



EIE

Excellence in
Entrepreneurship

Tiger Loans Pounces
on More Possibilities
PAGE 22

Neighborhood Grocery
Gives OC Another G.O.
PAGE 22

Diamond Sponsor



Platinum Sponsors



Silver Sponsors



An Orange County Business Journal Special Report and Custom Content

EIE AWARD NOMINEES START ON PAGE 36

Tiger, Tiger Burning Bright, Mostly Oil at Midnight

Mortgage Broker Plans Offerings for a Lifetime

By PAUL HUGHES

One old entrepreneur story has it that someone who knows nothing about an industry launches a venture, buys a fictitious-business name filing published in a favorite local business journal, and with some unsexy stuff in-between, is eventually visited by success, snagging a slew of small-business honors, buying a Revero, then doing it all over again.

Alex Chen is doing it all wrong.

First off, he knows a lot about the sector of his Irvine venture, at this point a niche mortgage lender called **Tiger Loans Inc.** He spent nearly a decade with **Experian Consumer Direct Inc.** when it was in Irvine, a unit of credit tracker **Experian Plc** that brought us those catchy FreeCreditReport.com jingles.

He's acquainted with borrowers, lenders, and the need for not just big data, but the good kind.

Second, Chen's skipping the part about magical success and putting crazy chunks of time on the unsexy stuff. He's busy laying the groundwork to build the lender into "an online B2C platform ... based on personal-financing big data" to sell consumers "all financial products and services they'll need through their life."

Modest goals have never been an entrepreneur's strong suit.

Tiger Loans is focused on two targets for the moment: Asian-American professionals who live and work in the U.S., and foreign nationals abroad—especially in China—both of whom seek U.S. investments, such as real estate.

Chen was born in China, came to the U.S. in 1994 for graduate school, and is now a U.S. citizen—he belongs squarely in the first group.

The second has gotten interesting recently as China tightened the flow of cash out of the country. People who previously could plunk down \$2 million to buy a home in the U.S.—a second residence for travel or business, or for their children attending U.S. schools—now can't do so as easily.

"These are high-income people," Chen says. "The loans are often not backed by Fannie or Freddie" because of the loan amounts involved and because such borrowers, he says, often don't have U.S. credit histories or income.

The former all-cash buyers now need to borrow, which means they need lenders, perhaps including Chen.

On the plus side, they might now buy two houses with that \$2 million—a funding Tiger Loans can help arrange.



Chen: all financial products and services they'll need

tomers.

Interest rates are still low, he says—and there are those U.S. schools—and not just the **University of California-Irvine**. "Irvine public schools have name recognition in China."

Chen left Experian in 2010 to launch broker Circle Square Mortgage. The business grew into direct lending, and he renamed it Tiger Loans in 2014. It did about \$100 million in loan volume last year.

He's licensed to loan in California, Washington, Texas, Florida, Georgia, Virginia and Maryland—the states are either on the Pacific Coast, sunny most of the year, international favorites, near halls of power, or all of the above.

He began to see extended possibilities when he had to buy life and health insurance for himself. In underwriting, mortgage bankers see a lot of the information that guides consumer choices or corporate decisions in other products, for instance, insurance, and the insurance shopping helped him make the connection.

"We have income data, asset data, the credit report," he says. "We know why they don't qualify or why they do, and if they're not looking for other products now," and when they might be doing so.

He was licensed to sell life and health insurance in California in 2016 and founded **Tiger Life Insurance Agency Inc.** last year.

"Once I have that [data], why should I only do mortgages?"

Light Bulb Moment

One reason not to is that Consumer Fi-

nancial Protection Bureau numbers show the national new-home loan average is \$244,000, and a broker might get 2% of that—about \$4,900.

Many people buy homes more often than every 30 years nowadays, but not enough, so selling other products in-between looks like a good idea.

"Once they do a mortgage, who knows?" Chen says.

His idea is financial planning and products for all.

"Average Americans haven't fully utilized financial products" commonly available to "high net-worth individuals" like those China-based homebuyers.

"The assets of 99% of my [lending] customers' households [and] my own weren't optimized or protected," he says. "What I really want to do is build something for [them]."

Most boutique financial services companies cater to the wealthy, he says. If he can scale such efforts with technology—apps and an online portal—those can also be offered to those in other income brackets.

The lending will "build momentum and infrastructure," Chen says. "My end-goal is to make the online platform a go-to place for all financial products for every American family."

Menu of Services

See what we mean about entrepreneurs' extravagant goals? And that's not all.

Consumers could research and compare financial products and services at different stages of life: mortgages, auto loans, per-

► *Tiger Loans 24*

China Calling

The work comes first.

The Facts

It's a fact Chen shares with potential cus-

Cornering Groceries: Cut-Rate Food Stuff of Opportunity

Selling Entrepreneurs On 'Extreme Discount'

By PAUL HUGHES

"I'd rather work a hundred hours for myself than 40 hours for someone else," says **Ryan Stack**.

Sounds like entrepreneur spirit, where the punchline to "set your own hours" is "pick any 14."

Stack and his wife, Amanda, co-own and operate a **Grocery Outlet Bargain Market** in Tustin with its Emeryville-based parent, **Grocery Outlet Inc.**—a 72-year-old, family-founded and private equity-owned chain of about 300 locations in six states and annual revenue pushing \$1.6 billion.

Grocery Outlet—GO, for short—renewed a Southern California expansion in 2015 when, like the bargain-priced shoppers it attracts, the chain picked up more than a dozen leases in the Fresh & Easy bankruptcy. It had stores about seven years ago in Buena Park and Fountain Valley that closed.

It has a store each in Tustin, Lake Forest, Irvine, Orange, Costa Mesa, La Habra and Westminster and plans to open one in Huntington Beach next month.

Three others are in border towns Long Beach and Whittier, and 26 total are spread among Orange and Los Angeles counties and the Inland Empire.

Tustin's GO was previously a Trader Joe's, which moved across the street to a bigger space and more parking. Lake Forest's GO is a 15,400-square-foot former Fresh & Easy co-owned and operated by **Joel Collar** and **Paul Ah Sing**.

"They gutted the store and built it to Gro-



Say cheese: Lake Forest GO store operators Joel Collar and Paul Ah Sing have fun with a recent deal

cery Outlet standards," Collar says.

'Extreme' Deals

Tustin opened in June, Lake Forest in December. The former pays \$17 a square foot a

year for its 12,500 square feet at Tustin Crossings—half what smaller tenants in the center pay, **CoStar Group Inc.** records show.

Richard Rizika, vice chairman and managing director of **CBRE's** Southern Califor-

nia retail services group, says it's not uncommon for anchor tenants—Grocery Outlet has 45% of the Tustin store's leasable area—to strike better deals and that in each case, "they're paying fair market value"—even if that includes property owners' need to fill big empty spaces.

CBRE's most recent OC retail report shows a 3.6% vacancy rate and average rates of \$28 per square foot.

GO locations move in a subniche of retail called "extreme discounting," which the Wall Street Journal cited in December as a bright spot of bricks-and-mortar activity.

The paper called out Goodlettsville, Tenn.-based **Dollar General Corp.**'s plan to add 900 stores this year, following 1,200 new locations and 1,000 remodeled ones in 2017.

Low food prices can also hurt farm-state economies, as another Wall Street Journal piece the same month indicated—the very shopping populations many such stores depend on. But it called Dollar General, with \$22 billion in annual revenue and a \$29 billion market cap, "rural America's store of choice."

And therein lies one of the challenges to GO's effort here.

"The business model typically does well in struggling communities," Stack points out, "but this is an affluent area."

Beer & Wine

GO's SoCal plan looks like this:

Corporate leverages its buying power to negotiate discounts—name brands at off-brand prices, including boutique choices.

"I love a good bottle of wine," Stack says—and he carries them.

Lake Forest has "tons of craft beer" in an

► *Grocery Outlet 24*



At Cox Business we give you all the tools to make your vision a reality. Explore our advanced suite of voice, Internet and TV services.

BUSINESS REQUIRES VISION

You want a provider whose business solutions can grow with your success. Our dedicated local team offers 24/7 response. There's never been a better time to switch to Cox Business.

coxbusiness.com | (844) 203-0027

Grocery Outlet

► from page 22

eclectic mix, Collar says.

“There are no schematics here,” he says of set-in-stone store layouts conventional chains hew to. He and Ah Sing are familiar with those after putting in a combined 25 years for Safeway in Oregon.

“We set our store to the area’s demographics.”

A vendor distributes 200 different beers, and “Stater Bros. can only order 20 of them” because of the schematic.

“If we’re approved [by corporate] for 180 of them, we can order all 180.”

That also allows regional sourcing.

“We have local produce, local meat,” Collar says. “Our eggs come from Downey; our milk comes from Fontana.”

Odd Steals

All at a discount.

Walk into a location, and it seems everything is half-off, including the good stuff.

“We only carry items you can save 40% to 70% on,” Stack says. “It wasn’t here last week and might not be next.”

And he says the store is “absolutely crushing it on customer service” with “happy staff and a family feel”—the Stacks and their two toddlers live a “2 ½-minute walk” away.

Store loyalists, he says, call GO trips “a treasure hunt every week.”

That can net you four Power Bars for a buck, as well as the odd item or two: products in out-of-season packaging or flavors that may have failed to live up to taste tests—limited-edition “Crush Orange” Pop-Tarts, let’s say.

Systemwide average unit volumes top \$5 million, which means some stores do even better. Stack says the Santa Rosa GO, run by a guy he used to work for, is in the top five, but his own first-year results will be “more humble.”

Pizza Man

Stack, 31, was managing a Papa John’s Pizza near Sacramento when the recession hit.

“You can spend \$40 on pizza, but \$40 at a grocery store will get you a lot farther,” he says.

Eateries began to close—including Stack’s, which shared a parking lot with a Grocery Outlet.

He’d gotten to know its co-owner, **Dave Herout**, and one day Herout asked why he was in the bank when it “wasn’t payroll Friday?”

Stack replied, “It’s last-paycheck Tuesday,” and went to work for Herout the same day.

“He said, ‘The fact you don’t know anything about grocery is good. I can teach you anything you need to know.’”

Walmart grabbed the spot when GO’s lease expired 11 months later. Herout opened the Santa Rosa site, and Stack went to work for corporate, helping open stores.

“In three years, I’ve been in more than 100



Stacks: co-own, operate Tustin store with parent Grocery Outlet Inc.

Grocery Outlets,” he said.

He and Amanda, in company lingo, became “aspiring operator trainees” in 2016 and came south last March.

OC’s Allure

Stack was born in Fountain Valley; Amanda, 29, “is a Disney fanatic; she bought annual passes and treats it like the corner park.”

The family goes to the beach more now.

“I’m a beach bum,” he said. “I love the sand.”

Both can also be found in the store.

“We’re doing this to be mom and dad,” he says. “My 4-year-old stands on a milk crate and stocks the shelves. He sets products on the candy aisle with front labels and logos showing ‘for a small reward.’”

Work “absolutely requires more of my time” than a regular job, and even the friendliest, most familial staff “won’t build it the way I want to, though they can keep it running.”

But “when I need to and want to,” Stack steps away. “Owners never miss a t-ball game, never miss a school play.”

Collar and Ah Sing were unfamiliar with OC before relocating from Oregon, but Collar had been to Disneyland, and the duo told the Business Journal there are suburban similarities between Beaverton and Lake Forest—families, dogs, sidewalks.

They “looked at a map, and [OC] was gorgeous,” and “we did our due diligence,” Collar says.

The duo were two of 4,000 applicants for stores in 2017 and trained in Santa Cruz for six months last year.

“We want to bring affordable, quality gro-

ceries to Lake Forest,” he says.

SoCal Challenge

The challenge is that Southern California is where grocery concepts go to die, in 2015 two at a time.

After Fresh & Easy, there was Haggen’s, a Bellingham, Wash.-based chain that tried to grow from 18 to 164 stores in 2014, including about a dozen in OC, but filed bankruptcy in September 2015. It has 15 stores now, all in its home state.

Fresh & Easy filed for the second time the following month. Before Haggen’s there was Smith’s, a Salt Lake City chain whose 1990s SoCal adventure cost it \$500 million; it was bought in 1997 by the Fred Meyer chain, which sold to the **Kroger Co.** in 1999.

Grocery chains elsewhere are down: Williamsville, New York-based **Tops Market LLC** asked investment bank **Evercore Inc.** for help with its \$723 million debt load in January, and **Moody’s Investors Service Inc.** dinged it for a limited footprint in just four states, Reuters said.

Amazon.com’s purchase of Whole Foods Market last year should put further pressure on the sector.

Grocery industry analysis in news reports as GO’s local push picked up steam in the past two years pointed to its lower cost of goods based on corporate bargain-buying as a big advantage.

Another chain trying to make it here is Germany-based **Aldi Sud**—sister company Aldi Nord owns Trader Joe’s—which has the same benefit, in that its inventory is largely private-label and therefore cheaper.

Last week, Portland, Ore.-based **New Seasons Market** curtailed its Northern California expansion—including a planned store in Grocery Outlet’s headquarters city—and a vision to double the chain to 25 stores. Its chief executive and the plan’s architect, **Wendy Collier**, left the company.

It’s Personal

GO’s second edge is the community feel from individual operators.

The Stacks, Collar, Ah Sing and the rest aren’t franchisees but connected to the parent via individual LLCs. Collar and Ah Sing, for instance, co-own **Grocery Outlet JPB-Go LLC** with an affiliate of Grocery Outlet Inc.

Operators don’t own it all, as a franchisee might, but it costs less to get rolling—\$100,000 to \$200,000—than a full-fledged fast food franchise, say—and the groceries industry generally isn’t open to indie operators nowadays.

A spokesperson said, “Our model is most similar to ... consignment.” GO “secures the sites and buys the inventory ... operators invest in equipment, hire staff, and have the freedom to adapt their stores to the community.”

They decide what to sell from deals corporate negotiates, and the two split the profits.

