual sales for the first time, up from \$96 million the year before—marking another record year for the firm.

"It's a gigantic goal and hurdle to get over," Chief Executive **Tony Elias-Calles** told the Business Journal. "We've been dreaming about that for a long time."

Elias-Calles took over the commercial construction firm from his former boss in 1989, when there were no customers. He renamed it Consolidated Contracting, and after four years, his brother-in-law **Joseph Troya** joined the business.

Over the last three decades, Consolidated has worked primarily in the commercial sector with projects including healthcare facilities, senior and affordable housing, corporate offices, parks, recreation and sports centers, religious buildings and private education.



Tony Elias-Calles and Joseph Troya are brothers-in-law who oversee Consolidated Contracting

The parks and recreation category has been a cornerstone for the firm, having completed almost 30 parks in Orange County for Newport Beach-based **Irvine Co.**

Additionally, more family members have joined operations such as Elias-Calles' kids **Matthew** and **Shane** and Troya's wife **Alis** along with the pair's nephew **Ryan Kraemer** and Troya's son-in-law **Eric Flores**.

The company won a Business Journal **Family-Owned Business Award** last year in the medium-size category.

Elias-Calles said he didn't expect his family to become a part of Consolidated when he first took over the firm.

"To be honest, I never expected them to come here and never expected the company to be blessed by God the way it has been," he said.

"The boys — it's crazy to think of what they were as little people, watching them grow up, and now getting to watch them as men and leading a company is fantastic," the CEO added, referring to his sons.

Consolidated, with 70 employees, has several projects in the works for 2026, such as another assisted living facility in San Marcos and a mixed-use building with retail and apartments for a church in Fontana. The firm is about to start working on a new clinic, fol-

lowed by work at a preschool in Corona.

80% of the company's work is repeat business, and Elias-Calles said recent opportunities with new clients have led to more jobs in assisted living centers and self-storage.

The firm just completed a seven-story apartment complex for affordable senior living in Chula Vista, known as the **Congregational Suites**.

Elias-Calles said private development in assisted living centers had "dried up" in the last few years, so Consolidated turned to affordable housing markets, which have become the largest area of growth for the firm.

"The morale is an all-time high as you can imagine, coming off of 2020 and '21 and '22, which were brutal years," he said.

Elias-Calles said that 2026, "God-willing," was lining up to be another potential record year.

"Our philosophy is excellence and profitability," he added. "That's what we're always shooting for." ■

Main Electric on Expansion Course

■ By KEVIN COSTELLOE

SANTA ANA — **Main Electric Supply Co.** continues its expansion, opening offices in Phoenix and in Layton, Utah, just north of Salt Lake City, this year.

Last year, Main Electric owner and CEO **Scott Germann** received a Business Journal **Family-Owned Business Award** in the large business category.

"Later this year, we plan to open up new facilities in San Jose and Santa Maria," Germann said on May 6.

He says much of the company's success is "attributable to attracting great employees."

"Main continues to find success in the family culture that we've created and belief in empowering our people," he says. "Despite



Scott Germann shown after receiving Business Journal Award

many challenges in the market and economy, we are optimistic about the future."

Runs Company with 2 Sons, Daughter

While Scott Germann is the owner and

chief executive, his son **Derek** is the company president. Another son, **Ryan**, handles pricing and vendor relations, while daughter **Kelsey** is a switchgear project manager.

"I never try to be dogmatic or absolute in my decision-making," Germann says of the family links. That goes for listening to his employees as well.

The Santa Ana-based electrical distributor supplies a vast array of products, ranging from lighting for commercial buildings and hospitals, to switches, wiring, heating components, lubricants and even batteries, with plenty in be-

tween, according to the company's website.

Disneyland, SoFi

The company has worked on some of the best-known local projects, including a ride at **Star Wars: Galaxy's Edge at Disneyland**, **SoFi Stadium**, **Resorts World Las Vegas**, expansions at **John Wayne Airport** and **LAX**, and **UCI/CHOC** medical center off Jamboree Road in Irvine.

Main Electric also supplies products for EV chargers, battery storage and solar power renewables.

"We sell to electrical contractors," the CEO says. "We get involved in very large projects." The company also has a retail side for contractors, including those that are a "one-man shop." ■



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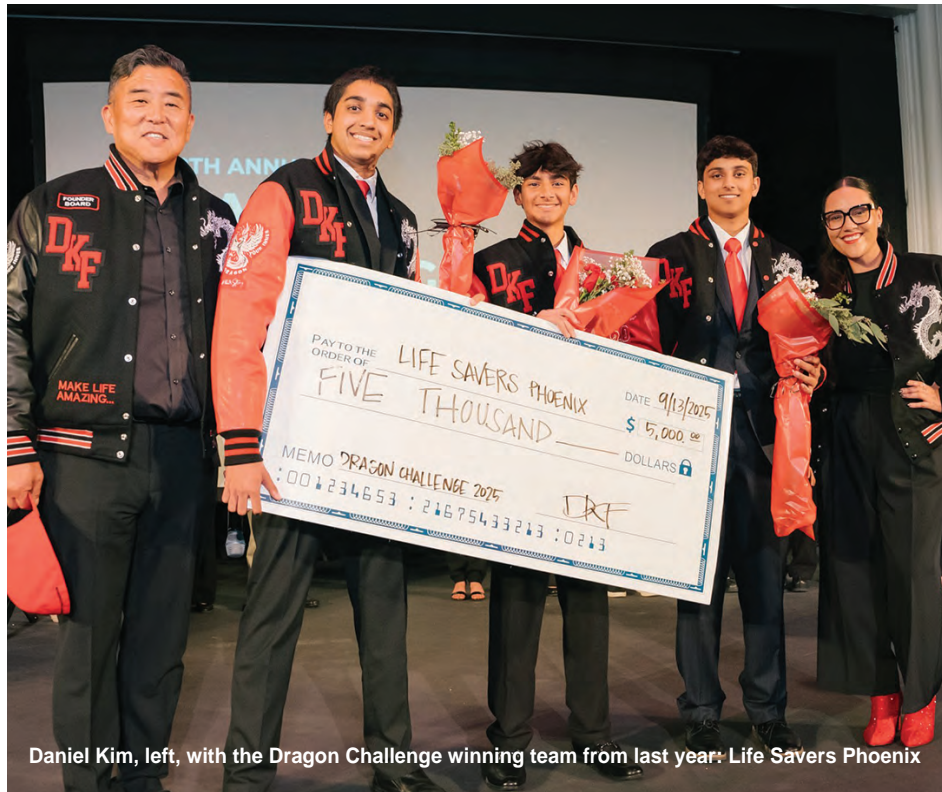
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Daniel Kim, left, with the Dragon Challenge winning team from last year: Life Savers Phoenix



Dragon Kim, left, with his father Daniel

Dragon Kim Foundation CEO: 'We Want to Go Nationwide'

■ By NANCY LUNA

IRVINE — At the start of each **Dragon Kim Foundation** fellowship program, co-founder **Daniel Kim** tells aspiring teen entrepreneurs how he once had early ideas for companies like **Amazon** and **Uber**—but he never acted on them.

The former New York City investment banker uses the lesson to drive home a point: plenty of people have great ideas, but it's the **Jeff Bezos**' of the world that triumph because they push past self-doubt and execute.

"I'm teaching them how to be all in, how to take something they really want to do and go do it," Kim told the Business Journal.

Last year, Kim received a Business Journal **Family-Owned Business Award** for his work as co-founder and chief executive of the Dragon Kim Foundation, an Irvine-

based nonprofit incubator that funds social entrepreneurial projects by high school students from California, Arizona and Nevada.

Since its inception in 2017, the program has guided more than 500 teens, organizing them into teams that each receive \$5,000 in seed funding.

The goal is to add more training centers. Teach more kids. Impact more lives.

"We want to go nationwide," Kim said. "I want to change the world."

Dragon's Legacy

The foundation was created in honor of Kim's son, **Dragon Kim**, who died during a camping trip in 2015. Dragon's parents channeled their grief into ensuring their son's legacy would endure by founding the Dragon Kim Foundation, initially a music program serving kids in underserved areas.

Dragon, a gifted musician, came up with the idea to teach music to kids while a freshman at **Orange County School of the Arts** in Santa Ana. Kim, who spent more than 25 years as an investment banker at top firms including **SBC Financial Group**, **PaineWebber** and **Abacus Partners**, guided his son through his business plan.

But Dragon's tragic accident occurred before he could get the arts program off the ground.

His family established the foundation in 2015.

While music lessons are still part of the program, Kim said the entrepreneurial segment is the "thrust" of the foundation.

In the first year of the Fellowship program, the foundation funded five projects by 11 teens. Last year, it funded 63 projects by 138 high school students, impacting the lives of more than 56,000 individuals.

Teen fellows receive rigorous leadership and business training called an "MBA in a box," and are paired with a professional mentor.

The program ends with a **Shark Tank**-style Dragon Challenge, where teams compete for additional funds to continue their projects. Judges over the years have included **Masimo Corp.** founder **Joe Kiani** and the president of **Stanford University**.

Last year's Dragon Challenge winners created a CPR program in Phoenix for more than 1,000 kids and trained them on how to handle emergency situations.

"These boys worked so hard, organizing an amazing program," said Kim, adding that he was moved by how well they articulated the impact they made.

"I love that most importantly," he said. "I really do believe we are changing their lives." ■

Elephant Signage: Adapting to Stay Competitive

■ By YUIKA YOSHIDA

MISSION VIEJO — There are still ups and downs for **Kateryna** and **Alex Karasyk** when it comes to running **Elephant Signage & Display**.

After fleeing their war-torn home country of Ukraine in 2017, forcing them to restart their successful 20-year custom signage business from scratch, the company has since completed more than 300 signage and installation projects nationwide.

While business has been operating steadily, growth has slowed in the past six months, according to Kateryna, who serves as managing director.

"We need to scale our business, but to go to the next level, you have to have more working capital," Kateryna told the Business Journal.

One of Kateryna's focuses is increasing their in-house capabilities by investing in more production equipment and obtaining an installation license.

"We are not a production company," Kateryna said. "We are still working like sign experts and consultants."



Kateryna and Alex Karasyk

She is also concentrating on reducing their prices to better compete in the market.

Kateryna said they're priced higher than competitors because of the personalized serv-

ice she provides to clients.

"If you go to **Vistaprint** or online printed shops, they're going to be cheaper," she said. "But customers understand they can come to me. I pick up the phone after 6 p.m. on Saturday and Sunday. They appreciate my time and my effort, so they pay more than they would for a regular printed shop."

Currently, Kateryna handles all direct sales herself, but says she'd like to hire more people once the company "improves its financial situation."

Other ongoing challenges include delays in project approvals.

"The permitting process here is much longer than people like," Kateryna said.

City fees to approve a sign can cost up to \$1,500, plus another \$1,500 for sign production and \$1,500 for installation, Kateryna said, making it difficult for small businesses

to afford.

One of the company's clients is a small, women-owned bakery that is paying around \$6,000 for a primary sign.

"It's really a big price for clients," Kateryna said. "A big challenge for me is how I can reduce the price for my clients but not lose margin and profit for myself."

Giving Back to the Community

Within the community, the company is a foundation sponsor of **Love Mission Viejo**, a group of churches, businesses, nonprofits and city leaders working to address local needs.

Love Mission Viejo on May 16 is hosting its third annual citywide volunteer event, which will feature projects focused on city beautification, school enhancements and helping senior citizens.

Additionally, Kateryna has been a board member of the **Mission Viejo Chamber of Commerce** for nearly seven years. She says she runs the organization's marketing and communications to support and promote local women-owned businesses.

"It takes a lot of effort, but I'm happy to give back to this community," Kateryna said. ■

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When Legacy Meets Liquidity: Strategic Legal Counsel for Family-Owned Businesses

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



Addison Adams, Esq.

A recent survey showed nearly 8 out of 10 family-owned businesses expect a CEO transition within the next ten years. Although most agree a leadership plan is necessary, very few are actually implementing a plan for a new CEO. Whether you’re preparing for a leadership transition, exploring a business sale or expansion, or planning for either one, having experienced legal counsel can make all the difference.

Adams Corporate Law is a boutique corporate law firm headquartered in Orange County, California. We work closely with owners to help them prepare for a new CEO, whether from the next generation or outside the family.

Alternatively, we help owners prepare their business for sale when the time to retire is upon them. Our legal strategies are tailored to align with your goals and values. We bring structure to complex decisions, mitigate risk, and help preserve both relationships and enterprise value.

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

To this year’s honorees, congratulations. Your commitment to leadership, resilience, and legacy is inspiring. At Adams Corporate Law, we’re here to help ensure your next chapter is built on a strong foundation. To learn more, visit us online at adamscorporatelaw.com or call (714) 619-9360 to connect with our team.

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BANC OF CALIFORNIA

Is Your Payments Strategy Paying Off?

Every business owner knows that success in today's world depends on a smooth payment experience. Sites like Amazon and Zappos have made the checkout process so easy that customers expect the same level of ease everywhere they make payments. They expect a fast, secure and hassle-free checkout, whether they are shopping for business supplies and services, buying a package of workout classes, or making a copay at the doctor's office.

When it comes to payments, the most important thing a business can do is to ensure their customers have smooth experiences. Any friction a client encounters during the payment process correlates directly with lost sales and repeat business.

Scaling Up Successfully

According to the Federal Reserve, cash accounts for only about 14% of all U.S. payments, while credit cards have been driving the overall growth in payments. Even use of mobile phones for payments is on the rise, representing 11% of all in-person non-bill payments and 45% of remote payments.

