An Orange County Business Journal Special Report

INNOVATOR of the YEAR AWARDS

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2025 Innovators Forge Ahead

■ By NANCY LUNA

IRVINE — Last year, five local pioneers in healthcare and technology were honored at the Business Journal's annual Innovator of the Year Awards.

The recipients were Dana Biechele-Speziale of AtomICs; Thomas Burns of Glaukos Corp.; Brett Wall, formerly of Medtronic; Kathy Azeez-Narain of Hoag; and Eason Abbott and Dustin Armer of Renata Medical.

In the following pages, we catch up with all but Biechele-Speziale, who was unavailable, to learn what last year's winners are doing now. See pages 22 and 24.

The 12th annual Innovator of the Year Awards will be held Oct. 7 at the Irvine Marriott. Wall, who left Medtronic in June, will be the keynote speaker.

Kathy Azeez-Narain: Putting Hoag in Patients' Pockets

■ By EMILY SANTIAGO-MOLINA

NEWPORT BEACH — Hoag Chief Digital Officer Kathy Azeez-Narain, recognized last year by the Business Journal for improving patient experiences through technology, is preparing to debut her next latest project, Ask Hoag.

The artificial intelligence-powered service acts as a "conversational front door to Hoag care," designed to respond to patients' health questions and concerns with personalized game plans, reviewed and approved by Hoag clinicians, that lead to care.

"For us, this product really puts Hoag in your pocket," she told the Business Journal.

Ask Hoag is not just a chatbot that provides generic responses.

"It's a game changer because we're not just looking to let AI answer stuff for you or give you advice. We're looking at it in a really responsible way," she said. "This is your health. Advice is one thing, but when you need that clinical support, we need that human support. We need those experts to really opine on what's happening to this person, regardless of what AI might be saying."

Kathy Azeez-Narain
Chief Digital Officer
Hoag

Ask Hoag was initially introduced internally to employees and will be released to the public soon as its own mobile app during the fourth quarter. It's currently in beta testing.

Last year, Azeez-Narain was a recipient of the Business Journal's 2025 Innovator of the Year Award.

She was recognized in part for launching a new virtual care platform called Hoag Compass and for developing a mobile app for new mothers called Nona.

Hoag Compass, a subscription-based care model launched in summer 2022, combines in-person, virtual and app-based care to help patients pursue lifestyle and wellness goals while remaining connected to their care teams.

Nona, introduced later that year, provides digital support for new mothers after childbirth, when many can feel disconnected from their healthcare providers. The app can connect patients to classes, clinical advice and nurses consultants for post-partum care at home.

Azeez-Narain, who came to Hoag Memorial Hospital Presbyterian in 2019 after working at American Express for 15 years, likes solving problems.

Her recent focus has been getting Ask Hoag ready for its public debut.

"In my entire career, innovations come from problems that are really hard and meaty, that you got to sink your teeth into," she told the Business Journal. "That's where my head has been—how do we solve some of these meaty problems?" ■

Tom Burns: Looking for Ways to Keep 'Entrepreneurial Zeal'

■ By PETER J. BRENNAN

ALISO VIEJO — When Tom Burns last September accepted the Business Journal's Innovator of the Year award, Glaukos Corp. had a market capitalization of around $5 billion.

Since then, the market cap has more than doubled, and the company has "grown exponentially in headcount," according to Burns.

"I am hoping my biggest accomplishment has been striving to preserve the entrepreneurial zeal, pervasive humility, sense of humor and unbridled ambition to build new markets that make a difference—traits that have defined our culture since our founding 25 years ago," the chief executive and chairman told the Business Journal.

Burns has already had a remarkable run since joining Glaukos in 2002 when it had only four employees, an unproven product and no revenue.

On July 29, the company reported record second-quarter net sales of $185.6 million, up 50% year-over-year, and raised its full-year guidance to between $680 million to $700 million from a previous range of $620 million to $635 million.

The company went public in 2015 with shares initially priced at $18 each. The shares in August reached an all-time high of $181.27. At press time, they traded at $178.57 each (NYSE: GKOS).

In 2025, the Business Journal named Burns as a Businessperson of the Year in the health sector.

Tom Burns
CEO/Chairman
Glaukos Corp.

A Tiny, Tiny Medical Device

Glaukos became famous for inventing the world's tiniest medical device that is smaller than dot on this "j." The product, which became known as Micro-Invasive Glaucoma Surgery (MIGS), is a tiny micro-device that is inserted inside the eye to lower intraocular pressure and treat glaucoma.

The company had no revenue from 1999 to 2015 and several "near-death" experiences.

Burns didn't want to rely on one product, so the company has spent almost $1 billion on research and development.

Across the company's five product lines, there are 13 publicly disclosed products in its pipeline along with several others the company has yet to announce, Burns said.

Glaukos has recently began branching into corneal crosslinking and keratoconus, a condition that causes the cornea to thin and bulge outward, distorting vision; the rare eye disease occurs in kids in their late teens. Glaukos' solution is Epioxa, its recently approved eye therapy designed to slow the progression of keratoconus. Around 20% of untreated keratoconus patients require corneal transplants.

"We are builders of new marketplaces," Burns said. "Each of these new markets has the potential to be transformative, both in advancing patient care and creating long-term value for our company."

The company's U.S. glaucoma business generated $118.5 million in sales, led by growing contributions from iDose TR, which generated about $74 million in second-quarter sales. The implant continuously releases medicine inside the eye to reduce elevated eye pressure from glaucoma, with effects lasting up to three years.

A next-generation version of iDose, iDose Trio, is undergoing patient-follow up from a Phase 3b study, with FDA approval targeted for the end of 2027.

In June, Glaukos announced it completed patient enrollment for a Phase 2 study evaluating a treatment for Demodex blepharitis, an inflammation of the eyelids caused by mites. Results for the study, which enrolled 275 patients, are expected by the end of this year.

"As awareness and diagnosis of this chronic condition continue to increase, we believe there is a substantial need for differentiated therapeutic approaches that expand treatment options and improve patient access to care," Burns said.

"We hope to help build and increase the overall market so that more patients can benefit from these newer therapies in the future." ■


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Brett Wall Eyes Next Act After Medtronic Exit

■ By JOSEPH PIMENTEL

IRVINE — After spending over 25 years helping to grow a multibillion-dollar medical technology company that employed thousands, Brett Wall left Medtronic—a move that surprised medtech industry insiders.

In his first interview since leaving Medtronic in June, the executive told the Business Journal he wants to lead another company and may return to the entrepreneurial environment that first brought him to Orange County more than 20 years ago.

"I still have drive and interest in running a company one day," he said.

Wall, who served as executive vice president and president of Medtronic's Neuroscience portfolio, received a Business Journal Innovator of the Year award last year and will be the keynote speaker at the 12th annual event on Oct. 7 at the Irvine Marriott. The annual event honors people and organizations in Orange County who demonstrate brilliance and leadership in innovation (see pages 23 and 24 for updates on other 2025 winners).

Former Medtronic executive Brett Wall will serve as the keynote speaker at the Business Journal's upcoming Innovator of the Year Awards in October

Wall's Exit

Wall spent more than 25 years helping grow Medtronic into a multibillion-dollar medical technology company. He led the Neuroscience portfolio, which has about 18,000 employees and generates more than $10 billion in annual revenue.

During his tenure, Wall's division helped advance treatments and technologies in spine surgery, Parkinson's disease, brain sensing and stroke care.

"A lot had been done," Wall said of his time at Medtronic.

Wall said he didn't have a single epiphany moment when he realized it was time to leave. He had discussed a transition with Medtronic CEO Geoff Martha and wanted to ensure his departure worked well for the company and its shareholders.

On a personal level, leaving his co-workers has proven to be the most difficult part of his departure. He said he misses working with colleagues with whom he spent years building businesses and developing new treatments.

"Really hard," Wall said. "What I miss is these really great people that you've built a career with."

Next Chapter

Wall is still considering his next move.

He said he's thought about joining company boards but said he's not ready to limit himself to just those roles. Instead, his next move will likely take him back to his entrepreneurial roots. He's especially interested in staying in Southern California, particularly Orange County, and helping the local tech scene grow.

"We have every opportunity here to build one of the strongest medtech ecosystems in the world," Wall said.

He said Orange County has the universities, engineers, entrepreneurs and established companies it needs, along with growing industries like artificial intelligence, defense and aerospace.

The region's high cost of living, however, makes attracting and retaining young talent increasingly difficult. That challenge is personal for Wall.

He and his wife moved to Orange County about 25 years ago, knowing few people. They built their careers and a life here, and he wants the next generation to have that same chance.

"Along with freedom comes, which we don't talk about very much, duties," Wall said. "Our duties to the society here to make this place great so other people have the same opportunity should be upon us as well." ■

Renata Medical: Grows Pediatric Heart Device Pipeline

■ By YUIKA YOSHIDA

NEWPORT BEACH —Renata Medical has continued its momentum since winning the Business Journal's Innovator of the Year Award last year.

The pediatric cardiac device company has raised fresh capital with a $25 million Series D round last month and recently won FDA approval for a second generation of its lead device, the Minima Stent—an expandable heart stent tailored for pediatric patients.

"This is the second time that we've submitted to the FDA for a Class III med device and got approval without any pause or delay," Chief Executive Dustin Armer told the Business Journal.

"I think that speaks to both the team's work ethic, but also our relationship and collaboration with the FDA."

The latest version, dubbed Minima Pro, adds a 10-millimeter delivery balloon to the two sizes offered with the original Minima Stent.

"Our new stent comes with improvements that will hopefully help physicians apply it in more situations," Armer said.

The company additionally doubled its headcount to 30 employees this year ahead of launching Minima Pro by year end in the U.S.

Eason Abbott and Dustin Armer
Co-founders
Renata Medical

New Device Targets Single Ventricle Heart Disease

Minima isn't the only product in Renata's pipeline.

The company is progressing in developing the Lumina Shunt for patients with single ventricle disease, a rare congenital heart defect where a baby is born with only one of two ventricles that pump blood out of the heart.

"Despite the extraordinary work of clinicians and researchers, these vulnerable patients have seen relatively little dedicated device innovation," Armer said.

If approved, the device could replace an open-heart surgery called the Fontan Procedure with less invasive transcatheter surgery.

It currently takes an average of three surgeries to treat the condition, with patients spending anywhere from five days in the pediatric ICU up to weeks in the hospital, Armer said. The surgeries are needed as children grow and their changing proportion affect how blood is rerouted, he added.

Renata has received grants from Palo Alto-based nonprofit Additional Ventures to support development of Lumina. The organization funds efforts aimed at finding a cure for single ventricle heart disease. It reported having $220 million in assets and has donated $17.2 million to date, according to tax filings.

"Thanks to their partnership and our team's execution we have made tremendous progress on the Lumina shunt," Armer said.

Renata is in the midst of working with the FDA to potentially begin first-in-human trials early next year.

Last month's funding round, led by Archimed, will allow the company to expand Minima commercially outside of the U.S. While Armer did not disclose which countries they're eyeing, he said that the company is "gearing up so we can be poised to go wherever we want in 2027." ■

Q & A WITH JEFFREY M. VERDON, ESQ.

"It's hard to create wealth, it's even harder to protect it."

Says Verdon, Managing Partner at Verdon Law Group. Building wealth takes years of knowledge, judgment and experience. Protecting it requires a different skill set, one unfamiliar to many entrepreneurs. Without thoughtful estate and asset-protection planning, a lawsuit or unforeseen event can threaten a lifetime of work. Supporting these awards celebrates innovators while emphasizing the importance of preserving their success.

Q: What risks do entrepreneurs often underestimate?

Many rely too heavily on liability insurance despite its limits and exclusions. Litigation can be punishing even when the defendant prevails. Legal structures can create protective "moats" around valuable assets, making claims harder and costlier to pursue.

Over four decades, I have seen prepared clients resolve claims for a fraction of the exposure. Planning changes the dynamics before a dispute begins.

Q: When should founders protect their wealth?

The sooner, the better, and always before a claim or "black swan" event. Once a claim exists, it may be too late. Growing companies face vulnerabilities, including employment claims, contractual disputes and personal exposure. Plans should evolve with business value, wealth and family circumstances.

Founders approaching a liquidity event should seek advice early. Lawful tax strategies may defer capital gains for years, allowing proceeds to remain invested and be placed within an asset-protection structure.

Q: Can you tell us about the short-term cost vs. the long term value of effective asset protection?

The right question is not simply what it costs to implement effective protection strategies. It is what it could cost if those protections are not in place when a lawsuit or other unforeseen claim arises. Thoughtful planning requires an investment today, but its long-term value can be measured in the wealth, business interests and family legacy it helps preserve.

Q: Why does Verdon Law Group support the OCBJ Innovator of the Year Awards?

Since the early 1980s, I have watched Orange County evolve from a real-estate-centered economy into a destination for innovative companies and entrepreneurs. UCI, Chapman and Cal State Fullerton help educate and retain talent.

The nominees embody the risk-taking, grit and determination driving that innovation. Supporting these awards celebrates innovators while underscoring the importance of estate planning and asset protection to preserve success.

Q: How does your practice continue to innovate?

Laws change, court decisions reshape planning, and strategies must evolve. We are also carefully exploring responsible uses of AI while continuing to pursue effective tax planning and strong asset protection.

Q: What should successful innovators remember?

Don't wait for the "what if" to happen. Ask whether your current plan truly protects your company, family and legacy, and what it could cost if it does not.

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Top 3 Mistakes Early Technology Startups Make on IP Strategy and How to Fix Them

By: Byron Ruby, Partner & Kate Stuckman, Patent Prosecution Chair

Few startups dedicate resources to develop an intellectual property (IP) strategy. If your company has made it as far as its first raise, first customer, or first working prototype, this is usually the ideal inflection point for the company to do so. The company is far enough long to justify the expenditure of resources, but still early enough to lay strong foundations at low cost.

As patent prosecutors and IP litigators, we are all too familiar with the downside risk of having an incomplete IP strategy. We are also familiar with instances where a company races down a certain path, only to find it no longer fits their go-to-market strategy. Fixing those kinds of mistakes at that point is often far more costly than creating a cogent IP strategy on the front end.

Here are three of the top mistakes early start-ups make on IP strategy and how to fix them:

1. Inadequate controls and protections around the core IP, technology, and brand

If your company has managed to achieve early success, it is likely because your team works well together and trusts each other. Trust, while invaluable, should not be a substitute for adequate controls and protections. Most technology startups employ only a check-the-box approach to protecting their trade secrets; they have non-disclosure agreements, invention assignments, employee agreements, and even HR handbooks. But they do not take more proactive steps to protect their nascent IP, for example, by limiting access to information on a need to know basis, using advanced security features, or limiting how information is stored or transmitted. These measures are often viewed as creating unnecessary roadblocks. Many startups also neglect to refresh their controls and protections over time, even though the IP and the company continue to evolve. Theft, when it does occur, can be difficult to remedy, particularly for a resource-constrained startup. A more proactive approach is highly recommended, not just to prevent theft, but to instill a culture of secrecy that itself provides a valuable safeguard.

