

An Orange County Business Journal Special Report & Custom Content

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AWARDS CEREMONY AT HOTEL IRVINE March 12, 2019

Ex-Telogis Exec Debuts App-Based Concierge Service

Targets Include Tech Cos.
Seeking Worker Perks

■ By CHRIS CASACCHIA

A former **Telogis Inc.** executive aims to free up time for office workers and other employees by providing pickup and concierge services during the day via smart phone app.

"The problem is not uniquely mine," said **MyShoperoo** founder **Krishna Vanka**, who's juggling demands of entrepreneurship



Vanka: 'problem ... not uniquely mine'

and his 3-year-old son, **Aditya**. "This is a common [issue] for all employees."

The Aliso Viejo-based company has signed a handful of corporate clients since its July launch, including shared-office provider **TechSpace**, where it's headquartered. Two

human resources benefits companies are also aboard: **BeaconPath** in Mission Viejo and **TriNet Group Inc.** in the Bay Area—the latter with 2,000 workers.

Vanka wants a hundred clients by year-end and has begun by targeting tech firms—which like the service as a recruiting and retention perk to offer workers—and the HR industry, loaded with companies that have networks of corporate clients who may also seek out the service.

Driver's Seat

Businesses pay \$79 a month per employee; costs can decline based on more users, who



Shoperoo: aims to help workers, local stores; boost company benefit packages

offload shopping, dry cleaning runs, and ordering goods and services from local businesses, excluding restaurants.

AI-based software creates optimum routes for drivers—"shoperoos"—who shuttle between businesses and the workplace.

Requests logged by 1 p.m. are completed by 4 p.m., within a 5-mile radius; longer trips are done by the next day. Food comes in freezer bags keeping contents cold for up to six hours.

Users pay only for the goods or services

with no added fees.

On an average day, 20 to 30 users access the service.

Sharing Rides

MyShoperoo holds potential benefits for others within its developing network: local independent retailers and drivers from ride-sharing companies such as **Uber** or **Lyft**.

The company pays \$25 an hour for its after-noon crunch time, which commonly coincides with some of the slowest-demand

periods for ride-sharing.

"We're tapping into this time frame when they're not making money," said Vanka, a graduate of the Los Angeles chapter of the **Founder Institute**, a startup accelerator in more than 180 cities (see Startups & Innovations column, page 32).

The service intends to help funnel business into the local economy, drawing consumers to flower shops, pet stores, bakeries and others and potentially away from online retail.

"We're trying to reverse the cycle," said Vanka, who's hyperfocused on growing the business in OC. "If we can do this in Orange County, we can do this anyplace."

He raised more than \$100,000 last year from friends and family to get the bootstrapped company off the ground.

Car Guy

Vanka became the first product manager at Telogis in 2013, shortly after the telematics specialist raised \$93 million in a Series A funding round led by Menlo Park investment firm Kleiner Perkins Caufield & Byers, now **Kleiner Perkins**.

Aliso Viejo-based Telogis used GPS technology and proprietary software to help commercial fleets create better routes, track shipments and deliveries, manage mobile workforces, and smooth workflows.

By the time he left Telogis in 2017, he was vice president of product management, responsible for half the company's annual revenue, which topped \$100 million at the time.

His departure came a year after Telogis was acquired for \$900 million by **Verizon Communications Inc.** The software maker is now part of a unit called **Verizon Connect**, which manages vehicle fleets. ■



Masterson: skincare co. could fetch \$1B



Golledge: prior \$105M sale; new venture



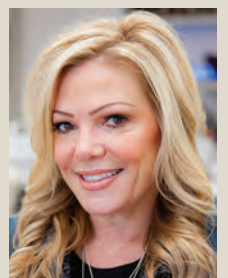
Smith: 'think about what we're buying'



Wolters: 'everything we do is a challenge'



LeFlore: plans more of 'tangible place'



Beamish: no one 'dictating the narrative'

Women

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And definitely don't tell her that it's even harder for women entrepreneurs.

"It doesn't matter if I'm a female," said Smith, who's ramping up work at **Brevvie**, a service company she co-founded last year.

"It doesn't matter what I am. If I'm good enough, I will get funding."

Recent headlines bear that out.

A pair of women entrepreneurs from the Business Journal's OC 500 Directory of Influence disclosed within two weeks of each other sales or planned sales that put their combined companies' value at more than \$1.1 billion.

■ **Tiffany Masterson** is considering a sale at private equity-backed skincare maker, **Drunk Elephant LLC**, in a deal that could value her company at \$1 billion (see story, page 74).

■ Last month came word former **Irvine Co.** exec **Lori Torres** sold **Parcel Pending**, which uses electronic lockers and proprietary software to securely store delivered packages, for more than \$100 million.

Neither of the local companies—both

among the biggest recent success stories in OC—was in business in 2012.

What's more, a third woman-owned upstart company—**Jobot**, an AI-based recruitment platform—in January announced one of the area's biggest new job pushes in recent months, with 100 new positions coming to OC.

Founder **Heidi Golledge** is on her third—at least—entrepreneur-go-round; the biggest to date was job site **CyberCoders**, which sold for \$105 million to a \$2 billion market cap suitor in 2013.

There's plenty more women entrepreneurship waiting in the wings, along with Smith's **Brevvie**, whose short-term tool and product rental company is in a pilot program at several locations; it taps trends similar to **Parcel Pending** and is the brainchild of another ex-Irvine Co. executive.

Other notable upstarts include **Alissa Wolters**, a linguistics researcher at **University of California-Irvine** and founder of education software firm **Maven**, working out of UCI's The Cove, as well as **Natalie LeFlore** and **Eileen Dukes Beamish**, who are barely out of the prelaunch phase with **Planfull** and **Mane Beauty Lounge**, respectively (see separate story, page 34).

Business rules are the same, regardless of gender, the entrepreneurs tell the Business Journal.

Here are some of their stories.

Like Rabbits

Golledge's first venture didn't sell for \$105 million; it was more important.

The Jobot chief executive began breeding rabbits at age 11, selling them to local pet shops to help her single mom, **Virginia**, who worked two jobs to support four kids.

Her father was a fighter pilot in Vietnam who never made it home.

She recalls her mother saying in West Virginia, where her mom grew up, "You either owned the coal mine or you didn't."

In the late 1990s, Golledge saw a shot at something like the former: an emerging internet environment, "where you didn't have to literally own the coal mine; you could get a dot.com name and ... a great idea."

The idea was **CyberCoders**, co-founded in 2000 with **Lance Miller** and sold a baker's dozen years later to Calabasas-based **On Assignment Inc.**—now **ASGN Inc.**, a NYSE-traded, IT and professional services firm with a \$3.3 billion market cap.

Golledge had a five-year noncompete clause after the sale and ran **CareerBliss**, a site launched about the same time as **CyberCoders** that provides an online career community for job seekers.

In October, she started Jobot in El Segundo, which melds artificial intelligence with real recruiters to pitch companies to highly sought candidates.

Jobot is adding an office and moving the company's headquarters to OC, where it plans its hiring push.

At least four businesses counting the bunnies; what gives?

"I don't golf," Golledge said. "Building a unique culture and helping people and mentoring them ... that's exciting for me and fun."

Power Tools

Kristine Smith has about two decades of residential real estate experience, including five years at the Irvine Co., and currently as vice president of marketing at **Surterre Properties** in Newport Beach.

Over that time, she saw living spaces getting smaller, with less storage space for residents, who nonetheless still owned

► Women 36

A photograph of three business professionals sitting around a table in a modern office setting. On the left, a woman with short blonde hair is looking towards the center. In the middle, a man with glasses and a beard is looking towards the right. On the right, a woman with dark curly hair is smiling and gesturing with her hands. There are white coffee cups and papers on the table.

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[Snapshot]

An Education in Entrepreneurship *Teaching People Well Goes Higher Tech*

■ By JASMINE SPEARING-BOWEN

After 10 years of providing in-home tutoring for middle and high school students locally—and “the driving, the scheduling, the whole having-a-parent-at-home” this entails—**Adam Sadri** said an old-school tutoring mentality was ready to graduate.

His Irvine-based **Tutor Nerds** this month launched **TutorNerd.com** to make the process easier for his clients and company.

“We saw the limitations of in-person tutoring,” he said. “So we’ve refined the experience.”

Sadri is the founder and chief executive of both companies, which are running alongside each other.

The venture is self-funded so far; as it doubles its tutor count to 150 and gets to about 300 clients, the



Sadri: growing self-funded venture



Nerdy: online refines on-ground

self-described nerds will seek some backing and Sadri expects a gradual overtaking of the old-school operations by the online version.

“I didn’t want to take a successful business and change its business model and having done that, God forbid, not be successful,” Sadri said.

On-ground tutoring is \$68 to \$89 an hour depending on the subject; online runs \$63 to \$74 per session. ■

The idea of “language lessons” sounds vaguely romantic—foreign travel, exotic experiences, new friends—but “learning a foreign language” conjures decidedly different images—dusty chalkboards, conjugating Portuguese irregular verbs and perhaps having one’s immature pronunciation morphed into inscrutably accented French by a scowling native speaker or veteran of the Foreign Legion: you learn, yes—but almost wish you hadn’t.

Irvine-based **Immerse** aims to close that gap.

The software maker is pushing the envelope in electronic language education—and stamping it with enough postage for foreign airmail. It pairs virtual reality software with **Oculus Go** headsets to help users meet-up with native speakers in 50 virtual destinations. Ironically enough, many locales are in the U.S.

Chief Executive **Quinn Taber** said the

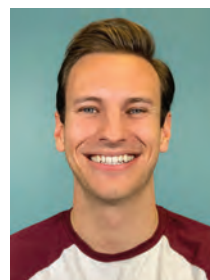
company’s biggest corporate clients are in Asia, with users looking to learn English. He opened an office in Taiwan last year to spur business overseas.

This follows a \$600,000 angel investment round in 2017. Taber’s considering seeking additional funding in the fall. The latest iteration of its software released on Feb. 1.

Taber studied languages in school but said without practice people can’t achieve fluency. After some time spent in the Mideast—full immersion cubed—and with advances in VR technology, a business idea was born.

The software, real-time tutors, and experiencing elements of local culture can triple learning and retention, he said.

“It goes beyond language learning,” Taber said, letting you “travel to places you’ve never been. It strikes this chord [and] hits at your wanderlust.” ■



Taber: ‘beyond language learning’

Women

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items—tents, coolers, luggage, party games, cameras, vacuums, tools, etc.—used occasionally but stored constantly.

She co-founded Huntington Beach’s **Brevvie**, short for Briefly Rent Everything, so people could rent rather than buy—an ever-growing take on consumer choices today.

She’s targeting denizens of high-density spaces—apartment buildings, say—**Marie Kondo** followers and a lot of millennials, who are completely comfortable with the “sharing economy.”

There’s an ecologically economic element as well.

If it can keep trash out of the landfill, “I’m happy about it,” she said. “We can stop consuming for the sake of consuming and really think about what we’re buying, why we’re buying it, and if we really need it long term.”

Brevvie is friends-and-family funded so far to the tune of about \$70,000. She’s working with startup accelerator **OCTANE** to pursue backing.

The idea is akin to fellow Irvine Co. alum **Torres’ Parcel Pending**—a system for packages, often delivered to young residents of apartments.

Backed by **Tech Coast Angels** and others, **Torres** cashed out last month after five years, selling to France-based **Neopost** for a figure “more than” \$100 million. It will stay local and **Torres** remains chief executive, to help **Neopost** expand in the U.S.

Smith’s year-old effort is being tried at **The George** apartments in Anaheim near **Angel Stadium**, owned and managed by **Lyon Living**, and **The Runway** complex in **Playa Vista**.



340-unit complex next to Angel Stadium testing out Brevvie’s service

The proof of concept intends to attract investors and **Brevvie** wants 20 additional OC multifamily installations this year.

Class Acts

Wolters’ Maven taps software for language learning. It’s grown from her work in teaching English to international students and others: they struggled with vocabulary and **Wolters** struggled to find a way using existing materials to help.

So, in the entrepreneurial refrain, she launched her own.

Maven generates learning material based on selections users make as they read. The startup in June was accepted into UCI’s Applied Innovation Wayfinder program.

She and a team of 10 volunteers are coding software, building a website, doing market research. A pilot program is slated for May, ideally working with schools to get feedback on the offerings.

She doesn’t want “just another product, but a tool that meets people’s needs and is really helping.”

Wolters is **Maven’s** chief executive and learning every day what that takes, especially when it comes to selling and marketing herself.

Estimates of how much venture capital funding goes to women runs in the single-digits, on a percentage basis.

“Everything we do is a challenge,” **Wolters** said. This is “just one more.” ■

Newbies Offline

Many new businesses are based around tech; these aren’t.

Natalie LeFlore wanted a daily planner to help her stay on track with her spiritual growth. She couldn’t find one, so she made it herself.

Planfull was in beta last year and sold out; her initial 2019 run did so as well—in a few weeks.

Planners sell online for now, but **LeFlore** aims to sell the product at conferences and bookstores next year, and expand the line to include journals and notebooks under the same brand.

“There can be a sort of fatigue that comes with relying on our devices,” **LeFlore** says, “especially with something as intimate as spiritual growth. Having a tangible place to write and reflect was something I felt would add value.”

Likewise—and amid the ballyhoo of traditional retail demise—**Eileen Dukes Beamish** opened **Mane Beauty Lounge** in **Mission Viejo**. After 30 years in the corporate world, including as a vice president at recently acquired Irvine-based **Booker**, a back-office appointment and accounting platform for spas and salons, she opened her own such shop.