It's important to consider where your business is today, where it is headed, and whether your payments technology can support those goals. That can be easier said than done, given the rapid industry consolidation and technology advancements the payments industry has recently experienced.

Like many growing companies, a lot of family businesses find that their payment systems were put in place years ago — likely because these legacy systems met basic functionality requirements and were inexpensive to implement. However, requirements shift as transaction volumes rise and a business expands to new sales channels. There may also be newfound needs, like integrating payment systems with accounting, enterprise resource planning (ERP) and inventory management software that can provide data analytics.

All of this means that payment processing systems have to scale alongside the business, but many legacy systems become strained as volumes increase. This might show up as processing lags during peak traffic, limited API (application programming interface) capabilities, or difficulty supporting new sales channels or alternative payments methods like digital wallets.

Scalable payment processing allows businesses to grow without payment issues slowing them down. The right system supports online, in-store and mobile sales, and it offers an elastic infrastructure that supports high transaction volumes during seasonal peaks or sudden surges in demand — like ticket sales for Taylor Swift's next tour.

Every Second Counts

Payment downtime means lost revenue. When customers can't easily complete checkout, they abandon their carts and shop somewhere else. Even worse, payment failures can damage brand reputation and erode trust.

A payment system uptime of 99.9% is the widely accepted industry standard, but the best online payment processing systems don't stop there. They increase reliability by building redundancy into each layer, such as server infrastructure and network routing, so no single point of failure creates performance issues.

Real-time transaction monitoring improves payment system reliability by catching potential issues before they can escalate into full outages. When problems do arise, automated systems instantly reroute traffic, so transactions go through while teams fix the underlying error. The best online payment systems also include risk-mitigation features such as fraud detection and ongoing monitoring.

Payments = Knowledge

Business owners are increasingly viewing payments as a valuable source of strategic insight.

When payment processors integrate with tools such as ERP, customer relationship management, and point-of-sale and accounting platforms, they often reveal patterns that might otherwise be missed. These connections provide a detailed view of how money moves through the business, allowing teams to make more informed decisions.

Payment data integration can help companies:

- Track conversion rates and lifetime value
- Identify operational inefficiencies, such as processing delays or repeated refund requests
- Streamline reconciliation and simplify financial reporting.



Integrating payment data with inventory systems helps companies more accurately anticipate demand and optimize cash flow. And updating inventory in real time allows finance and operations departments to work from the same data, reducing lag and improving forecasts.

A Consultative Approach

Choosing a payments solution is a critical part of a company's financial infrastructure.

Banc of California is a true relationship bank that takes a consultative approach with our family-owned businesses and other clients. Our dedicated business bankers are well versed in new technologies, like our BancEdge payment processing solution, which is designed to support businesses of all sizes with flexibility and reliability.

The cost of payments solutions can vary widely, and they can have complex billing structures. Our bankers will work with you to identify great, cost-effective solutions tailored to your business. They can also provide access to subject-matter experts who can help you make sense of the complicated payments ecosystem.

About Banc of California, Inc.

Banc of California, Inc. (NYSE: BANC) is a bank holding company with over \$34 billion in assets and the parent company of Banc of California. Banc of California is one of the nation's premier relationship-based business banks, providing banking and treasury management services to small-, middle-market, and venture-backed businesses. Banc of California is the largest independent bank headquartered in Los Angeles and the third largest bank headquartered in California and offers a broad range of loan and deposit products and services through 79 full-service branches located throughout California and in Denver, Colorado, and Durham, North Carolina, as well as through regional offices nationwide. The bank also provides full-service payment processing solutions to its clients and serves the Community Association Management industry nationwide with its technology-forward platform, SmartStreet™. The bank is committed to its local communities through the Banc of California Charitable Foundation, and by supporting organizations that provide financial literacy and job training, small business support, affordable housing, and more. Member FDIC. For more information, please visit us at www.bancofcal.com.

Sean Foley is the President of Banc of California's Orange County and Inland Empire Region. He oversees the team dedicated to commercial and real estate businesses in the area and has deep experience supporting clients and structuring debt facilities that meet their strategic needs.

Learn more at bancofcal.com or contact Mr. Foley directly at Sean.Foley@bancofcal.com.





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ORANGE COUNTY ADVANTAGE

Our contingent commercial practice group is based in Irvine. We know the OC business community, the local state and federal courts, and OC juries. Our cases typically involve **shareholder or corporate fraud**—misappropriation of funds, shares, or assets from shareholders, competitors, or customers. Our experience spans diverse industries and successful businesses throughout **Orange County**.



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Led by Founder Richard McCune and backed by a team of seasoned trial lawyers, McCune Law Group has **over 35 years of success** in high-stakes litigation, with **more than 20 years in contingent commercial cases**. Our results include a \$203 million consumer fraud verdict, a \$22 million shareholder fraud verdict, and a \$5.5 million shareholder fraud verdict, along with numerous seven- and eight-figure settlements.

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EverBank Supports Orange County's Family-Owned Businesses and Communities

EverBank is proud to support family-owned businesses in Orange County and across Southern California through a relationship-driven approach to banking that reflects the priorities of owners and the communities they serve. By combining its nationwide digital banking platform with a growing network of financial centers across Southern California, EverBank is positioned to meet clients where they are with both convenience and personalized service.

That client-first approach is reflected not only in EverBank's products and services, but in its continued investment in California. As a premium performance banking partner, EverBank delivers reliability, security and deep expertise through high-value products and services for both consumer and commercial clients. Across Southern California, that approach is grounded in a simple focus: helping clients make the most of their financial opportunities.

This commitment is also reflected in EverBank's continued investment in California as part of its broader growth strategy. In 2024, the bank established a West Coast hub in Irvine, bringing leadership and operational teams closer to clients in the region. Today, EverBank operates 11 financial centers across Southern California, including locations in Alhambra, Arcadia, Beverly Hills, Chino Hills, Corona del Mar, Encino, Irvine, Koreatown, Rowland Heights, Santa Monica and Westlake Village.

This growing physical presence reflects a long-term commitment to Southern California and a recognition of the vital role that local, family-owned businesses play in the regional economy. Many of EverBank's local leaders and bankers bring decades of experience in California and live in the communities they support, offering a deep understanding of the role family and community play across the Golden State.

For Patrick Nygren, EverBank's Senior Vice President and Head of Retail Banking, who is based in Los Angeles, the expansion reflects both the scale of opportunity in the region and the bank's long-term commitment to the California market.

"Orange County is an incredibly vibrant and opportunity-rich market," Nygren said. "By pairing our digital banking platform with select financial centers in key communities, we're able to deliver both the convenience clients expect and the personal relationships they value."

Family-owned businesses are a cornerstone of the local economy, with many built on long-standing relationships, shared values and a commitment to future generations. EverBank works with these businesses by listening first and building banking relationships that can evolve alongside their needs over time.

Guided by a focus on helping clients achieve their own definitions of success, EverBank brings together banking and lending capabilities designed to support both business priorities and personal financial goals. The bank's approach is built around the idea that clients should feel like they have a banking partner designed specifically for them, with solutions shaped around their goals, priorities and long-term plans. Whether a business is expanding, managing cash flow and planning ahead, EverBank works closely with clients to understand their goals and deliver practical, tailored support.

With competitive rates on savings solutions, a variety of business checking options and flexible financing capabilities, EverBank supports companies at every stage of growth. Its commercial financing specialists bring real-world experience across industries, allowing the bank to tailor solutions to the specific needs of each client.

The bank's strategy combines digital banking with strategically located financial centers, allowing it to operate efficiently while still providing clients with in-person access. Clients also benefit from a full suite of digital capabilities, including 24/7 account access and tools designed to support visibility, control and ease of use.

Extending its relationship-driven approach beyond banking, EverBank is



also focused on strengthening its engagement within the communities it serves. Across Southern California, the bank partners with nonprofit organizations and community groups to support initiatives that promote economic opportunity and address critical local needs. The bank achieves this through its national community program, EverBank Builds.

In Orange County, this comes to life through EverBank's work with the Orange County Rescue Mission, an organization that provides services for individuals and families experiencing homelessness. EverBank partners with the Orange County Rescue Mission to advance programs that create sustainable pathways for local families. Recently, EverBank supported their Children's Business Fair, which offers homeless youth exposure to what it means to be an entrepreneur and start a business. EverBank employees volunteer as mentors, working closely with participants to develop ideas, create products and bring them to market, helping build not only practical skills, but confidence and a sense of ownership.

This is just one example of how EverBank employees contribute their time and resources to strengthening the communities they serve. Through career development programs, volunteer service and community rebuilding efforts, EverBank employees contribute both time and resources to causes that matter locally. This engagement reflects our commitment in action. Our associates nationwide come together with shared dedication and compassion to empower individuals of all ages to attain financial health and build generational equity. EverBank Builds stands for our commitment to building the communities around us.

"Orange County and the broader Southern California region are home to a diverse and resilient business community," said Regional Manager Brian Gilpatrick, who oversees retail operations across the state. "As we continue to grow here, being present in the community and supporting the people behind these businesses is a key part of how we operate."

As Southern California's business landscape continues to evolve, family-owned companies remain a driving force of innovation, resilience and economic growth. With a commitment to personalized service, comprehensive financial solutions and community engagement, EverBank is helping these businesses navigate today's challenges while preparing for the opportunities of tomorrow.

For businesses seeking a banking partner that understands their unique needs, EverBank offers a combination of expertise, accessibility and long-term perspective – supporting not only the business itself, but the people and families behind it.

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WANT TO PREVAIL IN YOUR DIVORCE?

LOOK TO ISRAEL FOR STRATEGY

By Paul Nelson, Esq



What's the best way to win a war?

Start before the other side, then strike first. This was how Israel defeated the much larger combined armies of Egypt, Syria, and Jordan in the Six Day War of June 1967.

Conflict had been brewing in the Middle East ever since Palestinian guerilla groups triggered Israeli reprisals in Jordan and Syria. Tensions escalated throughout the next spring until Egyptian president Gamal Nassar showed Syrian support by using his navy to blockade Israel's port city of Elat.

But Israel was ready.

It had been monitoring its Arab neighbors closely since 1948. Also, it had spent the previous 12 years building one of the most formidable militaries in the world. Its intelligence service, the Mossad, was second to none.

Early on June 5, Israel responded to the Egyptian blockade by launching a massive, well-coordinated air attack. Within hours, Israel wiped out 90 percent of Egypt's air force—while it was still on the tarmac.

Israeli tanks then swept through the Sinai all the way to the Suez Canal while simultaneously shelling East Jerusalem with a devastating armor assault.

It was all over in six days.

Israel now controlled the Golan Heights, East Jerusalem, the West Bank of the Jordan River, the Gaza Strip, and the entire Sinai Peninsula. It was in the perfect position to negotiate a cease fire.

All because it had prepared for this fight *years* ahead of time.

Divorce may be likened to warfare. If you're contemplating your own, you should approach divorce the same way. Get ahead of things. Don't be reactive.

If you're caught by surprise, you're likely to find you have no place to live, that key documents are unavailable or have suddenly "disappeared," and that events are happening far faster than your ability to handle them. Instead, give yourself the head start you need to stake out an advantageous position.

This is exactly what I advised a client we will call Anthony. He had a profitable mail order business estimated to be worth \$20 million. He claimed he funded the business 15 years earlier with \$10,000 from his own savings. Anthony also insisted his wife Sara had not contributed any money of her own, nor had she participated in the business in any way.

Although Anthony and Sara were getting along okay at the time, he suspected she was being unfaithful. As his counsel, I insisted he document his entire business history ASAP to prove his sole ownership. It took Anthony six months to attain all the necessary records, but he was eventually successful.

This was a good thing. Because in the final phase of such document discovery, he also confirmed Sara was in fact, having an affair.

Devastated to be right about his suspicion, Anthony was also ready.

When time came to divorce and divvy up assets, we could prove beyond a doubt that Anthony's business was entirely *his*.

Had he not done this work in advance? The pain of his wife's infidelity—coupled with the emotional roller-coaster that followed—likely would have made things far harder. Worse, it might have cost him millions and millions of dollars. Instead, like Israel, Anthony prepared ahead of time, and it paid off.

Are you too, facing divorce? I recommend you select the same strategy to get the best possible outcome. For just like in war, preparation *is* everything.

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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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Rooted in Legacy, Growing with Purpose

In today's fast-moving and often transactional business environment, family-owned companies operate differently. You are not building for the next quarter. You are building for the next generation.

That distinction shapes every decision. It is not just about performance, but about purpose. The outcomes will help build the legacy you are creating for your family, your employees, and your community.

At CommerceWest Bank, we understand this because we work alongside business owners like you every day. Our approach to banking is grounded in the same principles that define family enterprises: strong foundations, thoughtful growth, and a long-term commitment to what matters most.

In our opinion, a family-owned business is much like a tree. Its strength is not defined by how quickly it grows, but by how deeply its roots are planted and how intentionally it is cultivated over time.

The Roots are the Values That Anchor Growth

Every enduring family business begins with roots.

While not visible on the surface, they are the foundation of long-term success, representing the values, vision, and purpose that guide decisions across generations. And they are unique to every family-owned business.

In many family enterprises, those roots are grounded in integrity, resilience, and a deep sense of responsibility to employees, customers, and the community. Unlike businesses built for short-term exits, family-owned companies are anchored in legacy.