Byron Ruby
Partner

2. Taking the wrong IP route

Depending on the industry or technology, different IP strategies can and should be pursued. For example, in the nascent robotics industry, many designs are patentable, but the cost of reverse engineering is low. And given that many specs are published (including specs by OEMs for the parts that go into many commercial application robotics), it makes sense for robotics companies to “go public” on their patentable design as early as possible. In contrast, it is likely a mistake for a biotechnology company to rush to obtain a patent on a new therapy. Many new biotechnologies or pharmaceuticals take years of preclinical and clinical trials before receiving FDA approval. By that point, half of the lifetime of the patent or more has been spent, without commercialization. It is better, therefore, to keep the technology a trade secret, rather than rushing for a patent.

A trickier example is software. Depending on the software and the industry, some combination of patents, trade secrets, and copyright might be the correct path, but it depends greatly on the software, its use-case, and the industry. For example, many early SaaS companies explore white-labeling their software for enterprise customers, based on a license and subscription model. By design, it may be harder to claim a trade secret on your company’s IP, since it is being licensed and white-labeled to so many companies. Here, the copyright in the source code should almost certainly be protected. Best practices include the use of proper copyright notices, but stronger legal protections can be secured by registration of the copyright with the U.S. Copyright Office. Or again, AI companies have found that the patent strategy route is also desirable to protect innovations in a fast-growing space where dozens of companies are fighting to quickly build the same functionality first and, so, need to take a holistic approach to patent portfolio management.

3. Securing a patent quickly without thinking about long term patent portfolio management

Another mistake that early startups make is prioritizing getting any patent over protecting the right inventions first as part of a strategic plan to build a portfolio over time. Filing for provisional patents can be inexpensive, but a lazily or hastily written provisional patent might never make it past the patent office. It is also easy to get a patent issued for an invention that is so narrow that it is essentially unenforceable, while it is much harder to land patent protection for an intelligently-built portfolio of patents that yield long term value beyond mere specifics of a company’s initial product launch. It is often a mistake to go for fast and cheap, rather than think through long-term patent management strategies. Regrettably, such mistakes can go unnoticed for years, with flaws becoming apparent only once a company seeks to license or enforce its patents.

Kate Stuckman
Patent Prosecution Chair

The future of a developing market may not be well-defined in a startup’s early phases. Thus, early patent filings should be crafted not only to cover the early developments made by the company that are core to the new technology, but also to anticipate various pathways of the market’s ultimate trajectory years into the future. A related mistake is thinking that one’s entire product can be encompassed in a single patent, when often a product’s novelty is composed of many distinct inventions each deserving of a separate patent. Experienced counsel can help inventors identify all of the nuggets of innovation that should be protected early, strategizing a pathway to maximize early protection at lower upfront cost while deferring larger payments for years down the road when the company’s cashflow has increased.

Conclusion

Taking the time early to build a coherent IP framework is one of the most important decisions a technology startup can make. Founders who treat IP protections as a strategic asset rather than an afterthought send a clear signal—to investors, partners, and competitors alike—that they plan to be around for the long run.

Technology Shapes the World. People Give It Direction.

Every business today is under pressure to move faster, operate smarter, and adapt to constant change. Technology is making that possible. But technology alone does not create progress. People do.

At Ingram Micro, one of the world's largest technology ecosystem companies, we help businesses connect technology with the expertise and relationships to help them grow. Every day, we bring together technology vendors, solution providers and customers to solve complex challenges, unlock new opportunities and accelerate business outcomes.

This approach is our guiding philosophy – one that influences how we invest, how we evolve, and how we help customers and partners navigate an increasingly complex technology landscape.

We call it being Aggressively Digital. Amazingly Human.

That philosophy comes to life through Xvantage™, Ingram Micro's AI-powered digital experience platform that is helping redefine distribution for the modern technology ecosystem. Xvantage brings together AI, digital commerce, automation, and data-driven intelligence designed to help businesses work more efficiently. The platform helps streamline operations, improve visibility, and create a more connected experience across the technology ecosystem.

But while technology powers the platform, people are what power results.

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To date, Ingram Micro has been awarded six U.S. patents for innovations powering Xvantage™, reflecting our commitment to developing technology that solves real business challenges designed to addresses practical business needs while enhancing the experience of those who rely on it every day.

As Ingram Micro continues its evolution into a platform company, we remain focused on creating practical value through technology while strengthening the relationships that power it. The future of innovation is not about replacing human expertise. It is about amplifying it.

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That is what it means to be Aggressively Digital. Amazingly Human.

Stradling

Generative AI and the Innovation Economy: Why Trade Secret Protection Now Determines Who Wins

Generative AI, from expansive Large Language Models (LLMs) to specialized code assistants, has changed the calculus of corporate innovation. The primary threat to a company's R&D pipeline is no longer external hacking alone; it is inadvertent internal disclosure. The same technology that can accelerate R&D can also expose proprietary data when employees feed sensitive information into public-facing models and potentially expose it outside the organization.

For example, a team of mathematicians spent a year developing a solution to the Navier-Stokes problem while using a public-facing LLM to organize their work. Shortly before publication, the LLM provider published its own AI-generated solution using a remarkably similar approach, raising questions about whether the model had inadvertently used the team's work.

Companies that want to preserve their competitive advantage and legal protections must address AI risk directly. Under frameworks such as the Defend Trade Secrets Act (DTSA), companies must show they took reasonable measures to safeguard proprietary information, including protections for internal AI tools.

Why Trade Secrets Are Becoming the Preferred Vehicle for Protecting Corporate IP
In an era of rapid AI iteration, trade secret protection is increasingly attractive for innovations that are difficult to patent, evolve too quickly for the patent process, or may lack a human creator. Unlike patents, trade secrets provide potentially perpetual protection without requiring public disclosure.
A robust strategy should protect two key categories of assets: core AI models, including architectures, parameters, and proprietary algorithms; and training data, including cleaned datasets, workflows, confidential prompts, and deployment strategies.

The Threat Landscape: How Corporate IP Leaks
Risks generally arise through four vectors: human error, Shadow AI, malicious actors, and output exposure.

Human Error: Employees may upload source code, internal documents, customer lists, or other proprietary information into public-facing AI services. External providers may use those inputs to improve or train models, creating the risk that company knowledge becomes available outside the organization. Companies also face prompt injection attacks (where attackers manipulate an LLM into overriding its guardrails to reveal internal data) and supply-chain vulnerabilities that can expose internal information (where third-party components contain exploits designed to exfiltrate information).

Shadow AI: Employees may use personal AI accounts, unapproved browser extensions, or consumer tools outside sanctioned enterprise systems. These services can bypass logging and endpoint monitoring and may include terms allowing broad use of prompts or failing to guarantee that outputs will not reflect other users' proprietary inputs.

Malicious Actors: Attackers may target models and training data directly through model extraction, membership inference attacks, or model inversion attacks designed to reveal proprietary architecture or sensitive training data.

Output Data Exposure: Risk also arises from AI-generated outputs. Incorporating code or text derived from third-party trade secrets or copyrighted material can create infringement exposure, even without intent. Heavy reliance on raw AI output may also create ownership concerns because AI-generated material may lack copyright protection under U.S. law absent sufficient human authorship. These risks matter because trade secret protection can be lost once information becomes public without confidentiality protections.

Three Pillars for Protecting the Innovation Pipeline
A comprehensive defense rests on three pillars: Policy and Legal, Human Training, and Technical Controls. Companies should not treat AI as one asset; training data, model weights, prompts, and outputs should be segmented and protected individually.

Policy and Legal
Companies should conduct regular trade secret audits, classify AI assets, and clearly label sensitive materials. NDAs and invention assignment agreements should prohibit employees from submitting company IP to external LLMs.

Vendor contracts should include non-retention provisions, prohibit training on company inputs, address third-party IP claims and define ownership of fine-tuned weights, embeddings, and customized prompt libraries. User agreements should prohibit reverse engineering, scraping, and knowledge distillation from outputs.

Sensitive development should occur in private LLMs or air-gapped environments. Companies should also document human contributions and creative decisions to preserve future patent options.

Human Training and Culture
Policies are effective only if employees understand them. Companies should prohibit uploading proprietary data to general-purpose AI services, train employees on what qualifies as a trade secret and reinforce that confidential workflows and financial information may require protection.
Offboarding should also address AI-related risks. Exit interviews should reinforce continuing confidentiality obligations, while system access and API keys should be revoked promptly.

Technical Controls
Technical systems should enforce these policies in practice. Companies should use role-based access controls and zero-trust architecture for AI assets, along with Data Loss Prevention tools that block transfers of proprietary information to external endpoints. Work involving core IP should be limited to internal, isolated, or private LLM environments.

For highly sensitive data, organizations can use Federated Learning and Differential Privacy to reduce the risk of reconstruction attacks.

Retrieval Augmented Generation (RAG) creates concerns because internal documents are converted into embedded vectors stored in specialized databases. Access controls should mirror the permissions on the underlying documents so employees cannot retrieve information they otherwise lack permission to view. Data provenance and lineage tracking can help establish which human-generated assets contributed to fine-tuned models.

Companies should review third-party SaaS tools that incorporate AI by default, including video-conferencing summarizers, writing assistants, and IDE plugins. Protecting IP requires continuous audits, model monitoring, and a dedicated incident-response plan.

Navigating Regulatory Conflicts Without Sacrificing Innovation
Companies must also balance trade secrecy with new disclosure obligations. Regulations such as the EU AI Act may require transparency about training data or model safety, creating tension with the need to protect proprietary information. When disclosure is legally required, sensitive information should be clearly identified and designated as a trade secret to preserve the strongest available protection.

Conclusion
Generative AI creates significant challenges for human-centric IP law, but trade secrets may be particularly well suited to protecting AI-related innovation. The risks unique to AI reinforce trade secret law's core purpose: protecting valuable proprietary information from careless or malicious exposure. Pairing technical controls with a clear legal strategy can help companies use AI to accelerate innovation without sacrificing the IP that makes that innovation valuable.

Greg Cordrey is a partner in Stradling's Intellectual Property practice with nearly 30 years of experience in patent infringement litigation, post-grant proceedings such as inter partes reviews (IPRs), and complex IP disputes involving trade secrets, trade dress, and advanced technologies. He represents clients enforcing IP rights and defending infringement claims.

Henning Schmidt is Counsel in Stradling's Intellectual Property practice group. He represents plaintiffs and defendants in complex intellectual property litigation involving high-tech patent disputes, including computer hardware, software, networking technology, and telecommunications. Henning has litigated patent cases in Federal District Courts, the ITC, and proceedings before the PTAB and CBM.

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Innovation Creates Value. Is Your Tax Strategy Keeping Up?

Beyond the R&D credit:
How innovators can use specialty-tax strategies to preserve capital for growth

Innovation is measured by what a company creates: a new product, platform, process or business model. Building it takes investment, and the tax strategy surrounding that investment can affect how much capital is left for the next stage of growth.

Innovators are usually better served by a full set of specialty-tax strategies than by chasing a single incentive. Depending on their activities and investments, that can include federal and California research credits, a payroll-tax offset for eligible startups, deductions for domestic research expenditures, California sales-and-use-tax relief on equipment, a cost-segregation study on a facility, and state or local hiring and expansion incentives.

The R&D credit is often a starting point, and it applies even when no one at the company has "scientist" in their title. Work on improving products, software, manufacturing processes, formulas or techniques may qualify when a company is working through real technical uncertainty by testing and experimenting. Eligible costs may include wages, supplies and contract research expenses.

Strong research-credit claims are those that are connected to specific projects, people and activities. Project plans, testing records, time tracking and development reports show what work occurred, what uncertainty was addressed and how alternatives were evaluated. The credit should also be coordinated with the treatment of research expenditures.

Federal rules generally permit deductions for domestic research expenditures incurred in tax years beginning after 2024, while eligible startups can apply part of the credit against payroll taxes.

Capital spending opens a different set of benefits. A cost-segregation study looks at a building that was purchased, constructed or renovated and identifies components such as certain electrical systems, specialized plumbing, interior finishes, equipment connections and site improvements that may depreciate faster than the building itself. Accelerating those deductions can help short-term cash flow, although the expected benefit should be weighed against study costs, future plans and applicable tax limits.

Manufacturers and some research-focused businesses should also evaluate California's partial sales-and-use-tax exemption on qualifying machinery and equipment. Companies planning a major hiring push, relocation or facility expansion may qualify for additional negotiated or location-based incentives. Many of these programs are time-sensitive and may require applications or certifications in place before equipment is bought or a deal is signed.

The right time to evaluate these benefits is when a project or capital investment begins, not once the tax return is due. Getting technical, operations, finance and tax teams communicating early improves documentation, supports cash-flow forecasting, and preserves more capital for what's next.

Ready to put these strategies to work for your business? Contact RJI CPAs to get started.

Fernando Jimenez, CPA, MST
CEO/Partner in Charge, Tax
949.852.1600, ext. 424
fjimenez@rjicpas.com

Max Lewandowski, CPA
Chief Financial Officer and
Audit Partner
949.852.1600, ext. 441
mlewandowski@rjicpas.com

About RJI CPAs
Founded in 1980, RJI CPAs offers comprehensive accounting and consulting services and has earned recognition on Forbes' lists of America's Best Tax and Accounting Firms and America's Top 200 CPAs. As a PCAOB-registered firm and member of DFK International, RJI upholds the highest professional standards. Learn more at www.rjicpas.com.

FBFK LAW

You Built the Advantage. Now Protect It!

Five Tips To Protect Your Innovation

Congratulations. You cast aside the way things have always been done and had the courage to challenge the expected. You have turned ambitious ideas into reality and created a lasting impact, transforming your industry. Simply put, you've created something amazing.

People have noticed. That includes your employees and your competition. And then it happens. Suddenly there is a new player in your space and, likely, some of your former employees have switched sides. How did they catch up so quickly? They are using your trade secrets.

The Orange County Business Journal's Innovator of the Year Award recognizes something innovators already know well: their products, processes, and business models are genuinely different. But that same distinctiveness makes their ideas a target. The same competitive edge that earned an IOTY nomination can be your most valuable, and most vulnerable, asset. You had the courage to go beyond what is possible; now you need to safeguard that innovation.

A trade secret can last indefinitely as long as it stays secret. Recipes, algorithms, pricing models, customer lists, data, AI models, methodologies, manufacturing processes, customer intelligence, marketing plans, product road maps, and countless other business tools can be protected with the right plan.

California's Uniform Trade Secrets Act ("CUTSA")

California's version of the Uniform Trade Secrets Act, codified at Civil Code sections 3426 through 3426.11, is the primary vehicle for protecting confidential business information in the state.

CUTSA defines a trade secret broadly and applies where information meets a two-part test. First, the information must derive independent economic value from not being generally known to, or readily ascertainable by, others who could profit from it. The categories are wide and even negative know-how (knowing what does not work) can also qualify. Second, it must be the subject of efforts that are reasonable under the circumstances to keep it secret. That second requirement is where many businesses stumble.