She opted against a franchise so no one else was “dictating the narrative” and used her life savings to fund the salon, which currently has six stylists.

People sometimes assume, “that my husband funded my investment or that it’s a hobby,” she said. “That couldn’t be further from the truth.”

— Jasmine Spearing-Bowen

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The Entrepreneur's Guide to Exit Options

The early days of a business can so often be a bustling, exciting cavalcade of refining products, building a customer base, and establishing a market presence. Amidst this heady rush to grow and sustain your venture, it can be tempting to let any thought of a future exit take a backseat.

The truth is, if you have a sense of your ultimate goal, you can more effectively plan for it and operate the business accordingly—even if your horizon is decades away.

From keeping the business in the family to selling to employees to going public, digging into the nuances of each opportunity ensures you pursue the right path for you and your company—and increases your chances of a successful transition.

Here's how to get started.

What exit works best? It depends on your goals

There's no one defined exit strategy for business owners. Determining your own exit plan depends on a variety of factors, from financial needs to your desire for the future of the business to the aims of other investors or family members involved—and beyond.

Understand all your exit options

Part of creating an exit strategy is cultivating an awareness of the choices you have for financially exiting your company. For example, selling a business outright may not be an option if you can't find a buyer or receive the valuation you'd like. Understand the available options and you may discover there are more avenues for realizing the value of the time and money you've invested into your company than originally thought.

Selling to a family member

According to SCORE, nearly 20 percent of U.S. small businesses are family owned.

These family partnerships can include spouses, grown children, or a combination of extended family leadership and employees. For many business owners, maintaining family control is the priority when contemplating an exit strategy. In these cases, creating a succession plan is one of the most important tasks a business owner can undertake.

After all, a sudden or ill-planned exit may leave a family-owned business without a sense of direction. A lack of plan, even while you're still with the company, can also enable the current generation of leaders to maintain the status quo, even if it's at the expense of innovation and growth that would benefit the up-and-coming family members. Selling the business to another member of the family requires careful deliberation.

Selling to your employees

Sometimes the people who work for your company are the best option for its next owners. They're already personally vested in the company and may even be shareholders. They're committed to the mission of the business and likely possess a solid understanding of its inner workings. Still, selling a business to employees remains relatively uncommon—employees often either aren't interested in buying the company or don't have access to the capital necessary to make the purchase.

The good news is that if you have an employee—or group of employees—ready and willing to make the leap, your company can benefit from the continuity of keeping the sale with someone already familiar with the organization and a smoother transition overall.

Selling to a third-party buyer

This is the most common path sought out by owners seeking to exit their business. Selling your business on the open market often helps business owners garner a higher price for the company than selling it to family members or employees. It also removes some of the unique complexities related to those transactions. Your list of potential acquirers depends on your business and industry, but could include larger companies, private equity firms, or an individual.

If a third-party sale is your plan, the earlier you prepare the better. An investment bank can often provide invaluable advice as you work to identify potential buyers and then negotiate a deal that meets all of your financial and business objectives.

Initiating a public offering

Going public—that is becoming a publicly traded company via a stock offering—is an option reserved for a small percentage of companies. Businesses that explore an IPO are typically highly scalable companies that have already achieved a significant amount of growth and are looking for even more. Consider that in 2017, only 160 companies with a market capitalization of more than \$50 million went public. IPOs have been on the rise over the past few years, and notably, the majority of companies that do go public aren't yet profitable. The public offering provides a way to raise a significant amount of cash, and pay out initial investors as well as the company's founders and owners.

Know that an IPO requires a significant amount of strategic planning, expertise, and guidance to execute correctly.

Liquidating your assets

In the event that you're unable to find a buyer—or perhaps uninterested in selling—you may choose to wind your business down. While not necessarily the most profitable way to exit a business, in some cases it may be the only viable option. That said, owners may be able to realize a financial return via selling the company assets.

Closing a business is a big decision—and you'll want to cull as much value from what you've built as possible.

Think Ahead from the Beginning

Launching your company requires a lot of hard work, courage, and financial resources. You'll need to put that same effort into setting your company up for success when it comes to an exit strategy.

Take the time to consider all of your options during the business planning phase so you can keep your goals in your line of vision. For example, if you plan to leave the business to your children, then incorporating them into the company early is critical. Similarly, if you're looking to sell to a larger industry player or PE firm, then you'll want to know what these potential acquirers look for in a purchase—and incorporate those into your own objectives.

One last tip: Continue to review—and, if necessary, revise—your exit options as the business grows and evolves. You can even use those reviews as an opportunity to figure out how to optimize your business today so it's a more attractive asset when you are ready to exit.

With the additional effort, you and your business will be set up for the best possible outcome.

Joe Yurosek

Fifth Third Bank hired Joe in December 2017 as California Market President to lead the Golden State's commercial vertical and market expansion strategy. An Orange County native and long-time resident, Joe has more than 25 years of banking experience; he joined Fifth Third from Comerica, where he served as market president for the Orange County region. He also was responsible for corporate middle-market strategy in Orange County, Long Beach and San Diego and co-led sponsor coverage strategy for Southern California. Joe holds a bachelor's degree from California Polytechnic State University-San Luis Obispo and earned his MBA from University of Southern California's Marshall School of Business.



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Strategies to Consider Now For a Tax-Efficient Business Exit Later

By City National Bank

If you own a thriving business, sooner or later you're likely either to sell it, hand it to family members or take it public. Whether you're just starting out or thinking about retiring in the next few years, it's not too soon to consider your strategy for managing this change to your greatest financial asset.

A key part of that planning includes considering what steps you'll take to mitigate tax burdens for yourself and your successor.

"The day you open your business is the day you have to plan for exiting it," said Natasha Davis, City National Bank senior wealth planner, who has helped numerous clients position their companies for sale or transfer. In fact, she said, "the later you start planning, the fewer alternatives you may have when your business eventually changes hands."

"Even if you expect to hold onto your company for the foreseeable future, the business represents value within your estate," she noted. It's also wise to prepare for the unexpected — perhaps even an unexpected offer far exceeding your estimated valuation.

Options for Asset Protection and Tax Savings

Start by consulting with your financial planner, lawyer and accountant, who can help you evaluate your estate and plot the most financially sound moves.

Davis asks clients first about their company governing documents, which may limit what they can do in structuring the business. You may need to change these documents, so ask your advisors to review them and make suggested improvements.

Any business faces a number of potential exit scenarios. Owners might sell or transition it to the next generation — or transfer the business through a sale-gift combination — or sell to employees or an outside third party. "In typical third-party sales, planning should ideally occur long before a transaction," said Davis. "That's because once an offer is on the table, options become more limited."

The GRAT Option

One popular tool is a grantor retained annuity trust, or GRAT. "It provides a vehicle into which an owner can place a low valued business interest, but retain an annuity for a period of time, with growth occurring outside his or her personal estate," Davis explained. "If you wait until someone makes an offer on your business, however, it's too late to benefit from transferring shares to a GRAT, since you can't value an asset at less than its known worth," she said.

One City National Bank client who planned to eventually sell a family business obtained a valuation of roughly \$10 million and placed his company shares into a GRAT. His brother and co-owner did the same. The following year, they received an offer to sell the business for \$65 million.

"After the sale, because of the GRAT, they each have an annuity for a period of years from the liquidity event, but ultimately were able to save millions in estate tax by passing the lower value shares into the GRAT during their lifetimes," said Davis. "This strategy may also be applied to interest in a company pre-IPO allowing families to pass along assets quickly while avoiding paying estate taxes on soaring post-IPO share prices," Davis added. It's always important to consult with an attorney and a CPA for a comprehensive analysis of your unique situation. One of the risks: If the business owner dies before the GRAT expires, all assets return to the estate and its heirs will have to pay taxes on the growth.

Gift-Tax Exclusion

Using the annual gift-tax exclusion as a powerful tax-saving technique for passing a business interest to the next generation. As with other assets, an individual may gift an amount equal to the annual gift-tax exclusion — \$15,000 in 2018, or \$30,000 for a married couple — tax free.

"One client couple used this strategy to pass ownership interest in their business to their children, starting in 2010, and continue to do so every year," Davis explained. "If you plan to transfer a business to children by giving shares over time it's important to obtain and cement a valuation at the outset," said Davis. The IRS allows closely held businesses to discount the value of shares for a valid purpose, such as minority share discounts, or closely-held business discounts. Those can



help families transfer valuable assets while taking greater advantage of the annual gift-tax exclusion.

Family Limited Partnership

"A family limited partnership, or FLP, is another option that allows significant estate- and gift-tax savings when passing ownership to family members," Davis noted.

Limited partnership can allow an owner to maintain control while taking advantage of valuation discounts from the limited partner interest and quickly shifting their interest to the family members who will eventually take the reins.

The value of these limited partnership interests will be significantly discounted due to the

partnership's lack of operational control — third parties would pay less for a restricted interest in a company than they would for unrestricted control — which works to the family's financial advantage, allowing business owners to give much more property to their heirs on an annual tax-free basis.

Eventually, as the couple ages or decides to give up control of the assets, they may choose to transfer general partnership interests to heirs.

Before Accepting An Offer

Business owners sometimes find themselves presented with an unexpected offer that sounds too good to refuse. Davis urges them to carefully evaluate the tax and long-term implications before they accept.

Consider, for instance, a business worth \$10 million that earns \$1 million a year, with the owner perhaps taking home \$500,000 annually. Along comes an eye-popping offer to sell for \$30 million, which might net the owner \$15 million.

Will that \$15 million generate \$1 million a year? Will it support the owner's family for the next 20 or 30 years? "People might be wowed by a large offer, but may be better off keeping the business and going into work for a few more years, so they generate that \$1 million annually," said Davis.

"The earning potential of a living, breathing business is much better at times than the earnings potential of the stock market," she said.

In one instance, though, a client with a tech business held off, feeling the company was in a position to increase in value significantly in five years.

"So with that we did do some planning," said Davis. "The client is now restructuring and positioning the company for sale, possibly in a few years."

Given the complexity and the number of options available, it's important to consult with professionals to evaluate your situation before a sale. City National Bank's wealth planners can help you weigh your options. To learn more, contact us.

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Natasha M. Davis, JD, LL.M, MBA (Taxation)

Senior Wealth Planner
Wealth Planning Group
City National Bank
(949) 223-4575
Natasha.Davis@cnb.com



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“You’ve got to be determined. You can’t be afraid of change. And you’ve got to have the guts to do what you think is right, regardless of what others say. You’ve got to be willing to take chances, and you can’t be afraid to lose, because you will lose at times. And when you do, you’ve got to pick yourself up and go do it again. We all rely on personal relationships ... because that’s what business is ... good relationships. And that’s exactly what we get with Mechanics Bank ... it’s personal, it’s easy.”

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New Law:

Created by the Tax Cuts and Jobs Act (TCJA), Opportunity Zones were designed to increase investment in low income communities throughout the country. In June of 2018 over 8,000 communities in all 50 states, the District of Columbia and five U.S. territories were designated as Qualified Opportunity Zones (QOZ).



original gain. Finally, if the investment in the QOF is held by the taxpayer for at least ten years and the taxpayer makes a basis adjustment/permanent exclusion election, the basis of the property equals the fair market value of the investment when the investment is sold or exchanged. Since the basis equals the FMV there is no gain or loss realized on the sale or exchange.

What is a Qualified Opportunity Fund (QOF)?

Any gain from a sale or exchange of property by a taxpayer, to an unrelated person, that is invested in a QOF are any investment vehicle, organized as domestic corporations or partnerships, that holds at least 90 percent of its assets in QOZ property. Disregarded entities are not, however, eligible to be QOZs.

QOZ property includes: QOZ stock, QOZ partnership interest, or QOZ business property. QOZ Property is tangible property used in a trade or business. QOZ Partnership Interests and Stock are equity interests in certain businesses that operate in QOZs.

Who can invest?

C Corporations (including RICs and REITs), individuals, partnerships, S corporations, and trust and estates can invest.

How does a taxpayer defer the gain?

Any gain from a sale or exchange of property by a taxpayer, to an unrelated person, that is invested in a QOF within 180 days of a sale is excluded from income until the earlier of the date the investment is sold, or December 31, 2026. Only the gain needs to be reinvested, not the proceeds from the sale.

To elect to defer gain, the taxpayer makes a deferral election by attaching Form 8949 to their Federal income tax returns in the year of sale. It should be noted that, when a partnership elects to defer gain it is done at the partnership level. However, if the partnership does not elect to defer the gain, the gain is allocated to the partner and the partner can defer the gain individually.

The 5, 7 and 10-year rule

Once a taxpayer holds an investment in a QOF for five years his or her basis in the property is stepped up by 10 percent of the deferred gain. Additionally, once investments are held for seven years the basis is increased by another 5 percent of the –

Example

Taxpayer is an individual who purchased land for \$1,000,000 in 2014. The land has appreciated to \$1,200,000 in 2018 and is disposed/sold. Before 180 days expire, the \$200,000 gain is invested in a QOF which is invested in QOZ property. As such, the taxpayer owes no tax in 2018 with respect to the \$200,000 gain.

Manuel Ramirez, CPA, MST, FABFA, is Chairman and an International Tax Partner at RJI CPAs. Manuel is a founding member of the firm and has served as President and CEO since 1993. Manuel was appointed by Governor Arnold Schwarzenegger as a member of the California Board of Accountancy in 2007 and served as President of the Board in 2010. Manuel continues to consult on various international and multi-state companies and can be reached at 949.852.1600 or mramirez@rjicpas.com.