Irvine attorney **Rodney Hatter**, who focuses on franchises, likened it to the Good Neighbor Pharmacy model, a 3,200-location

co-op backed by Conshohocken, Penn.-based pharma **AmerisourceBergen Corp.**, which owns the name. The backer doesn’t run the stores, but it’s a \$136 billion-revenue distributor of pharmacy products.

“This could help give [Grocery Outlet] the mom-and-pop feel,” Hatter says.

It’s Private

An affiliate of private equity investor **Hellman & Friedman LLC** in San Francisco bought Grocery Outlet in 2014 from Boston-based **Berkshire Partners LLC**, which had owned it since 2009.

A price couldn’t be determined, but Dow Jones said first-round bids exceeded \$1.1 billion, and Reuters said before the deal that its earnings before interest, tax, depreciation and amortization were about \$100 million, and that it anticipated an acquisition at “more than 10 times that figure.”

Grocery Outlet’s website says **Jim Read** founded predecessor company **Cannery Sales** in 1946, selling surplus government food. He sold the business and bought into a Bay Area chain in 1959—again strong in surplus goods—bought at least one other chain, and started signing supplier deals—Del Monte was first—and independent owner-operators in the 1970s.

Third-generation Read family members **MacGregor Read** and **Eric Lindberg** are co-chief executives.

The chain passed \$100 million in revenue in 1982, \$500 million in 2001, and \$1 billion in 2011. It had 100 stores in 1995 and about 200 when Hellman bought it in 2014. Each store employs 25 to 30 people.

Opportunistic buying has always been a feature: During the early 2000s dot-com bust, the company bought “large remaining inventories of Webvan and wine.com” out of bankruptcy, its website says.

Payoff

Then comes the 100-hour weeks.

“Hard work is the only thing that pays off,” Ryan Stack says.

Sometimes it doesn’t—GO locations have closed here and elsewhere—but such fallout appears minimal.

A spokesperson says the chain opened 29 stores last year and closed one, in Pennsylvania. It plans to open 25 to 35 this year. In the past few years it had locations in Arizona, now closed.

Operators can buy as much as they want of inventory corporate finds for them. They don’t own all the profits—but it’s more than they would as store directors for a conventional grocery chain who are employees of someone else.

And they get to give back. The Stacks send 2,000 to 4,000 meals a month through **Second Harvest Food Bank** in Tustin. They give \$100 food vouchers to graduates of **Orange County Rescue Mission**’s life-turn-around program.

Ryan found “one of my best managers” from one of them, he says. “She turned out to be an absolute all-star.” ■

Tiger Loans

► from page 22

sonal loans, investments and insurance.

“The entry point could be any of the items,” he says, and data would be shared across all.

The platform will “apply sophisticated [artificial intelligence] algorithms to personal financial big data” to help loan officers and agents of all stripes—insurance, investing, etc.—find “suitable solutions [and make] recommendations” to consumers, “but not replace the live person needed to answer deeper questions ... build trust, and eventu-

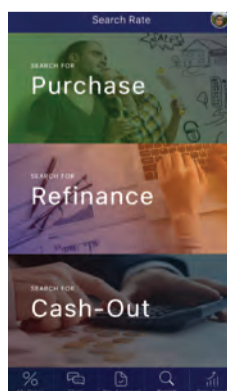
ally close the sale.”

That will include “pulling consumers’ personal financial data, analyzing it, and presenting recommendations.”

Licensed reps “can cross-sell and present financial recommendations to targeted customers in a more efficient manner with the help of personal financial big-data analysis.”

Sweat

The platform then executes



App: firm’s offerings intended to guide customers through life cycle

transactions—and as owner of the platform, Chen gets a commission, the rate varying depending on the product. He says the rate will beat the “much smaller finder’s fee” typical in mere lead generation.

“I don’t just want the lead. I want the transaction.”

New mortgages alone top \$2 trillion a year, according to the Urban Institute Housing Finance Policy Center.

But, “The value of each customer on the platform will be based on all financial products through life ... not just one transaction.”

Of course, Chen’s not the first to think of all this, and that’s where the work continues.

“To build such a platform is no easy task,” he says. It “requires a lot of ... sweat and ... ample funding.”

He said he self-funded two apps under the name **Approv**—one for consumers and a professional version for working loan agents. The apps have started on the work described above—including a patent-pending direct-chat feature.

They weren’t cheap.

Chen’s **approv.com** website, launched in 2013, is the mobile app-suite basis of the future platform. ■



Habits of Successful Entrepreneurs

There are millions of books, articles, workshops, etc. about being a great entrepreneur and succeeding at it. However, succeeding at business takes discipline, knowing when to ask for help and knowing what you don't know. The key to any growing business is to always have patience, surround yourself with people willing to help and guide you through your journey. The list below are reminders and useful tips that I have observed over my career from hard lessons learned, advising and guiding clients and learning from entrepreneurs and professionals.

- ▶ **Passion in your Business** – The desire to win, beat the competitors. It is not a marketing plan, operation know-how or strategic planning. It is the energy, the fire in the belly, that attracts customers, employees, etc.
- ▶ **Always be selling and growing profitably.** Passion is not the only formula for success you have to understand profits and margins. In addition, listen to your industry, trends and be highly innovative. Always listen to your core customer and deliver what they want and like about your product or service.
- ▶ **Cash is King** – You can't spend profits tied up in accounts receivable and inventories. Monitor these daily. In fact, many businesses fail because of great growth but lousy cash flow. Watch your overhead, avoid spending on your lifestyle and perks, be able to adjust quickly to any downturn.
- ▶ **Work on your business, not in it.** Do not get sucked into daily operating problems and firefighting or thinking you are doing great things by concentrating on improving accounts receivables or inventory turns by a couple of days. Working tirelessly on wrong issues is not productive. Tackle the key issues today.
- ▶ **Invest in people, especially those who excel in the core competencies you need to assist you.** Find people better than you. Incentivize your key people. Respect diversity in perspectives. Create a continuous learning environment. Attract a team with your core values and develop a compelling culture from top to bottom. Keep things fun.

▶ **Make key decisions quickly.** Hope is not a solution nor should it be part of any plan. Procrastination is the cement block that will bring you down. If the decision is wrong, admit failure and move on to the next decision.

▶ **Accountability** – hold everyone accountable in your organization for what they are there to do whether it is generating sales, producing products or services or creating processes and systems. Accountability begins with you. Hold yourself accountable and the organization follows. Don't and the organization follows and fails.

▶ **Be open to change and find ways to adapt.** The past is just that, historical. Concentrate on the future. Bring on an Advisory Board to help you spot opportunities or issues, provide needed insight and alternatives or contacts. You must listen, engage and act. Or don't waste anyone's time.

▶ **Always have a positive mental attitude.** You do not want blind optimism. You need to instill confidence as a leader and your team needs to feel certain that you are aware and in control. A team always looks to the leader for inspiration. Pessimism, negativity and not leading with intention and clarity are sure ways to bring an organization down.



Krajanowski

Keep this list and review it often. It will keep you focused and help you turn your dreams into reality. If you would like to discuss how we can help your business achieve your next phase of growth, I can be reached at dkrajanowski@singerlewak.com or 949-261-8600.

**You think your CPA firm is giving you
and your business good service,
personal attention and guidance.
Until you talk to us.**

Experience the difference.



Mark Cook, CPA Tax Partner
MCook@SingerLewak.com
949.261.8600

David Krajanowski, CPA Audit Partner
DKrajanowski@SingerLewak.com
949.261.8600

WWW.SINGERLEWAK.COM | 877.754.4557

ORANGE COUNTY LOS ANGELES WOODLAND HILLS MONTEREY PARK POMONA RIVERSIDE SAN FRANCISCO SILICON VALLEY DENVER, CO

Congratulations to All Excellence in Entrepreneurship Nominees

Proud to be a Platinum Presenting Sponsor of



Your Accomplishments Are Truly Premier

Supporting growing businesses across California & Nevada



PACIFIC PREMIER BANK[®]

PPBI.com

**Member
FDIC**

Pacific Premier Bank is a registered trademark. All rights reserved.

From Finance to Fashion

by Joe Lewis

Statistics will show that roughly 30% of college graduates work in the field of their chosen degrees. As a person who has always had a self-proclaimed "laser focus," I never thought I'd end up anywhere other than where I had planned, along the narrow road I was going to lay for myself.

After receiving an Executive MBA graduate degree at Chapman University, I set my sights on advancing a career in the world of finance. After college, I worked for three years with talented people in the wealth management industry, and in doing so, I picked up valuable insights, habits and tools to further hone my skills. Through this process, I gained experience not only as a salesperson, but also as a sales trainer, public speaker, finance professional and philanthropist. Although the tenacity and focus necessary to succeed in finance was hugely rewarding in itself, I felt a calling for something more.



Lewis

The crux of this "more" that I wanted stemmed from a desire to work in a company where my plans and ideas made a direct impact on the company and its consumers. The current path I was taking in finance showed time and again that my ideas were getting "lost in the system." Soon after, a simple trip to reboot my professional attire took an unexpected turn towards something much bigger. I scheduled a visit to the Mark Pomerantz Showroom in Newport Beach. I needed to reevaluate my wardrobe in anticipation of a career

change, but wasn't quite sure where I would end up. I met with Mark personally and after our conversation, and my new selections, I felt invigorated in a way I hadn't felt in long time. I've always loved clothing, suits in particular, and secretly wished I could somehow fall into a career in fashion. My background in finance made me think this was practically impossible.

Months later, I had another visit with Mark. We smoked cigars until late in the evening and chatted about his latest ideas, my career, and our combined passions for both fine clothing and business. Realizing we shared a lot of the same ideas, he invited me into his business and later made me his Director of Business Development. Mark is a talented and driven entrepreneur, with a degree in international trade and marketing in addition to his degree in design. His plans for his company are grand, both creatively and pragmatically, and I look forward to growing the brand vision. My newfound freedom to create, strategize, implement and execute will continue to flourish, but now it's for the growth of a brand I believe in (and of course for myself personally and professionally).

This opportunity, and the ability to follow my gut, has led me to a place where I can marry all of my creative passions with my business acumen. If you are looking to make a career change that presses on a new path, I suggest you explore it; it's never too early or too late to make a change that suits you.

JOE@MARKPOMERANTZ.COM

MARK POMERANTZ SHOWROOM

4041 MACARTHUR BLVD, SUITE 130

NEWPORT BEACH, CA 96660



2018 ANGELS BASEBALL

PREMIUM GAME DAY EXPERIENCE

LEXUS

DIAMOND CLUB

- LOCATED BEHIND HOME PLATE, WITHIN 20 ROWS OF THE FIELD
- ACCESS TO THE LEXUS DIAMOND CLUB RESTAURANT & LOUNGE
- IN-SEAT SERVICE
- CUSHIONED SEATS



FOR PRICING & AVAILABILITY CALL (888) 779-9961 OR VISIT angels.com/premium



Top 10 Things Entrepreneurs Should Know About the Tax Reform Act

The recently enacted Tax Cuts and Jobs Act ("TCJA") signed into law on December 22 is a sweeping tax package with substantial planning opportunities for the well-advised entrepreneur. Here's an overview of some of the more important business tax changes in the new law that will impact entrepreneurs and their businesses:

1. The corporate tax rate has been reduced to 21%. For this reason alone, entrepreneurs should understand the differences between C-corporations, S-corporations, LLC's and partnerships. The 21% tax rate applies to C-corporations and the determination on how to be taxed is important for entrepreneurs.

2. Alternative minimum tax (AMT) is repealed for corporations. Additionally, corporations are allowed to offset their regular tax liability by the AMT, which is partially refundable.

3. Increased Code Sec. 179 expensing, bonus depreciation and new rules for post-2021 research and experimentation ("R&E") expense. The new law increases the maximum amount that may be expensed under Code Sec. 179 to \$1 million, subject to a \$2.5 million phase out. A 100% first-year deduction is allowed for qualified new and used property acquired and placed in service after September 27, 2017 and before 2023. Specified R&E expenses paid or incurred after 2021 in connection with a trade or business must be capitalized and amortized ratably over a five-year period (15 years, if conducted outside the U.S.).

4. Pass-through entities and international taxation – A substantial portion of the over 500 pages of the TCJA are dedicated to provisions affecting pass-through entities and international businesses. There are many considerations which should be evaluated for your company's 2018 tax planning.

5. Domestic production activities deduction ("DPAD") is repealed.

6. Luxury auto depreciation limits. Under the new law, for a passenger automobile for which bonus depreciation is not claimed, the maximum

depreciation allowance is increased to \$10,000 for the year it's placed in service, \$16,000 for the second year, \$9,000 for the third year, and \$5,760 for the fourth and later years in the recovery period.

7. Limit on business interest deduction. Under the new law, every business, regardless of its form, is limited to a deduction for business interest equal to 30% of its adjusted taxable income. The limitation does not apply to certain taxpayers. Certain additional rules apply to partnerships.

8. Net Operating Loss ("NOL") deduction modified. Generally, NOLs arising in tax years ending after 2017 can only be carried forward, not back, indefinitely. Additionally, for losses arising in tax years beginning after 2017, the NOL deduction is limited to 80% of taxable income, determined without regard to the deduction.

9. New fringe benefit rules. The new law eliminates the 50% deduction for business-related entertainment expenses. Additionally, the deduction for transportation fringe benefits is denied, with certain exceptions.

10. Family and medical leave credit. A new general business credit is available for eligible employers.

If you have any questions regarding the impact of the new tax laws on your business, please contact Manuel or Fernando at 949-852-1600 or Mramirez@rjicpas.com and FJimenez@rjicpas.com.

RJI

Established in 1980, RJI specializes in audit, accounting, corporate and international tax issues for publicly traded and privately held companies. RJI is PCAOB registered and the Southern California member firm of DFK International, one of the largest global accounting networks.



Fernando Jimenez CPA, MST



Manuel Ramirez CPA, MST, FABFA



FULL-SERVICE AUDIT, TAX AND CONSULTING FIRM

DFK Affiliate- 7th Largest Network Globally

TAX SERVICES
SPECIALTY SERVICES
AUDIT SERVICES

ASSISTING CLIENTS IN ACHIEVING THEIR GOALS

tel: 949-852-1600 | fax: 949-852-1606 | www.rjicpas.com
18012 Sky Park Circle | Suite 200 | Irvine, CA 92614



Keeping HR Technology Trends on Your Radar!