When misappropriation occurs, CUTSA offers powerful remedies: injunctions to stop the use or disclosure, damages for actual loss and the wrongdoer's unjust enrichment (or a reasonable royalty), exemplary damages of up to twice the award for willful and malicious misappropriation, and attorney's fees.

The Federal Defend Trade Secrets Act ("DTSA")

The Defend Trade Secrets Act (18 U.S.C. section 1836) created a federal civil cause of action for trade secret misappropriation. It does not replace state law, so you can pursue claims under both CUTSA and the DTSA — but it opens the door to federal court, which can be advantageous for cases involving parties or conduct across state lines. Its definition of a trade secret and its remedies closely track CUTSA. In extraordinary circumstances an emergency seizure of stolen trade secrets can be ordered by the court.

Five Tips to Protect Your Innovation

1. Inventory what you have. You cannot protect what you have not identified. Catalog your confidential information and consider its value. This inventory also becomes evidence that you treated the information as a secret.

2. Take reasonable security measures. Both statutes require efforts to maintain secrecy. Use access controls and passwords, encrypt sensitive data, restrict information on a need-to-know basis, mark documents "Confidential," and secure physical and digital premises. Reasonable does not mean perfect—but it does mean deliberate.

3. Put agreements in writing. Have employees, contractors, vendors, and business partners sign confidentiality agreements and invention-assignment agreements confirming that work product belongs to the company. In California, where non-competes are unenforceable, these agreements can be your front line.

4. Manage the entrance. Onboard new hires with reminders not to bring former employers' secrets and demonstrate a lack of tolerance for employees who disregard this rule.

5. Control the exit. When an employee leaves, conduct exit interviews and retrieve devices and files, cut off system access promptly, and remind departing staff of their continuing obligations. If suspicious, consider a forensic review of employee devices and workstations to identify instances of such things as mass downloads of information or information being emailed to personal email addresses or competitors.

Your innovation has gotten you where you are today. A modest, consistent investment in trade secret hygiene helps ensure it keeps earning for you.

Orange County is home to some of the country's most inventive companies, entrepreneurs and technologies. At FBFK we are proud to work alongside businesses that challenge conventional thinking, and to help protect the competitive advantages they create. Congratulations to this year's Innovator of the Year nominees and winners. Keep building what's next. We'll help you protect what makes it yours.

Todd Friedland combines skill, strategy, and business judgment to achieve success for clients. With 30 years of handling complex legal matters, including commercial litigation, Todd Friedland is a lauded attorney well known for his legal leadership in Orange County and for implementing strategies designed to meet clients' goals and business needs. Todd's practice focuses on matters related to corporate governance and fiduciary duty, complex contract and manufacturing disputes, trade secrets, unlawful business practices, business torts, and real estate.

Todd G. Friedland
Managing Partner, California
todd@fbfk.law

Todd has been named to the OC500 by the Orange County Business Journal, and served as President of the Orange County Bar Association (2016), President of the Orange County Bar Association Charitable Fund (2017), President of the Association of Business Trial Lawyers – Orange County (2020), President of Project Youth OC and Constitutional Rights Foundation, and has also been named to Top 50 Attorneys in Orange County (Orange Coast Magazine 2018 – 2025), Top 100 Attorneys in Southern California (2025), Best Lawyers in America (2015 – 2027), and Southern California Super Lawyers (2011 – 2027). Todd is rated AV Preeminent by Martindale-Hubbell.

Prior to joining FBFK, Todd co-founded business litigation boutique Stephens Friedland LLP, and practiced with the multi-national law firm of Pillsbury Winthrop Shaw Pittman.

FBFK Law is a full-service mid-sized law firm in California and Texas. FBFK Law has been named a Best Place to Work by the Orange County Business Journal, and is the only law firm recognized on Fortune and Statista's America's Most Innovative Companies 2026 list.

UCI Health celebrates 50 years

A legacy of impact, from a single hospital to a six-hospital health system

UCI Health is proudly celebrating 50 years of caring for the community, bringing discoveries, treatments and research that saves lives and improves health.

It all began in 1976 when the University of California Regents purchased Orange County Medical Center and renamed it UCI Medical Center, now known as UCI Health — Orange.

"For 50 years, UCI Health has been driven by a commitment to improve lives through discovery, teaching and compassionate care. What began as a single hospital has grown into one of California's largest academic health systems, serving millions of people across our region," said Chad T. Lefteris, president and CEO of UCI Health.

"As we celebrate this milestone, we're proud of what generations of physicians, nurses, researchers, educators and co-workers have built together, and we're even more excited about what lies ahead."

Home to nationally regarded programs

An unwavering commitment to its mission — Discover. Teach. Heal. — has spurred its transformation from a single hospital into one of California's largest academic health systems. UCI Health — Orange has built nationally regarded programs that broke new ground in local healthcare, including:

- The county's first and only level I adult and level II pediatric trauma center
- The only National Cancer Institute-designated comprehensive cancer center based in the county
- The county's only American Burn Association-verified Regional Burn Center
- The county's first comprehensive stroke center
- The longest running Federally Qualified Health Center (FQHC) in the county, located in Anaheim

It has received Magnet Recognition for nursing excellence five times, along with 21 "A" grades for quality and safety from The Leapfrog Group.

Leading clinical programs to care for the greater Southern California community

As the clinical arm of the UC Irvine School of Medicine, UCI Health has established leading clinical programs over the last 50 years that have brought much-needed access to advanced care, research and clinical trials in critical areas to treat the most complex conditions and solve some of medicine's most pressing issues.

The Chao Family Comprehensive Cancer Center, Chao Digestive Health Institute, Gavin Herbert Eye Institute, along with programs in cardiology and neurosciences, are advancing patient care that ensures overall well-being.

Growing system built to last

As a forever organization, UCI Health is preparing for the future to ensure that the community will have access to high-quality, safe care for generations to come.

That means ensuring sustainability in its operations. It opened the nation's first all-electric acute care hospital in December 2025. The health system has been repeatedly recognized by healthcare sustainability organization Practice Greenhealth, including its prestigious Emerald Award, for its environmental commitment.

Today, UCI Health is a growing six-hospital health system that serves a region of 5.6 million people, with locations in Fountain Valley, Irvine, Lakewood, Los Alamitos, Orange and Placentia Linda. Later this month, UCI Health — Irvine Rehabilitation Hospital opens its doors.

UCI Health

Discover a legacy of impact

ucihealth.org/50th

Independent v. Institutionalized Trust Companies: In Defense of the New Paradigm

The financial services industry has witnessed extraordinary developments in U.S. trust law, beginning in 1983 when South Dakota was the first state in the nation to establish the dynasty trust. Modern trust law concepts such as domestic asset protection, strong privacy provisions, directed trusts, trust protectors, and decanting revolutionized the trust industry, directly addressing and resolving inherent conflicts of interest and lack of control that families were forced to endure under the traditional, institutionalized trust company model – where asset management, trust services, banking, and often insurance, were sold to families through a "big bank bundled" approach, wrought with hidden and excessive fees and high turnover.

The U.S. Trust Industry Transformed: A New Paradigm

Without a state income tax, top-tier U.S. jurisdictions with powerful modern trust law planning tools, such as South Dakota, offered tax planning opportunities for large families. The importance of selecting the proper trust jurisdiction became paramount, with some suggesting that it is a breach of fiduciary duty to place a trust in an unfavorable tax, asset protection, or privacy jurisdiction.

Fueled by exciting developments in modern trust law, independent "boutique style" trust companies that did not manage assets, such as Bridgeford Trust Company, proliferated in top-tier jurisdictions, and families were able to avail themselves of the most progressive trust laws in the nation, engage in prudent tax planning, and avoid conflict of interests, while not giving up direction and control. A market-driven correction to a highly flawed trust industry, and a new paradigm was born.

International Conglomerates and the Infusion of Private Equity

The new paradigm in the U.S. trust world developed a huge market opportunity for independent/directed trust companies. This attracted the attention of major international financial services and private equity firms – all looking for a "piece of the action" and to capture, or in many instances, retain revenue going to independent trust companies in top-tier U.S. trust jurisdictions.

The negative impact of this attention is already being felt in the U.S. trust industry. These international, multifaceted, and institutionalized financial services providers have established trust companies in top-tier jurisdictions, often without essential fiduciary talent, requisite understanding of U.S. trust law, or knowing how to properly administer trusts in a given state.

More troubling, many of these companies – often fueled and emboldened by private equity dollars – are buying independent trust companies in top-tier jurisdictions, including recently in South Dakota. Independent trust companies that were originally founded on the principal that the trust industry needed an independent, conflict-free, and non-institutionalized approach, have been rendered institutionalized, no longer boutique, and no longer conflict-free. An unfortunate development for the U.S. trust industry, as once independent trust companies created in the vein of a new paradigm, as a panacea for all that was wrong with the U.S. trust industry, have become part of the very problem they sought to remedy.

Bridgeford Trust Company: Big Enough to Matter, Small Enough to Care

The trust industry is and always will be a relationship business and, therefore, trustee services are best executed through a boutique, conflict-free, fully independent, personalized, and non-institutionalized approach. Large families not only crave this approach but have come to expect and demand it from their corporate trustee. Bridgeford Trust Company passionately embraces modern trust law and the new paradigm and executes a service model committed to these attributes with a clear focus on education, creativity, attention to detail, and great responsiveness.

Now the oldest and largest independently owned South Dakota chartered trust company, Bridgeford Trust Company provides boutique and conflict-free trust and fiduciary services as well as progressive U.S. modern trust law solutions around asset protection, privacy, and tax planning to domestic and international families.

Bridgeford Trust Company has evolved from one of South Dakota's first private trust companies into a fully independent public trust company serving the global ultra-high net worth and family office space, leveraging over 125 years of combined legal, accounting, and trust administrative experience executed through our talented and growing staff of fiduciary professionals. With a fiercely independent spirit and a deep passion for the power of modern trust law, Bridgeford Trust Company is committed to serving domestic and international families with its conflict-free, personalized, and non-institutionalized paradigm for many years to come.

BRIDGEFORD

For more information, scan the QR code to watch a short video from David A. Warren, JD, President & CEO of Bridgeford, that discusses this transformation and new paradigm.

If you have any questions, please contact David at dwarren@bridgefordadvisors.com or by calling (949) 798-6262.

While all trust administration and corporate governance functions at Bridgeford Trust Company are performed and executed through our two offices in South Dakota, education, planning, and marketing activity is coordinated through Bridgeford Advisors, Inc. dba Bridgeford – a legally distinct sister company of Bridgeford Trust Company – with locations in California, Florida, Pennsylvania, and South Dakota.


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The 2026 R&D Tax Credit Playbook: Strengthening Claims and Capturing Value

By Raj Rajan, Managing Director, CBIZ

The research and development (R&D) tax credit remains a valuable way for companies to offset tax liability, improve cash flow, and reinvest in products, processes, and software. However, the environment for claiming the credit has changed. Evolving IRS expectations, expanded Form 6765 requirements, and the rapid adoption of AI are making R&D credit claims more data-driven, transparent, and dependent on documentation created during normal business operations.

Claims need to be identified, quantified, and supported more carefully now. Companies that treat the credit as a year-end calculation may miss eligible activities, overlook useful documentation, or create unnecessary risk in the event of IRS review.

Why Form 6765 Matters More Now

Form 6765, Credit for Increasing Research Activities, is becoming increasingly relevant. The revised form and instructions require taxpayers to provide more information, including details on qualified research expenses, officers' wages, acquisitions or dispositions, and business components. For tax years beginning before 2026, Section G, Business Component Information, is optional for all filers. For tax years beginning after 2025, Section G is expected to be required for many taxpayers, subject to exceptions. Companies may need to describe qualifying projects, align related costs, and distinguish between direct research, supervision, and support activities.

Although the IRS has adjusted implementation timelines before, businesses that strengthen documentation now will be better positioned as reporting requirements evolve. Companies that wait may find details harder to locate, particularly when qualifying work is spread across several teams.

The Importance of Connected Documentation

A strong claim is built on documentation that connects the technical work to the costs. This doesn't require formal research files for every project. In many businesses, especially small and middle-market companies, qualifying activity is documented through tools employees already use, including project plans, engineering notes, meeting notes, design files, change logs, and more.

This is especially important when employees wear multiple hats. While several leaders may contribute to qualifying work, their documentation may be scattered. That is not necessarily a deal breaker, but it means the credit study process should work with existing workflows rather than impose a new compliance structure later. A practical approach can help translate day-to-day business records into a supportable credit position without overwhelming essential business teams.

AI Is Changing How Companies Innovate

AI is changing how companies develop products, improve processes, analyze data, automate workflows, and deliver services. As AI becomes embedded in more business functions, companies may have new opportunities to identify qualifying research activities, particularly when developing proprietary tools, designing algorithms, building custom data pipelines, integrating complex systems, or resolving technical performance, scalability, reliability, or quality issues.

However, using AI does not automatically qualify a company for the R&D credit. The same IRS four-part test still applies: the research must involve domestic Section 174A expenditures, be technological in nature, support the development of a new or improved business component, and include a process of experimentation focused on improving function, performance, reliability, or quality.

For example, developing a proprietary model, evaluating model architectures, building custom data pipelines, or solving complex integration challenges may involve qualifying activities if the work meets the applicable requirements.

Real Savings Require Coordination

The R&D credit can reduce federal income tax liability, support cash flow, create refund opportunities, and, in some states, provide additional value through state credits. For eligible startups and small businesses, the ability to apply the R&D credit against certain payroll taxes can also help monetize qualifying research activity before the company has income tax liability. For established businesses, the opportunity may span multiple departments and locations, making value easy to miss when reviews focus only on job titles, accounting categories, or obvious projects.

For credit purposes, coordination matters because the strongest claims connect qualifying activities, business components, employees, and costs in a way that is both practical and supportable. The technical narrative, cost calculation, employee input, and tax return reporting should all tell the same story. Disconnects can create unnecessary risk or cause a company to understate an otherwise supportable benefit.

Cross-team collaboration is crucial to identify activities that may not be labeled "R&D" internally, such as process improvements, automation initiatives, manufacturing adjustments, software enhancements, product redesigns, or technical problem-solving performed for customer or market requirements.

A Practical Action Plan

1. **Name and track key projects.** Identify projects involving technical challenges, design alternatives, testing, or problem-solving, and use consistent names or project codes to connect documentation and costs.
2. **Preserve ordinary course documentation.** Determine where evidence already exists, such as project management tools, engineering files, emails, design records, and more. Retain the materials that show what was developed, what challenges arose, what alternatives were considered, and how issues were resolved.
3. **Connect people, activities, and costs.** Work with project leaders to understand who was involved in research. This will matter more as Form 6765 reporting emphasizes business components and wage categories.
4. **Review AI and automation projects carefully.** Separate technical development and experimentation from routine deployment of third-party tools. Document the uncertainty, alternatives tested, and technical decisions made.
5. **Coordinate early with tax advisors.** Evaluate federal and state credits, amended return opportunities, and payroll tax credit eligibility before year-end, when records are easier to gather and planning options may be broader. Early coordination can also clarify which activities to pursue, exclude, and document.