Justin A. Hudson, CPA, MAcc, is a Tax Manager with RJI International CPAs. He specializes in mergers and acquisitions and International Tax. He is a CPA in the state of Georgia. He earned his Bachelors in Accounting and Masters in Tax from the University of Georgia. Justin can be reached at 949.852.1600 or jhudson@rjicpas.com.



Please reach out if you need further assistance with this matter!

About RJI CPAs

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 accounting networks in the world.

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CEO/FOUNDER OF
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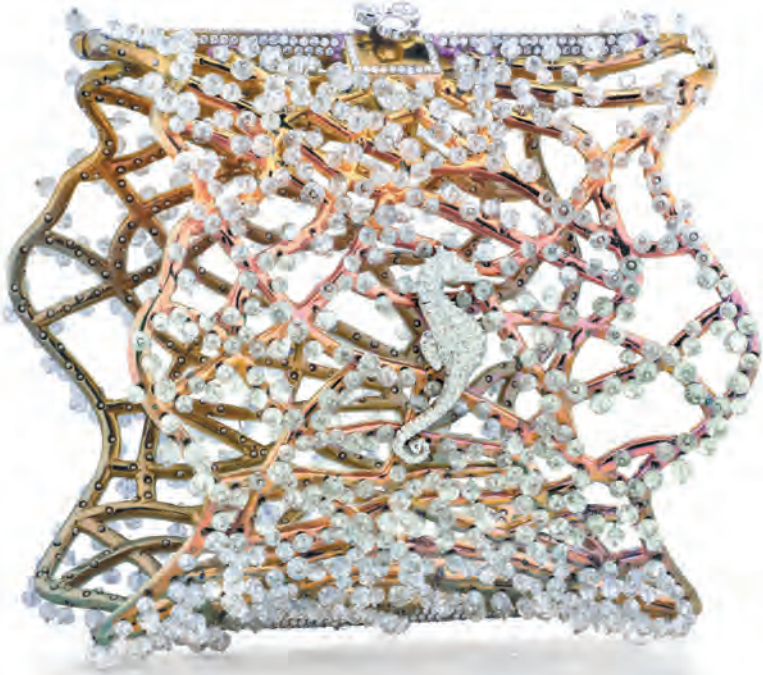
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Lugano Diamonds was founded with the vision of creating exquisite, bespoke jewelry. From the initial inspiration of the gem and design, Lugano's master craftsmen create each piece with meticulous attention to detail that results in truly exceptional masterpieces. Each piece of jewelry is designed to be a wearable work of art, unique to itself.



Complex, Gorgeous Details

The Titanium Coral Cuff exemplifies the meticulous detail and creativity in a Lugano work of art. Inspired by the intricacy and beauty of coral, the cuff is woven with titanium and over 1,000 illuminating diamonds. More than 27 carats of bead and 16 carats of briolette VS collection diamonds complemented by three carats of rose and round brilliant collection VS diamonds create dimension and complexity. This awe-inspiring piece will transcend generations and forever make an incredible statement.



A Culture of Luxury Old Miner's Cut Diamond Studs

A distinguished collection of jewelry must include luxurious diamond earrings. Elevate your appreciation for diamond studs to a new echelon with Lugano's Old Miner's Cut Diamond Studs. Each earring showcases a more than eight carat cushion cut diamond and a collective 17 carats of glistening diamonds. Each diamond is placed on a bed of round brilliant collection VS diamonds and set in 18k white gold. Be immersed into a culture of luxury.



Emerald and Diamond Ring

History shares Cleopatra was passionate for emeralds. Similar to her, these stones are intoxicatingly beautiful and alluring. Lugano captures the essence of the storied gem in the Emerald and Diamond Ring. An enchanting nine carat emerald cut emerald surrounded by two distinctive kite diamonds is divine. Set in 18k white gold and detailed with round brilliant collection VS diamonds, this ring will beautifully stand the test of time.

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11 Health and Technologies Inc., Tustin*Michael Seres, Founder/ CEO*

Founded in 2013, 11 Health and Technologies Limited is an integrated sensor platform for long term patients who manage chronic conditions while connected to medical bags. CEO and founder, Michael Seres has created a community-centered connected health care network in the ostomy/IBD space that uses a patient to patient outreach and support model, while providing real-time bio-marker information to clinicians and health care providers via a cloud-based IoT business model. 11Health is the world's first company to launch a smart ostomy pouch and wafer with FDA clearance. The company's vision is to connect those bags to the 11 Health Sensor Network to improve outcomes for patients, deliver relevant real-time data to clinicians and lower costs. Seres frequently works with the NHS, the Department of Health in the US and top hospital groups like Mayo, Cleveland Clinic, Stanford etc., advising on the patient to patient care model and the real time care platform that 11 Health has built.

**Advertify, Ladera Ranch***Daniel Robbins, CEO*

As head of marketing and operations for OC Facial Center, Daniel Robbins has helped grow the company to a two time Inc 5000 winner with over 2.5 million in revenue yearly. In 2018, Robbins decided to launch a digital marketing agency, Advertify, to help local businesses drive customer growth and expand online through e-commerce and Amazon sales. Leading up to the launch of Advertify, Robbins created a groundbreaking medical grade men's skincare brand called 'his'. He launched an advanced pigment technology sunscreen that helps to hide and cover-up skin imperfections including uneven skin tone, acne, scars and redness. Robbins understood the importance of the amount of press the men's skincare line received and now hopes to help other businesses by providing a service that is affordable and works. Robbins is also a writer on men's skin health and has been featured in Forbes, Medium, Thrive Global and HuffPost.

**AIVITA Biomedical, Irvine***Hans Keirstead, Ph.D., CEO*

Dr. Hans Keirstead is an internationally known stem cell expert and has led therapy development for cancer, immune disorders, motor neuron diseases, spinal cord injury and retinal diseases. Keirstead is the CEO of AIVITA Biomedical which was founded in 2016 to develop stem cell-based clinical therapies and commercial products that improve quality of life and save lives. Its most notable achievements are the advancement of a platform cancer immunotherapy capable of treating multiple cancer types, currently in Phase II trials for ovarian and brain cancer, and the invention of a novel skincare active that has been commercialized to help fund the Company's clinical programs. In 2005, Keirstead was awarded the Distinguished Award for Research, the UCI Academic Senate's highest honor, as well as the UCI Innovation Award for innovative research leading to corporate and clinical development. He was a founding advisor of the California Stem Cell Initiative that resulted in a \$3 billion stem cell fund (CIRM). He has been a long-time advisor to several governments on biomedical policy.

**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.

**American Advisors Group, Orange***Reza Jahangiri, CEO*

Reza Jahangiri is the founder and CEO of American Advisors Group (AAG), the nation's leader in reverse mortgage lending and a pioneer in helping older Americans responsibly use their home equity to Retire Better. Jahangiri's vision has been to build on the strength of AAG's nationwide advertising campaign featuring acclaimed actor, Tom Selleck, to create the nation's first senior-focused, product-agnostic home-equity-solutions company. American Advisors Group was formed in 2004 and today AAG has over 1,200 employees and six offices across the nation committed to helping older Americans achieve their vision of a better retirement. Some accomplishments include growing revenues from \$10 million in 2010 to more than \$280 million in 2017 and championing major industry reforms and consumer protections for reverse mortgage product. Jahangiri also helped lead a major brand transformation in 2018 into a full suite of home equity solutions for seniors, thereby officially transitioning AAG from a monoline, product-focused business to a solutions provider. In 2018, Ernst & Young awarded Jahangiri Entrepreneur Of The Year® in the financial services category in Orange County.

**Amnion Life LLC, Newport Beach***Dr. Amir Fassihi, CEO/Founder*

Amnion Life LLC has developed a revolutionary new incubator system for preemies in a hospital NICU. AmnioBed offers a patented, cost-efficient solution that can potentially improve preterm infant's chance of survival, decrease long term morbidities and reduce the time needed in neonatal intensive care. AmnioBed's patented and groundbreaking incubator technology creates a simulated amniotic fluid environment to nurture and protects against two of the largest shortfalls of current technology - hypothermia and dehydration. Dr. Amir Fassihi, the company founder, developed the AmnioBed technology. The ultimate goal of the AmnioBed is to directly address the target PTB infant population to improve outcomes, reduce complications and decrease costs associated with length of stay (LOS) in NICU and longer-term societal costs. Fassihi attended UCLA for his undergraduate degree, UCSF School of Medicine and completed his residency in the field of radiology at the Keck/ USC Medical Center.

**Anduril Industries Inc., Irvine***Palmer Luckey, Founder*

Palmer Luckey, founder of Oculus VR and Anduril Industries, is inventing technology that keeps America safe and helps those who serve to do their jobs more efficiently, safely and cost-effectively. Anduril is creating innovative technology that can make a real impact and protect those who risk their lives in dangerous situations. Palmer began this journey over a year ago with the sole purpose of committing top technical talent to help those who defend our country to stay safe and out of harm's way. He is also the designer of the Oculus Rift, a virtual reality head-mounted display, and the founder of Oculus VR. Frustrated with the inadequacy and high cost of the existing HMDs on the market, Palmer began experimenting with his own designs in 2009 at the age of 16. In 2012, he formed Oculus VR, which was acquired two years later by Facebook for \$2.3 billion.

**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.

**Antonello Ristorante***Antonio Cagnolo, Owner/Chef*

Since 1979, Antonello Ristorante has taken its guests on a nostalgic journey to an Italy through the eyes of owner and visionary, Antonio Cagnolo. Highly rated in the noted Zagat Guide for several years, Antonello Ristorante has earned a sterling reputation for having served luminaries over the world including presidents, foreign dignitaries, movie stars, entertainers, industrialists and other leaders. Proprietor Antonio Cagnolo is a multiple winner of the Golden Scepter Award and Circle of Fame Awards, two of the most prestigious honors a restaurateur can receive. Restaurant critics around the world have admired Antonello's expansive menu of antipastos, soups, salads and fresh pasta dishes as well as an ample variety of exquisitely prepared fish, poultry, veal and beef entrees. Antonello's award-winning wine selection boasts more than 500 foreign and domestic labels, and for special occasions or formal gatherings, there are eight private dining rooms to choose from with guest seating from eight to 85.

**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 has helped manufacturing clients grow profitably 20-50 percent a year. 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

wherever you'd like to take your business in 2019, we can help you get there.

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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. Austin Taylor specializes in custom-made men's business and casual wardrobes. 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.

**Axonics Modulation Technologies Inc., Irvine**

Raymond Cohen, CEO

Raymond W. Cohen is a serial entrepreneur who has been responsible for formation and operation of companies that have added to the business landscape of both Orange County and impacted the health and welfare of people around the globe. Following several successful corporate endeavors and profitable company sales in the medical technology and device fields, Mr. Cohen and his team set their sights on the underserved and often disabling market of incontinence. Axonics developed and is focused on commercialization of an implantable neuromodulation system directed toward clinical indications associated with urinary and bowel dysfunction. In addition, Mr. Cohen has led the Axonics organization from concept to corporate formation, and in 2018, a successful IPO valuing the company at close to \$400 million. The Axonics technology marks a real change in the outlook and lives of people in all walks of life, young and old, who often avoid social activity due to their conditions.

**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.

**Beeya, Laguna Beach**

Ladan Davia, CEO/Founder

Beeya is a meta-search engine for jobs that uses artificial intelligence to match job seekers with over 11 million job listings daily. Some of these partners include Indeed, Zip Recruiter, Adzuna, and 43 other affiliate partners. A job seeker can go to Beeya and search by industry and location and get all job listings, in one place. If a user makes a free account and puts their resume, Beeya's algorithm will read the resume and match the user to all of those jobs. 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. The website brings the online job hunt, social network and professional network ideas all onto one platform. 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.

**Below Invoice Inc., Laguna Hills**

Cole McKeon, President

Below Invoice founder and president, Cole McKeon is revolutionizing the luxury and exotic automotive industry by changing the way people acquire vehicles. His independent automotive concierge service has helped customers save thousands of dollars and countless hours. Below Invoice was founded in Jan. 2014 with the mission of streamlining the automotive buying experience from start to finish. Whether you're looking for a Lexus or a Lamborghini, Below Invoice provides a comprehensive set of services including locating your desired vehicle, negotiating optimal lease or purchase options, and delivering the vehicle to the location of your choice. McKeon's established relationships with premier dealerships across the nation allow Below Invoice to secure vehicles otherwise unattainable. His company's competitive pricing and no-hassle experience has attracted customers from across the nation. Below Invoice is currently in the midst of compiling one of the biggest off-market exotic and hypercar offerings in the nation.

**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 percent increase in revenue in 2017. 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.

**BHE Management Corporation, Laguna Niguel**

Marla Brower Hemmel, Founder/President

Marla Brower Hemmel is the founder and president of BHE Management Corporation, a 25-year-strong premiere Homeowners Association management firm representing many major homebuilders in Orange County. The firm was formed in 1993 to provide clients with professional, personalized association management. Hemmel leads her firm in a manner that pleases both the developers, who hire her firm consistently to create the initial association rules and budgets, as well as the homeowners themselves. This creates relationships that continue for more than a decade in nearly every case.

**Business Communications Solutions, Irvine**

Sunny Rajab, CEO

When Sunny Rajab founded Business Communications Solutions (BCS) in 2001, it started out as a single source telecommunication solutions and structured cabling provider. Today, it has successfully evolved and grown with the changing technology to now include audiovisual design and integration, national rollout deployment, networking and wireless solutions, CCTV surveillance, paging, and sound masking. Rajab was a mere 20 years old when she founded BCS, her vision and ambition continuously paves the way for BCS to stay at the forefront of emerging technology. Her innate ability to strategically adopt innovative technologies to suit the evolving needs of her client base, while concurrently practicing lean fiscal decision-making, has secured BCS's year-over-year increases.