2018 will be an interesting year for HR as technological solutions continue to advance by leaps and bounds. From robotics to Artificial Intelligence, organizations have been utilizing these upgrades in technology to dramatically improve the way they conduct business. Let's look at some technological advancements set to be a hot topic for the upcoming year!

Winning the war for talent. In today's market where unemployment has hit record lows, organizations have realigned Talent Acquisition initiatives to focus on the use of innovative technology as a competitive solution to attract top talent.

► **Artificial Intelligence (AI) and Robotics** have been steadily increasing their presence throughout recruiting departments. Talent Acquisition leaders are reporting that within the next year, their open requisition numbers will continuously increase yet their recruiting teams will remain the same size. As a result, AI and Robotics are being introduced to the workforce in order to improve the screening process, reduce biases, and eliminate repetitive administrative HR tasks. In addition, many HR departments today have personalized these tools to support their day to day recruiting functions.

► **Gamification** is an innovative approach to engaging the right talent by creating a fun, interactive and creative recruiting process. For instance, many companies are introducing screening procedures based around a "game" where candidates are tested on their problem solving skills on certain tasks expected of them. For this trend to be successful however, employers should keep this process simple and provide future applicants the opportunity to share their experience via social media as well as provide rewards when possible!

► **People analytics** has pivoted from being a simple scorecard to providing crucial predictive insight into business needs. According to Forbes, 69% of companies are integrating People Analytics data as part of their day to day HR transactions. This is a huge increase compared to prior years which ranked about 10%-15% of companies surveyed. The reason for this shift is due to a couple of reasons including higher quality data, real time collection abilities and an urgent

need for executives to report on factors such as pay equity, skills gap and diversity.

HR Technology will continue to disrupt the industry as more organizations start utilizing these advances to strategically enhance their HR departments. Make sure you stay ahead of the game by capitalizing on these growing trends!

Partner with Marquee Staffing - we are local, progressive and specialized!

Marquee Staffing has been partnering with top OC employers for more than 25 years and we understand the importance of innovation within the workplace. Our Business Development and Recruiting team continuously strive to stay up to date with hiring trends in order to stay competitive. Through the use of up to date technological advancements, we provide our clients and candidates the best experience through a streamlined, quick and easy process!

To learn more about Marquee Staffing, please visit www.marqueestaffing.com.

Claudia Perez, Senior Vice President of Operations

As the SVP of Operations, Claudia oversees day-to-day strategic operations, including spearheading marketing projects, employee training and development programs for Marquee Staffing's contingent workforce. With her strong background in business development, she continuously strives to build lasting partnerships with clients and candidates. As a result, her team focuses on quality, customer service, compliance and strategic placements.



JUST GREAT TALENT

THAT'S THE BOTTOM LINE.

Accounting and finance is probably one of the most highly regulated departments in your business – and the most susceptible to risk. Partnering with Marquee Staffing gives you one less thing to worry about.

Marquee is Southern California's accounting and finance staffing expert, delivering proven talent to all types of businesses.

Let us help you:

- Develop cost-effective staffing solutions
- Comply with state, local and federal regulations
- Increase business efficiency
- Build a stronger bottom line

Need to add to your success team? Let Marquee work wonders for your bottom line.

**Contingent • Contract-to-Hire
Direct • On-Site**



www.marqueestaffing.com

Mobilitie keeps us connected

Wireless Coverage Solutions

As the global provider of wireless solutions, we are the designers, builders and operators of the networks that deliver high speed connectivity in the most densely populated, demanding and challenging of environments. In high-rise office buildings, sporting venues, city centers and businesses, we own and operate some of the largest and most complex networks in the world. We keep our eye on the needs of the world's ever increasingly connected communities of tomorrow.



DAS

Indoor and outdoor neutral-host Distributed SM Antenna Systems, designed to provide optimal coverage and capacity for all wireless carriers, at even the largest and most challenging venues



COLOCATION MANAGEMENT

Comprehensive management of the entire colocation process, including site marketing, lease processing, installation supervision and ongoing lease administration, now vital to the additional 5G density requirements and limited real estate



COMMUNICATION TOWERS

Multi-carrier communication towers built to enable improved wireless service for carriers, spanning their nationwide macro networks, based on our industry leading Lease-to-Suit® model



SMALL CELLS

Indoor and outdoor Small Cell networks, based on CRAN, DRAN and emerging Microcell technologies with complex radio heads, providing improved 5G, LTE advanced and Wi-Fi connectivity



Wi-Fi

High-density Wi-Fi networks providing seamless Internet access for all mobile devices while delivering a customized and rich platform of powerful customer communication tools such as location-based services, video broadcast and CRM applications



PROFESSIONAL SERVICES

Comprehensive technology service offering to include Wireless and IoT solutions consulting, wireless design & optimization, managed services and contingent workforce engagements as a preferred supplier for our national client base across all industries within IT, Engineering and Wireless disciplines

OUR SOLUTIONS



*Please Make Your
Valentine's Day
Reservations at
949.553.1333*



NOW OPEN AT THE DISTRICT

Prego's Menu Features Authentic Pizzas, Freshly Made Pastas, Grilled Fresh Fish, Spit-Roasted Meats, and Luscious House-Made Desserts!

We proudly serve an extensive selection of Imported and Domestic Wines, Craft Beers and exotic hand crafted cocktails. Our Happy Hour is Every Weekday Afternoon from 4-7 p.m.

Celebrate with Prego! Corporate Events, Catering, Weddings, Rehearsal Dinners, Baby Showers, Elegant Events, and much more!

2409 Park Avenue | Tustin, Ca. 92782 | 949.553.1333 | pregooc.com



An Orange County Institution

Building on more than 30 years of culinary excellence on the Orange County dining landscape, Prego Mediterranean has settled into its new home at The District at Tustin Legacy. Long-time supporters and new guests have been enjoying the lively bar area and grand dining room at the new location, where Chef Ugo Allesina continues to lead the culinary team. With two decades of experience at Prego, Chef Ugo has brought back signature items and has added new Mediterranean-focused dishes to the menu. The kitchen continues to focus on utilizing seasonal ingredients, the best meat and seafood, and freshly made pastas.



Prego owners Ruth and Tony Bedi

New Mediterranean-focused dishes include Seasonal Hummus of mushroom and truffle, sundried tomato and roasted garlic basil, served with house-made rustic flatbread; Golden Beet Salad with mixed baby greens, yellow beets, goat cheese and caramelized onions tossed in a balsamic reduction; and Lobster and Shrimp Stuffed Sole in a white wine, garlic, lemon and caper sauce.

Adding a splash of Mediterranean color to California, Prego Mediterranean features a lively exhibition kitchen, allowing diners to view the artful chefs creating their delicious dishes. With a capacity to seat more than 250 guests, Prego features al fresco dining, full bar, private dining and catering services.

For more information, visit www.pregoOC.com.

MORRIS AND WELFORD

A JD CLASSICS COMPANY

Now available at our showroom in Newport Beach, California



1934 Bentley 3 1/2 Litre Tourer

COACHWORK BY VANDEN PLAS, RESTORED, NUMBERS MATCHING. EXTRAORDINARY.

Chassis #B59BN

Please visit www.morrisandwelford.com

[@morrisandwelford](https://www.instagram.com/morrisandwelford)

enquiries@morrisandwelford.com

4040 Campus Drive, Newport Beach, California 92660

PAT PERSICHINI 949-836-8844

MALCOLM WELFORD 949-500-0585

Classic Car Specialists Open in Newport Beach

We are guessing that if you've driven down Campus Drive in Newport Beach over the past few months, between the private jet terminals across from John Wayne, you've probably noticed a new automobile showroom *not* displaying new cars, but instead classic ones! Morris and Welford, a classic and vintage car dealership, has opened at 4040 Campus Drive



primarily specializing in sports and racing cars from the 1950s and 1960s. Malcolm Welford and Miles Morris have partnered with England's premier classic dealership, JD Classics, to enter the North American classic car market, and they have chosen Newport Beach as their headquarters. The fabulous showroom features Aston Martins, Ferraris, Bentleys and even a 1920 Stutz 'Bearcat,' one of the first American supercars. They have recruited Pat Persichini, formerly from Ferrari of Newport Beach, to head up sales, and when we asked Pat "why the move from Ferrari after 18 years?" He answered, "Classic cars transport us to a different era...the sounds, the chrome, the designs are all captivating and evoke wonderful memories in all of us. These beautiful cars have also proven to be actual investments over time while most new cars plummet in value, adding to the allure of the classic car hobby. M&W buys, sells and consigns these cars and can offer unique methods to finance them." Morris and Welford are excited to be in Newport Beach and look forward to becoming part of the community. They are open during the week from 9 a.m. to 5 p.m. and by appointment on the weekends to cater to their clients' busy schedules.

Morris and Welford is located at 4040 Campus Drive in Newport Beach. Please call 949-679-4999 and visit www.morrisandwelford.com for more information.

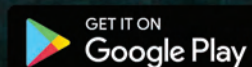
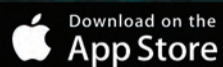
VILLA

CONGRATULATIONS TO ALL OF THE 2018
EXCELLENCE IN ENTREPRENEURSHIP NOMINEES

Proud sponsor of the
2018 Excellence in Entrepreneurship Awards



Find your dream home on the Villa Real Estate app.



949 717 6000 | VILLAREALESTATE.COM

LIGHT THE FIRE IN HER HEART

LUGANO DIAMONDS PRESENTS ROMANTIC RUBIES



Breathtakingly Beautiful

Her heart will be forever yours when she eyes these illustrious Ruby Cushion Drop Earrings. Cascading from the drops are an astounding 12.14 carats of Cushion Rubies and 2.26 carats of Diamonds. Need we say more?



Fit for Royalty

'Long may she reign' with the Royal Ruby Ring on her finger. This magnificent 3.03 carat Oval Ruby is majestic with a crown of 1.60 carat Marquise Diamonds. This ring will be next in line to become a family heirloom.



Wrapped in Love

Slip a perfect blend of simplicity and sophistication around her wrist with this Ruby Wrap bracelet. With 2.72 carats of Round Rubies, this elegant wrap moves gracefully from luncheon to evening.



LUGANO[®]
DIAMONDS

An experience as remarkable as our collection

We welcome you to view our stunning collection at the Lugano Diamonds Grand Salon located at 620 Newport Center Drive, Suite 100, Newport Beach. Our Aspen and Palm Beach locations are also open, please call 866.584.2666 or email info@luganodiamonds.com for more information. [f](#) [@](#) [t](#) [g+](#)



LUGANO[®]
DIAMONDS

An experience as remarkable as our collection

NEWPORT BEACH | ASPEN | PALM BEACH | 949.720.1258 | LUGANODIAMONDS.COM

© LUGANO DIAMONDS

2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

18/8 Men's Hair and Grooming, Irvine*Scott Griffiths, CEO*

Scott Griffiths helped to create 18/8 Men's Hair and Grooming, a fine men's salon, so that men would no longer have to go to women's salons. With 400 stores operating and in development, 18/8 Men's Hair and Grooming is continually innovating its product service offerings, providing a full spectrum of grooming and hair care solutions so that clientele can look better, feel better — and as a result, perform better. Every year, 34 million men go to women's salons. Griffiths and his team were the first to create this category and solution as a meaningful substitute. Concurrently, 50 million men have issues, concerns or challenges with thinning hair. 18/8 Men's Hair and Grooming is the first to design a total true solution helping men keep their hair longer or get it back.

**AIVITA Biomedical, Irvine***Dr. Hans Keirstead, CEO*

AIVITA Biomedical is a clinical research company focused on the development of stem cell-based treatments and products which improve quality of life. AIVITA has recently initiated a Phase II clinical trial investigating its cancer immunotherapy in patients with ovarian cancer, having enrolled their first four patients in January 2018. The company is actively working to expand this treatment into additional cancer types. This research is supported in part by a newly launched commercial skincare line, ROOT OF SKIN. Sales of this product support the treatment of women with ovarian cancer. ROOT Cause, AIVITA's newly launched charity initiative, seeks out opportunities to give back to the local community and beyond. The company has an ongoing relationship with the Queen of Hearts Foundation for ovarian cancer and helped fundraise at a recent event. Dr. Hans Keirstead himself remains an advocate for regenerative medicine and healthcare issues in the local community and nationwide.

**All Green Electronics Recycling, Tustin***Arman Sadeghi, CEO*

Arman Sadeghi is a serial entrepreneur who has started a number of successful companies in the last 20 years. He is most widely known as founder and CEO of All Green Electronics Recycling, which was recently named the 366th fastest-growing company in the U.S. by *Inc.* magazine. He is also currently the principal and CEO of Titanium Success Inc., a peak performance and coaching company, which was started a year ago, but has already seen incredible exponential growth. Being a presenter at a TEDx Conference in 2012 gave him a taste of life as a public speaker and desire to take his personal and professional life one step further. As a keynote speaker, Sadeghi teaches skills in the three key areas of business/entrepreneurship, finance, fitness and relationships to create change, not in months or years, but in a matter of hours. All Green Electronics Recycling is a global leader in secure e-waste recycling, hard drive destruction, IT asset disposition, remarketing, computer equipment refurbishing and asset recovery.

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

Antis Roofing & Waterproofing keeps families safe and dry, and is nationally recognized as a leader in corporate social responsibility. Early in his career, Founder Charles Antis met a single mother and her seven children who were unable to pay for a much-needed roof repair despite living in a mold-infested home. Antis repaired the roof for free and was so inspired by the experience that he began a life-long practice of giving back first and without question — erring on the side of generosity. Antis attributes its success to loyal customers and partners who are inspired by the company's philosophy that "the more you give, the more you grow." Antis is the proud recipient of the following awards from local and national organizations in 2017: U.S. Chamber of Commerce Best Corporate Steward Award for Small and Mid-Market Business, Outstanding Mid-Size Business Award at Orange County's National Philanthropy Day, and Civic 50 Orange County Awards presented by the *Orange County Business Journal*.