Turning Innovation into Savings

The R&D tax credit remains valuable, but the process is becoming more disciplined. Waiting until tax filing season to reconstruct research activity may create challenges, but companies that build documentation into normal workflows can create a stronger, more defensible claim.

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Courageously Designing for the Future: Human Skills in an AI World

By Dawn S. Reese, Chief Executive Officer, The Wooden Floor

At The Wooden Floor, innovation has never been about pursuing the newest idea or technology. Our Culture of Innovation is human-centered, grounded in how we listen, learn, and carry out our important mission.

For more than a decade, our design-thinking practices have taught us to begin by listening to and learning from our students and families, asking better questions, challenging assumptions, and remaining curious about what might be possible. This methodology has allowed us to evolve alongside the young people we serve while remaining firmly rooted in **our mission to inspire and transform their lives through the power of dance and access to higher education.**

Today, perhaps no emerging force is asking organizations to rethink the future more quickly than artificial intelligence.

From the Digital Divide to the AI Divide

The conversation about technology-access is changing. Having a laptop and an internet connection is no longer enough. Students increasingly need the knowledge and confidence to understand artificial intelligence: how to use it effectively and ethically, question its outputs, recognize bias and misinformation, and determine when it should or should not be used.

In 2024, **UNESCO** warned of an emerging **"AI divide,"** in which access to advanced AI tools, infrastructure, subscriptions, and learning opportunities may not be equally distributed. Just as importantly, UNESCO emphasizes that AI literacy must include human-centered design, critical thinking, and ethics, not simply technical proficiency.

At this moment, The Wooden Floor's mission feels particularly relevant.

The Wooden Floor, one of the nation's foremost creative youth development organizations, has served more than 100,000 young people since our founding. We are not a dance studio. We use dance as a vehicle to develop distinctly human skills that will become even more valuable in an AI-driven world: ***Creativity, Critical Thinking, Communication, Collaboration, Character,*** and ***Courage*** which we call **The Wooden Floor 6 Cs©.**

The Wooden Floor student Victoria C. at UCI Brain Camp

We evaluate the impact of our model and assess these 6 Cs throughout our year-round program, which serves students for up to 10 years, and through *Dance Uplifts*, our community engagement program serving children in Title I school districts in North Orange County. Through both programs, students learn to generate original ideas, solve problems with others, communicate their perspectives, question assumptions, navigate uncertainty, and find their own voices.

We witness the impact of our work every day. **Since 2005, 100% of graduates of The Wooden Floor's year-round program have enrolled in higher education.** And over the past five years, **60% of our graduates have pursued S.T.E.A.M. degrees,** declaring majors such as biotechnology, neuroscience, gaming, computer science, and medicine.

As AI changes how we learn and work, **The Wooden Floor 6 Cs becomes even more important.**

Innovation Requires Responsible Experimentation

At The Wooden Floor, we know that innovation requires responsible experimentation for our students and for our organization.

AI is rapidly moving from experimentation into the everyday operations of nonprofits, influencing data analysis, marketing, fundraising, finance, and other functions. Yet many organizations are still determining how to move forward strategically. The August 2026 Bridgespan report, **Choosing Your AI Path: A Framework for Nonprofit Leaders to Make Strategic Choices,** found that **70% of nonprofit leaders and staff globally agree or strongly agree that they are not taking advantage of meaningful opportunities to use AI, while only 8% report having a formal AI roadmap in place.** This creates an important opportunity for the corporate and nonprofit sectors to learn from one another.

At The Wooden Floor, we recently completed a skills-based volunteer project with our corporate partner **PIMCO,** whose team members collaborated with our staff to help develop an AI governance and operational framework. Partnerships like these can bring valuable expertise and capacity to nonprofits while helping organizations adopt emerging technologies thoughtfully, strategically, and responsibly.

Designing for Possibility

Our role as leaders is not to predict exactly what artificial intelligence will look like five or ten years from now. We cannot. **Our responsibility is to prepare people and organizations to thrive regardless of what comes next.**

As part of The Wooden Floor's new 2027–2028 Strategic Plan, we are building the capacity of our staff by providing opportunities to learn, experiment, and use AI responsibly. We are continually listening to our students and families to understand how technology is affecting their education and their lives. And we are working to ensure that young people learn to go beyond merely consuming new technologies, in order to become informed participants, creators, problem-solvers, and leaders in shaping what comes next.

When we encourage young people and our team members to ask, **"What if?" "Why not?"** and **"How might we?",** we are doing more than helping them navigate a new technological terrain. **We are developing the confidence to imagine a future that does not yet exist—and the courage to help create it.**

Dance is the Answer®

We believe when dance is used as a means of social change, innovation flourishes into courageous life-changing outcomes for the children we serve, and moves The Wooden Floor's exciting mission forward, which helps move our community forward. Join us to learn more at **TheWoodenFloor.org.**

Dawn S. Reese, Chief Executive Officer of The Wooden Floor, is a social innovator who leverages her unique blend of experience in business, technology, education, and the arts to propel young people forward. During Reese's 17-year tenure, The Wooden Floor has seen significant growth, both locally through opening a second location in Santa Ana, and through community engagement programs in school districts, as well as nationally through its licensed partnership model. Celebrating its 43rd Anniversary, recent awards for The Wooden Floor include: *2026, 2025, 2024* and *2023 Best Places to Work* by the **Orange County Business Journal,** *2026* **OneOC** *Spirit of Volunteerism's Innovative Impact Award* , *2022 Nonprofit of the Year Award* by the **Greater Irvine Chamber,** and *2021 Stand Up the Arts Award* by **Ovation TV/Charter Communications.** Reese's recent honors include: *2025 Outstanding Nonprofit Leader Award* by **National Philanthropy Day Orange County/Association of Fundraising Professionals**; *2024* Orange County Register *125 Most Influential People*; *2023 Empowering Lives Award* by **Templo Calvario**, and the *2022 Orange County Visionary* by the **Los Angeles Times Orange County**, among others.

Reese proudly serves on the **Santa Ana Chamber of Commerce** as Board Chair, the Board of Directors for the **Passkeys Foundation** as Immediate Past Board Chair, and **Orange County Music and Dance** as Finance Chair, as well as a Board Member for Advisors in **Philanthropy OC**, and the **MVS Foundation**. Reese began the first part of her career in management consulting specializing in the high technology sector. Currently, she is an evaluator and presenter for **OCTANE**'s Nonprofit Accelerator Program.

TheWoodenFloor.org in DawnSReese

DIVORCE-PROOF TRUST
VULNERABLE CHECKBOOK

By **Paul Nelson, Esq**

Is the family trust safe when a marriage ends? Mostly. The distance between mostly safe and safe is narrow, expensive territory, and it has funded more than a few forensic accountants' retirements. The separate property inside the trust is not divided. The lifestyle it pays for, and the checkbook it flows through, are another matter.

Orange County wealth increasingly arrives in trust form. Parents fund irrevocable trusts for adult children to move assets out of taxable estates, protect against creditors, and keep family money in the family. Then one of those adult children divorces, and the trust everyone assumed was untouchable gets its first real stress test.

Start with the good news. Property acquired by gift or inheritance is separate property under Family Code § 770, and a beneficial interest in a trust created and funded by a parent is treated the same way. The trust corpus is not divided in the divorce. A spouse cannot ordinarily reach assets held in a properly drafted third-party irrevocable trust, no matter how large the number or how long the marriage.

That is where the good news ends and the details begin.

First, distributions. Money that leaves the trust and lands in a joint account stops behaving like trust money. Deposited alongside salary and used for household expenses, it commingles, and the beneficiary spouse bears the burden of tracing every dollar back to its separate source. Records fail more often than theories do.

Second, support. The corpus may be untouchable for property division, but trust income is very much touchable for support. Courts setting child and spousal support consider income from all sources, and regular distributions qualify. In In re Marriage of Williamson, 226 Cal. App. 4th 1303 (2014), even recurring cash gifts from wealthy parents were properly considered in the support calculation. Probate Code § 15305 goes further, allowing a court to reach a beneficiary's trust distributions for child support notwithstanding a spendthrift clause. The moat protects the castle. It does not protect the paycheck.

Third, the couple's own trust. A revocable living trust created during marriage and funded with community property changes nothing about the character of what is inside it. An estate plan is not a property agreement. Converting community property to separate property requires an express written declaration under Family Code § 852, and courts read that requirement strictly.

Finally, disclosure. California imposes fiduciary duties between divorcing spouses, and trust interests must be disclosed even when they are plainly separate. Believing an asset is protected is not a reason to hide it. It is, in fact, an excellent way to lose the protection.

For parents doing the planning: an independent trustee, genuinely discretionary distributions, and a beneficiary who is not also the trustee all strengthen the wall. For beneficiaries: keep distributions in a separate account, in the beneficiary's name alone, forever. The trust was built to survive a lot of things. A checkbook should not be what defeats it.

The 12th Annual

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The 11th Annual INNOVATOR of the YEAR AWARDS

Meet the Judges:

Julie Beckley - Senior Vice President, Southern California Sales Manager, *Columbia Bank*

Julie Beckley is Senior Vice President, Southern California Sales Manager for Commercial Banking at Columbia Bank. In this role, she leads business development efforts across Southern California, working with companies ranging from emerging middle market businesses to larger middle market/corporate banking clients with revenues from approximately $5 million to several billion dollars. Beckley partners closely with business owners, CFOs, management teams, and professional advisors to understand their strategic and financial objectives and connect them with Columbia Bank's comprehensive commercial banking capabilities. She works across the broader Columbia platform to deliver tailored credit, treasury management, deposit, and specialty banking solutions that support client's growth and long-term success. With over 35 years of banking experience, Beckley has held leadership, relationship management, and business development roles spanning corporate banking, middle market banking, specialty lending, and strategic business development. She has spent more than 25 years serving the Southern California business community and is recognized for her extensive network, relationship-focused approach, and commitment to helping clients achieve their business goals.

Dan M. Cooper, MD - University of California Distinguished Professor of Pediatrics, *UCI Health*

Dr. Dan M. Cooper is the Associate Director of the Institute for Clinical and Translational Science (ICTS, the NIH CTSA). Dr. Cooper also serves as Special Advisor to the Dean, School of Medicine. Dr. Cooper received his MD from the University of California, San Francisco in 1974. His training included Internal Medicine residency at Hadassah-Hospital, Mt. Scopus, Jerusalem, and he completed his Pediatrics Training at NYU/Bellevue Medical Center. He went on to a 3-year fellowship in Pediatric Pulmonary Medicine at Babies Hospital, Columbia University. In 1981, Dr. Cooper joined the faculty at Harbor-UCLA Medical Center and in 1989, Dr. Cooper, in collaboration with the MLK-Drew Medical Center and CHOC-Children's Hospital, established the first ACGME accredited post-doctoral training fellowship in pediatric critical care medicine in the state of California. A major aim of the Fellowship was to encourage the recruitment of excellent pediatricians from underrepresented minorities. Dr. Cooper was recruited to UCI in 1997. Dr. Cooper led the effort to obtain an NIH General Clinical Research Center for UCI in 1999 which evolved into a successful NIH Clinical Translational Science Award which has been funded continuously since 2010. During the COVID-19 pandemic, Dr. Cooper led regional and national efforts to keep schools open by implementing safe and health practices. Dr. Cooper's research focuses on the translational science of exercise and physical activity and its impact on health and disease in the pediatric population. He is one of the leaders of the NIH Common Fund Molecular Transducers of Physical Activity study, the largest and most ambitious study the NIH has ever undertaken to understand the biological underpinnings of the health effects of exercise. Dr. Cooper also is a leader of the NIH funded project REACH which is focused on exercise and physical activity in children with sickle cell disease. He is currently working with the Santa Ana Unified School District to improve physical fitness education and assessment. Dr. Cooper has over 250 publications in major scientific journals including the New England Journal of Medicine, the Journal of Applied Physiology, Nature, and Pediatrics. He has been continuously funded by the NIH for 4 decades, and has been a major mentor for more than thirty scholars who have made major contributions to biomedical research.

Todd G. Friedland - Managing Partner, California, *FBFK Law*

Todd G. Friedland is the Managing Partner, California, of FBFK Law, a mid-sized law firm serving middle market companies and entrepreneurs in California and Texas. With more than 25 years of complex commercial litigation experience, Friedland combines skill, strategy, and business judgment to help clients achieve success in their ventures and disputes. Friedland is known for his leadership in Orange County and for developing strategies aligned with clients' goals and business needs. Friedland is named in the OC500 by the Orange County Business Journal and has been recognized by Superlawyers in the Orange County Top 50 and Southern California Top 100. Friedland served as President of the Orange County Bar Association and Board Chair of the Association of Business Trial Lawyers, Project Youth OC, and Constitutional Rights Foundation. Friedland is a member of the Food From The Bar advisory board supporting Second Harvest Food Bank. Friedland's golf game is legendary – but not in the right way. Friedland@fbfk.law.

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

Victor Guerrero has dedicated more than 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!

Michael I. Katz - Managing Partner, *Katz Ruby & Carle LLP*

Michael I. Katz is the Managing Partner of Katz Ruby Carle LLP, a Chambers®-ranked litigation firm based in Costa Mesa known for its sophisticated handling of high-stakes intellectual property and business disputes. Before founding Katz Ruby Carle, Katz was a partner at Morrison & Foerster LLP. Katz is recognized as one of the leading trade secret lawyers in California. He currently represents InnoPeak Technologies in a high-profile trade secret dispute with Apple related to Apple Watch health-sensing technology, MaxLinear on claims that Comcast misappropriated technology critical to the operation of Full Duplex (FDX) DOCSIS networks, and BioCorRx in asserting trade secret claims related to addiction treatment modalities. A formidable force in any legal forum, Michael Katz combines legal excellence with strategic discretion, earning him the respect of clients, colleagues, and adversaries alike.

Kyle Leingang - Partner, *Stradling*

Kyle Leingang is a partner at Stradling, Chair of the firm's Debt Finance Practice, and Co-Chair of the Recruiting Committee. He represents lenders and borrowers in a broad range of debt finance transactions, including commercial lending, syndicated and asset-based facilities, acquisition financings, securities offerings, and seller financing in M&A transactions. Prior to joining Stradling, Leingang advised on bank mergers and investment transactions on behalf of the U.S. Department of the Treasury. In addition to his finance practice, Leingang is a recognized beer, wine, and spirits attorney who serves as outside general counsel to breweries, distilleries, retailers, lenders, brand owners, and investors. He advises clients on financings, mergers and acquisitions, corporate governance, regulatory compliance, distribution agreements, and other business matters across the industry.

Justin Owens - Partner, *Stradling*

Justin Owens is a partner at Stradling whose practice focuses on complex business litigation and class action defense. He represents clients across a wide range of industries in federal and state courts, as well as private arbitrations, and is known for securing early and decisive victories in high-stakes disputes. Following a federal clerkship in the U.S. District Court for the Central District of California, Owens developed his trial skills at a large litigation firm before joining Stradling in 2015. Since then, he has built a strong track record of achieving exceptional results for clients in complex commercial litigation matters.