At CommerceWest Bank, we align closely with these principles. We believe financial partnerships should be rooted in trust and understanding. We take the time to know our clients beyond their balance sheets, recognizing that behind every business is a story, a family, and a future that deserves to be protected and nurtured.

The Trunk Provides Stability Through Generations

The trunk of a tree represents strength and continuity. It is what holds everything together as the business grows over time. For family-owned companies, this stability often comes from leadership continuity and a shared commitment to the original mission.

Maintaining that strength requires intention. Each generation must balance honoring traditions with adapting to change as markets evolve and new challenges emerge.

CommerceWest Bank supports this evolution by providing strategic financial guidance tailored to multi-generational planning. Whether it is capital access, liquidity management, or risk strategy, we understand these transitions are pivotal moments. Our role is to help ensure the business remains strong, stable, and positioned for continued growth.

The Branches Allow for Expanded Opportunities

As a tree matures, its branches extend outward, reaching for new opportunities. Similarly, family-owned businesses expand into new markets, develop new products, and evolve their operations.

Growth, however, must be intentional. Thoughtful expansion allows a business to extend its reach while maintaining its core identity.

At CommerceWest Bank, we act as a strategic partner in this phase of growth. We provide customized lending solutions, treasury management services, and advisory support aligned with each client's long-term vision.

The Leaves Are the People, Culture, and Community

The leaves of a tree are where life becomes visible. They represent vitality, energy, and connection to the environment. In a family-owned business, the leaves are the people, the

culture, and the community relationships that define the organization.

Family enterprises often foster a unique workplace culture. Employees are not just team members; they are part of an extended family. These businesses are also deeply connected to their communities, contributing to local growth and supporting causes that matter.

CommerceWest Bank shares this commitment. As a relationship-focused institution, we prioritize meaningful connections with our clients and our community. We believe strong relationships are essential to long-term success.

The Seasons Help Navigate Change with Resilience

Every tree experiences seasons. There are times of rapid growth, periods of dormancy, and moments of challenge. Family-owned businesses are no different. Economic cycles, industry disruptions, and generational transitions all test the strength of the organization.

What sets family businesses apart is their resilience. Because they are rooted in long-term thinking, they are often better equipped to weather uncertainty.

At CommerceWest Bank, we view ourselves as partners through every season. Whether a business is navigating expansion, facing economic headwinds, or preparing for leadership transition, we provide steady guidance and support. Our approach is not transactional; it is relational and enduring.

Nurturing the Future

A tree does not grow on its own. It requires care, attention, and the right environment and a trusted partner to help it get there.

At CommerceWest Bank, we are proud to support family owned-business that are building for generations. We recognize that success is not built overnight. It is cultivated through thoughtful decisions, strong relationships, and a commitment to long-term value.

Our forward-thinking approach has led to recognition as one of America's Best Regional Banks & Credit Unions in 2026, and placement among the Top 20 Best Performing Public Banks in the Nation by American Banker. We have also been recognized in the Top 100 Publicly Traded Community Banks and included in the OC500 Most Influential Leaders by the Orange County Business Journal.

Our Chairman and CEO, Ivo Tjan, was honored in the 2025 LA Times OC Executive Forum & Leadership Awards, reflecting his continued commitment to leadership, innovation, and community impact.

Beyond these recognitions, we are deeply committed to the communities we serve, supporting Southern California nonprofits, contributing volunteer hours, and investing in programs that strengthen the people and businesses around us.

Conclusion

At CommerceWest Bank, we are proud to work alongside family-owned businesses that are rooted in legacy and growing with purpose.

By combining financial expertise with a relationship-first approach, we help our clients grow, protect what they have built, and prepare for what comes next.

Because when your business is built for generations, your bank should be too.

Congratulations to this year's award winners and nominees. You are the heartbeat of our community, bringing passion, purpose, and care into everything you do. Your work reflects a deep commitment to people, values, and the meaningful impact you create each day. We are proud to stand alongside you and be part of your journey.

Ivo A. Tjan
Chairman & CEO

Ivo A. Tjan, Chairman & CEO

Ivo A. Tjan is the Founder, Chairman, President & Chief Executive Officer of CW Bancorp and CommerceWest Bank, a publicly traded full-service commercial bank with a distinctive vision and culture dedicated exclusively to serving the business community. Mr. Tjan founded the Bank and successfully led its Initial Public Offering in 2001, making it one of the few banks in California to go public under founder-led leadership. Headquartered in Irvine, CommerceWest Bank partners with businesses across California, providing strategic banking solutions with a digital-first, relationship-driven approach.

Mr. Tjan's banking career began with leadership roles at Eldorado Bank, Home Savings of America, and Great Western Bank, where he gained broad expertise across commercial banking disciplines before launching CommerceWest Bank. The Bank was recognized by Newsweek as one of America's Best Regional Banks 2026, 2025 & 2024, and receiving a 5 Star Safety & Soundness Rating by Bauer Financial.



He has been widely recognized for his leadership and entrepreneurial achievements, including being named a 2025 LA Times CEO Honoree, one of Orange County's Most Influential Business Leaders on the OC500 and OC50 Lists by the Orange County Business Journal, and recipient of the Robert Ross Founders Award from the Muscular Dystrophy Association (MDA). He was also recognized as one of Vivid Magazine's Top 10 Asian American Entrepreneurs and listed among OC Metro's "Hottest 25 People in Orange County."

Mr. Tjan earned his Bachelor of Arts in Business Administration from California State University, Fullerton. Beyond his corporate leadership, he is deeply engaged in community and industry organizations. He is an active member of the Young Presidents' Organization (YPO), CEO Affiliation Group, Bank CEO Network, and The Pacific Club. His prior board service includes Working Wardrobes, California State University, Fullerton; New Majority; Marconi Foundation; The Children's Museum; CASA Advisory Board; and the ABA Government Relations Committee.

A strong believer in giving back, Mr. Tjan actively supports a wide range of charitable and nonprofit organizations throughout Southern California, combining his entrepreneurial success with a commitment to community impact.

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FRB is an entrepreneurial law firm that believes great results begin with great relationships.

We understand the unique demands of running a business, and our services go beyond standard legal advice. We partner with our clients, helping them navigate their industries with insights born from experience, driving success as if it were our own.

We empower clients to tap into our cross-departmental capabilities and network of professional relationships. This collaborative approach works because **your success defines ours.**



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Planning with Purpose: A More Thoughtful Approach to Succession and Legacy

Orange County has long been defined by people who build with intention – families who grow businesses over decades, individuals who turn opportunity into impact, and leaders who think not only about success today, but about what their success will mean tomorrow.

In conversations with clients across the region, one theme comes up again and again: the desire to make smart, confident decisions about the future without losing sight of what matters most. Succession planning, along with tax and estate planning, is often at the center of those discussions. Not because change is imminent, but because clarity brings peace of mind.

In many cases, the most meaningful planning conversations begin before there is a clear need to act. They start with simple questions: What does success look like over the long term? How should wealth support family members, both today and in the future? What role should it play in the community? These discussions often uncover priorities that extend well beyond financial outcomes, shaping how decisions are made across generations. By taking the time to define those priorities early, individuals and families are better positioned to create plans that reflect not only their assets, but their intentions – ensuring that future decisions remain anchored in what matters most, even as circumstances evolve.

Thoughtful planning conversations are deeply personal. They touch on family dynamics, long-held values, and the responsibility that comes with wealth. For many, succession planning isn't simply about transferring assets or formalizing documents. It's about stewardship – ensuring that what has been built is protected, positioned thoughtfully, and aligned with a broader vision for the future.

Increasingly, that vision must account for both opportunity and uncertainty. Business owners and families are navigating a landscape shaped by evolving tax policy, shifting market conditions and more complex asset structures. At the same time, generational perspectives are changing – often bringing new priorities around philanthropy, sustainability and purpose-driven investing. A well-considered plan should be flexible enough to adapt, while still providing a stable foundation to guide decisions over time.

Tax and estate planning play a critical role in that picture, but they are most effective when they are part of something larger. Market conditions evolve. Tax laws change. Families grow and priorities shift. A plan designed in isolation, or revisited only occasionally, can quickly fall out of alignment with real life.

At U.S. Bank, we view planning as an ongoing process, grounded in integration. Investment management, trust and estate services, banking, lending and business advisory expertise are most powerful when they work together. This cohesive approach enables clients to see how decisions in one area affect outcomes in another – and to move forward with greater confidence and control.

Planning also creates continuity. When it is coordinated across disciplines, transitions tend to be smoother, even when they're unexpected. Families and leadership teams have a clearer understanding of roles, responsibilities and intended outcomes. That alignment can help reduce friction at critical moments and preserve both financial and personal relationships.

Technology helps bring that integration to life. Sophisticated planning tools allow us to model scenarios, evaluate options and adjust strategies as circumstances change. But technology alone isn't the answer.

What matters most is how those tools are paired with experienced advisors who understand not just the numbers, but the people behind them.

Here in Orange County, that often means helping clients navigate

multigenerational planning, philanthropic goals, or the future of a closely held business. It may involve preparing heirs with education and guidance, facilitating conversations across generations, or structuring a legacy that supports both family and community for years to come. In every case, the goal is the same: to simplify complexity and help clients make decisions they feel good about – today and tomorrow.

It can also mean thinking beyond traditional definitions of succession. For some, that includes transitioning leadership while maintaining ownership. For others, it may involve exploring liquidity strategies, charitable planning or long-term governance structures. There is rarely a one-size-fits-all approach, which is why thoughtful planning begins with listening – and evolves with intention.

Another common planning theme is the desire for alignment – across family members, advisor groups, and different aspects of a financial life that can often feel fragmented. When those elements come together with clarity and purpose, planning becomes less about complexity and more about confidence. Decisions can be made with a clearer understanding of long-term implications, and with greater reassurance that every part of a strategy is working toward the same goals. That level of coordination doesn't happen by chance. It's the result of thoughtful, consistent planning that keeps pace with both opportunity and change.

True wealth planning isn't about reacting to life's transitions. It's about anticipating them, with care and intention. When planning is done well, it creates freedom – the freedom to focus on opportunities, relationships and experiences, knowing the foundation is secure.

The most rewarding part of my work is watching individuals and families gain that sense of clarity. They aren't looking for products. They're looking for perspective, continuity and a trusted team that can help connect the dots as their lives evolve.

For those who are thinking about how their wealth, business and legacy intersect, now is often the right time to begin, or revisit the conversation. Not because there is urgency, but because thoughtful planning creates options – and options create confidence.

Min Yoo is a Managing Director and Senior Wealth Strategist with U.S. Bank.

Min Yoo SVP

Managing Director, Senior Wealth Strategist

As a Senior Wealth Strategist, Min works with high net worth individuals and their businesses to design strategies that build, sustain and transfer wealth based on their distinct priorities. Min has significant experience working with business owners and investors to structure and implement business succession strategies, plan for liquidity needs and consults with clients on issues related to income and estate taxation, philanthropy and family legacy.

Min began his career in the banking and financial services industry in 1997. Prior to joining U.S. Bank Private Wealth Management, Min worked as a Senior Wealth Strategist at MUFG Union Bank and as a Manager in the Personal Financial Planning group with KPMG LLP. Min resides in San Fernando Valley. When he's not at work, he enjoys spending time with family and traveling.



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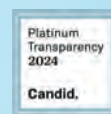


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California Business Divorce Blog: Navigating Legal Conflicts of Interest in a Business Divorce: A Guide for Business Owners

Author: Jason Anderson, Partner

Disputes between business owners are not uncommon. Although many are resolved amicably, some escalate to a business divorce. In such a case, a lawyer is critical to helping a business owner navigate the legal issues involved. However, a business divorce can easily trigger legal conflicts of interest that could prevent a lawyer from representing a business owner in that dispute. Business owners should be aware of these potential conflicts and understand the importance of having separate legal counsel for each key constituent of the business.

This post provides an overview of common conflicts issues that can emerge during a business divorce. It also offers best practices for business owners to address these challenges so they can retain the lawyer of their choice.

The Rules and Relevance of Legal Conflicts of Interest in a Business Divorce

In a business divorce, it is not uncommon for a business owner to want to hire an attorney who has already represented the company or its owners. However, a lawyer owes ethical duties to each current and former client, and a legal conflict of interest can arise if that lawyer currently or previously represented the company or other owners who are involved in the dispute.

These potential conflicts are addressed in the California Rules of Professional Conduct, which are binding ethics rules for all lawyers practicing in this state. The Rules are intended to protect the integrity of the legal system, enhance the administration of justice, and promote confidence in the legal profession. Rules 1.7 and 1.9 in particular address some common legal conflicts of interest that can arise in a business divorce.

Rule 1.7 prohibits a lawyer from representing a client who is adverse to another client, unless both clients consent. That rule also prohibits a lawyer from representing a client if there is a significant risk that the representation will be materially affected by the lawyer's responsibilities to or relationships with other clients or persons, or by the lawyer's own interests, unless the client consents.

Similarly, Rule 1.9 prohibits a lawyer from representing a client adverse to a former client in a substantially related matter, unless the former client consents.

Examples

No business owner wants to contemplate the various complexities of a business divorce, let alone the applicable legal ethics rules. But it is important to understand that, should you ever find yourself in a business divorce, legal conflicts of interest could prevent you from hiring the lawyer of your choice. The following examples illustrate some key conflicts that could emerge during this process:



Jason Anderson

1. The lawyer represents the owners: A lawyer owes a duty of loyalty to each current client. If the lawyer you want to hire for a business divorce already represents some or all of the owners, that lawyer cannot represent you against those owners without their consent, which is extremely unlikely in litigation.