**Apriem Advisors, Irvine***Harmon Kong, Founding Principal/Chief Wealth Manager*

Harmon Kong and his partner, Mark Iwamoto, co-founded Apriem Advisors (formerly Iwamoto Kong Wealth Management Group) in 1998. They were inspired by their vision of a community where wealth managers could provide tailored services and work together with their clients to pursue their own unique version of wealth, happiness and purpose. True to its Latin-based namesake, Apriem (meaning: to the highest degree), the firm strives to provide clients with the highest degree of service while handling all facets of their finances. Together with his leadership team, Kong has shepherded the independent, registered investment advisory firm to 20% organic annualized growth in assets under management,



reaching \$600 million AUM in 2017. In addition to its family-focused work, Apriem provides specialized services to female clients through its Women of Wisdom (WOW) program, as well as retirees from the industrial sector. Apriem's Industrial Retiree Practice has recently expanded to include high-profile companies such as Parker Hannifin and Boeing. Apriem is also a part of the prestigious Charles Schwab Advisor Network (SAN).

Arbela Technologies, Irvine*Nima Bakhtiary, CEO/President*

Nima Bakhtiary brings more than 20 years of experience in software, business consulting, and implementation of complex and multi-national financial and supply chain solutions. He is one of the founders of Arbela Technologies and has been president and CEO since October 2006. Under his leadership, the organization has become trusted advisors to numerous firms, delivering high-value business and technology consulting services to companies around the world. Arbela Technologies prides itself on helping companies lower the costs of offshore manufacturing — providing organizations a competitive edge by giving them an end-to-end solution by digitizing their processes. The company can then deliver configure-to-order products involving social media, marketing, sales, manufacturing, purchasing and more.

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

With more than 29 years of experience, Ron Viggiano has become the area's premier clothier by asking the right questions and understanding clients' wants and needs to help guide them into creating distinctive and personalized wardrobes. Using creativity and contemporary styling details, Viggiano has built a loyal following of successful business leaders and athletes in Orange County. Working side by side with his son, Chris, their focus is to continue developing strong relationships throughout Orange County and the surrounding areas. Austin Taylor has been featured on many television pieces, including ABC's *Extreme Makeover*, *Fine Living Channel* and *Wealth TV*.

**AutoGravity, Irvine***Andy Hinrichs, Founder/CEO*

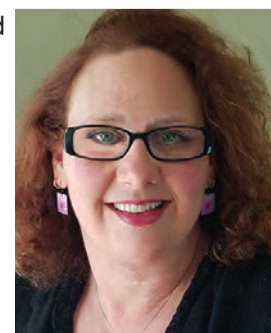
Since launching its pilot ship app in the summer of 2016, AutoGravity has provided more than 1.4 million car shoppers with a convenient, transparent platform that streamlines the auto-financing process. The FinTech pioneer continues to gain roughly 150,000 new users per month and recently surpassed \$2 billion in financing requested. By connecting prospective car buyers with the world's leading financial institutions, as well as a comprehensive dealer network containing more than 2,000 franchise car dealerships nationwide, AutoGravity evaluates variables such as vehicle and dealership preference and credit worthiness to intelligently match consumers with lenders and financing offers that create the most value — all in a matter of minutes. Due to its expanding suite of consumer apps and rapidly growing workforce, AutoGravity outgrew its previous office space and has since relocated to a new, state-of-the-art facility in Irvine, which features a distinct look and a modern working environment for its digital natives.

**B. toffee LLC, Irvine***Betsy Thagard, Founder*

An award-winning handcrafted toffee, B. toffee's "crunchy perfection of sweetness" offers the ultimate indulgence. Combining the finest, freshest, and most natural ingredients, Betsy Thagard spent years of passionate experimenting to create the perfect toffee. Her provocative manipulation of savory butters, fine domestic sugars, premium Guittard and Callebaut chocolates, topped with deluxe pecans are unlike any other toffee in the world. Since B. toffee's inception in 2009, the sweet treat has caused a stir in the candy confection world. With a dedicated following and ever-growing customer base, Thagard has turned her passion into a profitable business. B. toffee received top gold honors for "Top Toffee" and "Best Packaging" by the Taste Awards in San Francisco and has also been awarded the "Official Toffee" at the Golden Foodie Awards — the highest culinary food honor in Orange County. B. toffee can be found in many high-end specialty markets both locally and nationwide, including Dean & DeLuca, Whole Foods, Bristol Farms, and at several luxury resorts, like Bacara Resort & Spa in Santa Barbara.

**Balloonzilla, Irvine***Marla Borokoff, CEO*

Marla Borokoff has been in the balloon industry for more than 12 years. She is the founder of Balloonzilla, and helped to create and teach many of the designs that the company sells today. She has helped trained all of



A man in a light-colored sweater stands in front of a Panini Kabob Grill restaurant. He is holding a large white sign that lists 14 new locations opening in 2018. The sign features the Panini Kabob Grill logo, which is a green circle with a yellow globe in the center and the words "PANINI KABOB GRILL" and "HEALTHIER MEDITERRANEAN FOOD" around it. The sign also lists the following locations: Burbank, Carlsbad, Del Mar, Lakewood, Little Tokyo, Mission Viejo, Pasadena, Rancho Cucamonga, Riverside, and UTC San Diego. The background shows the restaurant's exterior with a large "PANINI KABOB GRILL" sign and a "NEW LOCATIONS OPENING IN 2018!" sign.

“Commitment.
That’s why
I’m a Mechanic.”



Mechanics Bank®
Where Relationships Matter

"In Mediterranean culture, it is our custom to welcome guests into our homes and give them the 'best of the best'. We're dedicated to that same approach in our restaurants, and it has really fueled our success. Mechanics Bank gives us that same level of commitment. They understand our business, and they've been with us throughout this journey. Their commitment is what has allowed us to focus on our future success."

— Mike Rafipoor | Panini Kabob Grill

Give us a call at 800.797.6324, visit us online at mechanicsbank.com, or better yet, come in and talk with us. It's a great way to find out if you're a Mechanic, too. Member FDIC. Equal housing lender.

2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Balloonzilla's staff, in all departments. Borokoff is a member of the Qualatex Balloon Network, and is also a Certified Balloon Artist. Balloonzilla has grown from Borokoff's garage to a thriving business in Sky Park, near the John Wayne Airport with more than 20 employees. Balloonzilla has created more than 150 different balloon designs, decorated more than 2,500 venues and events, and have 700+ customers.

Beeya, Laguna Beach

Ladan Davia, CEO/Founder

Ladan Davia started her first company in the tech space, Excelerate Test Prep, at 21. When she discovered the troubles people had during the hiring and employment process, she started Beeya at 23. Finding a job online is not a new idea, nor is the idea of connecting people in a professional network. What is a new and innovative idea is what Davia has created in Beeya. Beeya is a platform that automatically matches employers and employees using a matching algorithm based off of specific requirements selected by the user. The website brings the online job hunt, social network and professional network ideas all onto one platform. Beeya allows the user to look for exactly the job or candidate they desire, while filtering out results they don't want. Beeya is now serving 98 companies and almost 7,000 employees in Orange County. Davia also serves veterans and is currently working a deal with the U.S. government to find the 180,000 veterans in Orange County jobs through her platform.

**BEST-VIP, Huntington Beach**

Robert Vaughan, President/CEO

Beginning in 1995, BEST-VIP Chauffeured Worldwide has grown from a one-person, one-limousine business, to an award-winning, first-class transportation provider with a fleet of more than 140 vehicles and 200+ employees. Starting with the purchase of one limousine, and in 2016 acquiring a highly respected competitor, VIP Limousines & Coaches, BEST-VIP Chauffeured founder Robert Vaughn has led the company through an impressive expansion. The company's commitment to providing guests and clients with the freedom to make the most of their time – and their life – whether for business or leisure travel, has earned Best Chauffeured an enviable reputation within the premium transportation services industry. In addition to serving an array of Fortune 500 executives, VIPs, celebrities and leisure travelers, the company continues to distinguish itself by its involvement within the community. Organizations such as Make-A-Wish Foundation, CHOC Children's Hospital and Living the Dream Foundation are just a few nonprofit organizations that have benefited from Best Chauffeured and its volunteer efforts.

**Beyond Fifteen Communications Inc., Irvine**

Lauren Ellermeyer, Co-Founder/President

Beyond Fifteen Communications has a penchant for going beyond the norms of traditional PR to bring the highest level of media and market attention to its clients' brand propositions. By skillfully tying entrepreneurial ideas to results-driven strategies, the agency is setting new standards of PR execution, while redefining the agency/client relationship. Since 2009, co-founder Lauren Ellermeyer, has leveraged her progressive business style, keen eye for new talent, and public relations and social media expertise, to grow a home-based startup, into a flourishing nationally acclaimed communications powerhouse that has doubled in size year over year since 2010; with 23% increase in revenue in 2017 with year-over-year growth. Apart from cultivating Beyond Fifteen's collaborative, "client-first" business approach, Ellermeyer pours generous support into a variety of community organizations. She is a long-time partner of TedxOrangeCoast, and currently serves as a board member and Philanthropy Chair for American Family Housing. In addition to serving on multiple executive leadership boards, her favorite extracurricular activity is inspiring students and industry leaders alike on how to bring their entrepreneurial ideas to fruition.

**Bioniz Therapeutics Inc., Irvine**

Nazli Azimi, Founder/President/CEO

Drug development is a formidable endeavor, taking approximately 10 years and costing about \$1 billion to commercialize a drug. Not many people have the courage and patience to take on such a daunting task, but for Dr. Nazli Azimi, there was no other option but just to do that. Azimi was a recognized scientist at the prestigious National Institutes of Health (NIH) when she and a colleague discovered a novel, paradigm-shifting technology to develop therapeutic drugs that cost less, are more efficacious, and have less toxicity. When asked why she had to leave her comfortable academic job to become a bio-pharma entrepreneur, Azimi replied that she was compelled to do so, knowing the significant impact this technology would have on people's lives. Azimi founded Bioniz in 2010 in a small laboratory in Lake Forest. During the following years, she assembled a superb team of scientists and business leaders and built a rich pipeline of drug candidates, with one already in the clinic.

**Bonakdar Institute, Corona del Mar**

Monica Bonakdar, MD, Medical Director/Physician

As a physician, Monica Bonakdar's goal is to be an early adopter and an expert of new and safe technologies in the aesthetic arena, and to provide clients ongoing correction, maintenance and preventative aesthetic treatments. Through dedicating her entire practice to cosmetic dermatology and letting go of general medicine and general dermatology, the depth of Bonakdar's experience surpasses many of her colleagues. Bonakdar does approximately 40,000 units of Botox and 1,000 syringes of fillers every year. She has also developed an exclusive non-invasive face lifting and neck lifting filler technique, called AmpliPhi, with results unlike any other treatment. Bonakdar's success is due to her unrelenting determination and drive to achieve her goals; she has never let society's expectations of a woman from a third world country dictate what she settles for.

**Brower Group, Newport Beach**

Judy Brower Fancher, CEO

Judy Brower Fancher founded and leads one of the most effective and ethical public relations, content and marketing firms in Orange County. Now celebrating 24 years of serving clients across the nation, Brower Group has generated millions of dollars in direct revenue for her clients. Whether it is through publicity, website creation and management, email campaigns, social media campaigns or other services, Brower's clients are individually branded and gain true ROI on their marketing programs. From recommending the music in the parking areas at The District at Tustin Legacy, through guiding her internal team to achieve rewarding results for the agency's clients, Brower has overseen the birth and growth of a strong firm that has raised the bar not only for Orange County, but for the commercial real estate and financial services marketing industry on a national basis.

**Burns & McDonnell, Brea**

Rick Cramer, Environmental Technologies Manager

Rick Cramer has dedicated his professional career to advancing environmental science in California and across the U.S. In 2013, he introduced an innovative geologic technical practice to the environmental consulting industry that is influencing a paradigm shift in U.S. Environmental Protection Agency (EPA) regulations and helping to better protect the public today. Cramer has more than 25 years of experience providing strategic direction for contaminated site cleanup. He is passionate about finding solutions for complex environmental issues and helping others. Cramer is actively involved in the Groundwater Resources Association and regularly gives presentations across the country, sharing best practices. Outside of his support of environmental associations and initiatives, he gives back to the community through donations of time and money to organizations such as Orange County United Way and StandUp for Kids. He is a registered professional geologist in California. Burns & McDonnell is a full-service engineering, architecture, construction, environmental and consulting solutions firm.

**Business Communications Solutions, Irvine**

Sunny Rajab, CEO

Sunny Rajab is the perfect example of the success one can achieve when taking chances and working hard to follow the American Dream. Before even going to college, she founded a successful telecommunications company, Business Communications Solutions (BCS), that met the needs of other entrepreneurs and small business owners. Rajab also gave guidance and mentorship to other business leaders while pursuing her Executive MBA from USC. Never afraid of taking on major national projects or providing clients with ever-evolving technology solutions, BCS launched a cloud-based unified communications phone service, Kumo, and implemented audiovisual design and installation among its product and service offerings. A year ago at this time, Rajab worked remotely in order to be by her six-year-old daughter's side while she was undergoing chemotherapy to fight Stage IV cancer. Watching her daughter, Shayda, battle cancer prompted Rajab to begin her next venture, a nonprofit charity, the Shayda Strong Foundation, which provides support for other children with cancer.