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

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

Jeffrey M. Verdon - Managing Partner, *Verdon Law Group, LLP*

Jeffrey M. Verdon was named by Goldline Research as one of the "Top 10 Most Dependable Lawyers of California for 2008." He specializes in estate, trust and income tax planning, and asset and lifestyle protection planning for high-net-worth clients across the United States. Verdon was a Fellow and Senator of the distinguished Isle of Man-based Offshore Institute, a professional body that is dedicated to the education and training of competent practitioners in offshore and international finance and tax planning, and to improving the professional standards of those who dispense professional advice in this field. He is also one of the founding members of one of the earliest and most distinguished publications on comprehensive estate planning, Jacob's Report on Asset Protection Strategies. In addition to his practice, Verdon is a highly sought-after speaker in the areas of taxation and estate planning. He regularly lectures aboard luxury cruise ships, and at top Investment Conferences Internationally.

Sydney Warren - Managing Director, *Bridgeford Trust Company*

Sydney Warren serves as Managing Director for Bridgeford Advisors and works across Bridgeford's family of companies, including Bridgeford Trust Company and Bridgeford Global. In her role, Warren works closely with attorneys, family offices, wealth advisors, and other industry professionals on sophisticated trust planning solutions, multigenerational wealth strategies, and the practical application of South Dakota's modern trust framework. Warren routinely represents Bridgeford at conferences, industry events, and professional forums across the country, contributing to discussions surrounding modern trust planning, fiduciary innovation, and the evolving landscape of wealth preservation and governance. She also works closely with Bridgeford's senior leadership team to support and strengthen relationships with advisors and families.

Philip Wilson - Managing Director, *CBIZ*

Philip Wilson is a Managing Director in CBIZ's Costa Mesa office and a member of the firm's national Tax Controversy practice, bringing more than 30 years of experience in tax, accounting, and business advisory services. A former IRS revenue agent, Wilson advises companies and high-net-worth individuals on complex tax matters and represents clients in resolving issues with the Internal Revenue Service. He works across a broad range of industries, with deep experience supporting growth-stage and middle-market businesses, including those in the innovation economy. Wilson is known for his practical, solutions-oriented approach and his ability to navigate complex regulatory environments. Prior to joining CBIZ through its acquisition of Marcum LLP in 2024, Wilson served as Office Managing Partner at Marcum for over a decade. Earlier in his career, he was a founding partner of WilsonMorgan LLP, where he led tax compliance, consulting, and controversy engagements.

2026 INNOVATOR OF THE YEAR AWARD NOMINEES

2-1-1 Orange County, a key service of Orange County United Way, Irvine
Elizabeth Andrade, Executive Director

Orange County United Way is one of the region's largest nonprofit organizations, serving Orange County for more than a century through strategic community initiatives and cross-sector partnerships. The organization employs more than 150 staff and delivers dozens of programs that collectively reach hundreds of thousands of residents each year. Its work spans student success, financial security, homelessness solutions, and 2-1-1 Orange County's resource navigation services. In July 2023, Orange County United Way acquired 2-1-1 Orange County and appointed Elizabeth Andrade as its Executive Director. Under her leadership, 2-1-1 Orange County has expanded its reach and impact, connecting individuals and families to critical health and human services, including housing, food assistance, behavioral health, disaster response, and other community resources. She has led the organization's growth as a countywide hub for coordinated care, technology innovation, and cross-sector collaboration. Prior to joining Orange County United Way, Andrade served as Chief Executive Officer of Family Assistance Ministries (FAM), where she led efforts to prevent homelessness, strengthen housing stability, address food insecurity, and expand services for vulnerable individuals and families in South Orange County.

Abstrax, Irvine
Kevin Koby, CEO

Kevin Koby is the CEO and Co-founder of Abstrax, an Irvine-based flavor science company he built from a garage operation into a global ingredient supplier generating approximately $60 million in annual revenue and employing 185 people. Founded in 2017, Abstrax serves some of the largest cannabis operators and craft breweries in the world through three divisions: Abstrax Tech, which develops terpene profiles and flavor systems for vapes, concentrates, edibles, and pre-rolls, Abstrax Hops, which supplies hop extracts and natural flavors to the brewing industry, and Abstrax Flavors, which extends the company's flavor science into mainstream food and beverage applications. A native of Orange County and a lifelong surfer and skater, Koby studied chemistry at UC Santa Barbara before working his way up through cannabis cultivation and production, then co-founding Abstrax. The company has been featured on the cover of Forbes, ranked on Fast Company's Best Workplaces for Innovators, and named to the Inc. 5000 twice. In 2025, Koby was appointed to the invitation-only Fast Company Impact Council.

Acorn Biolabs, Irvine
Drew Taylor, Founder & CEO

Acorn Biolabs is a regenerative medicine company pioneering non-invasive hair follicle-derived stem cell collection and cryopreservation for personalized therapeutic applications in aesthetics and longevity. Founded by stem cell biologist and entrepreneur Dr. Drew Taylor, Ph.D., Acorn recently expanded U.S. operations to a 13,000 square foot facility in Irvine, California, anchoring a clinical network of over 200 partnered medical practices across North America. The company's proprietary platform enables patients to bank their cells at peak biological viability for future use, alongside YOU™, a highly concentrated secretome product enriched with growth factors including VEGF, FGF, EGF, and IGF-1, demonstrating significantly elevated bioactivity compared to traditional PRP. Supported by a Series A financing led by Merz Aesthetics, Acorn has scaled from early clinical deployments to broader North American commercialization, with two active IRB-approved sites investigating injectable applications. Acorn's work has been featured in Forbes, Men's Health, New Beauty, Goop, and other leading publications, and Dr. Taylor has presented at major medical and longevity stages worldwide.

Alpha Motor Corporation, Irvine
Edward Lee, Founder & CEO

Edward Lee is the Founder and CEO of Alpha Motor Corporation, a U.S.-based electric vehicle manufacturer advancing innovation in sustainable mobility. With over 23 years of experience, he has led vehicle development for global automotive brands including Lexus, Toyota, and Audi. As the creator of the Lexus LC 500 flagship luxury coupe, Lee has earned widespread recognition for his contributions to automotive design. He holds over 20 patents and has received multiple industry awards for both design excellence and business leadership. Lee earned his degree in Industrial Design with a focus on transportation from the prestigious ArtCenter College of Design.

Bigfork Bay Music LLC, Irvine
Scott Hansen, Founder

Bigfork Bay Music is a record label that signs no artists, and it owns everything it makes. Founder Scott R. Hansen, an intellectual property attorney and Recording Academy member, built the Irvine company on a simple premise: in music, the lasting asset is not the star but the song and the rights behind it. Bigfork Bay creates and produces its own songs, and every release becomes clean, licensable intellectual property that can earn for years across film, television, games, and advertising. The label runs lean. One founder directs the operation and hires performers and engineers worldwide, one track at a time, supported by a global roster of contract talent. Growth has been fast. The catalog now spans classical, new age, Latin, jazz, flamenco, and Afropop, with artists engaged across four continents. Its song Tunapaa won the Afrobeats category at the 2026 Hollywood Independent Music Awards, and its releases also won at the 2026 New Age Notes Radio Music Awards and the 2026 World Entertainment Awards.

Billion Dollar Beauty, Irvine
Natalie Plain, CEO

Billion Dollar Beauty is a cosmetic company dedicated to finding solutions to everyday beauty challenges. They have sold millions of their best-selling product, their Universal Brow Pencil, to retailers such as TJ Maxx, Amazon, TikTok Shop, Walgreens, and other retail channels globally. With multiple patents, they are a leader in innovation, notably in the brow category, which they developed as a category over twenty years ago.

Blank Rome LLP, Irvine
Sharon Klein, Vice Chair

Blank Rome is an Am Law 100 firm with 16 offices and more than 750 attorneys and principals who provide comprehensive legal and advocacy services to clients operating in the United States and around the world. Their professionals have built a reputation for their leading knowledge and experience across a spectrum of industries and are recognized for their commitment to pro bono work in their communities. Since its inception in 1946, Blank Rome's culture has been dedicated to providing top-level service to all of their clients. Sharon Klein is the firm's Vice Chairman of AI and co-leads its privacy and security practice nationally. With more than 40 years of experience, including prior in-house leadership at Siemens Medical Solutions, Klein brings a deeply practical perspective in highly regulated industries. She advises organizations on the responsible deployment and governance of emerging technologies, including artificial intelligence, across rapidly evolving data-driven environments. She is widely recognized for guiding clients through sensitive breach response and enterprise technology transformations, helping organizations innovate responsibly and sustainably in highly regulated environments.

BrandAmped, Lake Forest
Dakota Rader, CEO

Dakota Rader founded Golden Eagle Vodka, an American Character Vodka that he took to market with an in-house team in Southern California, quickly expanding into other states. As the industry began to shift, wholesaler consolidation shrank the number of distributors willing to take on smaller brands, leaving many independents without a clear path to retail and on-premise placement. Building and sustaining an in-house field team became harder at the same time, with rising costs and shrinking margins making that route less realistic for most independents. Rader saw an opportunity in the infrastructure he had already built for Golden Eagle and opened it up to other independent brands, launching BrandAmped. BrandAmped is a shared services platform that gives independent and growth-stage beverage brands access to a full-time, W-2 market management team without the overhead of building one in-house. The company now operates across California, Nevada, Arizona, and Texas, with additional markets in development, and continues to bring on new brand partners across those markets.

Brewery X, LLC, Anaheim
Clayton Wellbank, CEO

Clayton Wellbank is Co-founder and CEO of Brewery X, Orange County's largest craft brewery by production volume and one of the fastest-growing regional breweries in the U.S. Founded in 2019, Brewery X has grown to more than 200 employees and over $30 million in annual revenue, with distribution across California, Arizona, Colorado, Massachusetts, and Japan. Ranked among the 50 largest breweries in the nation and the top 10 in California, Brewery X continues to gain market share in a challenging industry where many competitors are contracting. Under Wellbank's leadership, Brewery X has built a diversified beverage portfolio that includes award-winning craft beer, hard seltzers, hard teas, and hard sodas. In 2025, the company earned global recognition by winning the World Beer Cup for Best IPA in the World. Brewery X also operates hospitality locations in Anaheim, San Diego, and Ontario International Airport, and serves as the official craft beer partner of the Los Angeles Angels and Anaheim Ducks. Brewery X has supported more than 500 nonprofit organizations, and Wellbank serves on the board of YPO Orange County.

City of Hope Orange County, Irvine
Edward S. Kim, M.D., M.B.A., Physician-in-Chief

Edward S. Kim, M.D., M.B.A., Physician-in-Chief, City of Hope Orange County, is an internationally recognized physician executive, scientist, and medical oncologist known for his trailblazing discoveries, leadership, and advocacy for equity in clinical study participation. Dr. Kim was instrumental in establishing City of Hope Orange County, which includes a 72-acre academic research campus in Irvine and five clinical locations. As system director, clinical trials for City of Hope, Dr. Kim is tackling one of cancer care's most urgent challenges: the exclusion of patients from clinical trials. Dr. Kim launched a pioneering national clinical trials model spanning 39 sites across four states. The model uses a centralized hub to rapidly open studies simultaneously, bringing trials directly to patients who need them most. Multistate trials at City of Hope reach first-patient consent is as few as 11 days post activation, with first patient accrual often achieved within 30 days. Dr. Kim is also the architect of a platform that accelerates trial matching and reduces administrative delays, helping more patients access potentially lifesaving treatments faster.

COHN Nutrition, Costa Mesa
Howard Cohn, Doctor & Owner

COHN Nutrition is an innovative health and wellness company dedicated to developing clean, science-informed nutritional solutions that simplify health without compromising quality. Founded by Dr. Howard Cohn, whose more than 35 years of clinical experience have shaped the company's philosophy, COHN Nutrition has quickly established itself as an emerging brand focused on premium, plant-based formulations designed to support whole-body wellness. (PRWeb) Its flagship product, H2 Blast™, represents a breakthrough in molecular hydrogen supplementation through its proprietary, no-water delivery system. Rather than releasing hydrogen into a bottle of water before consumption, H2 Blast is formulated to dissolve directly in the mouth, allowing the body itself to become the delivery vessel and maximizing convenience while preserving the intended delivery experience. (PRWeb) This innovative approach, combined with clean ingredients and a commitment to research-driven product development, has positioned COHN Nutrition as a company challenging conventional supplement delivery methods while creating practical wellness solutions for both healthcare practitioners and consumers.

Complex Appellate Litigation Group, Newport Beach
Mary-Christine (M.C.) Sungaila, Partner

A pioneering Big Law leader, M.C. Sungaila heads the Complex Appellate Litigation Group's Orange County office, where she shapes underdeveloped areas of the law through high-impact appellate cases. She has briefed or argued more than 170 appeals and dedicates significant time to pro bono human rights work, community service, and education. Sungaila is also a highly influential advocate innovating at the frontiers of public policy. An emerging leader in the field of space


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law, she is helping to shape space governance as a private-sector advisor to the State Department and as a delegate and invited expert to the UN Committee on the Peaceful Uses of Outer Space. As an outgrowth of her federal appellate work on behalf of families seeking to recover art stolen in the Holocaust, Sungaila was also a leading advocate for the federal HEAR Act that was signed into law this year. Sungaila balances her practice and advocacy with her award-winning podcast, The Portia Project®, which chronicles women's paths to success and inspires the next generation of women leaders.

CoreViva, Newport Beach
Dr. Alan Alexander, CEO & Co-founder

Dr. A. Alexander is the CEO and Co-founder of CoreViva, an innovative wellness company offering advanced whole-body MRI scans. CoreViva has engineered the fastest, most accurate, most comprehensive whole body MRI scan that delivers personalized patient recommendations, increases early disease detection, optimizes treatment options, and provides better outcomes. Dr. Alexander is a board-certified physician operating executive and practicing radiologist with expertise in longevity, cancer, and medical imaging. 27 years ago, he was part of the group at the NIH, National Institute on Aging, that discovered caloric restriction increases longevity, and the longevity effects of intermittent fasting. Prior to founding CoreViva, he was a team physician for the LA Lakers, LA Dodgers, and multiple collegiate teams. Previously, Dr. Alexander held a number of healthcare leadership roles including Global Head of Medical Imaging at McKinsey & Co. and Chief Medical Officer at a healthcare technology company. Across his career, he's interpreted MRI scans for many notable scholars, physicians, and celebrities.