2. The lawyer represents the company: When a lawyer represents a company, his or her primary duty is to the company, not to the individual owners. If the lawyer you want to hire for a business divorce already represents the company, he or she cannot represent you against the company without its consent. This is true even if you were the person who hired that lawyer to represent the company in the first place.

3. The lawyer previously represented the company or its owners: For each former client, a lawyer has duties of confidentiality and to not be adverse to the former client in any matter related to the prior representation. If the lawyer you want to hire for a business divorce previously represented the company or the other owners, that lawyer probably cannot represent you against them without their consent. Again, such consent is extremely unlikely in litigation.

4. Withdrawal and referral: In some situations, an ethical conflict may not only prevent your preferred lawyer from representing you, it may also require that lawyer to withdraw from his or her current representation of the company or its owners. This would require the company and possibly the owners to obtain new counsel, which would cost both time and money.

Best Practices for Business Owners

As a business owner who may be faced with a business divorce at some point, it is crucial to be proactive so you may engage the lawyer of your choice. The following best practices will help you to mitigate potential legal conflicts of interest and harm to the business:

1. Ask your current legal counsel about potential conflicts of interest. For example, discuss any concerns you have about sharing sensitive information with your lawyer, and his or her ability to represent you in a dispute, if he or she also represents the company or your co-owners.

2. Engage your own attorney if your interests appear to differ significantly from those of the company or your co-owners, particularly in situations involving personal assets, financial disagreements, or differing visions for the company's future.

3. Prioritize the best interests of the company when making decisions regarding the business divorce. Consider the long-term consequences of your choices and how they may impact the company's operations, reputation, and stakeholders.

4. Adhere to corporate governance principles to protect the integrity of the company during the dispute. This includes respecting the roles of the board of directors, management, and other stakeholders in making decisions and resolving conflicts.

Conclusion

Recognizing potential legal conflicts of interest is essential to ensuring you can hire the lawyer of your choice if a business divorce occurs. Business owners should proactively avoid such conflicts by seeking legal advice and maintaining open communication with their counsel. In so doing, business owners can successfully manage the challenges of a business dispute while preserving the long-term success and stability of their enterprise.



Banking Built for the West: Customers Bank Understands the Business of Family

Orange County has long been a hub for innovation, enterprise, and ambition. But behind many of its most enduring businesses is something more personal than a balance sheet — a family legacy. Generations of founders, operators, and visionaries who built something from the ground up with the drive to make it last. These are the customers Customers Bank was built to serve.

As proud sponsor of the Orange County Business Journal's Family-Owned Business issue, Customers Bank celebrates the entrepreneurs who bring both heart and hustle to everything they build. Family-owned businesses are the backbone of this region's economy, and they deserve a banking partner who understands the unique pressures and possibilities that come with running a business where the stakes are deeply personal.

A Bank That Evolves With You

Family businesses face a distinct set of challenges: succession planning, generational transitions, and the need to modernize without losing what makes the business special. Customers Bank moves alongside its customers, leveraging new technologies to strengthen relationships and create seamless experiences, while never losing the human touch that family businesses value most. With over \$25 billion in assets and a ranking among the 90 largest bank holding companies in the U.S., we bring the stability of a major financial institution paired with the agility and personal attention that family-owned businesses need to grow and thrive across generations.

A Banker Who Knows Your Business

Family business owners don't have time to repeat their story to a new representative every time they call. Customers Bank's single point of contact model eliminates that friction. Each customer works with one dedicated, experienced banker who knows their business, understands their goals, and delivers solutions built around their specific aspirations. No handoffs. No runarounds. Just a committed partner who shows up and follows through.

Built for What's Next

The most successful family businesses never stop looking forward. Neither does Customers Bank. Our capabilities span banking, lending, and treasury management, supporting customers at every stage from first-generation startups to multi-generational enterprises preparing for what comes next.

Orange County's family business community deserves a bank with a long-term view, a commitment to personalized service, and the expertise to back it up.

Banking built by entrepreneurs, for entrepreneurs.

To connect with a Customers Bank banker in Orange County, visit customersbank.com/oc.

Danielle Suakjian

Danielle Suakjian is a Senior Vice President and Group Director at Customers Bank with more than 25 years of experience supporting mid-sized and large businesses. She partners with customers to deliver integrated credit and liquidity strategies tailored to companies with \$10 million to \$250 million in revenue. Known for her relationship-driven approach, Danielle serves as a trusted advisor, helping customers grow with confidence and stability. She previously held leadership roles at Signature Bank, City National Bank, and Bank of America, managing complex portfolios and driving results through collaboration. Danielle holds a BBA in Marketing from California State University, Fullerton and is based in Newport Beach.



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FBT Gibbons Wealth Planning & Family Office

FBT Gibbons advises high-net-worth individuals, multigenerational families, and closely held business owners across the full spectrum of wealth planning. The firm's approach is grounded in helping clients make informed decisions about how their wealth is structured, protected, and transferred — in a way that reflects both financial goals and family priorities.

The firm's Wealth Planning and Family Office practices are designed to provide comprehensive, tailored solutions for preserving wealth across generations. FBT Gibbons offers strategic guidance on estate planning, tax efficiency, and business structuring, with a focus on ensuring those plans remain durable and aligned with each client's evolving objectives over time.

FBT Gibbons works closely with family businesses and their broader advisory teams, recognizing that legal decisions are often intertwined with business and personal considerations. Whether supporting growth, preparing for a liquidity event, or planning for succession, the firm emphasizes practical, coordinated advice. Across matters, the focus remains on discretion, clarity, and long-term stability.

Core Capabilities

Estate & Succession Planning

FBT Gibbons designs and implements estate planning strategies that balance tax efficiency with control and flexibility. The firm advises on trusts, family entities, and other wealth transfer structures tailored to each client's circumstances. For business owners, succession planning is approached as both a legal and operational priority, supporting continuity while minimizing disruption. The firm also guides clients and fiduciaries through probate and trust administration, addressing complex legal and tax considerations with precision.

Outside General Counsel Services

Through its Outside General Counsel model, FBT Gibbons serves as a consistent legal partner to closely held businesses and family enterprises. The firm advises on corporate governance, contracts, employment matters, and compliance, providing practical guidance that supports both day-to-day operations and long-term planning.

Mergers & Acquisitions

FBT Gibbons advises on acquisitions, divestitures, and other liquidity events, with careful attention to how each transaction fits within a client's broader financial and legacy goals. The firm integrates tax planning, deal structuring, and wealth transfer considerations to deliver a coordinated approach across complex transactions.

Real Estate & Charitable Planning

FBT Gibbons counsels clients on the acquisition, management, and transfer of real estate assets, including structuring, financing, leasing, and 1031 exchanges. The firm also advises on intergenerational transfers of real estate holdings, helping preserve value while managing tax exposure. In addition, FBT Gibbons works with clients to structure charitable giving strategies, including foundations and trusts, aligned with long-term philanthropic objectives.

Across all areas, FBT Gibbons brings a steady, business-minded approach to complex planning decisions. The firm's focus is not only on implementing effective structures, but on helping clients navigate change, manage risk, and plan confidently for the future.



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CONGRATULATIONS TO THE ALBERT AND MIAAD BUSHALA FAMILY ON THEIR 2026 NOMINATION FOR THE OCBJ FAMILY OWNED BUSINESS AWARD!



The Albert and Miaad Bushala Family – Expanding opportunity. Strengthening communities.

Rooted in the work ethic of a Lebanese immigrant father and the entrepreneurial spirit of a Chaldean refugee family, Albert and Miaad Bushala have built more than a successful business. They have created a legacy defined by generosity, resilience, and purpose.

For nearly 30 years, the Bushala family has grown a diverse real estate and hospitality portfolio across Southern California and Nevada, earning national recognition along the way. Their achievements include an ARCO station named “Best of 2025” by Business Rate and an RV resort consistently ranked among the nation’s finest for more than two decades.

Yet their most meaningful investments have always been in people and community.

The Bushalas were recognized as *Builders of Berkeley* for contributing more than \$1 million in lifetime giving to UC Berkeley’s Haas School of Business and Department of Music. Their philanthropic support also extends to the Orange County School of the Arts, Chapman University’s Argyros School of Business and Economics, the Hall-Musco Conservatory, Dodge College of Film and Media Arts, and the GRAMMY Museum. These institutions are helping shape the next generation of artists, entrepreneurs, and leaders.

Today, the Albert and Miaad Bushala Family are bringing that same vision to Fullerton, where they are developing a new community events space designed to bring together music, creativity, and connection. It is a direct reinvestment in the region that helped shape their story.

Their two children, both first-generation college graduates, have joined the family enterprise, helping ensure that the family’s values of grit, integrity, and generosity continue for generations to come.

Orange County helped shape the Bushala family. Now they are helping shape its future.

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ALBERT AND MIAAD
BUSHALA FAMILY

2026 FAMILY-OWNED BUSINESS AWARD NOMINEES

Aeronet, Irvine

Mark Pereira, CEO
Diana Pereira, Owner
Alex Pereira, Owner

Aeronet Worldwide's story begins with the entrepreneurial journey of its founder, Anthony "Tony" Pereira, who grew up in the Azores Islands of Portugal with two dreams: airplanes and living in America. In 1956, Pereira came to the United States on a student visa to study aeronautics, arriving with only \$100 in his pocket and a determination to build a better future. He was accepted to California Polytechnic State University in San Luis Obispo to study aeronautical engineering. Although his career took a path, the experience helped shape the determination and work ethic that would later define his entrepreneurial success. After gaining experience in the transportation and logistics industry, Pereira founded Aeronet Worldwide in 1982 in Southern California. What began as a small entrepreneurial venture built on hard work, customer service, and relationships grew into a respected global logistics provider. Founder Tony Pereira passed away in recent years, leaving behind an enduring legacy of entrepreneurship, resilience, and family leadership. Today, Aeronet continues as a multi-generational family enterprise led by the next generation of leadership, including Mark Pereira as Chief Executive Officer, who guides the company's strategic direction and continued growth. In 2026, Aeronet celebrated its 44th anniversary, marking four decades of growth from a small start-up into a globally recognized logistics company while remaining firmly rooted in Orange County.

**Albert and Miaad Bushala Family, Fullerton**

Albert & Miaad Bushala, Owners
Albert G. Bushala, VP
Miaad M. Bushala, VP

Albert and Miaad Bushala are accomplished business leaders, real estate investors and developers, and philanthropists whose work is anchored in the values of integrity, gratitude, and community. Albert, a Southern California native and son of a Lebanese immigrant father, built his real estate foundation working alongside his family before launching his own enterprise across commercial and hospitality ventures. Miaad, a Chaldean immigrant from Iraq and one of eight daughters in a refugee family, launched her first business at 22, embodying the entrepreneurial spirit at the heart of the American dream. Together, they have built a diverse portfolio spanning real estate management, commercial and industrial development, as well as service-based ventures across Southern California and Nevada. Their enterprise continues to grow through new community development projects in Orange County and beyond. Guided by a belief that business success and generous giving are synergistic, the family is deeply committed to expanding access to education, creativity, and opportunity. Albert and Miaad's two children now work alongside them, ensuring the family's philanthropic legacy endures for generations to come.

**America West Properties, Inc., Lake Forest**

Eric Strauss, Principal & Owner
Scott Fraser, Principal & Owner

Since its founding, America West Properties has been at the forefront of innovative property management, expertly serving institutional and private investment clients across 4.5 million square feet of retail, industrial, office, and medical/dental properties. America West Properties prides itself on building strong relationships with their clients and leveraging cutting-edge technology to make informed, strategic decisions that align with client's goals. Their commitment to enhancing property value is matched only by their dedication to exceptional customer service for tenants, owners, and vendors alike. Their mission is simple: to maximize property values while minimizing operational costs. They achieve this through effective tenant retention, leasing programs, and a hands-on management approach that keeps occupancy levels high.

**Apex Golf Carts, Laguna Hills**

Ryan Moeller, General Manager
Jessica Moeller, CEO

Founded in 2012, Apex Golf Carts is a family-owned golf cart dealership and service provider based in Orange County, California. The company specializes in the sales, rentals, service, and customization of high-quality golf carts for residential communities and commercial clients. Since its founding, Apex Golf Carts has grown from a small local operation into a trusted regional provider known for its customer service, reliability, and industry expertise. Over the years, the company has expanded its inventory, service capabilities, and delivery reach while maintaining a strong reputation for personalized service and long-term customer relationships. Apex Golf Carts supports both individual owners and large community or event needs, providing flexible rental options, maintenance programs, and tailored cart solutions. Through steady growth and a commitment to quality, Apex Golf Carts has built a loyal customer base throughout Southern California. The company's continued success reflects its dedication to innovation, responsive service, and providing dependable mobility solutions for a wide range of clients and communities.

**Arborland Montessori, Fullerton**

Veronica Chen, Principal
Sueling Chen, Founder

The goal of the Montessori school is to maximize children's potential by providing dedicated teachers, hands-on materials, personalized curriculum, and life-long study skills to cultivate children's intellectual, physical, and social development in a safe and loving environment. We celebrate our dedication to the children, we applaud the support of the parents, and we continue with an eagerness to adapt and move forward with the times all while retaining the profound philosophy of Dr. Maria Montessori. Arborland had grown into a bustling campus with three primary and three elementary classrooms and a waiting list. In subsequent years, many students have graduated from Arborland and gone on to take leadership roles and attend honors classes throughout junior high and high school. Montessori is about educating the entire person. It creates the opportunity for the student not only to excel academically but to excel culturally and socially. At Arborland, 100 percent of its alumni attend college, and many of them have graduated from prestigious universities around the nation.