**CEO Space Orange County, Irvine**

Dave Phillipson, Chapter President

CEO Space has been in business for more than 27 years, with nearly 300,000 members from all over the world and counting. CEO Space offers signature, week-long cooperative capitalism marketplace training experience for executives, entrepreneurs, professionals, investors, inventors, business owners and those who want to own their own business. CEO Space is a private, by-invitation-only membership. As chapter president, Dave Phillipson has hosted more than 700 meetings and has helped thousands of entrepreneurs during that time. Phillipson is



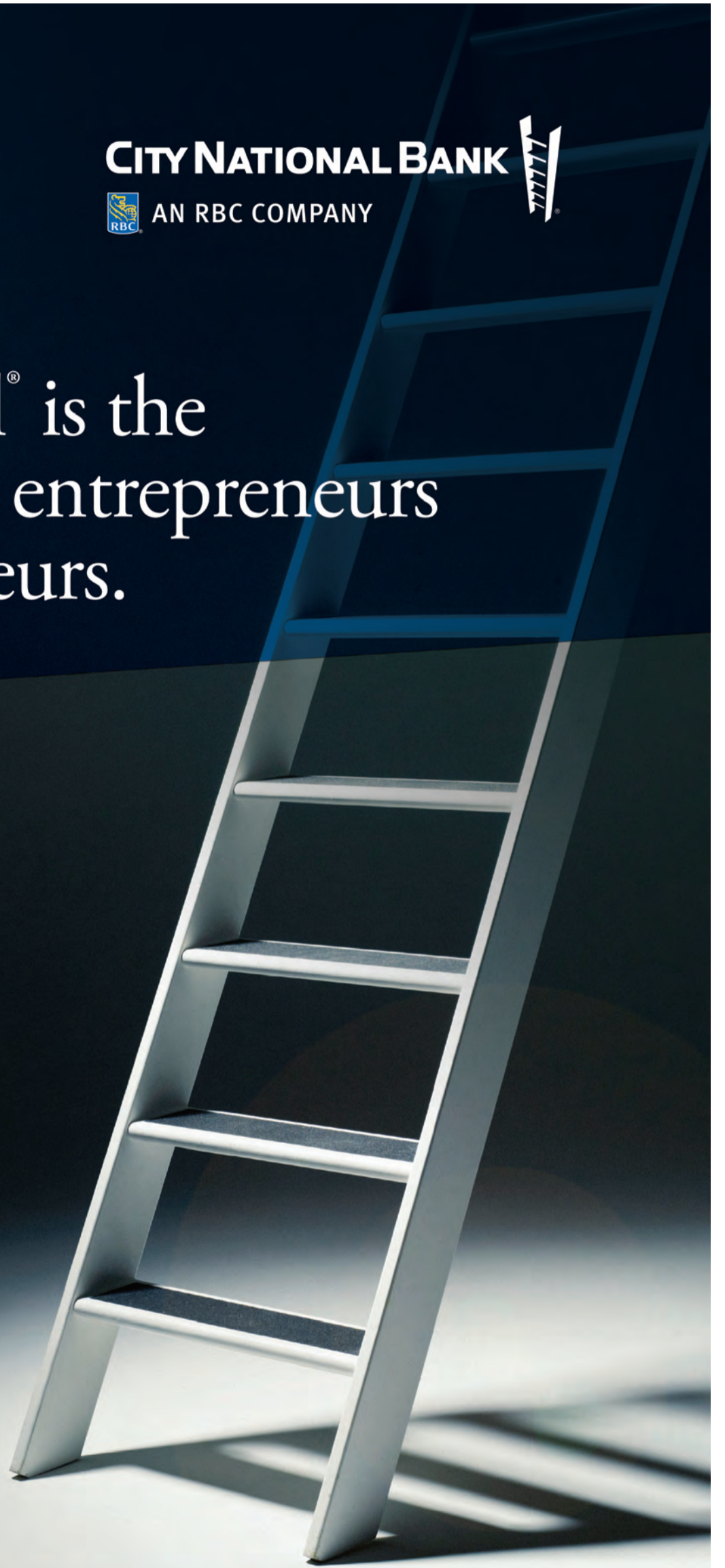
CITY NATIONAL BANK

AN RBC COMPANY



City National[®] is the bank built by entrepreneurs for entrepreneurs.

SERVING ORANGE COUNTY
ENTREPRENEURS FOR
MORE THAN 40 YEARS.



The people you trust, trust City National.

CNB.COM

CNB MEMBER FDIC ©2018 City National Bank. All Rights Reserved. City National Bank is a subsidiary of Royal Bank of Canada.

7025.01

2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

internationally recognized as a cryptocurrency/bitcoin expert, and is an investor, strategist, mentor and philanthropist.

CGS Business Solutions, Mission Viejo

Nick Chavis, President/CEO

Nick Chavis, along with his company, CGS Business Solutions is celebrating their sixth year anniversary with their third designation on the *Orange County Business Journal* Fastest-Growing Companies List. CGS has designed flexible IT staffing solutions to help customers to attract and build their most valuable asset to maintaining an edge in the marketplace and continued success – their people. The company just ended another successful year, experiencing more than 135% growth in the last two years. Chavis, a member of the North Carolina Lumbee Indian Tribe, is a certified minority business owner specializing in IT business solutions and consulting services. For the last 18 years, he has been serving some of Orange County's largest corporations. He is a guest lecturer at his alma mater, California State University Fullerton, where he has advised both undergrad and graduate business students on being an entrepreneur and career growth strategies.

**Chamber Music | OC, Irvine**

Kevin Kwan Loucks, President

In just five years, Chamber Music | OC has firmly established itself as one of the most dynamic classical music organizations in the country, dedicated to advancing the art of chamber music through performance, education and community outreach. Chamber Music | OC's rich program offerings serve thousands of Southern California residents annually, and have been recognized by Pulitzer Prize and GRAMMY Award winners, civic leaders, and top academic and artistic institutions across the country. Kevin Kwan Loucks developed a collaborative model that draws on the talent and skills of the executive team, and has positioned the organization favorably to enable future success for years to come; some of these initiatives include an ambitious growth plan to expand the organization's physical footprint into Riverside and Los Angeles, and the forming of partnerships with the Claire Trevor School of the Arts at UC Irvine and Pacific Symphony Youth Ensembles to open Orange County's first and only certificate-bearing PreCollege Music Program.

**Child Creativity Lab, Santa Ana**

Peter Chang, Executive Director

The Child Creativity Lab fosters problem-solving, critical thinking, divergent thinking, and innovation through science, technology engineering, arts and math (S.T.E.A.M.) curriculum in Orange County's classrooms. In collaboration with the Orange County Department of Education, OC STEM Initiative and several school district programs, the organization officially began broad-based program delivery in 2014, serving 1,815 youth in kindergarten through sixth grade schools. Since then, the organization has provided STEAM-based learning experiences to 40,000+ youth, with more than 70% coming from at-risk families. Recognition of Peter Chang's achievement was rewarded with the 2017 Excellence in Early Care and Education from the OC Association from the Education of Young Children, the 2016 and 2017 "Top-Rated Nonprofit" Designation from Great Nonprofits, and the 2017 Community Building Award from the City of Santa Ana.

**ChromaDex, Irvine**

Frank Jaksch, Founder/CEO

Frank L. Jaksch Jr. co-founded ChromaDex in 1999, brought the company public in 2008, listed the company on NASDAQ in April 2016 and serves as CEO. Under his leadership, ChromaDex has focused on developing a comprehensive natural products chemistry business, expanded into international markets and built an impressive roster of Fortune 500 customers. ChromaDex Corporation (NASDAQ:CDXC) is an innovator of proprietary health, wellness and nutritional ingredients that creates science-based solutions for dietary supplement, food and beverage, skin care, sports nutrition and pharmaceutical products. Prior to founding ChromaDex, Jaksch served as the International Subsidiaries Manager of Phenomenex, an analytical chemistry consumables company, where he managed the company's international subsidiary and international business development divisions. While at Phenomenex, Jaksch established strategic business offices in Australia, England, Germany and New Zealand.

**Cie Digital Labs, Irvine**

Anderee Berengian, Co-Founder/CEO

Cie Digital Labs (CDL) is an accelerator of innovation for large enterprises and a growth accelerator for emerging startups. Anderee Berengian has led the company's 50%+ year over year growth; 50%+ client growth with enterprise brands such as Pilot Flying J, Petco and Leslie's Pools, as well as more than a half dozen startups.

Berengian has helped to raise close to \$200 million for startups throughout his career and create more than 1,000 jobs through his entrepreneurial efforts. In combination with RezVen Partners, a Newport-Beach-based venture capital firm where he is founder and managing partner, Berengian has been instrumental in driving success for dozens of tech startups, including Cie Games (acquired in 2014 by Glu for \$100 million), Nativo (raised \$32 million in venture capital and growing revenues at ~400% year over year), StyleHaul (acquired in 2014 for \$300 million), Ankeena (acquired by Juniper Networks for \$200 million), CloudTrigger (acquired by Cloud Sherpas acquired by Accenture for \$400 million) and Cramster (acquired by Chegg Inc. in 2010).

**Commerce Machine LLC, Costa Mesa**

Justin Barr, Co-Founder

In 2016, Justin Barr bootstrapped a brand new E-commerce company to \$1.5 million in sales in nine months before deciding to launch Commerce Machine LLC, an agency that helps other E-commerce store owners scale their digital businesses built on Amazon and Shopify using techniques his team has mastered over their careers in digital marketing. Barr has been an active board member of the OC Entrepreneurs Organization for the last three years.

**CureDuchenne, Newport Beach**

Debra Miller, CEO/Founder

Fifteen years ago, Debra Miller's son, Hawken, was diagnosed with Duchenne muscular dystrophy, a fatal genetic disease with no cure. As a result, she and her husband founded CureDuchenne, a nonprofit with the mission to find a cure, that has since raised more than \$20 million and funded nine research projects that have progressed to human clinical trials, one resulting in the first drug ever to receive FDA approval for Duchenne. Miller has identified gaps in the Duchenne community and has successfully filled those gaps with programs ranging from research, patient care, data and registries to government relations and clinical trials. She started a division, CureDuchenne Ventures, that invests in early stage Duchenne research that has been thoroughly vetted by CureDuchenne's scientific advisory board. Through her leadership, CureDuchenne Ventures founded a gene-editing company, Exonics Therapeutics, utilizing CRISPR Cas9 technology and nine months later, Exonics received a \$40 million financing deal by San Francisco's The Column Group, bringing everyone one step closer towards finding a cure for Duchenne Muscular Dystrophy.

**Designers Resource Collection, Costa Mesa**

Warren DeYoung, Principal

Pamela Kellogg, Principal

Celebrating more than 30 years of excellence, Designers Resource Collection is the premier destination for interior designers. Open exclusively to the trade, Designers Resource Collection and partner showrooms, Kenneth McDonald Designs and Estate of Design are now under one roof in the Stonemill Design Center,



featuring 50,000+ square feet of combined showroom floor. The adjoining showrooms offer an all-new fabric display; semi-private client/designer collaboration spaces; and a comprehensive selection of indoor and outdoor furniture, accessories, bedding, fabric, wall coverings and lighting. Proud to be family-owned and operated by father/daughter duo Warren DeYoung and Pamela Kellogg, the collective brands provide an elevated experience to the design community and clientele, including famous faces such as Bravo TV's Jeff Lewis and HGTV's Christina El Moussa. Dedicated to supporting the local community, the team at Designers Resource Collection has supported philanthropic organizations such as National Charity League, Human Options, The Hebrew Academy, Toys for Tots, South County Outreach and Ronald McDonald House.

Devise Interactive, Irvine

Dalip Jaggi, Principal

Dalip Jaggi has been recognized as an entrepreneur who is always looking to do more and do better. He is the founder of the digital marketing agency, Devise Interactive. The company has been in business for four years, growing to a team of 11 in-house employees. Devise Interactive has also achieved 85% retention rate of clients. Jaggi also co-founded one of Orange County's hottest startups, Eva Smart Shower – a smart shower that will help you save water while you shower. Away from his different ventures, Jaggi stays very active in his community. He co-founded a local nonprofit, Forge54, a 54-hour hackathon weekend to give a marketing makeover for a nonprofit in need.





ALUMNI NOMINEES

LADAN DAVIA '14

CEO/Founder, Beeya
B.F.A. Broadcast Journalism

REBECCA HALL '96

CEO, Idea Hall
B.A. Communications

DAVE JUDY '87

CEO, Full Blown Events
B.A. Communications

KEVIN KWAN LOUCKS '17

Chamber Music OC, President
EMBA

SAMANTHA MEYERS '06

Owner/Baker, Sugared and Iced
B.A. Theater and Legal Studies

STEPHEN THORNE '94

President + CEO,
Pacific Dental Services
MHA

PETER TWILL

COO, Full Blown Events
Class of 1998

THINK LIMITLESSLY

Chapman University congratulates our alumni nominees for the
2018 Excellence in Entrepreneurship Awards. You experiment boldly,
act thoughtfully, explore tirelessly and achieve **anything imaginable**.



CHAPMAN UNIVERSITY

Chapman.edu

2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Diamond Fire Glass, San Clemente*Brian Langohr, Founder/President*

Brian Langohr founded the trusted leader in the fireplace glass industry, Diamond Fire Glass, in 2003. The company's products are featured in some of the finest homes, restaurants and resorts in the world. Diamond Fire Glass's products are manufactured exclusively for use in gas fireplaces and firepits, and are specially formulated to resist extreme heat without emitting any smoke, soot or ash. This year, the company filed an additional international patent on a new stainless steel fire ring designed for outdoor fire pits that will replace the old standard design that has been used in fire pits for ages. The company's new Pro Series Diamond Fire Ring™ is designed specifically for use with Fire Glass.

**eGumBall Inc., Irvine***John Bauer, CEO*

Since eGumBall Inc.'s incorporation back in 2007, the company's mission has been to become the United States' prime local search marketing provider. eGumBall employs more than 150 people in its California offices. Over the past few years, the company has perfected the art of Google My Business Optimization to such a degree that it now boasts a customer retention rate of 85%. Today, eGumBall has a customer-base in the thousands, and a service and satisfaction record which is unrivaled in the market sector.

**Elite Beverage International, Tustin***Luis Cota, President*

With decades of experience in the wine and spirits industry, Luis Cota has made this his career and his passion. Cota's initial eight years in the business were spent with the Gallo Winery in various positions throughout the country. Following that, he spent more than seven years with the Inglenook Napa Valley Co. Becoming president of Elite Beverage International has allowed Cota to fully develop his passion for tequila. Outside of the business world, Cota and his wife have a passion for education. Accordingly, they are very involved with various scholarships and support local libraries in Mexico.