CTC Global, Irvine
J.D. Sitton, Chief Executive Officer

CTC Global is an Irvine-based technology company helping electric utilities deliver more affordable, reliable, and sustainable electricity while reducing the risk of catastrophic wildfires and supporting rapidly growing energy demand. As AI, data centers, advanced manufacturing, electrification, and renewable energy transform the global economy, the company's patented ACCC® Conductor technology enables utilities to safely deliver substantially more electricity over existing transmission lines—often avoiding years of permitting, construction, and billions of dollars in new infrastructure costs. Since becoming CEO in 2014, J.D. Sitton has led CTC through a period of exceptional growth, expanding the company's global footprint to more than 1,600 projects in over 70 countries, supported by five production facilities, approximately 50 manufacturing partners, and a worldwide team of over 600 employees. A mechanical engineer with an MBA, Sitton has built a distinguished career commercializing breakthrough energy technologies. Under his leadership, CTC Global also introduced the GridVista™ System, an industry-first platform providing utilities with continuous, real-time visibility into transmission line performance.

e360, Irvine
Mike Strohl, CEO

Mike Strohl is CEO of e360, an award-winning enterprise technology partner, which he has helped lead since 1994. During his tenure with the company, Strohl has guided e360's growth as it has become a trusted advisor to some of the nation's top healthcare, financial services, entertainment, education, and public sector organizations, with expertise spanning cybersecurity, digital workplace, modern infrastructure, cloud, AI services, and managed services. Strohl has also championed initiatives such as FinOps and the Office of Innovation to keep clients ahead of changing technology and to ensure measurable business outcomes from their IT investments. Under his leadership, e360 has also earned sustained recognition from industry analysts and partners, including repeated appearances on CRN's Solution Provider 500, Tech Elite 250, and Fast 150 lists, multiple Partner of the Year awards from vendors such as Citrix and Google Cloud, and regional recognition from the Orange County Business Journal. He holds a BS in Business Administration from San Francisco State University and is based at the company's headquarters in Irvine, California.

ECOS, Cypress
Kelly Vlahakis-Hanks, President & CEO

Cypress-based manufacturer ECOS makes the #1 selling green laundry detergent in the U.S. and over 200 safer household cleaning products. ECOS is the first green brand to rank among the top 10 laundry detergents sold nationwide, conventional brands included. Founded in 1967 and led by president and CEO Kelly Vlahakis-Hanks, the family-owned and -operated company is a nationally recognized leader in green chemistry and sustainable manufacturing. Vlahakis-Hanks oversees four U.S. manufacturing facilities in the U.S. with approximately 300 employees, plus a European manufacturing platform. Under her leadership, ECOS became the first manufacturer to receive USGBC LEED® Zero Energy, Carbon, and Waste certifications for net-zero impacts. ECOS's revenue has grown 16% year over year, and the company has a 4-year growth rate of 77%. It is significantly expanding its manufacturing capacities, with 145,000 square feet in Cypress and over 550,000 square feet nationwide by 2028. ECOS continually invests in innovative manufacturing formats like its liquidless laundry detergent sheets, and it was the first manufacturer in the U.S. to make detergent sheets domestically.

Eggs Unlimited, Irvine
Timothy Cohen, President

Tim Cohen is the Founder and President of Eggs Unlimited, one of the nation's largest independent egg supply companies. Over the past seven years, he has transformed the company from a startup into a nearly $900 million global business by combining traditional family values with a modern, technology-driven operating model. Known throughout the industry as the "Egg Whisperer," Cohen has more than 20 years of experience and has helped modernize the egg industry through innovation in sourcing, market intelligence, logistics, and customer service. His entrepreneurial approach and ability to anticipate market shifts have enabled Eggs Unlimited to build one of the industry's most diversified supply networks, helping customers navigate periods of unprecedented supply disruption with confidence. Cohen's leadership philosophy is built on long-term relationships, exceptional customer service, and investing in people. His commitment to developing talent and embracing technology has made Eggs Unlimited a destination for ambitious professionals seeking accelerated career growth, while maintaining the family values that have been central to the company's success.

Finally Quiet, Inc., Irvine
Peman Montazemi, Founder & CEO

Peman Montazemi is the Founder and CEO of Finally Quiet!, an Irvine, California-based medtech startup developing the first AI-powered acoustic operating system for high-noise clinical environments. The company is focused on transforming communication, voice interaction, and AI-driven documentation workflows across dentistry and future healthcare applications. Under Montazemi's leadership, Finally Quiet! has rapidly evolved from an early-stage concept into a commercially active company with growing traction among dental clinics, DSOs, and international strategic partners. In April 2026, the company became revenue positive for the first time in its history, significantly outperforming internal projections during the launch of its Phase I Pilot program. Finally Quiet! has also gained strong recognition within the Southern California innovation ecosystem, receiving multiple awards for healthcare and consumer technology innovation while securing strategic partnerships and pilot discussions with some of the largest dental organizations in the United States and abroad.

Forest-PKG, San Juan Capistrano
Matthew Wright, Founder

FOREST is an AI-powered packaging intelligence platform designed to help packaging professionals discover information, identify qualified partners, and connect more effectively across the packaging ecosystem. Founded in Orange County, FOREST brings together buyers, suppliers, academia, and industry organizations through a searchable and collaborative platform focused on improving access to packaging knowledge and business opportunities. Matthew Wright is the Founder of FOREST and a packaging industry veteran with more than 25 years of leadership experience. Throughout his career, he has held leadership positions at International Paper and Temple-Inland and founded rightPAQ, a packaging company that he successfully grew and later exited. Wright later founded Specright, helping establish specification management as a recognized software category and advancing how organizations manage product and packaging data. He has led multiple mergers and acquisitions throughout his career and authored "The Evolution of Products and Packaging." Today, he continues to serve as Executive Chairman of the Specright Board while leading FOREST's vision to make packaging intelligence more accessible, connected, and actionable through artificial intelligence.

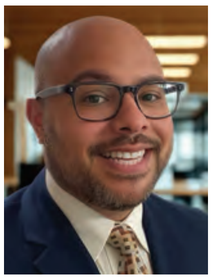
Go Rentals, Newport Beach
Martin Elliott, Chief Financial Officer

Martin Elliott is the Chief Financial Officer of Go Rentals, who brings deep private equity–backed experience in consumer and multi-location businesses as well as a proven track record of expanding EBITDA, strengthening cash flow, and building scalable finance organizations. He joins Go Rentals following his tenure as Chief Financial Officer of global brand Spanx, where he oversaw the company's profitable growth and helped transform the business into a performance-driven enterprise through cost discipline, working capital rigor, and KPI-based operating frameworks. Known for his strategic vision, operational expertise, and collaborative leadership style, Elliott serves as a trusted partner to sponsors and boards, focusing on margin expansion, capital efficiency, and positioning companies for strategic and capital markets exits. At Go Rentals, he is responsible for overseeing the company's financial operations, driving cash flow growth, and identifying new opportunities for expansion and innovation as the company continues to grow as the premier provider of high-end rental vehicles for private aviation clients and the most discerning travelers.

Good Life Property Management, Irvine
Natalia Mangold, Integrator & Chief Operating Officer

Good Life Property Management is a Southern California residential property management company specializing in single-family homes, condos, and small apartment buildings. Founded in 2013 by Steve Welty, a licensed California real estate broker, the company was built with a mission to make rental property ownership easy. Over the following decade, Good Life Property Management scaled to manage more than 1,200 residential units and expanded into Orange County, cementing its position as Southern California's most trusted property management firms. The company has earned the confidence of over 1,000 Southern California homeowners and boasts more than 1,800 client reviews. Notable differentiators include a six-month money-back guarantee, competitive management fees, and specialized services for military families. Guided by core values of team first, problem-solving, and raising the bar, Good Life Property Management remains committed to its purpose: to create opportunity, enjoyment and impact.

High School Inc. Academies Foundation, Irvine
Felix Lugo, Executive Director



Felix Lugo serves as Executive Director of High School Inc. Academies Foundation, a nonprofit organization in partnership with Santa Ana Unified School District, Career Education & Workforce Innovation and Santa Ana Chamber of Commerce that connects education, business, and community partners to prepare students for high-demand careers through Career Technical Education (CTE), work-based learning, and industry partnerships. Founded in 2006, High School Inc. supports thousands of students annually across multiple Orange County high school academies with a dedicated team of five employees and an extensive network of educators, volunteers, business leaders, and community partners. Under Lugo's leadership, the organization has expanded career pathways serving over 3,500 students throughout Orange County in Culinary & Hospitality, Healthcare, Autmotive, New Media, Global Business, Engineering & Computer Science, Agriscience, Biomedical Science, E-Business, and Esports (in the Fall 2026) while strengthening employer partnerships that provide internships, mentorships, scholarships, and real-world learning experiences. He has also led organizational improvements in strategic planning, data systems, fundraising, and community engagement, helping position High School Inc. for long-term sustainability and measurable impact.

Histologics LLC, Anaheim
Neal Lonky, MD, MPH, Founder & CEO

Neal Lonky MD, MPH is the Founder and CEO of Histologics LLC, a medical device company that is dedicated to the diagnosis and effective treatment of tissue-based disease

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with a “compassionate” approach. He is Clinical Professor of Ob/Gyn at University of California, Irvine and still practices Gynecology part-time as “Partner Emeritus”, So Cal Permanente Medical Group. Dr. Lonky received his BA from SUNY Buffalo, MD from SUNY Stony Brook, Internship and Residency from Harbor UCLA in Obstetrics and Gynecology, and Public Health degree in Health Policy and Management from UCLA. He is a former elected Director of the Southern California (Kaiser) Permanente Medical Group, multi-awarded Researcher, and recipient of Exceptional Contribution Alumni awards from both SUNY Stony Brook and the UCLA School of Public Health.

Iffel International Inc., Anaheim
Hema Dey, CEO - The AI Translator

Iffel International Inc. is a global AI consulting and revenue-focused marketing firm headquartered in Anaheim Hills, Orange County, founded in 2006 and operating across more than 35 countries spanning five continents. The firm partners with growth-stage companies across law, healthcare, manufacturing, and professional services—deploying proprietary AI frameworks engineered to drive EBITDA, not just activity. Iffel’s client engagements are measured in one currency: revenue outcomes. Hema Dey, Founder and CEO, is a Forbes Top 5 AI Leader and the architect of a philosophy that is increasingly rare in the AI industry—that Team Human and Team AI are not in competition. They are in partnership. And when that partnership is designed correctly, it produces compounding business value that neither can generate alone. Under her leadership, Iffel International has developed three proprietary revenue frameworks—SEO2Sales™, Generative Engine Optimization (GEO2Sales), and Signal2Phygital™—and a suite of named AI agents serving client operations across multiple industries. Her forthcoming book The AI Translator (June 2026) delivers this framework to business leaders globally.

InnoCaption, Irvine
Paul Lee, CEO

Paul Lee is the Chief Executive Officer of InnoCaption, a leading accessibility technology company based in Irvine, California, providing real-time captioning and AI-powered text-to-speech for phone and video calls for people with hearing loss or speech disabilities. The company, which has grown to a team of roughly 40, had a milestone 2026: it developed new AI-powered text-to-speech features, including AI Refine, and launched InnoCaption Video, bringing its captioning to video calls for the first time. Lee led the ideation and development of the new TTS features and recently received a patent on the work, earning InnoCaption an AI Breakthrough Award for Text to Speech Solution of the Year and a Fast Company World Changing Ideas honorable mention. Lee joined InnoCaption in 2020 as CFO, became COO in 2023, and was named CEO in 2026. Before InnoCaption, he spent over a decade as an investment professional at Merrill Lynch, FFL, and Ontario Teachers’ Pension Plan, across New York, San Francisco, Hong Kong, and London. Lee lives in Irvine with his wife and two sons.

Kerr, Brea
Paulin Wahjudi, Sr. Manager Product Development

Kerr is a global dental solutions company that develops and manufactures restorative, endodontic, rotary, and infection prevention products used by dental professionals worldwide. Founded in 1891, Kerr has built a long-standing reputation for innovation and clinical excellence, serving customers across North America, Europe, Asia, and other international markets. The company is part of Envista Holdings Corporation, a global family of leading dental brands committed to advancing oral health through innovation and education. Kerr continues to maintain a stable workforce while supporting clinicians through a portfolio of market-leading products, including OptiBond™, SonicFill™, Harmonize™, Maxcem Elite™, K-Files™, and CaviWipes™. With more than 130 years of industry experience, Kerr has become synonymous with quality, integrity, and customer partnership. The company’s ongoing investments in product development, clinical education, and customer support have helped strengthen its position as a trusted leader in dental consumables. Today, Kerr continues to drive innovation that enables dental professionals to deliver efficient, predictable, and high-quality patient care around the world.

KYA, Santa Ana
Tony Leyds, CEO & Founder

As the CEO and Founder of KYA, Tony Leyds brings extensive experience from a multifaceted background. With a law degree and a successful legal career in South Africa, Leyds transitioned into entrepreneurship in the United States, co-founding USA Shade & Fabric Structures. At KYA, Leyds upholds a commitment to excellence, fostering innovation and empowerment within their team as well as the clients, students, and communities they serve. KYA is an employee-owned, modern specialty general contractor redefining how public environments are built and improved. By integrating specialized expertise, aligned teams, and disciplined execution, KYA delivers complex projects with speed, consistency, and long-term performance. Serving education, civic, healthcare, federal, and public-sector agencies, KYA is rooted in a values-driven culture and a mission to create better places. Through its commitment to quality, accountability, and innovation, KYA builds environments where people belong today, ideas flourish tomorrow, and community thrives over time. Over the 13 years KYA has existed, it has grown from $750K in 2013 to just over $300 million in 2026 and became an ESOP (Employee Owned) in 2023.

Lionheart Health, Inc., Newport Beach
Howard Leonhardt, Executive Chairman & Co-CEO

Lionheart Health, Inc. is an Orange County-based regenerative medicine and healthspan technology company developing bioelectric stimulation, biologics, longevity therapeutics, and AI-enabled personalized wellness platforms designed to help people live healthier, longer lives. The company has grown into a multidisciplinary organization with research, engineering, clinical, manufacturing, licensing, and commercialization operations serving a rapidly expanding network of more than 100 licensed and endorsed treatment locations worldwide. Lionheart Health has built a portfolio of more than 700 patent claims, utilizes multiple FDA-cleared technology platforms, and was recognized as a Top 40 Semi-Finalist in the global XPRIZE Healthspan competition from more than 600 international entrants. Under the leadership of Executive Chairman Howard J. Leonhardt, the company has accelerated commercialization through strategic partnerships, new licensing programs, and expanding clinical research focused on heart, brain, muscle, skin, hair, orthopedic, and healthy aging applications. Leonhardt, a serial medical technology entrepreneur with more than four decades of innovation experience, has founded or helped launch numerous life science companies and continues to position Orange County as a global center for regenerative medicine, bioelectric medicine, and longevity innovation.

Makani Science, Irvine
Dr. Michael Chu, CTO

Makani Science, Inc. is an Irvine-based medical device startup that developed the world's first wireless, wearable continuous respiratory monitor. Founded in 2018 as a UC Irvine spin-off, the company addresses a critical medical blind spot using a soft, postage-sized patch to accurately track breathing in real time. Makani has achieved significant growth, graduating from Y Combinator, securing FDA 510(k) clearance in 2025, and receiving a prestigious 2025 NIH grant. Makani is currently developing its second-generation Aire product and a life-saving neonatal device for detecting apnea in premature NICU babies. As Chief Technology Officer, Dr. Michael Chu is the visionary innovator behind Makani’s groundbreaking sensor technology. His technical leadership is driving the mission to predict respiratory complications, drastically reduce hospitalizations, and establish a new standard of proactive, data-driven respiratory care from neonates to adults. Focusing on technical execution and innovation, Dr. Chu and the team are committed to advancing respiratory care and improving patient outcomes. The company operates with a highly agile team of eight employees.

