

AN ORANGE COUNTY BUSINESS JOURNAL
SPECIAL REPORT & CUSTOM CONTENT

Excellence in **ENTREPRENEURSHIP** Awards



Standing: Peter Chang,
Dave Judy, Peter Twil,
Tiffany Bonando, Zara
Cerni, Laura Garrett;
Seated: Carol Stone,
Sophia Komourous, Brian
Langohr, Michael Cerni



Elmer Morales,
Christina Ly,
Philip Wilson



Rebecca Hall,
Hank Blank

DURAN, LUCKEY, ACQUISITIONS,
EXPANSIONS, CREATIVE DESIGN

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Anoosheh Oskouian,
Paula Steurer,
Anne Lee



Kurt Busch, Hans Keirstead,
Dawn Antis, Charles Antis



Richard Reisman

EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES
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AWARDS CEREMONY AT HOTEL IRVINE
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Jahangiri, Duran, Hendy,
Luckey, Anderson

Trophies Were Just The Start

Mega-Valuations, Headline-Making Sales, and More Buys for EIE Class of '19

The Business Journal picks five winners each year for its Excellence in Entrepreneurship Awards. Last year, our selections made us and our nominating committee look pretty good—the 12 months that followed saw numerous headline-making events from the group, as the firms drew the attention of Wall Street A-Listers, Silicon Valley venture capitalists and more. Here's a quick look at the 2019 that was for the group.

—Jessie Yount

Palmer Luckey: Unicorn Again

Palmer Luckey's hard work continues to build valuable companies—and appears to be a fair amount of fun as well.

His presence at the CES technology show in Las Vegas last month seemed more play than work (exoskeleton arm, anyone?) and Luckey is legendary for tweets that tweak—**Blizzard Entertainment** was one target last year—and other off-the-cuff comments, including his comparisons of OC and the Silicon Valley for last year's Business Journal EIE event crowd.

"I have fun here," Luckey told the Business Journal in December, speaking of OC as a good place to recruit workers. "It's a lot easier to convince other people to have fun here, too."

His Irvine-based defense startup, **Anduril Industries**, is also having some fun.

In September, it secured a \$127 million investment at a \$1 billion valuation, vaulting the company to fabled unicorn status, one of the youngest startups to do so—but not the first for the erstwhile founder of **Oculus VR**, which sold to **Facebook** for \$3 billion three years after inception.



Robotic arm testing at last month's CES

Did we mention the submarine in his garage?

We did, in an article last month, when Luckey earned a nod as Businessperson of

the Year for the technology sector.

Crank

Around the time of the capital raise, Anduril

Anduril Industries ANDURIL

- **FOUNDED:** 2017
- **CEO:** Brian Schimpf
- **HEADQUARTERS:** Irvine
- **BUSINESS:** surveillance for defense, borders
- **EMPLOYEES:** 160
- **NOTABLE:** hit unicorn status or \$1 billion valuation late last year

moved into its new headquarters at Jamboree Road and Michelson Drive, where Luckey tweeted it was "time to crank out machines."

One of the first products for the company is Lattice, a surveillance system using artificial intelligence, cameras and drones. It has made headlines for its border protection potential.

There's more to come, according to Luckey: Anduril is working on Anvil, an attack drone—"counter-drone" is the formal term—which could have battlefield potential.

"We're having fun, doing cool stuff and making money," Luckey told the Business Journal on New Year's Eve.

"It doesn't get much better than that." ■

Heidi Hendy: Precise Palette

Heidi Hendy's homegrown interior architecture firm, OC's 13th largest by billings last year, is still ahead of the curve.

She's kept **H. Hendy Associates** busy since winning an Excellence in Entrepreneurship honor with projects ranging from a 230,000-square-foot building renovation for **Behr Paint Co.** in Santa Ana to a brand new 40,000-square-foot, two-story corporate office for ticketing provider **Paciolan** at **UCI Research Park**.

Among the firm's most moving work, though, resonates with roots in Newport Beach: the former Newport Balboa Savings and Loan building, a historic landmark at Lido Village, was renovated to make space for **SAP's** Innovation Center, along with a coworking space, in a spot along Newport Harbor owned by **Burnham-Ward Properties**.