**Ergo21, Newport Beach***Steve Gambhir, President*

Steve Gambhir has changed the lives of thousands of people with back, tailbone and buttock problems with his seat cushion, Ergo21. Ergo21 with LiquiCell Technology helps to increase blood flow under the tailbone and thighs. Gambhir licensed the unique technology and created Ergo21, a high-level cushion and back support that can be used in multiple ways – in the car, on a sofa, bed, and during yoga and meditation. The Ergo21 is getting rave reviews from drivers of all kinds from Uber and bus drivers to pilots. In addition, wheelchair users also are getting relief from pressure sores when they use the Ergo21 cushions.

**Fratzke Media, Fullerton***James Fratzke, President/Co-Founder**Ryan Fratzke, VP of Client Strategy/Co-Founder*

The Fratzke brothers have entrepreneurship in their blood. They come from a long line of proud OC business owners, and in a short time, have grown Fratzke Media into a profitable, scrappy, successful venture with a strong vision toward future growth. James and Ryan Fratzke, co-founders and identical twin brothers, are focused on bringing clarity to the noisy digital marketing world through a concept they've developed called Digital Storytelling. Fratzke Media works with brands to design a consistent online experience from beginning to end with strategic planning, innovation and hands-on execution through the eight channels of digital storytelling: website, SEO, social, email, digital ads, content, local search and reputation management. Within the first year, Fratzke Media has grown a strong portfolio of clients ranging from venture capital firms to Fortune 500 companies.

**Free Rein, Huntington Beach***Dr. Carole Harris, Founder/CFO*

Free Rein was established in 2013 by Dr. Carole Harris. Harris had the foresight to create a nonprofit organization to heal the members of its community through equine-assisted psychotherapy and horse rescue. Connecting local law enforcement departments and working with community organizations such as Sunburst Youth Academy, PALS and The Boys and Girls Clubs, she has taken

hundreds of kids through an eight-week curriculum, focusing on the dangers of gangs, bullying and drugs. And more importantly, teaching empathy and the life skills needed to be a productive member of our society. She has expanded equine therapy to include veterans with PTSD, victims of random acts of terror and those suffering from illness. Today, Free Rein is 100% volunteer-run and 100+ individuals come together in various capacities to care for the rescued horses, prepare meals for the kids, clerical duties and fundraising.

**Full-Blown Events, Anaheim***Peter Twill, COO**Dave Judy, CEO*

Full-Blown Events (FBE) is a full-service creative and production group. The company provides innovative and cost-effective solutions to clients who value the power of live events. FBE Founders Peter Twill and Dave Judy bring more than 40 years of combined experience in production management and technical implementation to



every project, with experience that spans across such industries as automotive, music and entertainment, pharmaceuticals and real estate. Judy began his career more than 25 years ago as a broadcast cameraman and cinematographer and quickly moved into producing commercials, broadcast television and music videos through his own production company. After numerous Telly, ACE, Communicator Awards, and an Emmy nomination, Judy turned his attention to corporate events. Twill grew up fascinated by the edit systems and cameras sold by his father's video equipment company. With technology in the blood, Twill has continued to stay on the cutting-edge of video design and integration.

GlobeChat, Newport Beach*Kevin Strom, Founder/CEO*

Kevin Strom has created the first global universal communication platform connecting people throughout the world regardless of language or distance. GlobeChat provides a single unified global communication platform, instantly connecting people throughout the world regardless of language. GlobeChat enables people to communicate with others anywhere in the world with video, photos, text, voice-to-text and audio files on Android, Apple and Windows mobile devices, as well as tablets, laptops and desktops. The platform translates languages real-time within private one-to-one, private group as well as public chat environments, allowing for seamless interaction – each person receives messages in their native language regardless of the language of the sender. GlobeChat offers an innovative search feature allowing users to easily filter others globally based on age, gender, orientation, religion, political affiliation, education, career, interests, commonalities and more – with the results immediately displayed on a colorful map of the world. GlobeChat is now in 130 countries with a monthly user growth of 33%.

**GritCycle, Costa Mesa***Marisa Wayne, President/Co-Founder*

Marisa Wayne's company, GritCycle, has grown into one of the most influential small businesses in Orange County. Having served more than 19,000 individuals in the company's five-year history, this organization helps individuals reach their personal fitness goals, and on a larger scale, raises money for local charities and nonprofits. Since GritCycle's inception in 2013, the company has raised more than \$1 million dollars. Wayne is also involved with the Chamber of Commerce in both Newport Beach and Dana Point, donating both services and support in community endeavors. GritCycle is an indoor cycling studio and athleisure retail boutique with two locations in Orange County.

**H. Hendy Associates, Newport Beach***Heidi Hendy, Managing Principal*

Heidi Hendy launched H. Hendy Associates in 1979 to drive innovation in the field of interior architecture and planning. Nearly four decades later, the company has established itself as a leading force in the industry as one of *Interior Design Magazine's* Top 200 Architecture Firms for 32 consecutive years. Hendy and her team help clients seamlessly relocate or remodel, with interior architecture services spanning strategic facilities programming, employee satisfaction analysis, change management and space planning. While each project astounds visually, efficiency and functionality are driving forces behind every design. The company's roster of new workplace solutions includes TRI Pointe Group, Monster Energy, Squar Milner, Mark IV, Yokohama Tires Corp., Kawasaki and OluKai. In addition to the many LEED-certified professionals at the firm, the WELL accreditation sets H.



2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Hendy Associates apart. Its ability to incorporate wellness concepts into every design, not only wins over clients and their employees, it reduces absenteeism and increases productivity.

Hibner Design Group, Irvine

Maryanne Hibner, President

Maryanne Hibner came to the United States from the Philippines at the age of six. She was driven from a young age, and knew that someday she would own her own business. Hibner put herself through design school and was quickly hired after graduation. After working for several interior design firms, she had the opportunity to join The Irvine Company and became the director of design in the Multi-Family Division. This gave Hibner the opportunity to round out her design experience to now include development and construction. A year after having her second child, Hibner made the decision to start commercial interior design firm, Hibner Design Group. Within the six years in business, she has grown the company and has successfully installed several projects across California.

**Idea Hall, Costa Mesa**

Rebecca Hall, CEO

Rebecca Hall founded and spearheaded a hybrid PR/marketing agency, when each discipline of marketing was separately operated. Her innovative spirit and vision for an integrated agency proved to be the catalyst for the cutting-edge force that Idea Hall is today. Hall also demonstrated unwavering leadership as she shepherded her agency – built on commercial real estate and financial services clientele – through one of the toughest economies in recent history with the 2008 Great Recession. This year, Idea Hall is celebrating its 15th anniversary. In 2017 alone, Idea Hall won 10 new accounts bolstering the legacy commercial real estate practice, while expanding into new markets. The agency has also expanded its service offerings to include virtual reality (VR) 360-degree video production. Hall remains one of the first female heads of an agency, and a leading female marketing and PR entrepreneur in Orange County. She attributes her success to staying three steps ahead of the industry, the CRE category and boardroom demographics.

**Intact Info Solutions LLC, Brea**

Danny Basu, Director

Roger Pakalapatty, Director

Intact Info Solutions LLC, a digital marketing and SEO company, was started in 2005 by Danny Basu and Roger Pakalapatty, two first generation immigrants with bootstrapped capital. Today, Intact Info Solutions has worked for 400+ clients in diverse industries such as medical, legal, E-commerce and B2B with clients ranging in size from Fortune 500 to mom-and-pop small businesses. The company has been featured on the *INC. 5000* list in 2012 and 2013.

**iWALKFree Inc., Long Beach**

Brad Hunter, CEO

Brad Hunter designed, manufactured, marketed and distributed the world's first and only hands-free crutch. iWALKFree gives users hands-free/pain-free mobility and the ability to live a functional, independent lifestyle. iWALKFree has been the subject of numerous clinical and university studies, and has won numerous awards. With capital resources of just over \$100,000, the product was designed, prototyped, tested, put into production, and inventory created, and then marketed and distributed in under 18 months. In addition, sales grew to almost \$3 million in under four years, despite limited marketing resources. Today, the company has patents that have been granted or are pending in seven countries and more than 500 doctors are prescribing the device.

**JobzMall, Irvine**

Nathan Candaner, Co-Founder

Pembe Candaner, President/Founder

Pembe Candaner and Nathan Candaner are co-founders of JobzMall Inc., an entrepreneurial venture started to disrupt the employment industry. The site is the first of its kind to combine user-friendly applications such as virtual reality, artificial intelligence and video sharing for the purpose of connecting people with their

MARK POMERANTZ

LUXURY MENSWEAR
BY APPOINTMENT

MARKPOMERANTZ.COM | APPOINTMENT@MARKPOMERANTZ.COM | SHOWROOM & ATELIER | 4041 MACARTHUR BLVD | NEWPORT BEACH

2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

perfect career opportunity. With \$1.5 million in seed money, JobzMall has launched with more than 250 organizations advertising their brands in virtual “stores” that offer job opportunities, including mega-employers such as Coca Cola and the City of Los Angeles.

JobzMall is more advanced and intuitive than current online jobs boards which have not changed significantly since the dot-com era. Pembe is a prominent businesswoman originally from Istanbul, Turkey. Pembe served as CEO of major corporations in the employment industry, including Adecco SA Turkey, Lee Hecht Harrison and Kariyer.net, Turkey’s leading job-finding platform.



Katie B Cosmetics, Irvine

Katie Bayliss, Creator/CEO

In 2007, entrepreneur, beauty expert and attorney Katie Bayliss along with her husband, Shaun Bayliss, combined their passion for makeup and law, and set out to revolutionize the cosmetics industry. Their mission was to advocate for the beauty industry by developing innovative, on-trend products that are safer and have more natural, beneficial, skin-loving ingredients. Their products are free of or have fewer artificial ingredients and toxic chemicals. Their message has connected with thousands of women who want to look beautiful, but do not want to sacrifice their skin. Under her vision and her understanding of the new social era, Bayliss harnessed the power of social media, digital marketing and multichannel distribution to profitable success. Bayliss was able to outgrow the business from a bedroom in her parents’ home to a large warehouse and distribution center in Irvine, with products shipping worldwide.



Kush Bottles Inc., Santa Ana

Nicholas Kovacevich, CEO

Nicholas Kovacevich launched Kush Bottles in 2010 in order to provide pharmaceutical-grade, child-safe packaging to the then-emerging medical cannabis industry. With the understanding that the legal cannabis industry presented an unprecedented opportunity, Kovacevich’s focus was to build an ancillary business that didn’t touch the plant, yet was integral to the marketplace. Now, Kush employs more than 70 people and has facilities in three states. The company is fully compliant with the SEC and publicly traded on the OTC exchange under the symbol KSHB. As one of the only nationally recognized brands in the cannabis space, Kush Bottles has emerged as an approved and trusted partner for the licensed cannabis business. By bringing child-resistant packaging and compliance standards to the emerging market, Kovacevich has become a well-respected executive by both the industry and regulators alike. As such, he has often asked to speak at various cannabis conferences and has been featured on major media outlets such as CNBC Inc., Cheddar and TheStreet.



Leaf Communication Consulting Inc., San Clemente

Dan Leaf, President/CEO

A family-owned business, Leaf Communication Consulting (LCC) is one of the fastest-growing companies in the wireless communications industry. LCC is a leading DAS (Distributed Antenna System) and in-building wireless design, implementation and maintenance company for the major carriers in the Western Region of the United States. LCC evolved from Dan Leaf’s previous company, Leaf Communication Services (LCS), started in 2004 in the state of Washington. The successful growth and business development of LCS resulted in an \$80 million national company; LCS was sold in 2011. Leaf relocated his family to Orange County in 2013 and created LCC. Having pioneered the DAS industry, and as one of the first in the new market space for cellular operators, LCC is licensed in California, Colorado, Georgia, Massachusetts, Nevada, Oregon, Utah and Washington State.



Managed Direct Response, Irvine

Pat Mercuri, Founder/President

Pat Mercuri is recognized as an innovator in the direct marketing and lead generation industries in Orange County. Mercuri has more than 20 years of experience and is recognized for his expertise in direct response, having introduced a number of innovative marketing programs for the mortgage, solar, automotive and retail services. During his career, Mercuri has mailed more than 200 million lead-generating marketing materials. His working day at 3 a.m., and he doesn’t stop until everything for the day is done, which is what makes Managed Direct Response so efficient in turnaround for print and production.



Manna Kadar Beauty Inc., Irvine

Manna Kadar, Founder/CEO

A noted industry expert, beauty editor and makeup artist to an impressive roster of celebrity clients, Manna Kadar has made a mark as an industry expert and a true trendsetter in the world of beauty. Kadar has been recognized by countless professional organizations for her business acumen and received the USC Remarkable Women’s Award in 2014. Manna Kadar Beauty Inc. has also been recognized as one of the fastest-growing businesses by the *Orange County Business Journal*. Kadar is active in various philanthropic organizations, including board of directors for Goodwill, board of directors USC – chairwomen for Women in Business, Desperate Paws for Orange County, and Glamour Gals.



Mark Pomerantz, Newport Beach

Mark Pomerantz, Menswear Designer/CEO

Founded in 2010, The House of Mark Pomerantz is a men’s luxury suit brand, headquartered in Newport Beach with a sales office in New York City and suits handmade in Italy. At a young age, Mark Pomerantz developed an intrinsic passion for understanding the essence of sartorial clothing and dressing with elegance. Earning a degree in menswear design and tailoring from the Fashion Institute of Technology in NYC, Pomerantz began his quest to integrate these passions. He ventured to Rome, Italy, to inspire his artistic view and refine his craftsmanship, contributing to luxury brands such as Armani, Valentino, YSL and Calvin Klein. The House of Mark Pomerantz designs wardrobes for a global clientele. Men who value an artist’s creativity and instinct for clothing, commission Pomerantz because of his vision. Born and raised in Newport Beach, Pomerantz has strong ties to the local community. In 2017, he donated \$100,000 of value to charities and has hosted college students in his private studio to inspire and develop the next generation of fashion and business innovators.