MatterHackers, Lake Forest
Lars Brubaker, CEO

CEO Lars Brubaker of MatterHackers built his career on turning bold ideas into thriving companies, and 3D printing was his most ambitious bet yet. In the early 2010s, Brubaker, a software engineer, built his own 3D printers at home, drawn to the technology even as the software of the era lagged behind it. He had already built and sold one company: he co-founded Reflexive Entertainment in 1997, grew it into a video game developer, and sold it to Amazon in 2008. Leaving Amazon in 2012, he partnered with two friends and founded MatterHackers, betting 3D printing would matter far beyond hobbyists. That founder-level passion for solving problems has never left the company. Headquartered in Lake Forest, California, MatterHackers has grown from three partners packing filament orders by hand into a leading provider of industrial 3D printing, serving manufacturers, aerospace companies, and government agencies, including Boeing, SpaceX, Lockheed Martin, Tesla, and Disney. The company employs approximately 140 professionals across California, Pennsylvania, and a new Texas center, growing revenue over 110% from 2023 to 2026.

Mobile X Global, Irvine
Peter Adderton, Founder & CEO

Peter Adderton is the Founder and CEO of MobileX, the world’s most customizable wireless carrier, headquartered in Irvine. Adderton, also the founder of Boost Mobile and Digital Turbine (Nasdaq: APPS), built the first and only wireless provider to use AI to analyze each customer’s actual behavior, forecast their usage, and recommend the most efficient plan. Through the MobileX app, users monitor their usage in real time and adjust their plans accordingly, so they only pay for what they use. MobileX maintains an industry-leading 1% port-in churn rate, customers save an average of 85% on their monthly bills, and roughly 70–80% are on a personalized plan rather than a flat unlimited tier. Distribution has scaled with the platform: MobileX is in approximately 3,700 Walmart stores, on Walmart.com, through an expanding independent dealer network, and directly to consumers. Earlier this year, Wave7 Research presented MobileX with its Momentum Award, citing the company’s rapid growth and brand strength in the independent dealer channel.

MoviTHERM, Irvine
Markus Tarin, Founder, President & CEO

MoviTHERM is an Orange County–based thermal imaging and industrial IoT company headquartered in Irvine, California. Founded in 1999, the firm has grown from a one-person consultancy into an industry-recognized advanced thermography company serving aerospace, defense, energy, and manufacturing clients across North America. Today, MoviTHERM employs its deep infrared expertise in a new strategic direction: predictive fire prevention through its iTL IoT Platform. Markus Tarin, Founder, President, and CEO, has led the company’s transformation from thermal hardware sales into a recurring-revenue IoT and SaaS platform business. Under his leadership, MoviTHERM’s non-destructive testing systems have been adopted by major aerospace manufacturers for composite-structure inspection, and the company has pioneered the introduction of IoT-ready thermal smart cameras to the North American market. Tarin has co-developed innovations featured at CES, contributed to peer-reviewed publications, and authored a chapter in Wiley’s definitive reference text on infrared thermal imaging. He is a member of Entrepreneurs’ Organization, Vistage, and IEEE.

OCVIBE, Anaheim
Nick Pacific, Vice President, Katella Commons

Nick Pacific is Vice President of Katella Commons at OCVIBE, a 100-acre mixed-use entertainment district currently under development in Anaheim, California. As part of OCVIBE’s senior leadership team, Pacific leads the planning, design, leasing, and development of Katella Commons, a 50,000-square-foot, chef-driven market hall that will anchor the district’s culinary experience when it opens in 2027. With a unique background spanning culinary arts and real estate development, Pacific has built his career creating innovative food-led destinations that connect exceptional chefs, vibrant communities, and transformative placemaking. Prior to joining OCVIBE, he worked with Arteco Partners where he helped develop and curate chef-driven restaurant concepts and market halls that transformed underutilized spaces into thriving community destinations. A graduate of the Culinary Institute of America, Pacific is recognized for his ability to bridge culinary creativity with operational and development expertise. His work focuses on creating

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authentic, sustainable hospitality environments that support independent chefs, foster cultural diversity, and deliver memorable guest experiences while driving long-term economic and community impact.

Ormco, Brea
Evan Tsai, Director of Advanced Development

Over the past 14 years, Evan Tsai has been a driving force behind some of Ormco's most impactful innovations, helping shape the future of digital orthodontics and generating hundreds of millions of dollars in revenue. He led the development of Insignia, Ormco's pioneering custom digital braces platform, which became a leading solution in customized orthodontic treatment. He also spearheaded the development of several key innovations within the Spark™ Clear Aligner System, including clinical features such as Bite Turbos, Integrated Hooks, StageRx, and BiteSync, all designed to improve treatment efficiency, clinical outcomes, and practitioner workflow. Tsai's contributions extend beyond product development. He has nine submitted patents, seven of which have been awarded, reflecting his commitment to advancing orthodontic technology through innovation. Today, he leads Ormco's team of AI scientists, guiding the development of artificial intelligence algorithms within Spark Software to enhance treatment planning and digital workflows.

OVAL by IRVINEi Coporation, Irvine
Khurram Hussain, CEO

IRVINEi Corporation is an Irvine-based deep technology startup pioneering Edge AI for the smart home market. Founded by Khurram Hussain, the company developed OVAL—the world's first Edge AI Physical Home Hub—featuring fully on-device AI processing with zero cloud dependency, protected by U.S. Patent No. 12,300,081 B2. OVAL integrates with more than 2,700 smart home devices and delivers 11 proprietary AI alert types, redefining home intelligence through privacy-first architecture. While OVAL's underlying Edge AI platform is applicable across senior care, hospitals, factory floors, and warehouse safety, Hussain made a deliberate strategic choice to focus on smart home and security—believing this vertical creates the greatest societal impact by democratizing AI for everyday consumers at scale. IRVINEi is currently executing a $7 million SAFE raise at a $20 million pre-money valuation, with a signed strategic partnership covering over 189 multifamily properties through LobiBox. Khurram brings more than 18 years of enterprise technology experience spanning AT&T, Verizon, Ericsson, and T-Mobile, with a background in electrical engineering and data science, including an M.S. in Analytics from Georgia Tech.

Pacifico Energy, San Juan Capistrano
Nate Franklin, CEO

William "Nate" Franklin is Founder, CEO, and President of Pacifico Energy Group, a full-lifecycle power developer headquartered in San Juan Capistrano, California, with offices in Dallas, Tokyo, Seoul, and Ho Chi Minh City. Pacifico is pioneering a new model of private power grids that generate and deliver electricity to hyperscale data centers directly, independent of the public utility network, and in January 2026 it secured the largest power generation permit ever issued in the United States. The model reflects a simple insight. At the scale of today's AI buildout, a single gigawatt of demand is larger than the peak load of roughly 95 percent of US electric utilities, so building a dedicated private grid makes more sense than straining the public one. Franklin founded Pacifico in 2012 and has grown its US gas-fired and battery-storage pipeline past 10 gigawatts, with additional renewables across the Asia-Pacific. Before Pacifico, he led utility-scale development at BP and was Vice President of Alternative Energy at Jaco Oil. He holds degrees from UCLA Anderson and UC Berkeley.

PKShukla.com, Villa Park
Pradip Shukla, CEO

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

Pretika Medical Corporation, Irvine
Thomas Nichols, President & CEO

Thomas ("Thom") Nichols is Founder and Chief Executive Officer of Pretika MedTech Corporation, an Irvine-based medical technology company developing OptixDX™, a first-of-its-kind connected wound imaging platform designed to transform surgical and chronic wound monitoring. Under his leadership, Pretika has built a strong intellectual property portfolio, secured multiple issued patents, established strategic collaborations with leading healthcare organizations, and advanced OptixDX through the FDA's Class II 510(k) regulatory pathway. Founded in 2023, Pretika is an early-stage MedTech innovator focused on improving patient outcomes through non-invasive optical imaging, cloud connectivity, and AI-enabled clinical decision support. Nichols has led the company's growth from concept to clinical validation, earning recognition as a finalist at HIMSS, HLTH's Digital Health Awards, and other national innovation programs. His vision is to shift wound care from episodic visual assessment to continuous, data-driven monitoring that enables earlier intervention, reduces complications, and lowers healthcare costs. Through strategic leadership, technical innovation, and a commitment to improving patient care, Nichols continues to position Pretika as a pioneer in the future of connected wound diagnostics.

Pro-Dex, Irvine
Rick Van Kirk, CEO

Pro-Dex, Inc. is an Irvine-based, publicly traded medical technology company specializing in the design, engineering, and manufacture of highly sophisticated powered surgical instruments used by many of the world's leading medical device companies. Through its unique combination of engineering expertise, proprietary technology, and precision manufacturing, Pro-Dex develops innovative surgical solutions that improve surgical precision, reliability, and patient outcomes across orthopedic, craniomaxillofacial (CMF) and thoracic procedures. The company's patented Adaptive Torque Limiting™ technology and next-generation Helios Pro surgical platform exemplify its commitment to advancing surgical performance through engineering innovation. Innovation extends beyond product development through Pro-Dex's vertically integrated capabilities spanning engineering, embedded software, electronics, regulatory expertise, and advanced manufacturing, enabling customers to move seamlessly from concept through commercialization. Since 2015, under the leadership of President and CEO Rick Van Kirk, Pro-Dex has accelerated its innovation strategy, expanded its technical capabilities through the acquisition of Advanced Precision Machining, and continued to deliver record operating performance while positioning the company for sustained long-term growth.

Raad Ghantous + Associates and The Raad Life, Dana Point
Raad Ghantous, Owner, Founder of Raad Ghantous + Associates & The Raad Life

The Raad Life is a first-of-its-kind lifestyle platform built on a radical idea: that design isn't just about spaces, it's about how you choose to live. Founded by Raad Ghantous, a luxury interior designer and Certified Aging in Place Specialist with over 25 years of experience, The Raad Life extends the philosophy of his Orange County-based firm, Raad Ghantous + Associates, beyond the walls of any single home. Where RG&A has long championed wellness-driven, generational design by creating interiors that support longevity and intentional living. The Raad Life brings that same ethos to a broader audience, reaching over 50,000 California households monthly and empowering people to design their lives on their own terms. The platform speaks directly to a generation redefining midlife: pro-aging, purposeful, and design-forward. Together, the two ventures form a cohesive and growing brand with a six-person team, proving that the most innovative design work happening today isn't just in homes, it's in how we reimagine the way people live.

ReadyAI, Irvine
Carol Eastman, CEO

Irvine-based ReadyAI.dev is an enterprise AI advisory and platform partner enabling organizations to establish a governed, board-visible internal AI environment. Under the leadership of CEO Carol Eastman, a respected IT CEO with two successful IT company exits, ReadyAI works with C-level leaders and boards to define a disciplined approach to AI adoption that balances innovation, oversight, and control. The Platform provides a private workspace for the major LLMs, along with no-code agent building and vibe coding, enabling enterprises to operationalize internal AI with greater speed and consistency while reducing Shadow AI. It is designed to give leadership teams cost discipline and budget certainty as they scale. ReadyAI is grounded in the TAO of AI—Transparency, Accountability, and Observability —principles highlighted in the book "Governance in the Age of Generative AI" by Dean Yoost and Ashwin Rangan. Rangan brings CIO leadership experience from Walmart, BofA, Rockwell Intl, and ICANN, along with his current board role at Qtonix Quantum. His decision to join ReadyAI adds validation to the company's vision and underscores its emerging leadership in enterprise AI innovation.

Rove Charging, Redondo Beach
William Reid, Chairman & CEO

Bill Reid is a distinguished leader with over three decades of experience in the energy, finance, and private equity sectors. As the Chairman and CEO of Rove, Reid has led the team to develop fast charging centers that serve all EVs, offering customer-centered experiences to meet the growing demands of the electric vehicle market. Reid has overseen the opening of two successful Rove centers in Orange County, Santa Ana and Costa Mesa. These urban centers answer nearly every pain point of the first-generation public charging experience. From reliable chargers to clean facilities to helpful staff on-site, the Rove experience has earned the team four industry awards in less than 18 months. Rove Costa Mesa just opened in April and is already seeing an average of over 600 charging sessions each day. Reid and his team have a pipeline of five more Southern California locations, expected to open by 2027. In addition to his role at Rove, Reid is the founder and CEO of Agate Power.

serviceMob, Inc., Irvine
Anuj Bhalla, Founder & CEO

serviceMob is an enterprise AI company redefining how organizations understand and improve customer service. Its AI-powered Answer Engine and experiential analytics platform unifies data across CRM, telephony, workforce management, QA, surveys and other enterprise systems to help organizations uncover the root causes of customer effort, improve operational performance and deliver measurable financial outcomes. Today, serviceMob partners with Fortune 500 enterprises and other leading organizations across telecommunications, healthcare, technology, retail and hospitality, helping transform customer service from a cost center into a strategic business asset. Anuj Bhalla is the Founder and CEO of serviceMob, where he leads the company's product vision and AI innovation strategy. serviceMob was named 2025 SaaS Company of the Year by the International Executive Council's IMPACT Awards and recognized by the MIT Sloan CIO Symposium Innovation Showcase, NVIDIA Inception, the MIT Innovation Fund, and Morgan Stanley. A graduate of the University of California, Berkeley and MIT Sloan School of Management, he conceived the original vision for serviceMob at MIT and has since evolved it into a category-defining AI platform for enterprise customer service.

Skullcandy, Costa Mesa
Brian Garofalow, CEO

Skullcandy is a global youth lifestyle brand, delivering high-performance headphones, earbuds, and bluetooth speakers at a value price via consumer electronics retailers, online marketplaces, and direct to consumers via skullcandy.com. The company is a PE owned,


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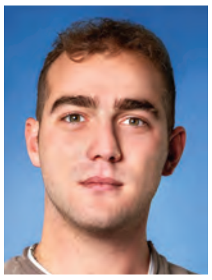
mid-market growth brand with headquarters in Park City, UT and regional sites including Vancouver, London, Melbourne, Shenzen, and Costa Mesa, where CEO Brian Garofalow often works from. Fueled by new innovative products and enhanced brand marketing, Skullcandy has grown over 30% year over year, while the category growth has remained flat in the U.S.

Skyworks Solutions, Inc., Irvine
Dave Feld, Fellow
David Feld is a recognized technology leader and one of three inaugural Fellows at Skyworks Solutions, where he leads the development of next-generation bulk acoustic wave (BAW) and thin-film surface acoustic wave (SAW) technologies for flagship smartphone RF front-end solutions. With more than 25 years of experience, he has been instrumental in advancing acoustic resonator and filter technologies from fundamental research to high-volume commercial deployment, with innovations incorporated into hundreds of millions of mobile devices worldwide. Prior to Skyworks, Feld served as a Distinguished Engineer at Agilent Technologies, Avago Technologies, and Broadcom, where he pioneered industry-adopted modeling, characterization, and power-handling methodologies for BAW devices. Earlier in his career, he was a Member of the Technical Staff at MIT Lincoln Laboratory, contributing to advanced superconductive circuit research. Feld is an inventor on 21 U.S. patent publications, author or co-author of dozens of IEEE publications and invited presentations and currently serves as co-chair of the Physical Acoustics Technical Program Committee for the IEEE International Ultrasonics Symposium.