Hendy's happily
ahead of curve

Coworking office space provider **HanaHaus** got a **Blue Bottle Coffee** bar at the location, encouraging collaboration, with coffee in hand.

Hendy continues to find innovative ways to incorporate such local specifics into design

plans. Another: while creating a space for **Tyvak Nano-Satellite Systems Inc.**, the company worked with a national security agency, engineers, the city of Irvine, and the government to design space that incorporates high-security features in the facilities.

H. Hendy Associates Hendy

- **FOUNDED:** 1979
- **MANAGING PRINCIPAL:** Heidi Hendy
- **HEADQUARTERS:** Newport Beach
- **BUSINESS:** architecture, interior design and planning firm
- **2019 REVENUE:** \$11.9M
- **EMPLOYEES:** 48
- **NOTABLE:** renovated historic Lido Village digs; preserved original features including doors to the former bank's vault

Up next? Hendy is working on a space for **Branded Online**, a marketing firm that is moving into **Lincoln Property Co.'s** new **Flight** creative office complex at Tustin Legacy. ■

►EIE Honors 38



AB-5: California’s Worker Classification Problem

Businesses with workers in California are dealing with a new tax headache this year. In the fallout from the 2018 Dynamex ruling, California lawmakers passed Assembly Bill 5 (AB-5), which makes significant changes to employee classification rules. The new rules drastically limit the pool of workers who can qualify as independent contractors and shifts a greater part of the tax burden to the employer.

Under the new law, California moved away from the previous “right-to-control” standard in favor of a new ABC test to determine whether to classify a worker as an independent contractor or an employee. The ABC test requires that all three of the following conditions be met in order to treat a worker as an independent contractor:

- A) The worker is free from the control and direction of the hiring entity in performing the work.
- B) The worker performs work that is outside the usual course of the hiring entity’s business.
- C) The worker is customarily engaged in an independently established trade, occupation, or business of the same nature as the work performed.

Workers in certain industries and occupations are exempt from the ABC test.

While the new legislation introduces daunting compliance costs for businesses, potential legal challenges are already brewing. Major companies in the gig economy space, such as Uber, Lyft and DoorDash, have filed paperwork to put a referendum on the California ballot this year that would create additional exemptions to AB-5’s far-reaching scope. Companies are also looking to differences between federal and state laws that allow workers to be classified as independent contractors for federal purposes and employees for California purposes.

Employee classification has become an increasingly hot topic in California, and AB-5 only turns up the heat. Employers should carefully review their existing contractor lists for compliance with the new rules and consider planning techniques to minimize the impact to their bottom line.

The experienced professionals at RJI CPAs can help you navigate AB-5 and the potential impact to your business.

About RJI CPAs
Established in 1980, RJI CPAs specializes in audit, accounting, corporate and international tax issues for publicly traded and privately held companies. RJI CPAs is PCAOB-registered and is the Southern California member firm of DFK International, the 7th largest global accounting network.

Manuel J. Ramirez, CPA MST FABFA
Manuel is Chairman/International Tax Partner at RJI CPAs, with specific experience in international and multistate taxation, M&A transactions, and representation before the IRS and state regulatory agencies. Manuel can be reached at (949) 852-1600 or mramirez@rjicpas.com.



Fernando Jimenez, CPA, MST, CEO
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“I like the flexibility that RJI CPAs offers. I don’t get “no” for an answer - instead they work with us to develop creative solutions that address our needs.”

— Wendy Figueroa, Internal Audit/Controller, Geo-Logic Associates

EIE Honors

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Reza Jahangiri: Magnum AAG



AAG: 24% market share for reverse mortgages

American Advisors Group is the reverse mortgage company that rose in national public prominence in part due to pitchman **Tom Selleck**, along with other actors who resonate with prospective clients: its celebrity spokesmen have consistently connoted capable, honorable strength for the seniors that make up significant portion of AAG's base.

Now the firm has another celebrity in its midst: Chief Executive **Reza Jahangiri**.

After receiving recognition at the Business Journal's EIE event last year, he was named to the inaugural Mortgage Global 100, a list created by trade journal Mortgage America Professional to acknowledge brokers, lenders and industry professionals who innovate in the industry.

Jahangiri keeps doing that sort of thing: AAG last year expanded its business model to include additional financial advising for clients, primarily senior citizens.