**Art Lewin Bespoke, Newport Beach**

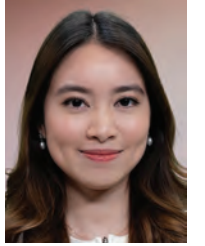
Art Lewin, President
Jamie Lewin, Client Relations
Christian Lewin, Assistant Client Relations

Art Lewin is a bespoke clothier with over 35 years of experience and serves as owner, CEO & creative director of Art Lewin Bespoke Clothiers, the leading custom clothier in the country. Lewin and his team plan, coordinate and maintain clients' wardrobes for them so they are perfectly attired for any occasion. For over three decades, Art Lewin Bespoke has catered to corporate stars and to some of Hollywood's leading celebrities and many other industry titans. As a second-generation clothier, Lewin has explained that his clients tell him and his team that their workmanship, knowledge, attention to detail and service make it readily apparent why they have been able to establish such a loyal following – with an impressive 94% retention rate, no less. Meanwhile, Lewin has donated for the past ten years more than \$1 million to the Salvation Army and other nonprofits in the LA area.

**Bake and Chè, Garden Grove**

Christine Nguyen, Business Owner & Co-Founder
Vinh Pham, Accountant
Huong Nguyen, Che

Bake & Chè began with humble roots in the home kitchen of a family of three: Vietnamese entrepreneur Christine Nguyen, her brother Vinh Pham, and the culinary craft of their immigrant mother, Huong Nguyen. Together, they shared a vision of preserving and elevating chè—a vibrant traditional Vietnamese confectionery desserts—while introducing its authentic flavors to broader communities. Specializing in traditional Vietnamese desserts known as chè, a variety of sweet beverages and puddings, Bake & Chè creates treats made from fresh, locally sourced combinations of beans, tropical fruits, jellies, and coconut milk—ingredients that represent authentic Vietnamese culinary flavors. Since opening its first storefront in 2023, Bake & Chè has experienced remarkable growth. What began as a small family operation quickly expanded into a thriving enterprise employing nearly 100 team members across three locations in Orange County and Los Angeles County. Today, Bake & Chè is recognized as Southern California's first modern Vietnamese dessert bakery, earning regional media recognition, collaborating with Starlux Airlines, attracting international franchising interest, and exploring opportunities in importing and manufacturing industries.

**Bellabu Bear, Costa Mesa**

Tamara Kaakani, Founder & CEO
Talal Kaakani, Co-Founder

Tamara Kaakani is the Founder of Bellabu Bear, a fast-growing children's apparel brand known for its ultra-soft bamboo sleepwear designed for babies and children with sensitive skin. The company was inspired by her daughter Bella's struggle with eczema, which led Kaakani to develop pajamas that were exceptionally gentle on delicate skin while also being thoughtfully designed for everyday comfort and convenience. Under Kaakani's leadership, Bellabu Bear has grown into a nationally recognized brand known for its innovative Convertible Footie, a patent-pending design that functions as both a footie and a romper. The brand has expanded through its direct-to-consumer platform, retail partnerships, and licensed collaborations with major entertainment companies. Bellabu Bear has earned the Seal of Acceptance from the National Eczema Association and was recognized on the Inc. 5000 list of America's fastest-growing private companies. Kaakani remains deeply committed to building products that help families live and sleep more comfortably while also supporting initiatives that benefit children and families in her community.

**Bryson Financial, Long Beach**

Trent Bryson, President & CEO
Rick Bryson, Founder
Alexa Bryson, Associate

Bryson Financial is a multi-generational, family-owned advisory firm built on a foundation of trust, discipline, and community impact. Established in 1969, the firm was led by the late Rick Bryson and is now guided by CEO Trent Bryson, continuing its legacy from Long Beach into a growing Southern California presence. Bryson Financial delivers strategic solutions across wealth management, insurance planning, risk management, 401(k) strategy, captives, employee benefits, and property and casualty coverage. The firm is particularly recognized for its work in the private equity sector, partnering with firms and portfolio companies to drive structure, efficiency, and long-term value. Beyond business, Bryson Financial has long been committed to giving back. The firm actively supports organizations such as the Long Beach Boys & Girls Club and Ronald McDonald House, reflecting its dedication to youth, families, and community well-being. Rick and Trent Bryson were both honored as Entrepreneurs of the Year by the Long Beach Chamber of Commerce, underscoring their leadership and local impact. With its expansion into Newport Beach, Bryson Financial continues to grow its legacy blending performance with purpose.

**Burkhart Bros Construction, Tustin**

Bryan Burkhart, Founder & President
Mark Burkhart, Founder & CFO
Jennifer Burkhart, Director of Operations

Founded in 2007, Burkhart Brothers Construction has established itself as one of Southern California's premier builders of luxury coastal residences and dynamic renovations. Led by brothers Bryan and Mark Burkhart, both USC alumni and Newport Beach natives, the family-owned firm is grounded in integrity, craftsmanship, and forward-thinking innovation.

Over the years, Burkhart Brothers has delivered some of the region's most architecturally significant homes, collaborating with renowned architects and designers including Paul McClean, Brion Jeannette, Rona Graff, Jeffrey Maynard, and Drew D'Angelo. Their most recent work has been featured in Architectural Digest, spotlighting standout residences for NFL legend Derek Carr and local legend Newport Beach Mayor Joe Stapleton. The firm has earned national recognition as the featured builder and winner on HGTV's The Flip Off, starring Tarek El Moussa, Heather El Moussa, and Christina Haack. In 2025 alone, Burkhart Brothers completed more than 25 homes, while also hosting Michelin-star chef dinners and widely attended industry panels at their stunning headquarters.





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C&C Development, Tustin

*Barry & Todd Cottle, Principals
Scott Cottle, Construction Manager*

C&C Development is a solutions-focused affordable housing developer founded in 2003 by Barry and Todd Cottle to create and preserve high-quality communities for families and seniors. The firm has developed more than 40 communities across Southern California totaling over 3,000 units of much-needed affordable housing. C&C's healthy, safe, and attractive housing strengthens individuals, families, neighborhoods, and the cities they serve. A significant advantage for C&C is an integrated structure, which includes in-house general contracting and property management, which allows C&C to control costs, maintain high development standards, and incorporate durable, sustainable materials to preserve long-term value that benefits residents and surrounding neighborhoods. This differentiation is why the firm is considered an important partner in helping cities and developers meet their affordable housing production and redevelopment goals through new construction, adaptive reuse of underutilized properties, and the rehabilitation of existing communities.

**C3 Tech, Santa Ana**

*Tricia Sanchez, Founder
Samantha Sanchez
Tony Sanchez*

Tricia Sanchez is the President and Co-Founder of C3 Tech, a family-owned technology solutions provider headquartered in Santa Ana, California. Fifteen years ago, Sanchez started the company from the ground up while raising three children, driven by a belief that a technology partner should be both highly responsive and deeply rooted in the local community. Under her leadership, C3 Tech has grown into a trusted regional provider known for personalized service, long-standing customer relationships, and a commitment to supporting the organizations that make Orange County thrive. Sanchez has always prioritized community impact alongside business growth, supporting local nonprofits and other charitable initiatives that strengthen families and children in the region. As the company continues to grow, Sanchez is guiding the next generation of leadership. Her daughter, Samantha Sanchez, recently joined the business following the completion of her MBA at the University of Southern California. Together, they are expanding C3 Tech's services while continuing the family tradition of personalized, locally rooted service.

**Chamberlain Backhoe Service, Placentia**

*Nick Long, Director of Operations
Anthony Long, CEO
Tyler Long, Fleet Manager
Jordan Long, Lead Operator*

Chamberlain Backhoe Service is a third generation, family-owned business that serves Southern California in the excavation industry. CBS has experienced exponential growth in the past five years, consistently increasing in revenue and employee count. CBS has been listed on Orange County Business Journal's Fastest Growing Private Company's for the past three years. CBS supports Stripes of a Warrior which helps individuals fight cancer financially. CBS also sponsors East Fullerton Little League Baseball, Yorba Linda Pop Warner Football, and Friends Community Church.

**Chups Mom2Mom Meals, Anaheim**

*Sami Skoruz, CEO & Co-Founder
Jeeva Skoruz, COO & Co-Founder
Raja Skoruz, Co-Founder & Head of Micro-operator in China
Mrs. Sami Skoruz, Customer Service Support for Meal Passes
Fourth brother of Sami located in India, Handles Chups.com website & app*

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

**Diversified Waterscapes Inc., Laguna Niguel**

*Patrick and Maria Simmsgeiger, Founder, CEO & COO
Grandfather (Patrick's dad), created the first product
Alexandria Simmsgeiger, (2010-2020) Sales and Administrative
Morgan Simmsgeiger, (2006-2012) Sales and Tradeshows
(2020-current) Operations & Marketing*

Diversified Waterscapes, Inc. is an Orange County-based aquatic ecosystem management company founded in 1987 by Power Couple Patrick Simmsgeiger and his wife and business partner, Maria Simmsgeiger. The company provides restoration, maintenance, and consulting services for man-made lakes, ponds, waterfalls, and water features serving golf courses, municipalities, parks, and residential communities. Diversified Waterscapes employs a specialized team operating throughout Southern California and supports a wide range of public and private clients responsible for maintaining highly visible water features. In addition to field services, the company develops and manufactures proprietary aquatic treatment products designed to improve water quality and maintain balanced aquatic ecosystems. Over nearly four decades, the company has earned a strong reputation for solving complex water quality challenges through a combination of scientific expertise, environmentally responsible treatment solutions, and practical field experience. Under Patrick and Maria's leadership, Diversified Waterscapes has grown into a multi-million-dollar family-owned business recognized for its technical expertise, innovative products, and long-standing client relationships throughout the region.

**e360, Irvine**

*Mike Strohl, CEO
Matt General, COO*

e360 is more than a company; it's a community. This sense of family isn't just because it started as one. It's also because of its long-standing team members, some with over two decades of dedication, and our commitment to e360's clients. Today, e360 has more than 200 employees and is a trusted advisor to prominent healthcare, financial services, entertainment, education, and public sector organizations across the U.S., assisting these clients in achieving their business goals through the delivery of essential technology, services, and solutions in AI, Cybersecurity, Digital Workplace, Modern Infrastructure, Cloud Solutions, and Managed Services. In 2025, e360 was named Citrix's partner of the year for the ninth time in the history of its decades-long relationship. Over the years, the company has also been recognized as a "Partner of the Year" by Cisco, Google Cloud, HPE, Microsoft, and NetApp, among others.

**Easton & Easton, Costa Mesa**

*Easton Family, Family of Personal Injury Attorneys
Rae Easton (Retired), Office Manager
Kristy Wieser, Office Manager
Jordan Wieser, Accounting Assistant
Dee Jones, Manager of the Demand Writing Dept.
Stan Ernest, Manager of the Lien Negotiating Dept.*

Easton & Easton, LLP has grown into a leading California personal injury firm grounded in family values, deep community engagement, and exceptional legal results. Co-managed by brothers Matthew Easton, Travis Easton, and Brian Easton, the firm combines decades of trial experience with a collaborative, client-first approach. Under their leadership, the firm has recovered hundreds of millions for injured clients, with recent landmark settlements including \$32 million and \$26 million policy-limit recoveries selected among California's top verdicts and settlements, as well as significant multimillion-dollar outcomes in 2025. In addition to legal excellence, Easton & Easton serves as the official team attorneys for the Anaheim Ducks and the Los Angeles Angels, reflecting strong community trust. Beyond the firm, Matthew and Travis take pride in giving back to Orange County by coaching baseball for their sons' teams, embodying the firm's commitment to mentorship, teamwork, and community involvement.

**Economos DeWolf, Newport Beach**

*Steve Economos, Co-Founder
Geoff DeWolf, Co-Founder
Matt Economos, Associate
David Economos, Associate*

Economos DeWolf is a Newport Beach-based commercial real estate firm led by Co-Founders Steve Economos and Geoff DeWolf, alongside second-generation team members Matt and David Economos. Founded in 2017, the family-led firm serves clients across Orange County with a specialized focus on investment sales, owner-user representation and strategic advisory across office, industrial, medical, coastal, and land assets. Together, the four-person team combines relationship-driven service with deep market knowledge, analytical rigor and a long-standing commitment to the Orange County business community. Economos DeWolf brings more than 50 years of combined experience and more than 500 sales totaling \$1.5 billion. Recent growth includes the addition of David and Matt Economos within the past three years, and 24 buildings sold across 2024 and 2025. Notable milestones include 15 buildings sold in 2022 despite pandemic-era workplace shifts and rapidly rising interest rates, as well as the firm's distinction as the only Orange County-based brokerage specializing in the sale of office buildings.

**Elite Connections International, Newport Beach**

*Sherri Murphy, President & Founder
Tammi Pickle, Vice President & VIP Matchmaker*

Sherri Murphy runs Elite Connections International with her daughter, Tammi Pickle, who is the Vice President of the company and a highly experienced professional matchmaker who has spent more than 25 years helping exceptional singles find meaningful, lasting relationships. As part of a family-founded matchmaking company, Pickle has dedicated her career to working closely with successful professionals, offering personalized guidance and thoughtful introductions designed to lead to long-term partnerships. Elite Connections International is a boutique, full-service firm supported by a hand-selected team of professional matchmakers, relationship coaches, image consultants, and photographers. The agency serves clients across Orange County, LA, San Diego, the Bay Area, Chicago, NYC, Florida, and international markets. It maintains an A+ rating with the Better Business Bureau and has facilitated thousands of successful matches leading to engagements, marriages, and families. Under Murphy and Pickle's guidance, Elite Connections has achieved consistent growth while upholding unparalleled standards of discretion and personalized compatibility. Their human-centered approach has made the firm the trusted partner for time-poor, high-net-worth individuals seeking meaningful connections beyond traditional dating.