Specode (Specode, Inc.), Irvine
Joe Tuan, Founder & CEO
Specode (specode.ai) is a HIPAA-compliant AI app builder purpose-built for healthcare, enabling founders and organizations to launch compliant telehealth and digital health applications in days rather than weeks. Founded in 2023 and led by CEO Joe Tuan, Specode delivers custom software development at no-code speed—without the usual no-code drawbacks of vendor lock-in and lost code ownership. It pairs a library of customizable, pre-built components (video calling, scheduling, EHR and pharmacy integrations, payments, and built-in HIPAA compliance) with on-demand guidance from healthcare and compliance veterans, and recently launched Specode Maestro, its most powerful build. Specode grew out of Topflight, the healthcare app and AI development agency Tuan founded in 2016 and bootstrapped to $4 million in annual revenue while serving Fortune 500 organizations and high-growth healthcare and AI startups. Topflight was named the 171st fastest-growing software company in America by Inc. 5000 and a Clutch Top 100 fastest-growing company. With a team of roughly 30, Specode advances Tuan's mission to accelerate AI-assisted virtual health clinics.

Sphere 3D, Stamford
Joel Block, Chief Executive Officer
Sphere 3D Corp. (NASDAQ: ANY) is a digital infrastructure company operating data centers. In a transaction that closed June 1, 2026, Sphere 3D expanded its operational footprint to 53 megawatts of power, spanning five data centers across Tennessee, Kentucky, and Iowa. Sphere 3D maintains a strong balance sheet and currently owns its assets outright. In a sector where leverage is the norm, Sphere 3D enters its next chapter with over 100 megawatts of expansion opportunity already in the pipeline, with land, power, and optionality in hand. The company sits at a rare intersection: proven bitcoin mining operations and hosting revenues today, with existing infrastructure actively being evaluated for conversion to AI and high-performance compute workloads tomorrow, positioning the same physical assets for significantly higher value potential. Leadership brings the right combination of operational discipline and strategic vision, including CEO Joel Block, a board comprising energy infrastructure veterans, public company finance expertise, and digital asset market depth, as well as a strategic advisory relationship with EA Advisors LLC.

Starquiz.ai, Irvine
Alp Cizem, CEO & Founder
Alp Can Cizem is the 24-year-old Founder and CEO of StarQuiz.ai, an inspiring and cutting edge AI-powered formative assessment platform giving educators real-time insight into student learning. A first-generation Turkish American and serial entrepreneur, Cizem has built three startups with the same technical co-founder since age 18. His first venture, Hobbimates, launched during COVID and scaled to over 15,000 UC students through in-person events. His second, Huxli.ai, emerged in the early GPT-3 era and grew to 300,000 users and $11 thousand in MRR on a bootstrapped budget. In 2024, Cizem founded StarQuiz after observing teachers "hacking" Huxli to power adaptive classroom learning. StarQuiz has since piloted at UC San Diego, Chapman University, and leading Turkish high schools, with results boosting midterm grades from 82% to 87% in one Chapman case study. The team is now expanding LMS integrations and positioning StarQuiz as core infrastructure for modern instruction. Cizem re-enrolled at UC San Diego to incubate StarQuiz in live classrooms, blending his entrepreneurial vision with firsthand classroom experience to drive lasting innovation in education.



Stretto, Irvine
Robert Klamser, Chief Innovation Officer
As chief innovation officer at Stretto, a market-leading legal services and technology firm, Robert Klamser leads AI strategy and product innovation with a singular focus: building technology that streamlines how legal work gets done. Drawing on his business acumen and track record as a successful entrepreneur, he architects solutions that anticipate market needs and deliver measurable value for legal and financial professionals. After serving as chief revenue officer, Klamser moved into the newly created chief innovation officer role where he has accelerated Stretto's AI efforts by launching ground-breaking AI solutions for bankruptcy professionals and integrating AI-assisted workflows into the company's operational processes. Earlier in his career, he co-founded UpShot Services, the industry's first claims and noticing agent capable of administering a corporate bankruptcy case completely electronically, creating new efficiencies for debtors and creditors. Klamser has been featured in The Wall Street Journal, ABI Journal, and Law360. He received ABI's "40 Under 40" award and The M&A Advisor's Emerging Leaders Award.

Swift Engineering, San Clemente
Hamed Khalkhali, Ph.D., MBA, President
Swift Engineering, headquartered in San Clemente, California, is an advanced aerospace engineering company specializing in high-altitude unmanned aircraft systems, autonomous flight technologies, advanced composite structures, and mission-critical engineering solutions for government and commercial customers. Founded in 1983, the company successfully transformed from a championship-winning motorsports manufacturer into a recognized aerospace innovator. Today, Swift employs approximately 55 full-time professionals, expanding to more than 150 during major program execution, while serving customers across aerospace, defense, and advanced technology markets. Under the leadership of Co-General Managers Daniela Bublik and Michael Chan, Swift has experienced significant growth through proprietary research and development, NASA-supported innovation initiatives, and next-generation autonomous aircraft platforms, including its groundbreaking Swift Ultra Long Endurance (SULE) aircraft. By combining decades of engineering expertise with a culture centered on curiosity, collaboration, and continuous innovation, Swift has established itself as one of Orange County's premier aerospace technology companies, developing solutions that improve communications, environmental monitoring, disaster response, and national infrastructure while advancing the future of autonomous aviation.

TAO Clean, Orange
Ryan Mongan, Founder
Ryan Mongan is an entrepreneur, inventor, and founder of TAO Clean, where he is reshaping the oral care category through patented products that combine health, hygiene, design, and everyday usability. TAO Clean has grown rapidly with a lean team of 22 employees and is expected to reach $115 million in revenue this year. The company is on track to grow revenue 3X this year, following 3X growth the prior year and 2X growth the year before that. Before founding TAO Clean, Mongan founded Speck Products, where he invented the hard case category for phones, a format that became the industry standard. Speck was also the first accessory brand to launch in-store when the original iPhone debuted through AT&T, and the company was later acquired by Samsonite in 2014. Across his career, Mongan has launched companies from scratch, created patented consumer products, and identified overlooked market opportunities ahead of larger players. He holds 60 issued patents worldwide and degrees from Stanford University and UC Berkeley.

Tarsadia Investments and ChronicleBio, Newport Beach
Rishi Reddy, Managing Director, Tarsadia Investments / Co-Founder & Executive Chairman, Chronicle Bio
Rishi Reddy is a Managing Director at Tarsadia Investments, a Newport Beach family office where he founded and leads the firm's venture and growth-equity strategy, partnering with transformative technology companies. In addition to being an investor, Reddy is a company builder first and foremost: he launched and led DigiPath Solutions, an early innovator in digital anatomic pathology, before joining Tarsadia to build its venture practice from the ground up. At Tarsadia, he has led investments in companies including ChronicleBio, ClinTrial Research, Matterworks, Fathom Health, PhilRx, AvantStay, Bolttech, and more, and he serves on or observes numerous boards. Most recently, Reddy co-founded ChronicleBio, an AI-driven life-sciences company building the world's most comprehensive data platform for complex chronic conditions such as ME/CFS, POTS, and Long COVID, where he serves as Executive Chairman alongside co-founders Fidji Simo and Rohit Gupta. He pairs an operator's empathy with an investor's discipline to build durable, category-defining businesses across the life-sciences ecosystem.

UC Irvine, Irvine
Stacy Branham, Associate Professor
Stacy Branham is a professor at UC Irvine by day and the inventor of ReadWithUs by night. She is a leading expert in designing technologies that enable people with and without print disabilities—such as those who are blind or dyslexic—to read picture books together. ReadWithUs is the result of over a decade of research and collaborations with blind PhD student Cameron Cassidy and ex-Google software engineer Joel Riley. Now available on iOS TestFlight, the app uses AI to transform digital scans of picture books into accessible reading experiences for people with print disabilities. They raised $750 thousand pre-seed, developed a beta app, and are now seeking $200 thousand seed. Their next steps are to complete the national NSF I-Corps (Q3 2026), incorporate into an investable non-profit (Q3 2026), apply for an NSF SBIR (Q4 2026), and launch our paid subscription service on the iOS app store (Q1 2027). Branham is the recipient of the prestigious NSF CAREER Award and was named one of the "Brilliant 10" rising STEM researchers by Popular Science.

UC Irvine ANTrepreneur Center, Irvine
Ryan Foland, Director
The UC Irvine ANTrepreneur Center is the university's hub for entrepreneurship and innovation, serving nearly 30,000 undergraduate students through courses, coaching, startup support, and industry partnerships. Since Foland became Director in 2022, the Center has expanded its reach, deepened ties with Orange County's business community, and created new pathways for students to discover entrepreneurship. Under Foland's leadership, the Self-Starter Micro-Internship Program has grown to more than 5,000 registered students, facilitating over 300 paid micro-internships and more than $200,000 earned by students. He secured a transformational $1 million philanthropic investment to renovate the Center and create the Santora Pitch Lab, a technology-enhanced space where students refine pitches and prepare for investors, competitions, and careers. Foland has also launched the AI Innovation Course, Side Hustle Challenge, and Startup Course, while helping student founders reach milestones including Y Combinator acceptance, venture funding, and successful acquisitions. The ANTrepreneur Center is recognized as a leading model for connecting higher education, entrepreneurship, and economic development across Orange County.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2026 INNOVATOR OF THE YEAR AWARD NOMINEES

UCI Health, Orange
Maheswari Senthil, Surgical Oncologist, Professor
Dr. Maheswari Senthil is a surgical oncologist and scientist at UCI Health, the only academic health system in Orange County and one of the largest in California. The 14,000-employee, 1,461-bed system comprises its main campus, UCI Health—Orange, its flagship hospital, the UCI Health—Irvine acute care hospital and medical campus, four hospitals and affiliated physicians of the UCI Health Community Network and a network of ambulatory care centers in Orange and Los Angeles counties. Senthil is the director of the Peritoneal Malignancy Program at the Chao Family Comprehensive Cancer Center, professor of surgery and pathology and laboratory medicine, vice chair of surgery research and chief of the Division of Surgical Oncology at the UC Irvine School of Medicine. She is also the associate director for the Institute for Clinical and Translational Science. She is currently principal investigator on STOPGAP II, a clinical trial for advanced stomach cancer now open in leading cancer centers nationally.

UCI Health, Orange
Sean Young, PhD
Sean Young, PhD, MS, is the Executive Director of the University of California Institute for Prediction Technology, the Center for Digital Behavior, a Medical School and Informatics Professor with the UCI Departments of Emergency Medicine and Informatics, and the #1 Wall Street Journal and International Best-Selling author of Stick With It. He studies digital behavior and prediction technology, or how and why people use social media, mobile apps, and wearable devices. He helps people and businesses apply this knowledge to predict what people will do in the future (in areas like health, medicine, politics, and business) and to change what they will do in the future.

UC Irvine Paul Merage School of Business, Irvine
Ian Williamson, Dean
Dean Ian O. Williamson is the Dean of the UC Irvine Paul Merage School of Business, a globally ranked institution known for its leadership in digital transformation, AI, and inclusive innovation. Since assuming leadership in 2021, Dean Williamson has positioned the Merage School at the forefront of business education by launching trailblazing programs in AI, sustainability, and leadership development. Under his tenure, the school has significantly grown its industry partnerships, research output, and philanthropic support—advancing strategic collaborations with global companies and public institutions. Dean Williamson champions a vision that aligns technological innovation with human-centric values, preparing a diverse new generation of business leaders to thrive in the digital economy. With over two decades of experience across four continents, his leadership fuses academic excellence with practical impact, elevating both the student experience and the school's regional and international influence.

University Lab Partners, Irvine
Varun Kapoor, Co-founder & CEO
Nura Health is an award-winning breakthrough precision diagnostics company spun out of a major women's health-centric regional CLIA/FDA-registered commercial laboratory in California. Funded by the ARPA-H Sprint for Women's Health Initiative, their mission is to develop practice-changing tests and personalized medicine platforms for complex and debilitating diseases such as endometriosis, reproductive disorders, and cardiometabolic conditions that impact quality of life, reproductive health, and longevity in women.

Vasonics, Inc., Corona
Ramy Albany, Founder & CEO
Vasonics, Inc. is a California-based medical technology company developing a next-generation vascular access platform designed to reduce peripheral IV catheter failure, one of healthcare's most common and costly clinical challenges. Led by founder and CEO Ramy Albany, the company has assembled a multidisciplinary team of experienced medical device engineers, regulatory experts, and internationally recognized clinical advisors while advancing toward regulatory clearance and commercialization. Under his leadership, Vasonics has built a robust intellectual property portfolio comprising 27 issued patents and 10 additional patent applications, established strategic collaborations with leading clinicians, secured early investor backing, and progressed product development through engineering validation and regulatory planning. Albany has combined clinical research with engineering innovation to challenge long-standing standards of care. His vision extends beyond developing a single device to creating a modular vascular access platform that improves patient safety, reduces healthcare costs, and advances the future of infusion therapy. His leadership continues to position Vasonics as an emerging innovator in medical technology.

ViridiStor LLC, Tustin
Terry Mullin, CEO
Terry Mullin is an active innovator and business builder in Orange County. He has formed and lead teams in market leading companies that have brought first in class software and hardware to the market. In 1995, Mullin created the concept of DAM (Digital Asset Management) whilst at FileNET, making it a leader in the Internet DAM segment. Within his latest venture, ViridiSTOR, Mullin has launched a new era in compact content management systems to deliver information to the over one trillion-dollar event, conference, and tradeshow industry. At the same time, Mullin has innovated and patented other products including an oral irrigation system that will aid millions in the recovery from oral surgery. Mullin has other patents pending in the area of wireless networking, curated AI-based data management, retail management, Alzheimer's memory retention systems and sustainable products. Mullin stays active within the community volunteering instructing audio engineering to middle and high school students in addition to instructing Project Management practices based upon his book "The Project Management Paradox" and on finance with his "AYBONI® Economics" e-book.

SEE YOU THURSDAY!

September 17, 2026

The 32nd Annual

Luncheon & Awards Program

12:00 p.m. - 2:00 p.m.
Irvine Marriott

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The ***Orange County Business Journal's*** **32nd Annual Women in Business Awards** recognizes outstanding women who are making a lasting impact across Orange County. Come celebrate leaders, innovators, and changemakers who are driving growth, inspiring others, and shaping the future of business.

Registration Information

Tickets*: $225
Table of Ten: $2025

Visit www.ocbj.com/events or contact Elyana Torres, Signature Events Manager, at 949.664.5065 or torres@ocbj.com.

Keynote Speaker

CHARLENE REYNOLDS
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*Tickets are non-refundable. Ticket price includes a one year subscription to the Orange County Business Journal ($30 allocated to the subscription). New subscribers only. Current subscribers may gift the subscription to a colleague.