**CapRock Partners, Newport Beach**

Jonathan Pharris, Co-Founder/President

Jon Pharris co-founded Newport Beach-based CapRock Partners, one of the fastest-growing private industrial investment and development firms, at the age of 29. At 34, Pharris became the company's president, spearheading acquisition and fund investment strategies for the nearly 11 million square feet and \$1.6 billion of industrial real estate the company has acquired, developed or has in the pipeline to-date. Under Pharris' leadership, CapRock Partners will be under construction on more than four million square feet of Class A industrial product in the Inland Empire this year, making CapRock one of the largest industrial developers in the Western United States. A former NAIOP national board member, he is a next-generation commercial real estate leader who has positioned his company to provide long-term logistics solutions for corporate America while generating profitable returns for CapRock's investors.

**ConversionPoint Technologies, Irvine**

Robert Tallack, CEO

Robert Tallack, CEO and co-founder of ConversionPoint Technologies, has built ConversionPoint Technologies from a start-up to a current valuation of \$143 million in 36 months. In 2018 he helped the company achieve over \$40 million in annual revenue. An industry veteran of the digital marketing business, Tallack has developed direct-to-consumer sales and marketing campaigns that have generated millions per month in sales. His ability to build an efficient organization using technology to scale rapidly has contributed greatly to his success. The company's proprietary e-commerce platforms enable high-volume product sales across multiple consumer verticals. Its technology suite includes a media optimization solution that uses machine learning to optimize ad purchases and lower customer acquisition costs, and a CRM that provides a robust payment processing and customer data management platform. ConversionPoint Technologies was named the third fastest growing company in Orange County in 2017 and was ranked the 93rd fastest growing software company by Inc. Magazine.

**Cuddly, Seal Beach**

Natalise Kalea, Founder/CEO

CUDDLY is a pet product gift registry and fundraising platform that serves pet parents and rescues. It's like a baby registry, but for animals. They serve over 1,200 rescues and over 200,000 animal supporters and pet parents. Users create gift registries and fundraisers and share them with their respective communities for support and/or to celebrate an animal's adoption, birthday, holiday, or just because. Five percent of all purchases go back to the rescue of the user's choice. In the last 10 months, they have created over 2,000 registries and in this quarter alone (Q4 2018), they are on track to create 2,000 more registries. They are also on track to



Securing Your Retirement: Best Asset Protection Your Lawyer Never Told You About

By Jeffrey M. Verdon, Managing Partner, Jeffrey M. Verdon Law Group, LLP

Life is full of little surprises. Wondering whether your retirement plan is "bullet proof" from future lawsuits and bankruptcy should not be one of them.



Jeffrey M. Verdon
ATTORNEY AT LAW

Imagine this...

You've worked your entire life to build a successful business reinvesting into your company all along. Your long-term plan was to sell the company when you turned 60 to retire to a life of leisure, living on the proceeds. Then disaster strikes. You and your company get sued resulting in a devastating multi-million dollar judgment. There aren't enough assets to pay off the debt and it's going to wipe you and your company out. Because you never saved for retirement you don't have enough protectable assets, such as a healthy IRA, to start over. And that "sell the company" retirement plan you worked so hard for? It's gone without a net.

Luckily, there is something you can do to avoid this fate.

If you live in California, you can create a Private Retirement Plan (PRP) to secure your retirement. PRPs are used for retirement savings and because it is statutory law, it is entirely exempt from judgments and bankruptcy. Sound too good to be true? Well, there is a catch. To qualify as a PRP, the plan must be operated strictly for retirement purposes and misuse of the plan disqualifies it.

Here's how it works: A business owner or professional with a successful company establishes a retirement plan funding it with company assets. Because a PRP is not an ERISA qualified retirement trust and does not enjoy any special tax treatment, contributions to and earnings

inside the PRP are unlimited. Your company can fund a PRP with a lump sum contribution or it can secure the funding commitment with its accounts receivables, real estate holdings, and intellectual property, to name a few. This prior lien for the PRP takes priority over any of the company's future claims including judgment creditors.

The real beauty of securing your retirement through a PRP is that the trust's assets are protected when you and your company are making contributions, and when you commence withdrawing your benefits when you retire. Hello peace of mind, goodbye future unforeseen creditors! This is a handy safety-net indeed.

PRPs are inexpensive to create and even less to maintain, especially when you consider the unlimited creditor protection it offers. PRP's are coordinated with your current qualified retirement plans.

If you're interested in learning more about Private Retirement Plan contact your legal or financial advisor, and if he or she isn't familiar with the PRP, contact our firm for a complimentary phone consultation. We would be pleased to help you secure your retirement.

Jeffrey M. Verdon Law Group, LLP is a boutique law firm specializing in Comprehensive Estate Planning and Asset & Lifestyle Protection. For over 30 years we have assisted affluent families and business owners with their comprehensive estate plans, maximizing wealth transfer opportunities, and providing "firewall" asset protection planning to protect estates and family legacies.



JEFFREY M. VERDON
LAW GROUP, LLP

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grow in transaction volume by 40 percent this quarter, which is in line with their growth for the last six quarters. Their run rate for this year is \$2.3 million.

Directive, Irvine

Garrett Mehrguth, CEO/Co-Founder

Garrett Mehrguth is the co-founder and chief executive officer of Directive, a leading B2B and enterprise search marketing agency headquartered in Irvine, California. Mehrguth, fascinated by the role search marketing plays in empowering companies and people to connect, has dedicated the past five years toward that passion. Since its establishment in 2014, Mehrguth has led Directive in its expansion of four global offices- LA, NYC, Austin, and London, spearheaded the growth and diversity of its team, which in the last year experienced a 205 percent growth rate in company size, and now boasts a team of 50-plus people with over nine nationalities from their HQ and home of operations. Additionally, he is committed to bridging the gender gap that plagues the marketing technology space with, currently, 25 percent of Directive's leadership team is comprised of women. Mehrguth led Directive's revenue growth from zero to five million in less than five years with a 20 dollar initial investment. The company now has expanded with three new locations in the U.S. and internationally into the U.K.

**Diverse Janitorial, Santa Ana**

Rolando Cordero, President

Rolando Cordero founded Diverse Janitorial and is celebrating the company's 10th anniversary in February 2019. Diverse Janitorial provides post-construction cleaning and commercial janitorial services for the largest and respected clientele in the public works sector. His company has won large public works contracts and continues to grow year after year. Cordero's company has done business with the Los Angeles County Metropolitan Transportation Authority, UCLA- Anderson School of Business, UC Riverside, and Grossmont College in El Cajon to name a few. Under his leadership, Diverse Janitorial was awarded the 2016 Top Latino Business Award by the Los Angeles Business Journal. Mr. Cordero has taken the time to work "On the business" instead of "in the business". He has received business assistance from the SBA, Score, PTAC, and SBDC which they all provide a low-cost fee. Mr. Cordero is focused on creating job opportunities for his community. He hires single parents, individuals with no High School diploma, retired veterans, and anyone that is looking for an opportunity to grow within our company.

**Elite Connections, Newport Beach**

Sherri Murphy, CEO/Founder & Tammi Pickle, VP

Sherri Murphy founded Elite Connections International over 25 years ago and has built it into one of the world's premiere matchmaking agencies. She's proud of the company's A+ rating with the Better Business Bureau, hundreds of glowing reviews, and even more happy couples she has helped create. Elite Connections was founded in Los Angeles in 1994 after Sherri met her husband through a matchmaker and saw a need for a safe, effective way for successful and commitment-minded singles to meet one another. The company has locations throughout Southern California, New York, Las Vegas and Florida, as well as as matchmakers in Paris and other major cities around the world.

**Ephesoft Inc., Irvine**

Ike Kavvas, CEO/ Founder

Ephesoft develops technology that makes meaning out of unstructured data for decision-makers worldwide. Using patented supervised machine learning and a focus on efficiency and reliability, Ephesoft has crafted the next generation of enterprise content capture and data discovery solutions. Organizations use Ephesoft to automate any document-based business processes, improving accuracy and productivity, while reducing costs. Ike Kavvas founded Ephesoft in 2010 and it was bootstrapped until 2017 when the company received their Series A funding, it has since grown and flourished over the past eight years. In 2015, Ephesoft was listed as an Inc. 500 fastest growing company with 1132 percent growth. Ephesoft introduced the industry's first browser-based, cloud and Capture-as-a-Service platform, making it simple for any sized organization to streamline document business processes. The company employs 150 people worldwide with customers in 53 countries and has over 250 global partners, including companies like Microsoft, Box, HP, Infor, Nintex, K2, Blue Prism, UiPath, and Quest Diagnostics. Ephesoft strives to be stewards of the community by creating internship opportunities with local colleges, making charitable donations and providing employee volunteer efforts for local organizations.

**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. 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 product has become so popular that Gambhir is closing in on his first \$1 million in sales, and is also expanding his product line with LiquiCell-filled bicycle seats, pillow cases, and shoe insoles. With 500-plus five-star reviews on Amazon, Ergo21 is poised to become the leader in the seat cushion industry. The Ergo21 is getting



rave reviews from drivers of all kind from Uber and bus drivers to pilots. In addition, wheelchair users also are getting relief from pressure sores when they use the Ergo21 cushions. This year Ergo21 is expanding its products to Canada, Australia, Japan, England, and Europe on Amazon and their website.

Forever Ageless, Newport Beach

Joseph Cerni, Physician and Medical Director

Dr. Joe Cerni is a leader in the latest developments in regenerative medicine and anti-aging technology. His warm, welcoming practice in Newport Beach is the gold standard for non-surgical face and body treatments. Dr. Cerni is at the forefront of the latest aesthetic research and he offers his patients a wide array of advanced treatments to restore, rejuvenate, and refresh face and body. He is recognized for the outstanding quality of his work, and beautiful results he consistently achieves. Dr. Cerni is No. 5 in the nation for Allergan injectables, with a great breadth of knowledge and experience with the correct use of Allergan products. Forever Ageless is the premier clinic for injectables, skin rejuvenation, and age-defying treatments in Newport Beach. As a cosmetic physician, researcher, and speaker, Dr. Cerni's qualifications and experience are above and beyond the ordinary. His patients trust him to perform face and body treatments for a more youthful, rejuvenated look.

**Fusion of Ideas, Lake Forest**

Russ Taylor, CEO

Russ Taylor is a steward of the only American mobile integration company of its kind offering large-scale custom device branding, app development, and logistics integration programs. Founded in 2003, Fusion of Ideas entered the mobile tech industry by selling phone covers and accessories at an Orange County mall kiosk. The public first took notice when the company created the world's first protective carbon fiber-style phone cover, StealthArmor. Taylor grew the business quickly, opened a retail store and met consumer demands by offering full-color laser and printing customization services for mobile devices. Taylor fostered strong relationships with device manufacturers, which led the business to focus strictly on business-to-business sales. Fusion of Ideas has worked with some of the most significant brands in the world, including Capital One, Audi, Major League Baseball, and Hilton, among others. Today, the company operates out of its corporate headquarters in Lake Forest and has partnered with nearly 2,000 businesses nationwide maximize the use of mobile technology in their organizations.

**Gorilla Stationers LLC, Cypress**

Rosemary Czopek, President

Gorilla Stationers has been servicing businesses and government agencies throughout the country since 2012 with their diligent customer service in addition to knowledge of all products within the office solutions industry. Founded in Huntington Beach by Rosemary Czopek, an industry veteran with over fifteen years of expertise, the company prides itself as a woman-owned business that has successfully carved its niche in the office supply sphere by offering top-brand, cutting-edge items with unbelievably low prices. By 2015, Gorilla Stationers had expanded across the country, with 28 shipping facilities nationwide to ensure promised next-day delivery. Gorilla Stationers has a relationship with one of the largest vendors of office products in the world, along with direct relationships with manufacturers, which provides access to over 150,000 products, meaning bottom-line savings for customers.

**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. Under Hendy's leadership, the firm has become a leading industry force as one of Interior Design Magazine's Top 200 Architecture Firms for 32 consecutive years. In 2019, with \$10 million in revenue and 25 percent year-over-year growth, H. Hendy Associates will commemorate a significant milestone – its 40th anniversary. Hendy has led the firm to become one of the longest-standing women-owned interior architect companies locally, creating a lasting legacy for the Orange County business community. Under her leadership, the firm helps 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 the driving forces behind every design. Hendy has helped Fortune 500 companies and nationally recognized brands like Kawasaki, Behr Paint Company and OluKai create effective workplace environments that become strategic tools for business success. In addition to the many LEED certified professionals at the firm, the WELL accreditation sets H. Hendy Associates apart. Its ability to incorporate wellness concepts into every design not only wins over clients but reduces employee absenteeism and increases productivity.

**Helix Semiconductors, Irvine**

Harold Blomquist, President/CEO

Harold Blomquist has more than 35 years of experience in high-tech electronics and the semiconductor industry. He has been CEO of his last four companies – with a talent for driving enhanced profits and investor returns. Blomquist has consulted to, and advised, Fortune 100 firms and global leaders in the consulting world. Prior to becoming CEO of Helix, Blomquist played pivotal roles in successful liquidity or capital growth





How Can an Entrepreneur Benefit from a Self-Directed IRA?