**ENO Brands, Cypress**

Kevin Tsao, VP Strategy & Sustainability

We are ENO Brands - a premium jewelry manufacturing solution dedicated to mastering the art of jewelry craftsmanship. ENO is a creative expression of the word ONE. It is founded on the belief that true craftsmanship and partnership means being ONE with the process, inside and out, forwards and backwards. Starting from humble beginnings selling at a local swap meet, the Tsao family has grown the business to a multi-continent operation that manufactures jewelry for many of the leading costume jewelry brands, such as Kate Spade.

**Farmers and Merchants Trust Company, Laguna Hills**

*Christine Walker-Bowman, Executive Vice President & Chief Operating Officer
Daniel Walker, Chair & President*

Farmers and Merchants Trust Company (FMTC) is a privately held wealth management firm providing trust administration, investment management, and fiduciary services to individuals, families, and nonprofit organizations. Founded in 1920 in Long Beach, California, FMTC is the oldest continuously operating state-chartered trust company in California and has maintained a longstanding reputation for stability, integrity, and personalized financial service. Today, the





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firm manages approximately \$6.5 billion in assets under management and offers a comprehensive range of services, including personal trust administration, estate settlement, charitable trust management, and professional investment management. FMTC works closely with clients to support long-term financial planning, wealth preservation, and intergenerational asset management. With more than a century of experience, FMTC continues to build on its legacy through strategic leadership and thoughtful growth while maintaining a client-focused approach. The firm's experienced team of professionals remains dedicated to providing fiduciary expertise and personalized guidance to help clients navigate complex financial decisions and protect their financial futures.

Go Rentals, Newport Beach

Kaye and Kavous Gitibin, Co-Founders

Go Rentals is a family-owned company founded in 1995 by two immigrant brothers in Newport Beach. Their vision was to create hospitality on wheels, serving HNW clients with seamless car rental experiences that had never existed before. With over 300 locations across the country, Go Rentals is the only company in 75 years to be awarded Forbes Travel Guide Elite car rental company in the world. The company began with seven vehicles in a 700-square-foot office across from JWA and has since grown into a national leader in luxury car rentals. Go Rentals is also the only car rental company in the world awarded the Safety First designation by the National Air Transportation Association (NATA). Its highly trained team members can deliver rental vehicles directly on the tarmac at private jet centers nationwide. Specializing in serving the private aviation community, Go Rentals is a proud member of the National Business Aviation Association (NBAA), with its leadership serving on the association's board. Go Rentals is also a proud supporter of Women in Aviation.

**Guardian Storage Centers LLC, Irvine**

John Minar, CEO

Eric Minar, Head of Development & Co-Asset Manager

Claire Minar, Head of Accounting & Co-Asset Manager

Guardians Storage Centers, LLC was formed in 1999 by John Minar. It was the outshoot of an apartment syndication /ownership company and an apartment development company. Guardian currently has 93 employees, both in the main office in Irvine, as well as on the Storage property sites in California, Arizona, and Nevada. Some of the Guardian properties went into forming the NSA REIT (NYSE), of which we were one of the founders. The contributed properties resulted in receiving shares in the REIT. Since exiting the operations part of the REIT in 2024, Guardian has continued to build new storage projects in Arizona and Nevada, and currently operates 50 properties, and continues to build three to four projects per year.

**Harris Spice Company, Anaheim**

Anil Shah, Founder & Co-CEO

Niketa Shah, Controller

Krishna Shah, Marketing Director

Jay Shah, Advisor

Harris Spice Company is a family-owned, minority-owned manufacturer built on a legacy of entrepreneurship, cultural heritage, and a passion for quality. Founded in the 1980s by Jayantil Shah, who set out to bring the highest-quality spices from India to the United States, the company began as a small family venture grounded in integrity and hard work. Today, Harris Spice is led by his son, Anil Shah, continuing the family's vision while guiding the business into its next generation of growth. Proudly operating from its manufacturing facility in Anaheim, California, Harris Spice employs a team of 120 people and sources more than 50 spices from around the world. The company combines responsibly sourced ingredients with environmentally conscious California-based manufacturing and an in-house R&D kitchen that drives innovation in spice processing, seasoning development, and packaging solutions. Serving national food brands, foodservice operators, and retail private label partners, Harris Spice remains rooted in family values—delivering quality, innovation, and stewardship forged over more than 40 years in business.

**Histologics LLC, Anaheim**

Neal Lonky, CEO

Stewart Lonky, Co-Founder

Naomi Lonky, Publishing & Website Development

Nathan Lonky, Quality Control

Histologics LLC was founded in 2010 with the patient care experience in mind in an era of "Value Based Care." Its main founder and inventor of the multi-patented Kylon® fabric brushes, Dr. Neal Lonky, (former Elected Southern California Permanente Medical Group Board Director) successfully proved through evidence-based research the novel sterile, single use, multi patented Kylon® tissue removal brushes and finger-controlled devices allow for a more compassionate biopsy or wound debridement patient experience, allowing for more compliance. This is in contrast to existing devices that are reusable steel instruments that must be processed and may pose cross contamination to the "next" patient. Histologics LLC has transformed cervical biopsy and wound debridement and removed the fear of the procedures, providing a more patient friendly, safe, and compassionate new standard of care. Two million procedures have been done in the USA to date due to this profitable company and thus many lives saved.

**Irvine Art & Music, Irvine**

Gloria Chang, CEO

Howard Chang, Founder

Jennifer Wang, Founder

Gloria Chang is the CEO of Irvine Art & Music, a family-owned business founded by Howard Chang and Jennifer Wang, now celebrating its 25th year serving the Orange County community. Originally established as a music education center, the company has grown to support a diverse population including students, professionals, hobbyists, and a wide range of organizations such as public schools, private schools, charter schools, homeschools, and nonprofit institutions. The retail division of the business was later developed by Joseph Chang, further expanding its impact and reach. As a second-generation leader, Gloria is driving the company into its next phase of evolution, focused on building consistent and sustainable growth while maintaining deep community roots. Her leadership emphasizes educational support, meaningful outcomes, and long-term value for both individuals and organizations served. In addition to leading the business, Gloria is also a practicing nurse practitioner, uniquely bridging healthcare, education, and entrepreneurship. This dual perspective informs her leadership approach, grounded in service,



resilience, and community impact. Gloria has prioritized cultivating a positive and supportive work culture, creating a safe and empowering environment for musicians and educators. As a female entrepreneur and minority business leader, she continues to expand community partnerships and position Irvine Art & Music as a sustainable and evolving model in arts education.

Jerusalem Roastery, Garden Grove

Talab Ibrahim, Co-Founder

Akram Ibrahim, Manager

Mohamad Ibrahim, Business Owner

Based in Garden Grove, California, Jerusalem Roastery was founded in 2024 by the Ibrahim family, an entrepreneurial family with extensive experience in international spices and specialty foods. The family-owned business combines a traditional Middle Eastern spice market with a welcoming café experience, offering customers a unique opportunity to explore authentic flavors and culinary traditions inspired by historic spice markets. In its first year of operation, Jerusalem Roastery has experienced impressive growth, expanding from a two-founder startup into a thriving enterprise with a growing team of employees and a rapidly expanding customer base. Building on the success of its specialty spice offerings, the Ibrahim brothers strategically broadened the concept to include a café featuring handcrafted beverages and desserts, creating a dynamic destination that enhances both customer engagement and overall business performance. A significant milestone in the company's early growth was the family's purchase of the shopping plaza where the business operates, demonstrating their long-term commitment to investment, stability, and future expansion in the community. Since opening, Jerusalem Roastery has attracted visitors from across Orange County who are drawn to its distinctive concept, quality products, and welcoming atmosphere. Through entrepreneurial vision, disciplined growth, and a strong commitment to customer experience, Jerusalem Roastery is quickly establishing itself as one of Southern California's most promising emerging small businesses.

**Jimenez Family Insurance Agency, Garden Grove**

Joe Jimenez, President & CEO

Sandi Jimenez, Vice President

John Jimenez, Broker & Agent

Joseph Jimenez, Broker & Agent

Sylvia Jimenez, Broker & Agent

Adeline Jimenez, Marketing Coordinator

Cecilia Gutierrez, Operations Manager

Joe Jimenez is President of Jimenez Family Insurance Agency, a third-generation family-owned independent insurance brokerage serving individuals, families, and businesses throughout California. With more than four decades of experience in the insurance industry, Jimenez leads the agency with a focus on personalized service, long-term client relationships, and strategic growth. The business was originally founded in 1970 by Jimenez's father-in-law, Edwin Slocomb, as College Student Insurance Service, initially serving the insurance needs of the local college community. Over time, the agency expanded its services to include homeowners, auto, life, and commercial insurance for a broader client base across California. After acquiring the business, Jimenez strengthened carrier partnerships, expanded both personal and commercial lines operations, and modernized the agency's marketing and technology platforms. Today, Jimenez works alongside his wife, Sandi, and several family members as the company prepares for its next phase of leadership with the third generation actively involved in the business. The agency continues to grow while developing specialty programs, including Music Lovers Insurance, serving musicians and live entertainment venues.

**JMAC Lending, Costa Mesa**

Christina Pham, President & Founder

Mai Nguyen, EVP, Operations

Anne Nguyen, SVP, Client Services

Anthony Pham, CFO

Heather Yee, VP, Operations

JMAC Lending represents the strength and resilience of a family-owned business built through the entrepreneurial vision and leadership of Christina Pham and her family. Together, Pham and family has built JMAC Lending into one of the nation's leading third-party origination (TPO) mortgage lenders, serving mortgage professionals and borrowers across the United States. A Woman-and Minority-Owned Business that will celebrate its 30th anniversary next year, JMAC Lending employs approximately 200 professionals nationwide and has originated tens of thousands of mortgage loans across the United States.

**KDA Inc., La Palma**

Karla Dennis, CEO

Kenneth Dennis, Director of Marketing

Kameron Dennis, Client Operations Manager

Karrington Dennis, Senior Tax Accountant

Karla Dennis is the Founder and CEO of KDA Inc., a nationally recognized tax strategy and consulting firm dedicated to helping individuals and businesses reduce taxes and build long-term wealth. Born and raised in Compton, California, Dennis' early life shaped her determination to create a better future for herself and her four sons. Driven by resilience and a deep commitment to family, she worked tirelessly to advance her education and create a company that means so much to not only her sons, but to all the staff as well. Through vision, perseverance, and a passion for helping others succeed financially, Dennis built her firm from the ground up into a nationally respected organization. Today, the company continues to grow as a true family enterprise, with each of her four sons contributing their unique skills and leadership to the business. Together, they have expanded KDA's reach and impact, helping thousands of individuals and entrepreneurs navigate complex tax systems and create lasting financial stability.

**King's Seafood Company, Costa Mesa**

Sam King, CEO

Michael King, Vice President of Real Estate & Development

Stephen King, Special Projects

King's Seafood Company (KSC) is a family-owned restaurant company headquartered in Southern California that operates 23 restaurants across five states under six distinct brands, including King's Fish House, Water Grill, Pier Burger and steakhouses 555 East, Lou & Mickey's and Meat On Ocean. Founded in 1983 by cousins Sam and Jeff King, the company builds on a family restaurant legacy that began in 1945. Today, under the leadership of CEO and Co-Founder Sam King, KSC is known for its product-driven philosophy and disciplined growth strategy. A key





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differentiator is King's Seafood Distribution (KSD), the company's dedicated seafood distribution operation in Santa Ana, which sources, processes and supplies seafood exclusively to its restaurants. This vertically integrated approach allows the company to oversee every step of the process—from sourcing seafood directly from fishermen to preparation and delivery to the plate—reflecting the care, passion and product integrity that define the King's brand. Through this approach, KSC has built a reputation for exceptional product integrity, consistency and hospitality across its portfolio of restaurants.

Love at First Bite Catering, Huntington Beach

John & Stacy LaBrake, Business Owners
Vanessa Gerrie, Operations Director
Cole LaBrake, Baker

Stephanie Gerrie, Human Resources & Scheduling

Love At First Bite Catering is a family-owned company based in Huntington Beach, California, known for creating beautiful, creative events with fresh, made-from-scratch food and genuinely friendly service. With a legacy dating back to 1982, the company has built a reputation for quality, consistency, and making events feel both special and approachable. Today, the next generation of leadership continues to innovate while upholding the standards that have made the business a trusted industry leader for more than four decades. From intimate gatherings and school functions to weddings, corporate events, nonprofit galas, and major sporting events, Love At First Bite has successfully executed thousands of events. The team is especially recognized for delivering high-volume service without compromising quality, including large-scale operations for the US Open of Surfing, AVP Huntington Beach Open, and the Pacific Airshow. At its core is a passionate, collaborative team dedicated to every detail—creating events that feel effortless, memorable, and full of heart.