The co-chair of the **National Reverse Mortgage Lenders Association** board for the second year running noted he eventually wants to take the company down additional paths, toward a broad-based retirement brand that includes financial and health products such as in-home care and medical supplements.

The company remains the largest in the reverse mortgage industry, with \$2 billion of issuance and 24% market share according to industry research for the fourth quarter of 2019. ■

American Advisors Group



- **FOUNDED:** 2004
- **CEO:** Reza Jahangiri
- **HEADQUARTERS:** Orange
- **BUSINESS:** reverse mortgage and related financial products
- **REVENUE:** \$280M
- **2019 REVERSE MORTGAGE FUNDINGS:** \$1.97B
- **COMPANYWIDE EMPLOYEES:** 1,200
- **NOTABLE:** Jahangiri named to inaugural Mortgage Global 100 list from Mortgage Professional America

Darin Anderson: Keeping Pace



Salas O'Brien buying spree continues

Darin Anderson and **Salas O'Brien** received quite a few nods from the Business Journal in 2019; after the chief executive won an Excellence in Entrepreneurship award, the Santa Ana-based company was recognized as just one of two engineering construction firms to boost local billings by double digits, ending the year with 311% growth to \$11 million in Orange County alone.

Rather than touting his own accolades, Anderson took to LinkedIn last month to praise 40 members of his leadership team for their commitment and service, noting it was the largest group the company had ever acknowledged.

Growth and greater performance isn't the only increase for employee-owned Salas O'Brien: it bought four firms last year, matching its 2018 total and resulting in expansion locally in Irvine and Corona, as well as in the Midwest, Northwest and

Salas O'Brien



- **FOUNDED:** 1975
- **CEO:** Darin Anderson
- **HEADQUARTERS:** Santa Ana
- **BUSINESS:** engineering firm
- **2019 REVENUE:** \$150M (estimate)
- **COMPANYWIDE EMPLOYEES:** 775
- **NOTABLE:** worker count 30% higher at 31 U.S. offices, largely by acquisition; bought 4 cos. in 2019

Texas.

Sticking to its "grow right" philosophy, the firm added 250 employees for a headcount of about 775, along with 12 new offices.

Salas O'Brien completed 3,700 projects in 2019, with a particular focus on sustainable engineering and energy-cost savings for its clients. ■

Joe Duran: He Wrote The Books



\$750M payout for United Capital

Will **Joe Duran's United Capital Financial Advisors** disappear into the gorilla that is **Goldman Sachs**? It's not uncommon after an acquisition and at the end of last month the financial giant—which bought United Capital for \$750 million in cash last year—announced it had changed the firm's name to **Goldman Sachs Personal Financial Management**.

The move had been expected and wasn't seen as meaning the new owner forgot why it bought the wealth adviser last May, months after Duran won an Excellence in Entrepreneurship award from us.

For one thing, United Capital's no slouch—at the time of the transaction, the firm had more than 220 advisers and \$25 billion assets under management.

Chief Executive Duran had previously told the Business Journal it would be great if someone paid "a lot of money" for United Capital and let him continue running it.

Then Goldman came knocking with cash and a promise of independence.

Then there's a big reason given by Goldman for its interest in United Capital: Duranian innovations including its digital platform, offered to other registered investment advisers,

meaning it could earn fees scaling a system developed to serve its own clients: the FinLife platform had \$20 billion more in assets under contract through the platform at the time of its sale.

Accelerant

Such work, along with Duran's developing digital bank, is also seen as enabling Goldman Sachs to push into giving counsel to a wider swath of investor, including those with as little as \$100,000 in assets to invest, which could vastly expand the combined companies' reach.

Goldman Sachs vet **Rachel Schnoll** will oversee the growth and development of the white-label FinLife platform, based on United Capital's technology. It's Goldman's entrance into working with third-party advisers.

Current challenges include pricing models and software compatibility with other RIA products.