It was in September that Richard first came up with the idea for his company, a tech start-up with huge potential. Like all ground-level entrepreneurs he needed funding and raising seed capital was not something he learned at Berkeley. Necessity being paramount he adapted and reached out to family and friends. It was from this group he learned that an IRA could fund his business.

As long as Richard stayed away from investors who are "disqualified" to his IRA (Individual Retirement Account) he could raise capital from this source:

Who's Disqualified

- you
- your spouse
- your parents and/or your adoptive parents
- your natural grandparents
- your natural children and/or your adopted children
- your stepchildren
- The spouse of your natural children
- your grandchildren
- Any fiduciary
- Any people providing services to your IRA

By March his business had the capital it needed to go to the next level. Right



now there is something like \$9.2 trillion in IRAs in America. Only about three percent of those funds are invested in alternative assets like real estate, private stock, notes, precious metals and more.

For Richard, his company flowed back a portion of the profits back to these IRA accounts. It was a win-win. Whether raising seed capital or funding expansion, IRAs can be a source of capital.

It's not unusual for people to think Self-Directed IRAs are something new. Actually they were created when ERISA was enacted by then president Gerald Ford in 1975. IRAs have always been able to hold any asset except life insurance and collectibles. A Self-Directed IRA is just like a typical IRA with the only exception being the asset class they hold.

Now well into his third year, Richard's company is humming along in no small part due to the creative thinking of his investors who had already established Self-Directed IRA accounts.

Feel free to contact me to learn more about this issue by calling me directly on a no obligation basis. Kaaren Hall (714) 831-1866 KHall@uDirectIRA.com

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events at Inmos, GSI, AMI, ZMD, Tower, Morpho, Simtek, and more. When Blomquist took over as Helix CEO in 2016, he was committed to not only keeping the operational headquarters in Orange County but also to hiring local talent and local subcontractors. In the time since Blomquist was appointed CEO, Helix has increased headcount by 50 percent and engaged multiple OC vendors and contractors with plans to continue to grow the company even more in the coming months.

I/Metro, Irvine

Erik Leckner, CEO

At I/Metro's Los Angeles, Orange County, and San Diego offices, I/Metro has led the design and engineering of a wide range of corporate, civic, and institutional projects that have helped redefine and advance technology around the world.



Idea Hall, Costa Mesa

Rebecca Hall, President/CEO

In 2003 Rebecca Hall founded Idea Hall, an agency that would respond to the need for integrated marketing, branding, PR and advertising services where corporate culture was valued. She set her sights on Orange County and forged a niche within its commercial real estate sector. Today, Idea Hall enjoys the reputation and position as OC's agency of choice. While its roots lie in public relations, the firm's progressive integrated model predated the industry's current trend toward consolidating creative with integrated comms shops. 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.



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.

JustFoodForDogs, Los Alamitos

Shawn Buckley, President/Founder

Shawn Buckley started JustFoodForDogs with one simple, primary objective - to increase the quality and length of life for as many dogs as possible. With the belief that Just Food for Dogs is quite simply the very best food for dogs in the world and they want your dog to have the advantages that come with using only USDA/FDA certified, for human consumption ingredients in our healthy homemade recipes. There are eight retail locations throughout Los Angeles and Orange County and their commercial facilities fill online orders. Prior to founding JustFoodForDogs, Buckley started a bicycle company at the age of 19, after selling the company to GT Bicycles he stayed with the company to help build the revenue from \$1 million to \$95 million in sales in just four years. At the age of 25, he started a PR agency, Buckley/Friedman and sold it 11 years later. At 36, he bought the rights to the oldest baby carriage company in the UK and started "Silver Cross", producer of the, most expensive strollers in the world, which he later sold to Halsall International for \$5.7 million.



Kareo, Irvine

Dan Rodrigues, Founder/CEO

Dan Rodrigues, founder and CEO of Kareo, began his entrepreneurial success as the co-founder of Scour, a very popular search engine for finding music and video files online used by more than 10 million consumers. With Scour, Rodrigues raised \$12.5 million in venture capital financing from Michael Ovitz, Ron Burkle, and Ron Conway, lead a 70-person organization, designed the Scour Exchange peer-to-peer software downloaded by more than \$7 million registered users, developed other patented technologies, and sold the company in 2000. Rodrigues started creating technology for the healthcare industry in 2001 as a co-founder and managing partner of Skematix, a software consulting firm based in Southern California. Among the various projects he led, Rodrigues designed and built a web-based medical billing software and healthcare information system for a national medical billing company. During his tenure at Skematix, Rodrigues also designed an online auction service for industrial equipment, a self-service Internet kiosk for airports, and an online music service. In 2004, Rodrigues founded Kareo. Under his leadership, Kareo has grown to 500-plus employees serving over 25,000 healthcare



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providers in the US. At the helm of Kareo, Rodrigues has raised over \$90 million in total capital.

Karma Automotive, Irvine

Dr. Lance Zhou, CEO

Dr. Lance (Liang) Zhou was named Karma Automotive's chief executive officer in December 2017 after serving more than 25 years in the automotive industry, most recently as CEO and President of Beijing Foton-Daimler Automotive, in addition to Daimler Global VP (Level I of Daimler AG). Zhou began his career as an engineer, progressed into sales and marketing, and then into general management, where he held a variety of progressively responsible executive positions. Most recently in October 2018, Dr. Lance (Liang) Zhou announced Karma's new "Value-Forward" Business Plan which will continue building upon the automaker's legacy of delivering distinct luxury electric vehicle experiences through innovative design, technology and personalization. Prior to joining Daimler, Dr. Zhou was with Naveco, a joint venture of Iveco of Fiat and Nanjing Auto, where he was chief executive officer and served on the venture's board of directors. Dr. Zhou earned Bachelor's and Master's degrees in Engineering from Northwestern Polytechnical University and a Ph.D. from Nanjing University of Science and Technology.

**Katie B Cosmetics, Irvine**

Katie Bayliss, Creator/CEO

Katie and Shaun Bayliss, law school sweethearts, are co-founders of Katie B Cosmetics - a subsidiary of parent company Katie B Global. Under Katie B Global are three other companies of which both the husband and wife duo own and manage. They include Katie B Realty, a complete and full-service real estate brokerage representing clients in residential and commercial property transactions; the Bayliss Law, a private law practice with emphasis on business and real estate law; and newly created Katie B Academy which is an educational program to empower women to dream and achieve their goals of entrepreneurship. 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.

**KME Systems Inc., Lake Forest**

Mark Essayian, President

Mark Essayian is president of KME Systems Inc., a technology implementation company he founded in 1993, provides IT consulting and support services to a wide range of clients. Under Essayian's leadership, KME Systems has grown into one of Orange County's most sought-after IT business partners and an influential voice to IT brands worldwide. With just over a dozen employees, the company has enjoyed nearly 40 percent growth YoY (2017 to 2018) and established a \$4 million dollar book of business that is recurring and profitable. KME Systems employee and client retention rates are through the roof, with more than 150 clients on board for more than 25 years. Essayian is recognized within the IT industry as a thought leader, influencing the decisions of emerging and established technology brands.

**Koder Inc., Irvine**

Elmer Morales, CEO/Founder

Elmer Morales is a serial entrepreneur, self-taught software engineer, and angel investor. He is the founder and CEO of Koder. He has 15-plus years of experience building innovative software and leading high-performance engineering teams at companies like Microsoft, Accenture, and American Express. Koder is an Irvine-based gig platform where top coders complete software development tasks and projects offered by businesses and entrepreneurs. Morales leads the company and is responsible for recruiting and leading a global team of CTOs, blockchain developers and software delivery managers. The platform helps companies scale their software engineering teams using a freelance, on-demand workforce. In September of 2018, Koder launched the public beta version on the Apple store. Customers download the Koder app and create tasks by defining specs and programming skills. Koder's algorithm invites its network of coders to perform the requested work. To date, the Koder platform has over 1,000 coders and thousands more in the queue.

**Leaf Communications Consulting Inc., San Clemente**

Dan Leaf, President/CEO

Leaf Communications, created in 2013, evolved from Dan Leaf's previous company started in 2005. Leaf pioneered the DAS industry as one of the first in the new market space for cellular operators. The successful growth and business development of LCS bought by Tempest Telecom was personally driven by Dan Leaf, himself and resulted in an \$80 million national company; he sold it in 2013. Leaf relocated his family to Orange County in 2013 and started his new company bringing existing clients over to from his former business and expanding the market to an even more well-rounded market space. His new company that is still growing exponentially today, Leaf Communications, is a leading DAS and In-building wireless design turn key operations company, implementation and maintenance company for the major carriers in the Western Region of the United States. Leaf Communication Consulting completes full design-build systems to the Fire Life Safety NFPA requirements, Cellular demand for enterprise solutions, as well as the direct relationship with the Cellular Operators as they grow and continue to build out their networks.

**Learning Oventions, Irvine**

Joseph "Jay" Connor, Founder/CEO

Under the leadership of Jay Connor, Learning Oventions launched its research-based software, A2i Professional Support System, in K-3 classrooms this year, as a part of a \$14.65 million U.S. Department of Education scale-up investment. A2i is an "Every Student Succeeds Act" Tier 1 program, designated as having strong research-based evidence, with a mission to radically improve reading outcomes on a systematic level. The Irvine-based startup has rigorously tested the professional support system in seven separate randomized control research trials in multiple states over 13 years, and currently holds a research partnership with the University of California, Irvine. In 2018, Connor was the leading force behind Learning Oventions' debut in four states, 37 communities, 112 schools and more than 850 classrooms to serve 22,000 students. Next academic year, Connor and Learning Oventions will strategically partner with additional communities to serve an increased number of students. A2i uses algorithms to analyze student assessment data to help teachers understand the type and amount of instruction needed to maximize literacy for each student.

**Levyx Inc., Irvine**

Reza Sadri, CEO

Reza Sadri is a 25-year veteran of Orange County's vibrant tech scene. Sadri has been a senior executive at multiple local publicly-traded technology companies including STEC and PROCOM. Also an entrepreneur at heart, Sadri has founded several start-ups including his current project Levyx. Co-founded with Tony Givargis, a professor at UCI, Levyx is revolutionizing how modern data centers process Big Data workloads. Levyx is a venture-backed enterprise software start-up that has raised multiple rounds of financing and counts industry-leading storage companies such as Intel, Samsung, and Dell among its partners. As a cutting-edge storage solution provider poised for accelerated growth, Levyx has been successful at attracting world-class engineering talent to the area. Levyx's award-winning products are improving the way we live our lives by deriving data-driven solutions much faster than conventional data center approaches. These solutions impact a full range of industries including bank risk analysis (including fraud detection), connected car initiatives, and human genomics.

**MAB, Santa Ana**

Omar Karim, Founder

Over the past 16 years, MAB digital marketing and its founder Omar Karim, has shape-shifted with opportunity, proving a diversity in skill set and a natural business sense. Starting as a lead aggregation platform in the early 2000s, MAB has since morphed into a retail agency offering digital marketing with specialties in search, development, social and brand. Along the way, MAB found success as an agency focused on real estate marketing until the market crash in 2008 caused Karim to switch gears and become a partner in a Fintech startup that was sold to a publicly traded bank in 2013. Karim and the MAB team now bring this breadth of experience to their clients. The company recently spun off two in-house projects and is bringing on marquee clients like Mayweather Fitness and OC Goodwill. They also report that customer retention is at an all-time high and revenue is growing at a rate of 50 percent YOY. Additionally, MAB executives are active chairs in Forge54, a nonprofit organization that provides pro bono marketing services to local nonprofits-in-need.

**Madison Alexander PR, Tustin**

Dan Chmielewski, Principal

With nearly 30 years of experience, Dan Chmielewski has spent most of his career working in IT security, enterprise networking, IT software, and internet platform technologies at large corporations such as 3Com and Data General, and working on large accounts at agencies with clients such as Lotus Development, Mitsubishi Mobile Computing, and Legent. In addition, Chmielewski has worked with start-ups like Gradient Technologies and Moss Software, and held senior management positions with technology firms in New York, Boston, and Southern California. And in 2004, Chmielewski started Madison Alexander PR (MA PR), a boutique technology communications consultancy focusing on filling the void for start-up and smaller technology companies, mostly in cybersecurity, to provide senior PR representation to help them grow to the next level. PR is a relationship business and Madison Alexander has developed great relationships with the media by delivering on what we promise when we pitch. MA PR does not have monthly retainers and has a team approach to accounts allowing senior, experienced PR representation that generates coverage, awards, and speaking ops.

**Managed Direct Response, Irvine**

Pat Mercuri, 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 starts 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.





“Business is Family.
That’s why
I’m a Mechanic.”

Brady O’Connell, George O’Connell and Kevin O’Connell

 **Mechanics Bank®**
Where Relationships Matter

“People come to O’Connell Landscape Maintenance because they like the family values; they like that they get to talk to an O’Connell. We have a lot of customers of 30 plus years, and that’s unheard of in our industry. We’ve done it by being honest, and with integrity and hard work, and we follow through on everything. With Mechanics Bank it’s the same – it’s a wonderful relationship. They’re so easy to deal with. I mean, how many CEO’s return your phone calls these days? It’s really important for us to have a good banking relationship – they take a personal interest in us. I’m a Mechanic because I believe in what they are to us: Family.”

— George O’Connell | O’Connell Landscape Maintenance

Irvine | Newport Beach | La Jolla | Beverly Hills | Westlake Village | and 40 locations throughout Northern California and Oregon

Give us a call at 949.270.9719, 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.