Montage Legal Group, Irvine

Laurie Rowen, Co-Owner/Founder

Erin Giglia, Co-Owner/Founder

Montage Legal Group uses a unique business model to give law firms access to a network of freelance attorneys who handle temporary or contract legal work remotely on an hourly or project basis. Montage handles administrative and billing tasks, allowing its law firm clients and freelance lawyers to focus on legal projects. Whether a law firm needs law and motion work, depositions, business documents, court appearances or document review – or needs expertise in a specialty practice – law firms can turn to Montage to find the exact type of freelance lawyer they need. Montage’s network of freelance attorneys is the top of the “contract attorney market,” with impressive credentials from top law schools and prestigious law firms. Just as an artistic montage unites simple elements to create a beautiful art form, the “montage” of freelance attorneys unites with firms of all sizes to create excellent work product. Founders Laurie Rowen and Erin Giglia have been recognized by various media outlets nationwide for their efforts to create an effective alternative legal practice model.



Moxxe PR Inc., Santa Ana

Mona Shah, President/CEO

Mona Shah, owner of Moxxe PR, is regarded as one of Orange County’s best restaurant publicists. While doing her best to be a hands-on mom to three children, Shah has managed to create a reputable name for herself by working with some of the area’s top restaurants, including The Winery Restaurant & Wine Bar, Driftwood Kitchen, ARC, Provenance, Puesto, Haven Gastropub, Portola Coffee Lab, Juliette Kitchen & Bar, Sapphire Laguna Beach, Hendrix and Sushi Roku Newport Beach. In addition, Shah sits on the board of directors of the Orange County Restaurant Association and promotes OC’s largest culinary event, Orange County Restaurant Week. Her PR experience comes from a wide range of positions, from being the PR director for the Miss Universe Organization and coordinating initiatives in sub-Saharan Africa with the Harvard Aids Institute, to working on the annual Golden Globes and Academy Awards telecasts, which she continues to do today.



My Choice in Home Care, Dana Point

Julie Zimmerer, CEO/Founder

Julie Zimmerer retired from her chiropractic practice after 20 years and created My Choice in Home Care from personal heartache, when a caregiver took advantage of her Korean War veteran paraplegic father following his last stroke before he passed away. She founded My Choice in Home Care on specific family values. The company has been recognized with numerous awards.



2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Since 2007, My Choice has grown from one small area in Canyon Lake, Calif. to serving people in Los Angeles to the tip of San Diego and everywhere in between. In addition, there are now two offices (one in Canyon Lake and another in Dana Point) with 100+ employees working at all times in each location and a caregiver list that exceeds 400 people combined. My Choice also earned the Veterans Homecare Contract of Loma Linda Hospitals, providing veterans deemed disabled during time of war with homecare services.

Netreo Inc., Irvine

Kevin Kinsey, CEO

Kevin Kinsey's first job out of college was with AT&T selling PBX phone systems; during his time at AT&T, he innovated a better way to sell the product and as a result, he was in the top 2% of salespeople for the entire six years he was there. After leaving AT&T, Kinsey went to work for a start-up systems integrator as a salesperson. Kinsey eventually was promoted to sales management and ultimately VP of Sales. After a Fortune-500 company bought the company, Kinsey was asked to run the entire organization for the remainder of an agreed-upon, two-year earn-out period. During that time period, Kinsey and his partners deployed a number of best-of-breed monitoring and network management tools in order to support their customers. At the close of this two-year period, Kinsey and his partners went on to form Netreo, a premier provider of IT management solutions for enterprise business. Today, Netreo employs 21 workers and conducts business in numerous countries around the globe. Clients include Wells Fargo, AON and Broadcom, and client retention is 96.5%.

**Nexem Corp., Newport Beach**

Matthew Blake, President/CEO

In 2017, Matthew Blake successfully rolled 10 companies into a new united brand, Nexem. Blake redesigned the strategy of multiple technology and staffing businesses into one, providing modern technical and human capital solutions to businesses. Nexem has grown from a workforce of 800 to more than 8,000 in 16 months (ending December 2017). In this same time frame, the company has grown from seven to 45 locations across the U.S. Nexem services some of the largest companies in the U.S. to bolster and improve their workforces. Nexem is also part of Staffing Industry Analysts and provides support to community programs such as ChildHelp and the JDRF through NexemCares, a newly formed foundation that supports multiple community charities by way of financial and volunteer activities.

**OC Facial Care Center, Lake Forest**

Kate Hancock, CEO

Kate Hancock started OC Facial Care Center with one treatment room and grew the company into a seven-figure, revenue-generating company with two locations and celebrity clientele. She has a passion to effect positive change in people's lives through spa treatments. She has donated footwear to kids in the Philippines and to people with medical conditions who can't afford hospital treatments. This year, her business was named to the *INC. 5000* list of fastest-growing private businesses, being one of the only spas to do so.

**Orange Aluminum, Laguna Niguel**

Cameron Munson, President

Orange Aluminum is a leader in aluminum metal supply. The company started as a one-man shop with an online webstore in 2007, and has evolved into one of the fastest-growing metal centers in America with recognition on *INC. 5000* list of fastest-growing companies in America two years in a row. Orange Aluminum has successfully partnered with local and national companies on projects such as the upcoming Apple campus and the renovated Newport Beach Country Club. The organization also has a dedicated philanthropy program, where staff members pick a different charity every quarter to donate a portion of the company's sales.

**Osmond Marketing, San Clemente**

Dr. Amy Osmond Cook, CEO

Osmond Marketing is a woman-owned, full-service content marketing organization specifically designed to meet the needs of scaling businesses. Osmond Marketing's innovative model allows companies to expand services seamlessly as they grow. With unsurpassed quality and customer service, Osmond Marketing experienced 148% growth in 2015, and is on track to experience the same levels of growth this year. In September, Osmond Marketing was ranked the 28th fastest-growing company at the MountainWest Capital Awards. Osmond Marketing was also recently featured in *Forbes* and *Huffington*



Post. Dr. Amy Osmond Cook is the CEO of Osmond Marketing and a health/wellness columnist for the *Daily Herald*, *Family Share* and *Cupid's Pulse*. She has also worked as an instructor at Arizona State University, Brigham Young University and the University of Utah intermittently for the past 15 years.

Pacific Dental Services, Irvine

Stephen Thorne, President/CEO

Stephen Thorne began working in the dental field in 1989 when his father, a dentist, offered him a job managing a struggling dental office. That first office became a big success, and Thorne continued to work with his father for several years before venturing out on his own and creating Pacific Dental Services® (PDS®), an early leader in the dental support organization (DSO) space. Since 1994, Thorne has grown PDS from a single Orange County dental office to 600+ offices across 19 states, making it one of the country's leading DSOs. In 2017, PDS opened 70 new supported dental offices and achieved more than \$1 billion in revenue. In 2018, PDS plans to open 80 new supported offices and expand into at least two more states. This year, PDS-supported clinicians provided a total of \$9 million in donated dental care to 7,400 patients in need locally through Smile Generation Serve Day; nationally through the PDS Foundation's Mobile Dental Clinic; and internationally through service trips to Ethiopia, Fiji and Guatemala.

**Performance Strategies Inc., Santa Ana**

Will Robertson, Founder/CEO

Performance Strategies Inc. (PSI) creates training courseware, online universities and marketing campaigns for small to medium-sized companies. Included are webinars, seminars, social media projects, workshops and video/audio productions. Performance Strategies Inc. was founded in 1985 by CEO Will Robertson. Some of PSI's accomplishments include video, audio and printed courseware for more than 3,000 telecom retail outlets, as well as local and long distance carriers, satellite service providers and long haul fiber optic systems. In addition, other business sectors that have been supported with consulting projects include banking, finance, insurance, transportation, energy, software, medical and pharmaceuticals. The company has worked with every Bell Operating company in the U.S. and several similar enterprises in Europe, Asia and South America.



Innovative, strategic and dedicated —
Rick Cramer is a trailblazer.

Rick is dedicated to helping clients and communities improve our environment. His innovative application, Environmental Sequence Stratigraphy (ESS), is the leading method to determine the nature and extent of groundwater contamination. Congratulations, Rick, on being nominated for the 2018 Excellence in Entrepreneurship Award.

BURNS & MCDONNELL

CREATE AMAZING.

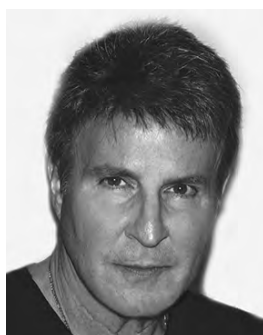
burnsmcd.com | Offices Worldwide



2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Physicians Center For Renewal, Newport Beach*Dr. Michael Cerni, Owner*

Michael Cerni is an Allergan-certified Master Injector. Dr. Cerni is highly skilled in state of the art techniques for the application of dermal fillers and neuromodulators used for facial rejuvenation. Physicians Center For Renewal has locations in Newport Beach and Laguna Niguel. Cerni was a founding partner for Pro Care Medical, and a practice management consultant for CareMore Medical Group, both large Southern California medical management services organizations. Cerni has been on the staff of St. Jude Medical Center, Whittier Hospital and Brea Community Hospital. He also recently completed work on his first novel, *God's Favorites*.

**Pinnacle Consulting Group, Irvine***Don Garcia, Owner/President*

Pinnacle Consulting Group Inc. is a comprehensive consulting firm providing district management/administration, finance and accounting, fire/EMS district administration and capital project administration services to governmental and private entities. With a successful financial service industry career spanning 30 years, Donald Garcia is recognized as a business leader throughout Orange County. He has developed unique processes and designs and implements financial strategies for affluent business owners, highly compensated executives and those who have inherited wealth, as well as providing retirement solutions. Nationally, he was appointed by former President George W. Bush to the international commission of the Woodrow Wilson International Center for Scholars, where he served as chairman of the Finance and Audit Committee. In addition, he served on the Mexico Advisory Board for the Woodrow Wilson International Center for Scholars.

**Posh Tech LLC, Laguna Hills***Adam Badawy, Inventor/Owner*

Traveling from hotel to hotel, Adam Badawy noticed that the hotels never had enough outlets to charge electronics. With this revelation, Badawy sketched a prototype doodle on a napkin and after two years of refinements, the doodle design is now his current project, Connect CHARLIE. 12-in-1. Connect CHARLIE safely charges all electronics with three plugs and nine USB ports. The product also features an LED nightlight and is small enough to fit into the palm of your hand. The company recently held a successful crowdfunding campaign on Kickstarter and Amazon's Launch Pad program. After 12 months of hard work and commitment, Connect CHARLIE can now be found in major retail stores such as Home Depot, Sharper Image, Houzz, and Bed Bath & Beyond.

**Powerhouse Communications, Santa Ana***Kristin Daher, President/Founder*

In just two years since purchasing Morgan Marketing & Public Relations, and rebranding as Powerhouse Communications, Kristin Daher has not only made a name for herself in the Orange County PR community, but has officially put her company on the map as a premier national PR firm specializing in the restaurant, CPG and franchise industries. A creative ideas agency providing a wide range of media relations, communications strategy and social media services, Powerhouse's client roster includes MainPlace Mall, Juice It Up!, Jimboy's Tacos, WOLO WanderSnacks, Hawaiian Host, Mauna Loa and The Literacy Project. Since first opening Powerhouse's doors in Santa Ana, Daher has built and nurtured a successful business for her employees, but has also expanded Powerhouse's service offerings while continuing to secure phenomenal media coverage for her clients. Powerhouse continues to grow and diversify with new clients, as well as partner with new vendors to offer value-added benefits and comprehensive, cutting-edge services to clients. Additionally, Daher continues to be an active participant and mentor, and most recently was elected as the 2018 YoPro Chair for OCPRSA.

**RapidX, San Clemente***Ammar Adra, Founder/President*

RapidX Founder Ammar Adra has more than 20 years of experience in the consumer electronics industry. RapidX focuses on inspiration from the modern world and the ever-increasing emphasis on technology and efficiency. The company's philosophy is to design products based on customer input from the bottom up, creating a consumer-centric portfolio melded with innovation. RapidX products include gaming and lifestyle chairs, ergonomic office chairs, Bluetooth trackers, USB chargers, multi-USB chargers and other innovative technology. Technology no longer exists to merely fulfill the role of accomplishing a task. Today, there is a demand for a higher standard and RapidX understands this desire, and offers nothing short of excellence.

**Realty ONE Group, Irvine***Kuba Jewgieniew, Founder/CEO*

Since 2005, Realty ONE Group has been a 100% debt-free and family-owned company that continues to experience tremendous growth year over year. With 10,000+ real estate professionals and 103 office locations spanning across 25 states, Realty ONE Group is poised for global expansion and has made an impact in an industry that is desperate for change. As the "UNbrokerage," Realty ONE Group continues to break boundaries and shift paradigms by being UNtraditional in everything it does, offering UNlimited support and tools, and by helping others realize their potential. Realty ONE Group is proud to be recognized by *Entrepreneur Magazine's* Franchise 500 as the #1 Real Estate Franchise in the Top New Franchise category, on the *INC. 500/5000* for seven years, and is ranked in the top 1% in the nation by REAL Trends. As one of the fastest-growing real estate brands in the nation, Realty ONE Group is committed to opening doors and helping real estate professionals achieve success, faster.

**Restoration Media Inc., Irvine***Sammy Sayago, CEO*

Established in 2001, Restoration Media is a data-driven marketing and communications company with specific expertise in email and direct consumer messaging channels. The company builds niche consumer-focused brands and connects consumers with highly relevant content through the use of behavioral data analytics.

**SeneGence International Inc., Foothill Ranch***Joni Rogers-Kante, Founder/CEO/Chairwoman*

Joni Rogers-Kante founded SeneGence® in 1999 and the company has since become a recognized, international leader in the cosmetics industry. To Rogers-Kante, just as important as a flourishing business, is the commitment to high-quality products that not only work, but give value to consumers and the communities in which the company's distributors live, while not depleting the earth of natural resources or creating unnecessary waste. Rogers-Kante traveled to the other side of the world with a team of scientists and botanists to find different ingredients than those available in the U.S. for the unique formulas in SeneGence products. After she learned that cosmetic companies continuously use the same ingredients in one product to the next – just in varying amounts, she knew SeneGence had to be different. Today, these unique ingredients are used to help produce amazing results in SeneDerm® anti-aging SkinCare and long-lasting SenseCosmetics™ products.