Duran—author of several best-selling financial books—penned a piece after the buy for InvestmentNews.com, where he is a frequent contributor, telling why he sold: "United Capital would need to go beyond building financial plans and managing assets" with advisers

United Capital Financial Advisors



- **FOUNDED:** 2005
- **CEO:** Joe Duran
- **HEADQUARTERS:** Newport Beach
- **BUSINESS:** wealth management firm
- **REVENUE:** \$230M (estimate)
- **COMPANYWIDE EMPLOYEES:** 680
- **NOTABLE:** sold to Goldman Sachs for \$750 million; innovative digital platform the basis of the buyer's entry into third-party advisory services

now offering banking and working clients on tax preparation, among other services, delivered "on an elegant, integrated platform. As an independent firm, it would take several more years and many millions of dollars to build this."

Instead, "joining Goldman would accelerate that effort overnight."

You'll see more of Duran in March; he's the keynote speaker for this year's Excellence in Entrepreneurship event. ■

Risks to the use of Independent Contractors with AB5

by Bradford Hall, CPA
Managing Director, Hall & Company

It was thought by our California state legislators that the passage of Assembly Bill 5 that went into effect January 1st of this year would result in businesses reclassifying their independent contractors that are not truly independent to employees with benefits. They believe this new law will bring in new employment and income taxes into the state coffers as well as provide benefits like paid sick days, healthcare benefits and overtime pay. The results so far have not shown this to be the case. Many businesses are cutting back on the use of Independent Contractors for fear of the potential increased costs associated with employment taxes and benefits. AB5 has created confusion in the overall classification process as it would be inappropriate to treat a worker as an Independent Contractor for federal purposes and as an employee for state purposes.

The new California requirements under AB5 for a worker to qualify as an independent contractor and not be subjected to employment taxes and benefits are the ABC tests. As of January 1st, the California worker must now meet all three of these factors: A) Be free from control and direction of the hiring business, B) Be performing work that is outside the usual jobs performed within the hiring business, and C) The worker must be customarily engaged in an independently established trade, occupation or business in line with the type of work being performed.

The first test has been a longstanding test by the IRS. It is based upon behavioral, financial and relationship control. The real change in the ABC test is test B. Many of the California businesses that hire Independent Contractors are hiring these workers in positions that are within the businesses' normal scope of work. This will be the factor that most companies will have the most difficulty getting around. The final test C requires the worker to be in a line of business that typically is independent. The IRS defines Independent Contractors as "doctors, dentists, veterinarians, lawyers, accountants, contractors, subcontractors, stenographers, or auctioneers who



are in an independent trade, business, or profession in which they offer their services to the general public."

Everyone knows that Uber and Lyft are heavily fighting AB5. With the 2017 Tax Act, there are no longer federal income tax deductions available for employees whereas these expenses are 100% deductible by Independent Contractors. With AB5s forced treatment of these Uber drivers as employees, 100% of the workers' costs for maintaining their cars are completely lost for federal tax purposes.

The AB5 law was introduced to reduce the misclassification of workers as Independent Contractors where no true business to business relationship existed. These were the facts in the California Supreme Court Dynamex case. The company, a nationwide same-day courier service, where prior to 2004 all drivers were classified as employees and in 2004 the company converted the drivers from employees to Independent Contractors as a cost savings measure. One driver, three months after leaving the company, filed a lawsuit claiming misclassification of its workers. This led to the Dynamex decision in April of 2018 and laid the groundwork for the current AB5. The over-reach of the new AB5 law will hurt the legitimate Independent Contractors that have been doing business successfully for years and years and may now be in jeopardy of not meeting the new ABC standards. The key now is for businesses operating in California to make sure that all hired independent contractors meet all the requirements of the newly enacted AB5 or at least prepared to defend against a challenge.

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Bradford L. Hall, CPA

MANAGING DIRECTOR

Brad is the Managing Director of Hall & Company, involved in all aspects of taxation and business planning. He has over 35 years of experience in public accounting with core strengths in tax planning for high net worth individuals, closely held corporations, partnerships, LLC's and trusts.

Michael Silvio, CPA

TAX DIRECTOR

Mike is the Director of Tax Services at Hall & Company. He has more than 28 years of experience in public accounting and tax and has served a variety of businesses in the high-technology, consumer product, software, biotech, life science, healthcare, manufacturing, construction, professional service and not-for-profit industries.