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Manna Kadar Beauty Inc., Irvine*Manna Kadar, Founder/CEO*

In January of 2012, after years of careful research and development, Manna Kadar Cosmetics was born. A prestige line of luxury cosmetic products formulated with the finest ingredients and most innovative technology. Manna Kadar designed the one and only Beauty Simplified System that minimizes the makeup application process to seven minutes or less. The award-winning Beauty Simplified System separates the makeup application process in three steps; Step 1- Prime, Step 2-Polish and Step 3-Perfect. Each product clearly indicates which step the product should be used indirectly on the product. This process guides women on how to easily create their desired look on a daily basis. 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 has received the USC Remarkable Women's Award in 2014 and has been recognized as one of the Fastest Growing Businesses by the Business Journal.

**Modulated Imaging, Irvine***David Cuccia, CEO/CTO*

Modulated Imaging is a direct result of David Cuccia's undergraduate work and doctoral dissertation at UC Irvine, and he is an internationally recognized pioneer and leader in the field of Spatial Frequency Domain Imaging (SFDI). The medical device company originally spun out of the Photonic Incubator in the Beckman Laser Institute and Medical Clinic (BLI) at UC Irvine. Dr. Cuccia founded Modulated Imaging to develop optical technologies that will impact a number of clinical problems in the diagnostic and therapeutic monitoring sector, particularly prediction, staging, and monitoring of chronic wounds. To date, Dr. Cuccia and his team have successfully raised approximately \$20 million in grant and private investment capital to develop the company, which includes a \$7 million first close of B-round funding in December 2018. He has also successfully secured over \$6.5 million in SBIR/STTR grants that facilitated the development of our Ox-Imager® technology and has six patents to his name and forty co-authored SFDI publications. Recently, Modulated Imaging received 510(k) FDA clearance for Clarifi, a quantitative, non-contact optical device for wide-field imaging of subsurface circulatory compromise, and aimed at helping Diabetic patients avoid complications such as chronic wounds and resulting amputations.

**Montessori Funtime Preschool, Lake Forest***Dr. Seema Choudhary, Executive Director*

The Montessori Funtime Preschool was founded in 2008 when Dr. Seema Choudhary's kids were little. Coming from a family of educators, her pursuit of excellence in education led to gaining further education & training in ECE (Early Childhood Education) and Montessori methodology of teaching. Between the ages of two to five years, children are at the apex of their ability to learn, their brains are like sponges and can soak up learning and that's why so important. Montessori activity time is a pivotal part of her program and with an equal emphasis on art, sport, group time, music & movement and healthy food. Kids blossom into avid capable and avid readers and are ready to learn more before graduating to kindergarten. Choudhary believes in 'Whole-child-development' with family involvement as the pillar of her school's foundation.

**Moxxe PR, Inc., Santa Ana***Mona Shah, Owner*

Mona Shah, the owner of Moxxe PR, stands out in the OC business world because in 2004 when her father was diagnosed with pancreatic cancer, she made the decision to leave her position as media relations director at a successful OC-based PR firm to spend time with him. After he passed away, she made the decision to build the PR firm and to carry on her father's legacy. He was a successful orthopedic surgeon, who possessed an MBA and was always striving to continue growing. Her goal was to make Moxxe successful - not into the biggest agency in Orange County, but the best. Although she services a wide variety of clientele, she has found her niche as an OC restaurant publicist and has created a reputable name for her company. In addition to handling the publicity for some of OC's most recognized restaurant concepts, Mona Shah sits on the Board of Directors of the Orange County Restaurant Association and promotes OC's largest culinary event, Orange County Restaurant Week.

**NB Private Capital, Aliso Viejo***Brian Nelson, President/Founder*

In 2007, Brian Nelson founded Nelson Brothers - a real estate investment firm specializing in university student housing with his brother Patrick. Not an easy task heading into a deep recession. With little money, a great concept, hard work and the ability to listen and adapt to clients' needs, Nelson led all sales and marketing efforts to help boost the company to over \$800 million in real estate management and over 1500 clients. By 2017, Nelson Brothers were named by Inc. 500 as the 4th fastest private growing real estate company in the U.S. and the 127th fastest growing company overall. In 2018, concerned about the impact rampant growth could have on the performance and relationship with investors - the keys that built the foundation of the company - Brian Nelson parted ways with Nelson Brothers and founded NB Private Capital. The goal was to transition this same drive built around the investors' needs, not growth. The company has been active, innovative



and effective and already ranked as the 29th Top Student Housing Owners by Student Housing Business Magazine.

Nextworks Strategy, Irvine*Scott Hamilton, CEO*

Scott Hamilton is the founder of Nextworks Strategy, a top advisory firm to small and middle market business. Nextworks has helped clients in several industry verticals including healthcare, hospitality, technology, engineering, and construction to improve their strategy execution and ability to scale. Nextworks Strategy is the pioneer in the use of collective IQ and stakeholder alignment tools via their unique business mapping services- Immerse Maps. Nextworks has also pioneered a new approach to strategic planning that allows organizations to be more agile and adaptable in today's digitized, fast-paced markets. Hamilton has grown Nextworks Strategy into a nationally known advisory firm over the past eight years while also leading the ENP Institute at UCI Applied Innovation. Hamilton has assisted the leaders of several hundred firms to be more strategically effective and on average increase revenues by 11 percent or more via a typical engagement.

**OC Marketing Solutions, Dana Point***Gina Waggener, Executive Director*

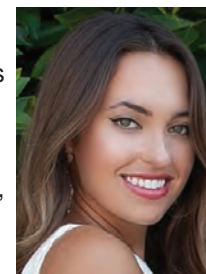
Gina Waggener is the founder of OC Marketing Solutions. With over 10 year experience in creating dynamic events in the US and overseas. She has managed all aspects of event planning, securing sponsors, establishing long-term vendor relationships, event pre-production, execution and fundraising for small to large business. As the marketing and events director, she increased event revenue and public appeal by forming strategic partnerships with non-profits. A percentage of sales going to various charities has resulted in increased attendance and sponsorships for her clients. Waggener is most known for her ability to increase public appeal by creating dynamic events that amplify the message, attract media attention and brand clients in the OC Market. Small business is her specialty in which she is able to customize a marketing program to fit any budget. Waggener knows what it takes to grow a successful business and specializes in launching entrepreneurs, startups and advising the sustainability communities. She and her team empower business owners by implementing effective marketing strategies; tools and training maintained by their staff or an outsourced CMO.

**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 aluminum web-store in 2007 and has evolved into one of the fastest-growing metal centers with recognition on the INC. 5000 list of fastest-growing companies in America for three years in a row. Orange Aluminum has successfully partnered with local and national companies on projects such as the Apple Campus, Newport Beach Country Club, and Hard Rock Hotels. Additionally, the company has a dedicated philanthropy program, where staff members collaborate to choose different charities to benefit from quarterly sales.

**Outshine Public Relations, Newport Beach***Talia Samuels, President*

At 23 years old, Talia Samuels founded Outshine Public Relations in 2015 with the desire to shine awareness on Orange County's top culinary talent. Recognized as one of Orange County's leading restaurant public relations firms, Outshine Public Relations proudly represents the industry's top chefs, restaurants, and culinary brands. Samuels works on behalf of a top-tier list of award-winning clients that entrust her to help their businesses succeed by increasing exposure through earned print, digital, television, and radio opportunities complemented with expertly executed social media and digital content strategies. Samuels sits on the board of directors for the California Restaurant Association's Orange County Chapter and the Newport Beach Restaurant Association. She has spearheaded campaigns for some of Orange County's most celebrated restaurants and celebrity chef personalities.

**Pendulum Property Partners, Irvine***Kevin Hayes, Managing Partner*

Since its formation in 2016, Pendulum Property Partners has acquired over 1,825,000 square feet of commercial office and retail office product, totaling more than \$599,000,000 in acquisition value. Each acquisition has been in a joint venture with highly discerning institutional capital including GEM Realty Capital, Longwharf Capital, CADRE, ARES Capital Management, and Goldman Sachs. Additionally, Pendulum operates and asset manages a 3.5 million square foot portfolio on behalf of family office capital. Through its acquisitions and operation of these physical assets the firm executes on value add strategies that benefit the surrounding communities. Outside of making the acquisitions and successful integration into operations, Pendulum has been successful in growing net operating income on its portfolio through a variety of business plan executions on varying assets.

**PeopleG2, Brea***Chris Dyer, CEO*

PeopleG2 was founded in 2001 by Chris Dyer and has become a leader in providing background check solutions to both large and small businesses and non-profit organizations. Chris believes that impersonal, automated background check solutions



FIFTH THIRD BANK



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have no value in the global talent management spectrum, especially as it relates to strategically significant individuals and teams. This is why he built a company with innovative services which mitigate risk and maximize best fits – whether for a prospective candidate, a promotion candidate or even entire executive teams. Noted for its hands-on, human approach in a highly automated industry, PeopleG2 continues to grow and has been recognized as one of the Best Places to Work in Orange County, one of the Fastest Growing Companies in Orange County as well as the 2018 Inc. 5000 list. PeopleG2 continues on a positive revenue growth trend, and in 2018 had its highest annual revenue as a company. In 2009, the company moved to a virtual model and has continued to be successful and achieve marked growth year after year.

**QuestSoft, Laguna Hills**

Leonard Ryan, Founder/President

Leonard Ryan has served as a leader in the Orange County mortgage industry for more than 30 years and at the helm of QuestSoft, which he founded, for more than two decades. In addition to significant growth over the past several years, Ryan and his company have been recognized with more awards than any other technology company serving the mortgage and banking industries today. Under Leonard Ryan's leadership, QuestSoft has excelled as the market leader in mortgage compliance automation. QuestSoft has grown its market base to more than 2,500 unique lending institutions using QuestSoft's software to automate HMDA, CRA, fair lending and other mortgage compliance products and services. Its products give instant feedback on whether a loan application violates new laws established by the Consumer Financial Protection Bureau and state regulators.

**Perfect Point EDM Corp, Huntington Beach**

William Larry Harrell, President/CEO

Perfect Point is an entrepreneurial company founded in 2005 by Larry Harrell, focused on the Aerospace industry. Perfect Point is "revolutionizing aircraft maintenance" with a game-changing solution to removing high-strength fasteners from aircraft structures called the E-drill. E-Drill removes fasteners 20 times faster than conventional drilling, reduces aircraft damage to less than one percent vs the industry average of 20 percent, and eliminates drilling debris. This means aircraft on the ground time for maintenance is substantially reduced. The E-drill proudly flies the made in the USA flag and uses local suppliers in support of our community. They actively support military veteran programs. The Company employs about 20 individuals from the local Orange County area and has current annual sales of ~\$5 million. Its customer base includes Boeing, Northrop Grumman, Lockheed, the USAF, USN, USMC, Airbus, Gulfstream, and many others in the U.S. and abroad.

**Rallio, Irvine**

Chuck Goetschel, CEO

Rallio is more than a social media management technology, it's a smarter, simpler way for brands to maximize social marketing efforts. Rallio technology provides a complete social media ecosystem allowing manufacturers, corporate brands and their locations, employees, and customers to build a local community, share experiences and drive local business. The Rallio Local division also provides agency-style support services to help franchise locations manage their online reviews, advertise on social platforms and grow their social media following. With several investors and a growing team, Rallio is forecasted to triple in revenue in 2019 through its products and services for franchises, brands, and multi-unit locations.

**Plutos Sama LLC, Irvine**

Matthew Browndorf, CEO

Matthew Browndorf founded Plutos Sama LLC in 2013 and now works as the CEO, chairman of the Board of Directors and managing member. Plutos Sama Holdings Inc. is a private equity company in the business of taking control positions in residential and commercial real estate ventures, micro-lending, securitizations, law firms, restaurants, mortgage servicing, and e-sports. Plutos Sama LLC developed a diverse and stable revenue stream in an expanding or declining, an economy that is cyclic agnostic to origination volume and supply of non-performing loans. Revenue streams across all business platforms are enhanced with cross-selling of services that work due to the complementary platforms that service each other, providing clients with a one-stop shop for all their professional needs. Browndorf is an experienced investment advisor and has led the Plutos Sama affiliates to make successful strategic decisions positioning itself for organic growth in emerging markets while aggressively pursuing merger and acquisition growth across all brands.

**Realty ONE Group, Laguna Niguel**

Kuba Jewgieniew, Founder/CEO

Since 2005, Realty ONE Group has been a 100 percent debt-free and family-owned company that continues to experience tremendous growth year over year. With over 11,000 real estate professionals and 160 office locations spanning across 35 states and four provinces in Canada, Realty ONE Group continues to grow by leaps and bounds while making an impact on its professionals by providing superior service, coaching, and technology to ensure they will achieve growth within their career. Realty ONE Group is proud to be recognized by Entrepreneur Magazine's Franchise 500 as the No. 1 Real Estate Franchise in the Top New Franchise category, INC. 500/5000 for seven consecutive years, and is ranked in the Top one percent in the Nation by REAL Trends. The quickly growing franchisor has also been recognized by Franchise Times as one of the country's fastest growing franchisors and is the only real estate brand to be recognized as one of the Top 10 fastest growing franchisors by unit.

**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.

**Route Four LLC, Newport Beach**

Ken Alston, CEO

Since acquiring Hydroponics in July 2018, Ken Alston has streamlined the mom-and-pop company into a professional corporation and has increased profit margins by 25 percent. Alston changed the direction of the company away from servicing small-farm, walk-in clients toward partnering with many of the largest indoor hydroponics facilities in the nation. Hydroponics now offers its clients professional procurement schedules and ROI analysis tools—services that have previously not existed within the industry. Hydroponics now represents the largest indoor hydroponics farms in terms of square footage in the nation. In an effort for fast expansion, Alston identified the company's financial needs and followed through by hiring a public-relations firm, a sales director, and a marketing team. Alston holds an MA from Columbia University and a BA from Southern Methodist University. He has been a periodic lecturer on the subject of search funds and entrepreneurship-through-acquisition at USC.