**MatSing, Irvine**

Leo Matysine, Executive Vice President
Dr. Serguei Matysine, Founder
Michael Matysine, Executive Vice President

MatSing is a privately held, family-owned technology company headquartered in Irvine, California, specializing in advanced RF lens antenna solutions that help mobile network operators increase wireless network capacity and performance. The company established its U.S. operations in Irvine in 2013 and has since grown its Orange County headquarters into the center of its global business operations and engineering leadership. MatSing was founded in 2005 in Singapore by the Matysine family, beginning as a small, engineering-driven operation exploring new approaches to radio frequency design. Early research led to the development of a proprietary lightweight dielectric meta-material in 2006, laying the foundation for the company's breakthrough RF lens antenna architecture. This patented technology differs fundamentally from traditional panel antennas used throughout the telecommunications industry. By generating multiple high-performance beams from a single antenna, MatSing enables operators to increase spectral efficiency, improve coverage, and support significantly more users in dense environments without building new cell sites. Today, MatSing's solutions are deployed globally by major wireless operators, including installations across approximately 70% of NFL stadiums and many of the world's most demanding high-density venues.

**Moorefield Construction, Inc., Santa Ana**

Mike Moorefield, President
Larry Moorefield, Vice President
Hal Moorefield, Vice President
Teri Coffey, Office Manager
Sue Tadevic, Insurance Admin
Cheryl Jackson, Office Administrator
Matt Moorefield, Project Manager
Brandon Moorefield, Project Manager
Allison Scalisi, Project Accountant
Erick Bianchi, Project Manager

Founded in 1957 by Harold Moorefield, Moorefield Construction, Inc. is a multi-generational, family-owned commercial builder now led by his three sons—Mike, Larry, and Hal—and supported by an emerging third generation beginning to take leadership roles. With 106 employees and approximately \$250 million in annual revenue, Moorefield serves the western United States, delivering projects across every market sector. Rather than specializing in one niche, the company prides itself on its ability to build anything while treating every client's investment as if it were its own. In recent years, Moorefield has expanded its footprint with the opening of a new Las Vegas office, completed Universal Studios' new Horror Unleashed attraction, and begun a major casino project with Caesars Entertainment in Northern California. The firm ranks among ENR's Top 46 Contractors in the Northwest and has been named ENR California's #1 Retail Contractor for the past three years. Rooted in long-standing relationships—many exceeding 20 years—Moorefield is guided by a culture where employees, clients, and partners are treated like family, supported by community involvement including Toys for Tots and CNIGA engagement.

**NEP Services, Newport Beach**

Andrew "Drew" Howitt, Founder & Director of Business Development
Stacey Howitt, Chief Executive Officer
Lexi Howitt, Data Entry

Andrew "Drew" Howitt is the Founder and Chairman of NEP Services, a family-owned, Orange County-based technology and strategic communications firm established in 1997. Alongside his wife, Stacey Howitt, Chief Executive Officer, Drew has grown NEP into a nationally recognized leader in fundraising, digital engagement, and advocacy solutions for law enforcement, firefighter organizations, labor groups, and nonprofits across 39 states. Under their joint leadership, NEP has raised over \$80 million for nonprofit partners, primarily first responder foundations and associations, while engaging 350,000 active donors annually through digital fundraising and marketing campaigns. NEP provides web development, SaaS and AI-enabled member communication platforms, digital fundraising tools, and strategic outreach campaign tools designed to strengthen labor and public safety organizations and their communities. What began as a focused fundraising firm has evolved into a full-service, technology-driven enterprise supporting organizations nationwide. Drew and Stacey's long-term vision, entrepreneurial resilience, and commitment to ethical engagement have positioned NEP as a trusted partner. Their leadership exemplifies the core strengths of a family-owned business: stability, integrity, innovation, and sustained community impact.

**Orange County Farm Supply, Orange**

Chris Roy, Co-Owner
Dave Roy, Co-Owner
Claire Roy, CFO
Allison Roy, Accounting
Alice Mishica, Manager

Orange County Farm Supply is a locally owned, family-operated business providing high-quality products for gardeners, landscapers, and agricultural professionals. Established in 1948 and owned by the Roy family since 1962, the company has served the community for over 75 years. Originally founded as a traditional farm supply, the business has evolved to meet the needs of today's market, now serving primarily homeowners and garden enthusiasts while maintaining strong commercial partnerships with clients such as Disneyland, Orange County school districts, and commercial properties. Orange County Farm Supply offers a wide range of products, including soil amendments, organic fertilizers, seeds, compost, mulches, potting soils, tools, and bedding plants. The company is known for its expertise, soil testing services, and strong commitment to organic and environmentally responsible growing practices.

**Peak Financial Group, Irvine**

Chris Robertson, President
Peter Robertson, Founder & CEO
Diana Robertson, CFO

Peak Financial Group is a multigenerational, family run wealth advisory practice led by Peter and Chris Robertson, who together bring more than four decades of experience serving high net worth families, entrepreneurs, and multigenerational households. Peter, a Financial Planner for over 30 years and a Chartered Financial Consultant (ChFC®), built the firm on principles of stewardship, clarity, and long term partnership. His expertise in comprehensive planning, estate strategies, and business succession has shaped Peak's reputation for disciplined, relationship driven guidance. Chris, President of Peak Financial Group, joined the practice in 2019 and has helped modernize and expand the firm's capabilities. A UCLA trained aerospace engineer and former Boeing systems analyst, he brings a uniquely analytical approach to financial planning and investment management. His leadership has earned national recognition, including the 2025 AssetMark Extraordinary Advisor of the Year and 2025 Family Office Specialist of the Year. Together, Peter and Chris guide Peak's strategic vision, delivering sophisticated, tax efficient planning and long term legacy strategies to families nationwide.

**Precision Wallcovering & Painting, San Juan Capistrano**

Allan Horn, President & CEO
Chad Horn, General Manager
Lauren Horn, Special Projects Admin

Founded in 1979 by Allan Horn, Precision Wallcovering & Painting is a premier, third-generation family-owned contractor serving the Southern California region. Headquartered in San Juan Capistrano, the company specializes in high-end residential and large-scale commercial services, including interior and exterior painting, specialty wallcoverings, digital murals, and acoustical fabric systems. Over its almost 50-year history, the firm has expanded from a student-led venture into a mid-sized industry leader with a team of nearly 50 dedicated office and field professionals. Precision's growth is anchored by its reputation for managing complex, time-sensitive projects for over 10,000 clients, including major office complexes, luxury hotels, and senior living facilities like Sunrise of Mission Viejo. A notable milestone includes the company's multiple nomination for the Orange County Business Journal's Family-Owned Business Awards, reflecting its deep community roots. As a PCA-accredited contractor, Precision continues to set industry standards through expert craftsmanship and a commitment to utilizing the latest installation technologies, ensuring its position as a top-tier service provider for both homeowners and elite design firms.

**Primary Freight Services, La Palma**

John Brown, CEO
Kathy Hogan, President
Christopher Figueroa, Director of Domestic
Christina Breier, Senior Procurement Analyst

Primary Freight Services is a U.S.-based, full-service freight forwarder and logistics provider with more than 25 years of experience supporting customers across international and domestic supply chains. With multiple offices nationwide and a team of over 50 employees, Primary Freight delivers customized solutions across air, ocean, and ground transportation, supported by strong compliance, documentation, and customer service capabilities. In recent years, the company has continued to expand its operational footprint and strengthen its internal infrastructure through process improvements, technology enhancements, and a continued focus on service consistency across locations. Primary Freight is also proud to be an ESOP-owned organization, reinforcing a long-term, people-first culture where employees are directly invested in the company's success. Known for reliability, responsiveness, and long-standing client relationships, Primary Freight remains committed to disciplined execution, continuous improvement, and sustainable growth in a fast-moving global logistics environment.

**Professional Plumbing Inc, Fountain Valley**

William Horsky, Owner

Professional Plumbing was founded in July 1985 by William Jay Horsky and formally incorporated as Professional Plumbing Inc. in 2001. The company has operated under Horsky's ownership for over 40 years, serving Orange County from five locations in Fountain Valley, Garden Grove, Huntington Beach, Costa Mesa, and Newport Beach, with residential and commercial plumbing services including water heater installation, drain cleaning, slab leak detection, and 24-hour emergency repair. Horsky expanded into the Inland Empire through Professional Plumbing IE Inc. Family involvement spans four generations: Horsky's father helped start the business in 1985 and remained active until his death in 1999; Horsky's mother remains involved today; Horsky's sister Liz Horsky has managed the office for nearly 25 years; Horsky's son previously worked in the business; and Horsky's grandson Michael is joining after high school graduation. The company trains its own plumbers through an in-house apprentice program producing decades-long careers — Nick Haas (more than 30 years) and Vince and Oscar Alonzo (each more than 20 years). The company's longevity rests on honest diagnostics, repair-first recommendations, and transparent pricing.



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Refrigeration Technologies, Anaheim

Mike Pastorello, President
John Pastorello, Founder

Founded almost 40 years ago, Refrigeration Technologies is a family-owned manufacturer of professional-grade chemical solutions for the HVACR industry. What began as a small operation in the kitchen of founder John Pastorello, focused on solving real problems for technicians, has grown into a trusted brand known for its safe, eco-friendly product lines and commitment to developing high-quality formulations. Today, the company remains family-led under John's son, President Mike Pastorello, continuing the values established by its founders: innovation, integrity, and a strong connection to the contractor community. Headquartered in Anaheim, California, Refrigeration Technologies develops and manufactures products used by HVACR professionals and facility maintenance teams across North America. The company has experienced significant growth in recent years, earning a place on the Inc. 5000 list of America's fastest-growing private companies for four consecutive years (2021–2024) and being named to LA Times Studios' list of the 25 Fastest Growing Private Companies in Orange County. To support continued demand, Refrigeration Technologies recently announced a major manufacturing expansion that will increase production capacity by more than 400%. As the company grows, it remains committed to its family-business roots—developing reliable products and building lasting relationships within the HVACR industry.



Sea Pointe Design & Remodel, Irvine

Lauren Mills, President
Andy Shore, Founder
Trent Shore, Director of Finance
Sally Shore, Procurement Specialist

Sea Pointe Design & Remodel is a family-owned design/build firm that has proudly served Orange County since 1986, built on a foundation of craftsmanship, integrity, and a deep commitment to community. What began as a small father-and-son general contracting business has grown into a nationally recognized, full-service remodeling company with a team of more than 65 in-house professionals, including designers, architects, project managers, and skilled craftsmen. Currently celebrating 40 years of excellence, the company is proudly led by President Lauren Mills, daughter of founder Andy Shore, whose leadership continues to carry forward the family's passion for creating homes that are not only beautifully designed, but thoughtfully built for the way families live. Key milestones include nine consecutive years as Best Kitchen/Bath Remodeling Specialist in the OC Register, multiple Best of Houzz awards for design and service, and a Top 10 national ranking in the Qualified Remodeler Top 500 Design/Build firms, placing the company among the top two percent of remodeling firms in the U.S. Beyond these accomplishments, the company remains deeply rooted in giving back—most notably through volunteer remodeling work for Thomas House Family Shelter, helping provide safe, updated housing for families in need. Sea Pointe's success is measured not only by the homes they transform, but by the lasting relationships they build and the meaningful impact they make in the community they proudly call home.



SouthWest Landscape Inc., Orange

Dan Hansen, President
Sandy Hansen, Vice President
Bryan Hansen, Vice President of Operations
Paul Hansen, Vice President of Client Services
Kim Thrall, Client Representative
Casey Silva, Office Manager
Sebastian Gomez, Client Representative

Founded in 1982, SouthWest Landscape, Inc. is a family-owned and operated commercial landscape company headquartered in Orange County, California. Under the leadership of President Dan Hansen, the company has grown into a full-service organization providing landscape maintenance, tree care, and enhancement services to a diverse portfolio of commercial, multi-family, and institutional clients throughout Southern California. With over 122 employees, SouthWest Landscape has built a reputation for operational consistency, long-term client partnerships, and a people first culture rooted in safety, training, and internal development. Recent investments in fleet expansion, technology, and organizational infrastructure have strengthened service delivery while supporting sustainable growth. As a family-owned and family-led business, SouthWest Landscape emphasizes continuity, accountability, and community stewardship. The company's success is driven by a commitment to managed care, employee longevity, and responsible growth values that have allowed the organization to thrive for more than four decades in a highly competitive industry.



Tevora, Irvine

Ray Zadjmool, CEO
Nazy Fouladirad, President & Chief Operating Officer

Ray Zadjmool and Nazy Fouladirad – a husband-and-wife couple from San Clemente, California – founded Tevora in 2003 as a cybersecurity pioneer when the term “cybersecurity” was still largely unknown. Today, Tevora is one of the largest privately-held cybersecurity and compliance consultancies in the country, with 1,500 clients spanning across the United States and beyond. Tevora has grown into a trusted partner to some of the largest and most well-known enterprises in the world, providing specialized services in cybersecurity, risk management, and strategic advisory support for Chief Information Security Officers. Tevora is headquartered in Irvine, with additional offices in Virginia and Arizona. Under Zadjmool and Fouladirad's leadership, the company has been recognized by Inc. as an Inc. 5000 Fastest Growing Company in the United States for 10 of the last 12 years. Tevora has been recognized several times by the Orange County Business Journal as a Fastest-Growing Mid-Size Enterprise and Private Company in Orange County and has been recognized by the Orange County Business Journal and the OC Register as a Best Place to Work.