**SetSchedule, Irvine***Roy Dekel, CEO*

With more than 10 years of real estate experience, Roy Dekel has served in a number of capacities including investor, financial adviser, director of business development and CEO. In the fickle climate of real estate, Dekel has been able to remain a resilient player, garnering business success for not only himself, but each company he has been involved with. SetSchedule brings real estate and technological expertise together for an unparalleled product. The mission is to eliminate all of the leg work real estate agents go through, and focus on placing top tier agents with verified appointments directly in front of vetted homeowners and investors who are actively looking to buy/sell their house. SetSchedule is soon to improve on its product line with the launch of new patented technology scheduled to be released by April 2018. Within the community, SetSchedule is also involved in various charitable and contribution programs.

**Ship & Shore Environmental Inc., Signal Hill***Anoosheh Oskouian, President/CEO*

As the pollution abatement industry's only female CEO, Anoosheh Oskouian is unique within the environmental sector. She has nearly two decades of experience in industrial and commercial project construction of a wide range of air design and fabricating combustion equipment, including thermal oxidizers, catalytic oxidizers, boilers, burners, carbon and zeolite absorption mechanisms. During her career, Oskouian has mastered air pollution abatement, waste heat recovery, energy consumption reduction and fabrication of integrated green solutions. She received the Ellis Island Medal of Honor from the National Ethnic Coalition of Organizations in New York (May 2015) and was named Sustainability Committee Chair by the FTA (Flexographic Technical Association). Oskouian's in-depth process knowledge and expertise provide the foundation for designing superior, innovative and efficient equipment, along with reliable technologies that help clients collect and reduce and/or eliminate air pollution emissions within environmentally acceptable guidelines. Under her leadership, Ship & Shore Environmental has grown 57% over the last six years.



2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

SKYCO Skylights, Costa Mesa*Ryan Marshall, CEO*

The SKYCO Skylights team provides 150+ years of combined technical expertise in the design, engineering and manufacturing of custom skylights, industrial unit skylights, UL listed smoke vents, roof access hatches, turn-key photovoltaic skylight systems and tubular skylights. SKYCO Skylights' technical team utilized its vast experience in the skylight marketplace to develop new and innovative daylighting solutions, as well as focus on enhancing and improving existing technology to provide higher-performing products at economical prices. SKYCO Skylights has achieved the highest-performing aluminum framed unit skylight in the market, and is proud to bring this innovative technology and exceptional value to the marketplace. The company also provides practical daylighting and smoke ventilation solutions, personal service and superior value, not just products.

**SnapWag, Sunset Beach***Brett Maiolfi, Founder*

In 2017, Brett Maiolfi launched SnapWag, the first craft dog food company. SnapWag is the only dog food company to use the craft-style production process and apply it to dog food, creating a premium, flavorful dog food at an affordable price. By participating in local events and speaking with dog owners, SnapWag reached success with its online delivery through the company's website, eventually expanding into retail locations throughout Orange County. After a great start, Maiolfi and his team launched their Shake & Wag Dog Food Seasoning line so owners could mix up their dog's meals without changing their diet or using unhealthy toppers. One of SnapWag's major focuses was giving back to the community by providing local animal shelters and organizations with high-quality food. For every delivery SnapWag makes, two meals are donated to a dog in need. In 2017, SnapWag donated more than 14,000 meals to local shelters and organizations in Orange County and Los Angeles. With the help of customers, SnapWag aims to triple that number in 2018.

**Sparkhouse, Irvine***Torrey Tayenaka, Founder*

From founding his first production startup in high school to his multi-faceted role as CEO of Sparkhouse today, Torrey Tayenaka is an acclaimed force in high-concept, branded video production and serial entrepreneurship. Fueled by a strong desire to pay it forward, Tayenaka has his hands in a wide range of pursuits – environmental, technological, medical and charitable – that prevent him from being pigeonholed. At any given time, he may play the role of inventor, producer or promoter, designing and developing projects he believes have the potential to change the world in their own way. As the success of his creative ventures continues to rise, Tayenaka has become a sought-after consultant and speaker, devoting countless hours to helping others bridge the gap between dreaming and doing by sharing his strategies for startup success and creative resourcing. Sparkhouse is a video production and marketing studio.

**Spinal Singularity, San Clemente***Derek Herrera, Founder*

Spinal Singularity designs medical devices to exponentially improve the quality of life for people with spinal injury. The company recently closed a \$3.1 million seed funding round to develop a revolutionary bladder management system for catheter users. Spinal Singularity has been awarded federal research grants from the NIH and NSF, and has won multiple business plan and pitch competitions and accelerator programs (UCLA, OCTANe, MedTech Innovator, YCombinator, HealthBox LA, PrimeUC). At the PrimeUC competition, the company won both the business plan and pitch competition and was awarded \$150,000 from Johnson & Johnson. At MedTech Innovator, Spinal Singularity was awarded the JLABs Innovation Award. Spinal Singularity has five full-time employees and manufactures its product in Orange County.

**Sports 1 Marketing, Irvine***David Meltzer, CEO*

David Meltzer has always been a game-changer. Starting in technology, Meltzer notably spearheaded Samsung's first smartphone division. He sparked his successful career in sports serving as the CEO of the famous Leigh Steinberg Sports and Entertainment agency, the inspiration for Jerry Maguire. While serving at Leigh Steinberg, Meltzer helped negotiate more than \$2 billion in contracts before branching off to found Sports 1 Marketing in 2010. Sports 1 Marketing has



since flourished to become a full-service marketing agency, recognized as one of the best in the U.S., and successfully launched its Aggregated Marketing Platform (AMP) and media company, S1Media House. AMP has won many awards as a disruptor in sports and event marketing. Meltzer is very active in the community, holding board positions in 44 different charitable and local business organizations, and was named 2016 Sports Humanitarian of The Year by *Variety*.

Sterling Public Relations, Corona del Mar*Paula Steurer, President*

Celebrating its 10-year anniversary milestone, Sterling Public Relations is a full-service public relations, marketing and branding firm in Orange County and Dallas, Texas. Offering custom-tailored services, including brand identity development, talent representation, public relations, advertising, email marketing, social media and graphic design, all services are handled in-house by Sterling PR's award-winning team. The firm has extensive experience in industries such as automotive, aviation, entertainment, fitness, fashion, health and wellness, interior design, philanthropy, professional services, real estate – both residential and commercial, and wealth management. Specializing in artfully tailored solutions for clients across the USA, led by media strategist and marketing innovator Paula Steurer, the brand has earned a reputation for excellence.

**Sugared and Iced, Coto de Caza***Samantha Meyers, Owner/Baker*

In just a short time, Samantha Meyers has taken Sugared and Iced from a hobby to a full-fledged business. Starting out making cookies for friends and family, Meyers now makes her custom cookies for many of Orange County's charity organizations and local businesses, including Festival of Children, The Adoption Guild and Women of Chapman, Hyundai, Neiman Marcus and Blizzard Entertainment. Most importantly, she creates her custom delights for many families across Orange County, helping them to celebrate special occasions in a unique and delicious way. With its grand opening in 2017, Sugared and Iced quickly grew from small orders to serving the community with thousands of cookies. Not only was Sugared and Iced part of many Orange County events, large and small, but Meyers was featured on the nationally televised talk show, Pickler and Ben, where she competed in and won a holiday bake-off judged by Food Network stars, Duff Goldman and Nancy Fuller.



CONGRATULATIONS JOE DURAN

NOMINEE



The entire team at United Capital would like to congratulate Joe Duran, CFA®, chosen as a nominee for Orange County Business Journal's 2018 Excellence in Entrepreneurship Award.

Thank you for pioneering changed to our industry that improve lives — including ours — every day.



2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Tangible Investments Inc., Laguna Beach*Silvano DiGenova, CEO/President*

For more than 30 years, Tangible Investments has been the premier gallery for collectors seeking the best in rare coins, precious metals, fine art and jewelry. As a market-leading numismatic dealer and auctioneer, the company purchases and sells highly desirable items at competitive prices. At its heart, Tangible Investments is the business of coin connoisseur, Silvano DiGenova, an accomplished grading consultant and antiques marketer. DiGenova's reputation within the industry has been built in part on some of the most historically important purchases and distributions in U.S. numismatics, yielding more than \$2 billion in transactions. This makes Tangible Investments not only one of America's most successful rare coin traders, but the top buyer in the country. DiGenova's unparalleled credentials – which include designing the grading standards for the rare coin industry – and financial resources have made Tangible Investments a major trendsetter in the market.

**The Hood Kitchen, Costa Mesa***Christie Frazier, Founder**Shelby Coffman, Founder*

The Hood Kitchen is an all-inclusive hub that provides comprehensive commercial kitchen, prep and flex space for artisans at every level and any specialty. From startup concepts to professional chefs, The Hood Kitchen, Market and Event Space provides turn-key solutions for cooking, educating, training and entertaining. The recent expansion also provides solutions for food artisans who need packaging room, office space and large scale storage. Developed by Orange County personal chefs, Shelby Coffman and Christie Frazier, the entrepreneurs brought a space to life that was exactly what they were looking for, but couldn't find during their tenure in the kitchen. Recognized as the premier facility of its kind in Orange County, The Hood Kitchen is proud to be an incubator for small brands, a destination for catering and food trucks, while also being a preferred choice for new or existing restaurant concepts in need of menu testing, creating and development. Dedicated to giving back, the company proudly supports philanthropic efforts by organizations such as Open Gate International and The Culinary Skills Program.

**The OC Nest, Irvine***Stacy Borroto, Owner*

The OC Nest is a unique real estate company that offers flat fees for buyers who find their home online. Given the changing real estate landscape and home buyers' increasing use of technology to find homes online, The OC Nest allows buyers to "buy smart" by paying a small flat fee to The OC Nest, and pocketing the difference. Given high home prices in Orange County, buyers can save tens of thousands of dollars off a standard commission, and still have an experienced broker protect their interests during the purchase of their home. Owned and operated by Stacy Borroto, a broker with more than a decade of experience, The OC Nest gives buyers the skill of an experienced broker, but the personal touch of a friend whose goal is to find all families their perfect "nest." The OC Nest saw immense growth in 2017, and with the addition of new agents to its team in 2018, The OC Nest expects to double its revenue.

**Titan Health & Security Technologies Inc., Newport Beach***Vic Merjanian, Esq., Founder/CEO*

Titan Health & Security Technologies Inc. (Titan HST) offers an emergency two-way mass communication platform accessible via iPhone, iPad, Apple Watch, Android, web, text message, email and phone. The platform is patented and further supercharged with features such as augmented reality and real-time translation. Titan HST is always raising the bar in emergency communication by developing and deploying cutting-edge features. In 2017, there were 18



million uses of Titan HST during emergencies across the United States. Titan HST reduces emergency response times by more than 50% on average. This has enabled individuals with medical emergencies such as seizures, overdoses and heart attacks get the help they need in record time.

Trilogy Financial, Huntington Beach*Jeff Motske, President/CEO*

Jeff Motske, CFP®, is president and CEO of Trilogy Financial, a privately held financial planning firm. Trilogy has nearly \$3 billion in client assets and more than 150 advisors nationwide in 10 offices throughout the United States. Founded in 1999 by Motske, Trilogy has become one of the fastest-growing companies in the financial services industry and provides innovative perspectives and tailored planning to help middle-class Americans achieve financial independence. Motske also is an author, accomplished entrepreneur, radio personality and recognized among the top 1% of financial advisors in America. He is the author of *The Couple's Guide to Financial Compatibility* and the host of *The Jeff Motske Show*, where he guides listeners through proven steps toward financial freedom. A passionate board member, alumni and collegiate baseball player of Vanguard University of Southern California, Motske helped raise \$850,000 to rebuild Vanguard's baseball field in honor of Dean Harvey, Motske's former teammate and friend who passed away from a rare brain disorder.

**United Capital Financial Advisers, Newport Beach***Joe Duran, CEO*

Joe Duran is CEO and founding partner of United Capital Financial Advisers, the nation's first and largest financial life management company. A proven entrepreneur, investor, best-selling author and sought-after industry speaker, Duran previously built Centurion Capital, which he sold to General Electric Financial (GE) in 2001 and served as president. United Capital currently manages more than \$21 billion in assets under management with nearly 90 locations and 600+ employees. Duran is also a renowned industry visionary with featured columns in both *Investment News* and *Time* magazine's *Money.com*. He is a frequent contributor to CNBC, Fox Business, Bloomberg and PBS, and appears regularly in both traditional and online media.

**Use Me Hair, Irvine***Devin Graciano, CEO/Founder*

Devin Graciano, former trend development executive for Toni & Guy, created Use Me Hair to deliver a necessary change in the hair care industry. Graciano achieved this through an innovative developmental process, from packaging, product consistency and performance to exceptional customer connection. Each product in the Use Me line is meant to be universal and celebrate different generation's lifestyles. Each product is handcrafted by experts in the first USDA-certified lab in the U.S. Created with the highest-quality ingredients, responsibly sourced around the world and designed to be user-friendly, Use Me is the luxury hair care line that is safe, effective and affordable.

**ViridiSTOR LLC, Tustin***Terry Mullin, CEO*

Terry Mullin continues to be an active innovator and business builder in Orange County. He has formed and led teams in market-leading companies that have brought first-in-class software and hardware to the market. Within his latest venture, ViridiSTOR, Mullin has launched a new era in compact content management systems to deliver information to the event, conference and trade show industry. His innovations not only make sense, but reduce monetary and environmental costs. 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 stays active within the community by volunteering to instruct audio engineering to middle and high school students.



Reserve Today!

Luncheon & Awards Program

March 15, 2018

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

Hotel Irvine

For more information, see page 10 or visit www.ocbj.com/bizevents.