**Ryan's Recycling, San Juan Capistrano**

Ryan Hickman, President

Ryan's Recycling is run and operated by nine-year-old, Ryan Hickman. Ryan's Recycling is responsible for recycling nearly half a million cans and bottles over the past six years with the intent to keep them from being diverted to the landfill or ending up in the ocean. Ryan's Recycling is also responsible for raising nearly \$9K in donations for the Pacific Marine Mammal Center in Laguna Beach to help with marine animal rescue. Ryan Hickman is responsible for bringing recycling and environmental awareness to the forefront through his recycle awareness events he puts on across the country and his speaking engagements to thousands of kids across the country. His videos have been watched over 200 million times across the planet and he's not planning on slowing down any time soon. Hickman also organizes local beach cleanup events a few times a month with locals and has been a featured inspirational speaker at many organizations - Chapman University, UC San Bernardino, Wyland Foundation, WE.org, Leadership Tomorrow.org, and the Pacific Marine Mammal Center.

**Protecht, Newport Beach**

Bryan Derbyshire, CEO/Founder

TicketGuardian has successfully raised \$13 million in capital since inception in 2016 and Bryan Derbyshire has grown his company to be the leader in the Insurtech industry in a short two years. In addition, he has created a need for the growing demand of the marketplace and the major need for his services. When they were in beta with their MVP product with their first platform partner, as when they released the initial version of TicketGuardian and saw that attendees and registrants were opting to cover their tickets at 18-32 percent conversions, they knew that they were on to something and solving a real issue that the consumer demand was asking for. Additionally, his company spent a year rebuilding the entire dev stack to be Enterprise ready in regards to security and scalability to take on the biggest ticketing platforms in the world, and they landed their first platform that sold over 25 million paid online tickets. The technology they offer is second to none and has vertical scalability, unlike no other company.

**Salas O'Brien, Santa Ana**

Darin Anderson, CEO

When Darin Anderson and partners Chuck O'Neal and Paul Silva acquired an 85 percent share of Salas O'Brien in 2006, the firm's revenue was a healthy \$4.8 million. Under his leadership, revenue doubled in the first two years and the firm was listed on the MEP Giants list for the first time, coming in at No. 97. Despite a significant

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recession across the United States from 2008-12, Salas O'Brien had only one year with billings less than the previous year. Anderson led the first successful merger in 2012, bringing on additional business units in Northern California and Seattle. He retained the original leadership of the acquired firms in order to maintain a local, entrepreneurial focus while creating a national presence. Since then, he has expanded that national presence through eight additional mergers, resulting in the growth of the firm to 19 offices, more than 110 registered professionals, and more than 550 employees. In 2016, Salas O'Brien converted to an ESOP, fulfilling the vision that Anderson and partners had shared for the company since 2006. At nearly \$100 million in annual revenue and more than \$3.5 billion in construction volume, Salas O'Brien continues to grow and flourish under Anderson's leadership.



Service Champions Heating & Air Conditioning, Brea
Leland Smith, Owner

Service Champions Heating & Air Conditioning was founded by Leland Smith in March of 2000, with one goal in mind: to provide homeowners a service that is beyond their expectations by developing technicians into being true champions of service. Smith started the company with just himself in the office and six technicians in the field. Service Champions now has over 200 employees. Service Champions is Southern California's best heating & air conditioning company. They service, repair, and install all kinds and brands of heaters and air conditioners. Service Champions is the only Southern California HVAC contractor to have earned the prestigious Diamond Certified Award. Service Champions has earned the Diamond Certified Award for eight consecutive years. The honor was given to them for exceeding the rigorous standards for client satisfaction and performance.



Sessions West Coast Deli, Newport Beach
Max Schlutz, Executive Chef/Partner

As the executive chef & partner of Sessions West Coast Deli with locations in Newport Beach, Huntington Beach and Irvine, Chef Max Schlutz presents a menu of gourmet, culinary-focused sandwiches in a relaxed environment. Unlike most sandwich shops in the region, Sessions proudly boasts a scratch kitchen with housemade sauces, sides, salads, and soups prepared daily. All sandwiches are made to order with fresh, locally grown produce; humanely and naturally raised meats; and locally baked bread delivered daily from a local artisan, OC Baking Company. Along with his two partners, Schlutz will be leading the restaurant as it continues to expand to new locations. Schlutz has created a critically acclaimed menu that has gained serious traction in the OC community. Sessions is poised for growth in 2019, with two locations currently in development.



Shine Illumination, San Juan Capistrano
Bruce Brenon, Founder/CEO

Bruce Brenon is a natural born entrepreneur who is dedicated to creating memorable experiences that attract crowds to public spaces. He started his first business (a lawn mowing service) at a young age in his Missouri hometown. That grew into a thriving landscaping business to eventually include holiday decorating for clients' homes and commercial properties. In 2006 he ventured to California and founded Shine Illumination. Brenon's client base in SoCal grew from a few HOAs and private homes to major retail, harbor and hotel properties requesting holiday and event installations to attract thousands of experience seekers nightly. Today, Brenon and his team of 25 designers, fabricators, installation crews and project managers create legacy experiences and iconic destinations – such as Dana Point Harbor's #HappyHarborDays and the Merry Kiss Me installation that has gone viral on Instagram. Dana Point is going into its fifth year of bringing people together and helping businesses thrive in otherwise slow winter months.



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. Most recently, she received the Ellis Island Medal of Honor from the National Ethnic Coalition of Organizations-NECO 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 percent over the last six years.



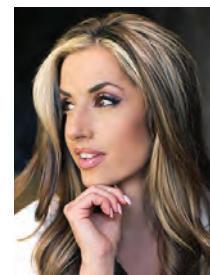
Sparkhouse, Irvine
Torrey Tayenaka, Founder

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 videographer agency that combines video production and strategic marketing company.



Sterling Public Relations, Corona del Mar
Paula Steurer, President

Sterling Public Relations, Inc. was founded in 2008 as a Publicity, Branding and Marketing hybrid by entrepreneur Paula Steurer. Committed to her clientele and their diverse brands, Steurer's innovative vision, strategic approach, and tenured industry relationships have played a vital role in propelling each company to the forefront of their respective industries. With a passion for building brand identities and her innate ability to connect, engage and drive brands to the next level, Steurer has become a trusted authority among entrepreneurs and executives. She has been selected as a keynote speaker and workshop leader by nationally recognized brands such as Mindbody Inc, Vizio, and Oracle to educate a variety of generations on how to design, implement and execute top-notch PR and marketing initiatives that drive results. Through her leadership, Sterling Public Relations has become the in-demand firm for brands throughout California and North Texas who desire a competitive edge.



Synoptek Inc., Irvine
Tim Britt, CEO

Founder and CEO of Synoptek and entrepreneur at heart, Tim Britt provides management consulting, including IT strategy and implementation leadership to companies that leverage technology to win — a mission he's been on for more than 20 years. In response to the growing need for high-value consulting and IT managed services, Tim Britt opened Synoptek's doors 15 years ago. Today, with 500-plus employees and an exceptionally high bar raised when it comes



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to customer service, Synoptek's offices stretch from Los Angeles to New York and a dozen cities in between. Under Britt's leadership, Synoptek has completed ten acquisitions. Between 2012 and 2018, Synoptek had more than 750 percent growth. The work was prodigious but Britt and his management team persevered, working 80-hour work weeks with diligence and ownership to realize the company's mission and vision. Since the evolution of Synoptek, Britt took on a philosophy that said, "we can do it better" and it spread.

Syntiant Corp., Irvine*Kurt Busch, CEO*

Kurt Busch is the chief executive officer of Syntiant Corp. He has extensive experience in product development, having driven the successful launch of new products, ranging from SAS and semiconductors for telecom and broadcast video to consumer electronics and data center systems. He founded Irvine-based Syntiant to bring artificial intelligence from the cloud to the end device. The company is developing a new kind of processor that is 50x more efficient than existing solutions. Syntiant's AI chips can be found in products as small as hearing aids to as large as smart speakers and laptops. The company has moved very fast in the last 18 months, from closing its Series A round in October 2017, to sampling its first products in June 2018, to closing its Series B round in October 2018. Early this year, Syntiant will be manufacturing its first commercial chip for customer delivery.

**Terra Tech Corp., Irvine***Derek Peterson, CEO*

Derek Peterson is the Founder and CEO of Terra Tech Corp. Terra Tech Corp. is a vertically integrated cannabis-focused agriculture company. They're pioneering the future by integrating the best of the natural world with technology to create sustainable solutions for medical cannabis production, extraction, and distribution, plant science research and development, food production and Closed Environment Agriculture (CEA). Through this development, they have created relevant brands in both the cannabis and agriculture industries in Nevada and California. In 2018, Terra Tech Corp. expanded their footprint in Southern California receiving permits to operate two additional retail dispensaries as well as cultivation and extraction in the City of Santa Ana. These facilities will be in addition to their existing retail asset, Blüm on Tech Center Drive in Santa Ana.

**Tevora, Irvine***Ray Zadjmool, Founder/CEO*

Ray Zadjmool founded Tevora in 2003 after seeing a gap in the security industry and felt a better thought process around risk and cybersecurity was needed. He established Tevora as a cybersecurity consulting firm with the goal of helping organizations of any size secure one of their most valuable assets: their digital information. He envisioned a company that could partner with organizations start to finish, from the sales process to compliance and finally, through maintenance, and built out a comprehensive set of services. Today, Tevora is proud to serve over 300 customers worldwide and offers a vast array of products and services around enterprise risk, compliance, incident response, threat management, data privacy, security solutions, and cloud security. Additionally, Tevora has been on the INC. 5000 list of Fastest Growing Private Companies for five consecutive years and has been named a Top Workplace in Orange County the last two years. Tevora is now 100 employees strong with offices in Irvine, CA and New York City.

**The 12, Costa Mesa***Josh Boyd, CEO/Co-Founder*

A driven entrepreneur, respected thought leader, and fitness industry innovator, Josh Boyd is the driving force behind the nationally acclaimed brand, The 12. Founding The 12 in 2013, following his own life-changing transformation, Josh set out on a quest to bring The 12 experience to men and women across the country. Beginning with their first brick and mortar location in Irvine, California, the company also has locations in Costa Mesa and Huntington Beach, California. Expanding nationally with corporate locations in Texas slated to open in 2019, The 12 has also launched their franchise program with the first franchise locations opening in Tustin and Long Beach in quarter two of 2019. In recognition of his dynamic leadership abilities and commitment to challenging the status quo to ignite change, Josh has become an in-demand public speaker and mentor, participating in workshops, seminars and speaking engagements across the country.

**The Literacy Project, Newport Beach***Sue Grant, Founder*

Sue Grant is a visionary whose passion to give the gift of literacy to young, struggling readers has fueled the formation and success of The Literacy Project, a nonprofit dedicated to serving at-risk children threatened to become illiterate adults. After collaborating on a literacy pilot program at the University of California, Grant developed an irresistible desire to provide disadvantaged youth with the tools to succeed in life; which inspired her to create The Literacy Project in 2009, thus beginning her lifelong journey to help "bridge the literacy gap."



Today her vision and leadership has brought the reading program to more than 8,500 children in school districts throughout Southern California and has raised over \$3.2 million for the cause. In 2018, the organization crossed state lines with the opening of a new chapter in Park City, Utah.

The Saywitz Company, Newport Beach*Barry Saywitz, President*

Barry Saywitz is the founder of The Saywitz Company—one of the largest privately held commercial real estate brokerage firms in Southern California. The firm exclusively represents tenants, companies, and users of commercial real estate on an international, national and local basis. The company has been in business for more than 40 years and continues to be one of the leaders in tenant representation in Southern California. Saywitz's main achievement is when he became a partner in Howard Ecker and Company in California and in 1994, he purchased the West Coast operations and changed the name of the company to The Saywitz Company. In addition, he founded Barry Saywitz Properties—which afforded him the opportunity to turn the transactional cash flow from the brokerage business into monthly stabilized cash flow from rental income. Barry Saywitz Properties started with one rental property in Newport Beach in 1997 and today encompasses more than 75 multi-family commercial, retail and industrial properties throughout Southern California.

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

Jeff Motske, CFP®, is president and CEO of Trilogy Financial, a privately held financial planning firm headquartered in Huntington Beach. Seeking a better version of the industry he had grown to love, Motske founded Trilogy in 1999 after observing that the "Wall Street-style" mentality of his peers conflicted with the "Main Street-style" needs of his clients. For the past 25 years, Motske has empowered everyday Americans to pursue the day that work becomes an option by providing easy-to-understand advice, educational tools and supportive guidance. Today, Trilogy has 10 offices and more than 100 advisors nationwide serving \$2.75 billion in brokerage and advisory assets. In just over three years, Trilogy Capital has grown to more than \$930 million in assets under management – a rate of growth that is unprecedented in the RIA space. In 2018, Financial Advisor Magazine named Trilogy Capital one of the fastest growing RIAs in the nation.