The Peggs Company, Riverside

Brett Nelson, CEO
Michael Doyle, VP of Logistics
Chris Nelson, Chairman

The Peggs Company is a third-generation, family-owned manufacturing and service provider specializing in retail equipment solutions for major grocery and retail chains across the United States. Founded in 1960 in Southern California, the company has grown from a small garage-based operation into a national organization with manufacturing facilities in California, Texas, and Virginia, supported by a broad service network. Today, Peggs produces and services shopping carts, cart corrals, and retail fixtures for leading retailers including Walmart, Target, Kroger, and Home Depot. Under the leadership of CEO Brett Nelson, the company has experienced continued growth through innovation, strategic acquisitions such as Renfro Industries, and expansion of its manufacturing capabilities. Peggs is also recognized as a sustainability leader, pioneering large-scale shopping cart remanufacturing programs. In 2024 alone, the company diverted over 230,000 carts from landfills and reduced nearly 19,000 tons of carbon emissions. With more than six decades of continuous operation, Peggs exemplifies long-term family leadership, operational excellence, and industry innovation.



The Rand Group, Newport Beach

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

The Rand Group is a family-owned, concierge-style wealth management firm founded by brothers Paul and Joel Rand and their partner, Sarah Minakary. After 15 years together at a major Wall Street institution, they established the firm in 2016 to provide clients with fully independent, fiduciary-driven guidance. Since then, The Rand Group has evolved into a nationally recognized practice—earning distinctions from Forbes and AdvisorHub—with offices in Newport Beach, California, and Maui, Hawaii. The firm serves families, small business owners, and corporate executives, helping them navigate complex financial decisions and major life transitions. The Rand Group continues to experience strong, referral-driven growth, a reflection of the deep trust clients place in the team and the family-like relationships they build. Known for its highly personalized and proactive approach, the firm acts as a command center for clients' financial lives, integrating investment management, tax and estate planning, business succession strategies, and long-term wealth preservation. Its ongoing expansion underscores a commitment to high-touch service, multigenerational planning, and comprehensive financial stewardship.



US Alliance Group, Rancho Santa Margarita

Fadi Cheikha, Chief Executive Officer
Kimberly Cheikha, Co-Founder, Director
Jake Cheikha, Risk & Marketing Specialist Manager
Jaden Cheikha, Referral Partner Enterprise Manager
Sheri Mahoney, Chief People Officer
Joanie Mahoney, Partner Relations Manager
Abe Berg, Referral Partner Manager
Zachary Berg, Project Account Manager

Born and raised in war-torn Lebanon, Fadi Cheikha, CEO of US Alliance Group Inc. and ECS Payments, immigrated to the United States at 20 after earning dual degrees in Business Management and Economics. For more than 30 years, he has built a vertically integrated payment and financial technology platform serving businesses nationwide, delivering card processing, ACH, check and ATM services, integrated lending, banking infrastructure, and proprietary technology. Founded in 1997 by his wife, Electronic Cash Systems now employs nearly 100 people, has doubled its workforce over the past five years, and has expanded operations into Puerto Rico. A hallmark of



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his success is the launch of Aiden Technology, which internalized proprietary innovation and development. USAG has earned 45 company recognitions and awards spanning workplace excellence, fast growth, community impact, and industry performance. Cheikha's accolades include a Forbes feature, inclusion in the OC 500 Directory of Influence, being named an Ernst & Young Entrepreneur of the Year finalist, being recognized among C-Level Focus's 10 Most Admired CEOs, and receiving the 2024 MWAA Industry Achievement Award.

Venture Strategic, Irvine

Jeffrey Corless, President & CEO

Victoria Corless, Director, Finance & Business Operations

Founded by Jeff and Victoria Corless, Venture Strategic is a fully integrated public relations, public affairs, communications, and marketing firm headquartered in Irvine, California. Deeply rooted in Orange County with a diverse portfolio spanning the United States, they craft and execute integrated strategies that build, enhance, and protect brand equity. They elevate client stories to strengthen reputation, shape public perception, and influence key audiences. Their firm provides high-level strategic counsel and execution for public and private sector clients. The firm was established to provide high-impact messaging, stakeholder engagement, and public affairs strategies that help businesses, organizations, public agencies, and nonprofits navigate complex challenges and fortify their brand. With an emphasis on innovation and results-driven strategy, Venture Strategic has advised Fortune 500 companies, healthcare organizations, and public policy initiatives, shaping influential campaigns and initiatives. Victoria and Jeff have played essential roles in building the firm's operational structure, fostering a strong company culture, and ensuring sustainable growth. The firm's ability to craft compelling narratives and execute high-profile campaigns has led to long-standing partnerships with major corporate, government, and political clients. Today, Venture Strategic continues to expand its influence, helping organizations achieve brand distinction, public trust, and policy impact while maintaining its roots as a family-owned business dedicated to client success. The company has more than doubled its business and revenue since its midpoint from inception to today.



Viele and Sons, Fullerton

Deanna Bui, VP Administration

Viele & Sons has evolved from an inspired idea into a well-established company within the food service industry. Called a "Corporation" by legalities, they still consider themselves a 'Ma and Pa' type family-owned business (with four sons, one daughter and several grandkids involved in everyday operations). Since 1958, they have worked hard to provide an extensive array of quality products to restaurants throughout Southern California. They carry over 8,000 products



ranging from paper disposables to non-perishable food items, and willingly special order hard to find items for our customers' convenience. They strive to meet each customer's needs and expectations for excellent service and competitive pricing. Their clientele includes family eateries, drive-ins, cafes, ethnic restaurants, pizza parlors, coffee houses, prisons, hotels, churches, schools, health care institutions and redistributors. Some of their satisfied customers include The Hat, Polly's Pies, Ameci Pizza & Pasta, Frantone's Restaurant, Senor Baja and many more. Personal service has always been and still remains a top priority at Viele & Sons. Their family takes great pride in trying to be available to any customer at any time – just a phone call away. Viele & Sons regards customers and employees as part of their family, and we feel this is what sets us apart from the other larger foodservice companies in the industry. Their founder and father Anthony Viele Sr.'s priority was to treat all people, including family members, friends, business associates, and customers, with respect, honesty and fairness. They hope to continue this same tradition of value for generations to come.

Zov's, Santa Ana

Armen Karamardian, CEO

Zov & Gary Karamardian, Co-Founders

Taleene Karamardian, Vice President

Morgan Karamardian, Brand & Training Manager

Founded in 1987 by celebrated chef Zov Karamardian, Zov's has spent nearly four decades defining Orange County's culinary landscape with its signature blend of contemporary California cuisine and Eastern Mediterranean influences. What began as a family-driven vision rooted in generations of home cooking has grown into an award-winning restaurant collection - with locations in Tustin, Irvine, Newport Coast, and San Clemente - known for vibrant flavors, seasonal ingredients, refined presentation, and gracious hospitality. Today, Zov's remains family-owned and operated, with three generations of the Karamardian family working side by side to carry forward its legacy of excellence and innovation. Legendary chef and restaurateur Zov Karamardian built the brand from her passion for Mediterranean-inspired cooking alongside her husband, Gary. Over the years, her children have grown into key leadership roles, with son Armen serving as CEO and guiding the company's expansion and strategic direction, while daughter Taleene leads creative and operational initiatives that shape the hospitality and guest experience. Zov's granddaughter, Morgan, oversees branding and marketing, collaborating across locations – from Tustin to Irvine and Newport Coast – blending tradition, innovation, and a deep commitment to hospitality that has defined the brand for nearly four decades. Notable achievements include: Orange County Restaurant Association – Chef of the Year (2016); U.S. Small Business Administration – Restaurant of the Year (2015); Orange County Business Journal – Business of the Year (2015); Orange County Business Journal – Restaurateur of the Year (2015); James Beard Foundation Angel Award (2002).



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3 Keys to Navigating Business Crossroads

A version of this article first appeared on eidebailly.com/oc-biz

Every business leader reaches a crossroads — whether it's scaling growth, pursuing a transaction, restructuring operations, or transitioning leadership. These moments are high stakes, often shaped by volatility, disruption, and incomplete information. While you can't control every variable, you can move forward with confidence using a structured, strategic approach.

1 Prepare for Strategic Growth

Sustainable growth starts with clarity. Research shows that up to 80% of revenue gains come from strengthening the core business — but only when leaders truly understand their current state.

That means having a clear view of:

- Cash flow, liquidity, and working capital cycles.
- Operational efficiency, automation, and reporting gaps.
- Supply chain flexibility and resilience.
- “What-if” scenarios tied to costs, taxes, and market shifts.
- Whether critical systems can deliver real-time, connected data.

With this foundation in place, leaders can move from reacting to change to pursuing purposeful, profitable growth. Organizations that prioritize strategy and innovation consistently outperform, often growing more than 10% annually.

2 Make Confident Decisions About Scale, Exit, and Leadership

Crossroads often trigger big questions: Do we expand? Acquire? Sell? Transition leadership? The goal isn't growth at all costs — it's growth with clarity.

Effective leaders assess:

- Strategic fit with core strengths.
- Risk versus reward and capital allocation.
- Whether infrastructure and talent can support growth.
- How quickly systems and teams can adapt, including with automation or AI.

The same discipline applies to ownership and leadership transitions. Buyers, investors, and stakeholders expect clear succession plans, defined roles, and digital-ready financials. Yet only about half of organizations have a CEO succession plan in place — leaving significant value at risk when change comes unexpectedly.

Proactive planning creates flexibility, preserves culture, and protects long-term value, whether the transition is planned or forced by circumstance.

3 Build Resilience for an Uncertain Future

Today's organizations must be ready to adapt every few years just to stay relevant. Resilience isn't about predicting the future — it's about preparing for multiple futures.

That means:

- Running scenario plans for demand shifts, cost increases, and regulation changes.
- Investing in leaders, teams, and systems that can pivot quickly.
- Establishing early-warning indicators to act before risk becomes reality.
- Ensuring technology enables visibility, accuracy, and scalability.

Ninety-five percent of CFOs say better reporting improves strategic decision-making. Strong systems are the foundation that allows AI, automation, and advanced analytics to deliver real value.

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At a crossroads, hesitation is costly. Leaders who invest early — in strategy, talent, technology, and planning — gain the confidence to act decisively, protect value, and drive durable growth. Let's navigate your crossroads together.



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Meet the Judges



Andrew Barrier - Vice President, Private Wealth Advisor, U.S. Bank

Andrew Barrier is a Private Wealth Advisor who works closely with Orange County founders and privately held business owners as they navigate major inflection points in their companies. His practice centers on exit and transition planning, guiding clients through succession, liquidity events, and how enterprise value becomes long term family wealth and legacy. He engages with clients well before a transaction, coordinating with investment bankers, attorneys, and CPAs to ensure the right structures and strategies are in place ahead of a sale or transition. After liquidity events, he helps families manage and preserve wealth through an integrated approach that includes investment management, trust and estate planning, and private banking solutions. Barrier earned his MBA from the University of California, Irvine, and completed his undergraduate degree in finance at Portland State University. He lives in Corona Del Mar and serves clients throughout Orange County. He enjoys tennis, golf, and traveling with his fiancé.



Sean Foley - President, Orange County and Inland Empire Region, Banc of California

Sean Foley is President of the Orange County and Inland Empire Region at Banc of California. He is responsible for overseeing and expanding the team dedicated to the bank's commercial and real estate businesses in the area, which includes client acquisition, client retention and portfolio management. Foley joined Banc of California in 2020 and has several decades of experience supporting clients and structuring debt facilities that meet their strategic needs. He has held significant leadership roles at major U.S. banks. Prior to his current position, Foley served as the Commercial Banking Executive at KeyBank in Washington state and spent 10 years as Regional President of U.S. Bank's Southern California market. Foley has lived in the Southern California community for more than 30 years. In that time, he has served in leadership roles at many business, community and nonprofit organizations, including the Mardan Foundation of Educational Therapy, California Bankers Association, United Way of Greater Los Angeles, the Pacific Symphony and Town Hall Los Angeles. He is currently a member of the Chief Executive Roundtable at the University of California, Irvine. Foley earned a bachelor's degree in accounting and business from the University of Pittsburgh.



Victor Guerrero - President & Chief Operating Officer, Infinity Bank

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



Andrew Mason - Partner, Stradling

Andrew Mason is a litigation partner at Stradling. He advises Southern California-based businesses, family-owned enterprises, and individuals on a broad range of litigation matters. Known as a practical problem-solver, Mason focuses on achieving efficient, strategic outcomes through creative negotiation or trial when necessary. His experience includes commercial contract negotiation, business disputes, litigation risk counseling, internal and regulatory investigations, judgment enforcement, and trust and estate disputes. He has represented clients in California state and probate courts, federal district courts, and arbitral forums.



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

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



Richard Reisman - Publisher, 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.



Micol Small - Partner, Stradling

Micol Small is a Counsel in Stradling's Litigation practice group. Small has extensive experience in complex business litigation, risk analysis, and corporate counseling. She has a track record of successfully leveraging her negotiation skills and in-depth knowledge of all phases of complex federal and state litigation to achieve her clients' objectives.



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

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



Michelle Vallejo - Vice President, Relationship Manager, EverBank

With over 14 years of experience in banking, Michelle Vallejo built her career around developing trusted relationships and helping businesses navigate growth with confidence. As a relationship manager, Vallejo specializes in commercial and specialty banking, with a strong emphasis on deposit strategy and delivering tailored financial solutions aligned to each client's goals. Vallejo is known for taking a thoughtful, solutions-oriented approach and for asking the right questions to truly understand each business - an approach that she is excited to bring to this year's judging process. It's a privilege to connect with leaders, learn their stories, and highlight the innovation and impact behind their success. Vallejo is also passionate about mentoring emerging professionals and continuing to grow as a leader, while contributing to a strong and collaborative business community.



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

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



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