**uDirect IRA Services, Irvine***Kaaren Hall, CEO*

Despite being in the midst of a recession and mortgage market collapse, Kaaren Hall founded and made a resounding success of uDirect IRA Services. The single mom discovered a strategic way to put her 20-plus years in mortgage banking, real estate, and property management to use. The solution was an untapped market for both her skills and for investors – self-directed IRAs. Through uDirect IRA, she has guided tens of thousands of Americans through the process of diversifying their investments using self-directed IRAs. Because self-directed IRAs can have a dramatic impact on retirees' quality of life, Hall brings her full passion for educating Americans about the little-known investment vehicle. She has educated tens-of-thousands of investors and professionals on how to build wealth by taking control of self-directed IRAs.

**Union Choice, Aliso Viejo***Donald Peart, President/Founder*

Don Peart, founded the company in 2004 under the name American Union Services, now Union Choice, has grown into a full-service real estate firm, focusing on the wealth building needs of first responders, public safety associations and labor unions through the development of diversified real estate portfolios. Mr. Peart has over 25 years of experience in the mortgage industry as either a principal or broker in a variety of highly successful enterprises. Union Choice, a real estate investment holding company has experienced phenomenal growth, providing financial services designed to build lasting wealth and prosperity for all its clientele. President, Don Peart is the No. 1 endorsed Home Lender for First Responders and IBEW throughout Orange County and LA County.

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

Joe Duran built United Capital, which pioneered the financial life management ethos that is catching like wildfire in the financial advice industry, from the ground up in 2006. Today, the firm manages over \$23 billion in client assets and is ranked No. 2 in Barron's 2018 list of Top 40 Independent Financial Advisors. United Capital helps clients see how their money fits into the bigger picture of their lives and has built a suite of technology and gamified tools, like Honest Conversations and MoneyMind, empowering clients to understand their own goals. United Capital has experienced tremendous growth through the acquisition of firms seeking to modernize their practice, and through FinLife Partners, offering United Capital's proprietary technology to independent third-party advisors. Since its inception in 2016, FinLife Partners has grown to \$23 billion in assets under contract.





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–The Team at United Capital

A photograph of Joe Duran, the Founder and CEO of United Capital, speaking at a podium. He is wearing a dark polo shirt and glasses. Behind him is a large screen displaying the words "UNITED CAPITAL". The foreground shows the silhouettes of an audience seated in a dark room, looking towards the speaker.

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“ At United Capital,
we always strive to be
better this Friday than
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–Joe Duran



Congratulations Nominees

2019

11 Health and Technologies Inc. - Michael Seres
 Advertify - Daniel Robbins
 AIVITA Biomedical - Dr. Hans Keirstead
 All Green Electronics Recycling - Arman Sadeghi
 American Advisors Group - Reza Jahangiri
 Amnion Life - Amir Fassihi, M.D.
 Anduril Industries Inc - Palmer Luckey
 Antis Roofing & Waterproofing - Charles Antis
 Antonello Ristorante - Antonio Cagnolo
 Arbela Technologies - Nima Bakhtiary
 Austin Taylor Inc. - Ron Viggiano
 Axonics Modulation Technologies Inc. - Ray Cohen
 B. Toffee LLC - Betsy Thagard
 Beeya - Ladan Davia
 Below Invoice - Cole McKeon
 Beyond Fifteen Communications Inc. - Lauren Ellermeyer
 BHE Management Corp. - Marla Brower Hemmel
 Business Communications Solutions - Sunny Rajab
 CapRock Partners - Jonathan (Jon) Pharris
 ConversionPoint Technologies Inc. - Robert Tallack
 Cuddly - Natalie Kalea
 Directive - Garrett Mehrguth
 Diverse Janitorial - Roland Cordero
 Elite Connections - Sherri & Tammi Murphy
 Ephesoft Inc. - Ike Kavas
 Ergo21 - Steve Gambhir
 Forever Ageless - Joseph Cerni
 FUSION OF IDEAS - Russ Taylor
 Gorilla Stationers LLC - Rosemary Czopek
 H. Hendy Associates - Heidi Hendy
 Helix Semiconductors - Harold Blomquist
 I/Metro - Erik Leckner
 Idea Hall - Rebecca Hall
 iWALKFree Inc. - Brad Hunter
 Just Food For Dogs - Shawn Buckley
 Kareo Inc. - Dan Rodrigues
 Karma Automotive - Dr. Lance Zhou
 Katie B Cosmetics - Katie Bayliss
 KME Systems Inc. - Mark Essayian
 Koder Inc. - Elmer Morales
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 MAB - Omar Karim
 Madison Alexander PR - Daniel Chmielewski
 Managed Direct Response - Pat Mercuri

Manna Kadar Beauty Inc. - Manna Kadar
 Modulated Imaging - David Cuccia
 Montessori Funtime Preschool - Dr. Seema Choudhary
 Moxxe PR Inc. - Mona Shah
 NB Private Capital - Brian Nelson
 Nextworks Strategy - Scott Hamilton
 OC Marketing Solutions - Gina Waggener
 Orange Aluminum - Cameron Munson
 Outshine Public Relations - Talia Samuels
 Pendulum Property Partners - Kevin Hayes, Jr.
 PeopleG2 - Chris Dyer
 Perfect Point EDM Corp - William Larry Harrell
 Plutos Sama LLC - Matthew Browndorf
 Powerhouse Communications - Kristin Daher
 Protecht - Bryan Derbyshire
 QuestSoft - Leonard Ryan
 Rallio - Chuck Goetschel
 Realty ONE Group - Kuba Jewgieniew
 Route Four LLC - Raymond Mao
 Ryan's Recycling - Ryan Hickman
 Salas O'Brien LLC - Darin Anderson
 Service Champions, Inc. - Leland Smith
 Sessions West Coast Deli - Max Schlutz
 Shine Illumination - Bruce Brenon
 Ship & Shore Environmental Inc. - Anoosheh Oskouian
 Sparkhouse - Torrey Tayenaka
 Sterling Public Relations - Paula Steurer
 Synoptek, Inc. - Tim Britt
 Syntiant Corp. - Kurt Busch
 Terra Tech Corp - Derek Peterson
 Tevora - Ray Zadimool
 The 12 - Josh Boyd
 The Literacy Project - Sue Grant
 The Saywitz Co. - Barry Saywitz
 Trilogy Financial - Jeff Motske
 uDirect IRA Services - Kaaren Hall
 Union Choice - Donald Peart
 United Capital Financial Advisers - Joe Duran
 Vengo Design International - Nancy Vengochea
 Vincit - Dalip Jaggi
 Vincit - Ville Houttu
 ViridiSTOR LLC - Terry Mullin
 WMBC - David Coles
 WMBC - Evan Coles
 WMBC - Scott Coles
 Zadara Storage - Nelson Nahum



Keynote Speaker

Bob Olson,
CEO & Founder

R.D. OLSON
DEVELOPMENT

Bob Olson is the founder of R.D. Olson Development, a Newport Beach, California-based firm engaged in the development of commercial properties nationwide with a specific focus on hotels and resorts.

A specialist in developing hospitality properties, the firm is also experienced in the development of office, retail, multifamily and recreational projects. Mr. Olson's longstanding experience as a builder has proven to be highly beneficial for development projects.

R.D. Olson Development is recognized for its ability to identify and act on opportunities, delivering solid execution through all phases of entitlements, design and development while maintaining focus on the business strategy and the bottom line.

Luncheon & Awards Program

March 12, 2019
12:00 p.m. - 2:00 p.m.

HOTEL IRVINE.

Tickets*: \$175 / Table of Ten: \$1650

Reservation Information

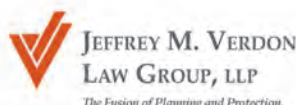
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2019 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Vengo Design International, San Clemente*Nancy Vengochea, Owner/Lead Interior Designer*

Nancy Vengochea has redesigned estates for notable clients seeking to create their dream homes and businesses internationally. With a keen meticulous eye for detail and ability to create spectacular living environments, it has earned Vengochea a top reputation among clients that include Hollywood celebrities, famous sports figures, and the international elite. She simplifies the complexities of luxurious high-end designs and seamlessly integrates architecture and environments, with both aesthetic and everyday living.

**Vincit, Irvine***Ville Houttu, CEO*

Ville Houttu is the Founder and CEO of Vincit California, Inc. Previously, he worked as the Head of Business Development at Vincit Group, helping the Finnish company to reach 350 employees and make it public in Nasdaq First North marketplace. Since founding Vincit California, Inc. Ville has grown the company to 30 US-based employees who have worked on 33 successful technical projects, including work for Logitech, Yamaha Watercraft, Irvine Company, Friar Tux, KCRW and other top-tier clients across multiple industries. Ville was awarded the 2018 Entrepreneur of the Year Award from Irvine Chamber of Commerce and has received increasing press coverage for his work in Orange County due to the quick expansion of Vincit. Ville also led the 2018 acquisition of Irvine-based Devise Interactive.

**Vincit, Irvine***Dalip Jaggi, Head of Business Innovation*

Dalip Jaggi has been recognized as an active, young entrepreneur filled with high energy, passion, and new ideas. Jaggi kicked off his career as the principal and founder of Devise Interactive, a brand & digital agency with a unique flavor. This innovation shop was acquired in December 2018 and has helped entrepreneurs & companies with their early-stage concepts & innovations. Jaggi now holds the Head of Business over at Vincit. Jaggi is professionally driven by tech-centric solutions that are built for a purpose. He is the co-founder of EvaDrop, the world's first smart shower device and Fraxtion, an easy to deploy kiosk for brick-and-mortar shops. Both startups are bringing cutting-edge technology to the market. Personally designed to explore, experience, and master new skills. Jaggi's interest in philanthropy has lead him to be the co-founder of Forge54, a nonprofit organization.

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

ViridiSTOR LLC was founded in 2008 by Terry Mullin and leading technology company executives who bring decades of experience in the computer hardware and software industries to the company's focus on distribution of non-paper based electronic information for the trade show and conference industries. Mullin continues to be an active innovator and business builder in Orange County. He has formed and lead teams in market-leading companies that have brought first in class software and hardware to the market. Within his latest venture, ViridiSTOR, Mullin has launched a new era in compact content management systems to deliver information to the \$595 billion dollar event, conference, and tradeshow industry. His innovations not only make sense but reduce monetary costs 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 has other patents pending in the area of wireless networking, retail management, and sustainable products.

**WMBC, Lake Forest***Evan Coles, Creative Strategist*

Evan Coles is the creative strategist behind WMBC and their team of industry-leading experts. Bringing his innate human-centric philosophy to the forefront of his professional endeavors, Coles co-created WMBC's innovative Human Centric Wealth Planning. In a league of its own, Human Centric Wealth Planning has been pivotal in designing wealth plans that allow the firm's clients to live their lives in fulfillment now-not just in retirement. By addressing the full spectrum of an individual's well-being, the system allows for advisors to have greater empathy for their clients and therefore create more creative and impactful financial systems. Coles graduated from Brigham Young University with a Bachelor of Science degree in Advertising.

**WMBC, Lake Forest***David Coles, COO/Wealth Advisor*

David Coles is the chief operations officer, a Wealth Advisor, and one of the driving influencers at WMBC. As a firm believer in people and their genuine nature, Coles co-created the Human-Centric Wealth Planning™ process. This process takes the raw data of financial planning and pairs it with the latest in well-being science to create a truly unique and impactful wealth



plan for the client. The creation of Human Centric Wealth Planning™ began in 2015, born of the realization that 1) issues such as family relationships, career decisions, or vitality were much more important to individuals than the rate of return they can achieve and 2) that money is the main tool individual's use to bring about change or improvement in their life.

WMBC, Lake Forest*Scott Coles, President/Wealth Advisor*

Pioneering the evolution of wealth management since the early 80s, Scott Coles is the founder of WMBC. As a trusted advisor for both clientele and industry professionals, Coles has earned nearly 40 years of experience which serves as a dynamic platform for himself and his team to draw solutions and opportunities from. Coles is a Charter Financial Consultant (ChFC), Chartered Life Underwriter (CLU), and Specialist in Complex Estate and Tax Planning. He is also the founder of Colwin Financial Insurance Services, Inc and the former radio show host of "You and Your Money", 640AM. Bringing the human element to the forefront of each and every decision, Coles recognized the need for human centric wealth planning that brings comprehensive value to the lives of those he serves. With a dedicated interest in each person and their respective goals, Coles is able to advise and strategize synergistic steps to get each person to the place of financial freedom they desire.

**Zadara Storage Inc., Irvine***Nelson Nahum, CEO*

Nelson Nahum is a co-founder of Zadara Storage, the world's first enterprise-class storage delivered as a fully-managed service. His roles include founding CTO and member of the Zadara engineering team that won two U.S. patents for innovative software-defined-storage. Zadara Storage's service model offers enterprises, SMBs and startups a flexible, agile and cost-efficient storage infrastructure that's always aligned with their needs. Solutions have been recognized for innovation and leadership. The accolades include the Frost & Sullivan New Product Innovation Leadership Award, No. 87 on the Deloitte Fast 500, Gartner 'Cool Vendor' in Storage Technologies, and Dell Founder's 50. Despite managing the demands of the company's rapid growth, Nelson has found ways to give back, including free data storage for the companies that were affected by Hurricanes Harvey and Irma. Nelson brings over 20 years of experience in the storage industry in multiple storage software development positions. He is known for creating innovative products and successfully bringing them to the market.



The Saywitz Company
would like to congratulate its President,

BARRY SAYWITZ,

on being nominated for the OCBJ Excellence in
Entrepreneurship Award.

On behalf of the company and its staff,
thank you for your leadership, guidance, and perseverance.

We look forward to continued success.

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The Saywitz Company

4740 Von Karman Ave., Suite 100
Newport Beach, CA 92660
(949) 930-7500

www.Saywitz.com