Tony Price, CPA

AUDIT DIRECTOR

Tony is Director of Audit Services and has nearly 20 years of experience in public accounting primarily in the Assurance area. Tony has extensive experience with both private and public companies in a wide variety of industries, including manufacturing, distribution, real estate, life sciences, fashion, technology and services.



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Risk Management...

Hope for the Best but Plan for the Worst

Today's legacy planning must involve risk mitigation strategies as well as tax reduction. If you end up in a significant lawsuit or regulatory dispute before your death will your legacy be protected from creditors and predators?

Risk mitigation is about removing the economic incentive of those who want to sue you and take your assets. There are many legal and proven tools that can achieve this starting with identifying assets the state legislatures have exempted from creditors. Many other planning tools are worth considering. They can be used in general planning, such as limited liability companies (LLC's & Limited Partnerships), and a myriad of irrevocable trusts which protect assets.

Comprehensive estate planning, with asset protection, is the most effective approach to protect your legacy from taxes and financially ruinous lawsuits. There are advanced disruptive technologies which have transformed the estate planning industry for those

concerned about protecting their legacies for their families. People don't buy auto insurance expecting to get into an accident – they purchase it in case one occurs. Advanced estate planning strategies work the same way. We hope for the best, but plan for the worst.

Planning for the protection of your assets is what risk management is all about. Litigation is on the rise in the U.S. In fact, 95% of the world's lawsuits are filed here. It is anticipated that in 2020 alone, over 15 million lawsuits will be filed. Many new business law changes, such as Wage & Hour lawsuits and Anti-Discrimination lawsuits, carry a personal liability component if the claims cannot be satisfied by the employer. These claims can place one's personal assets in harm's way due to the liability caused by someone in your employ. Now is the time to protect your family, your legacy, and your assets from an unforeseen lawsuit or legal attack.

Many have never heard of an asset protection trust (APT). Yet 19 states and

many foreign countries have laws that protect assets placed in an APT from the claims of creditors and predators, absent a fraud that may have occurred to creditors. To have wealth and not have an APT is like driving a vehicle without liability insurance. We just wouldn't do that.

The year 2020 will be a watershed one for estate planning as many of the tax benefits provided under the current administration will be repealed if there is a change in administration. California will bring back its inheritance tax to 40% for estates worth \$3.5M or more. When meeting with your estate lawyer to review your options be certain

to address risk mitigation and have your attorney include effective and legal firewalls that will make you an unattractive target for a lawsuit.

Risk mitigation for high net worth individuals requires skill and experience. To avoid mistakes with your estate planning decisions, seek advice from a qualified estate planning attorney who specializes in assisting affluent investors.

With more than 30 years of experience in estate planning and asset protection, the Jeffrey M. Verdon Law Group, Orange County estate planning attorneys, is a recognized authority in both fields.



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Jeffrey M. Verdon, Esq. is the Managing Partner of the Jeffrey M. Verdon Law Group, LLP, a Trusts & Estates boutique law firm located in Newport Beach, Calif. With more than 30 years of experience in designing and implementing comprehensive estate planning and asset protection structures, the law firm serves affluent families and successful business owners in solving their most complex and vexing estate tax, income tax, and asset protection goals and objectives. Please call us for a complimentary consultation.

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Data Privacy Tips for Emerging Businesses

By Sarah A. Lynn, BPM Partner

January 1 signaled the beginning of a new data privacy age in the Golden State, as the California Consumer Privacy Act (CCPA) created tailored regulations for residents and organizations doing business in California or with those located in the state.

These new regulations may be confusing to organizations of any sizes, but small businesses especially. Most small business owners haven't thought about the insurance level or the ramifications of a data breach, yet 75% of them come from small businesses.

While the law went into effect in January, the California Attorney General will likely delay enforcement until July, so it's never too late to gain a better understanding of new data privacy laws, assess current security measures and implement new policies to ensure future compliance.

Know Your Customers' Data Rights

The CCPA has a long list of items it defines as Personally Identifiable Information (PII) – which includes everything from name and household information to biometric data and internet activity – and it gives consumers greater control over the collection and use of PII. It's your organization's responsibility to have prominent, publicly-posted contact information with a path to a Data Privacy Officer who can assist individuals in accessing, updating or removing their personal information, and with opting out of marketing materials and the sale of their data.

You Must Also Hold Your Vendors Accountable

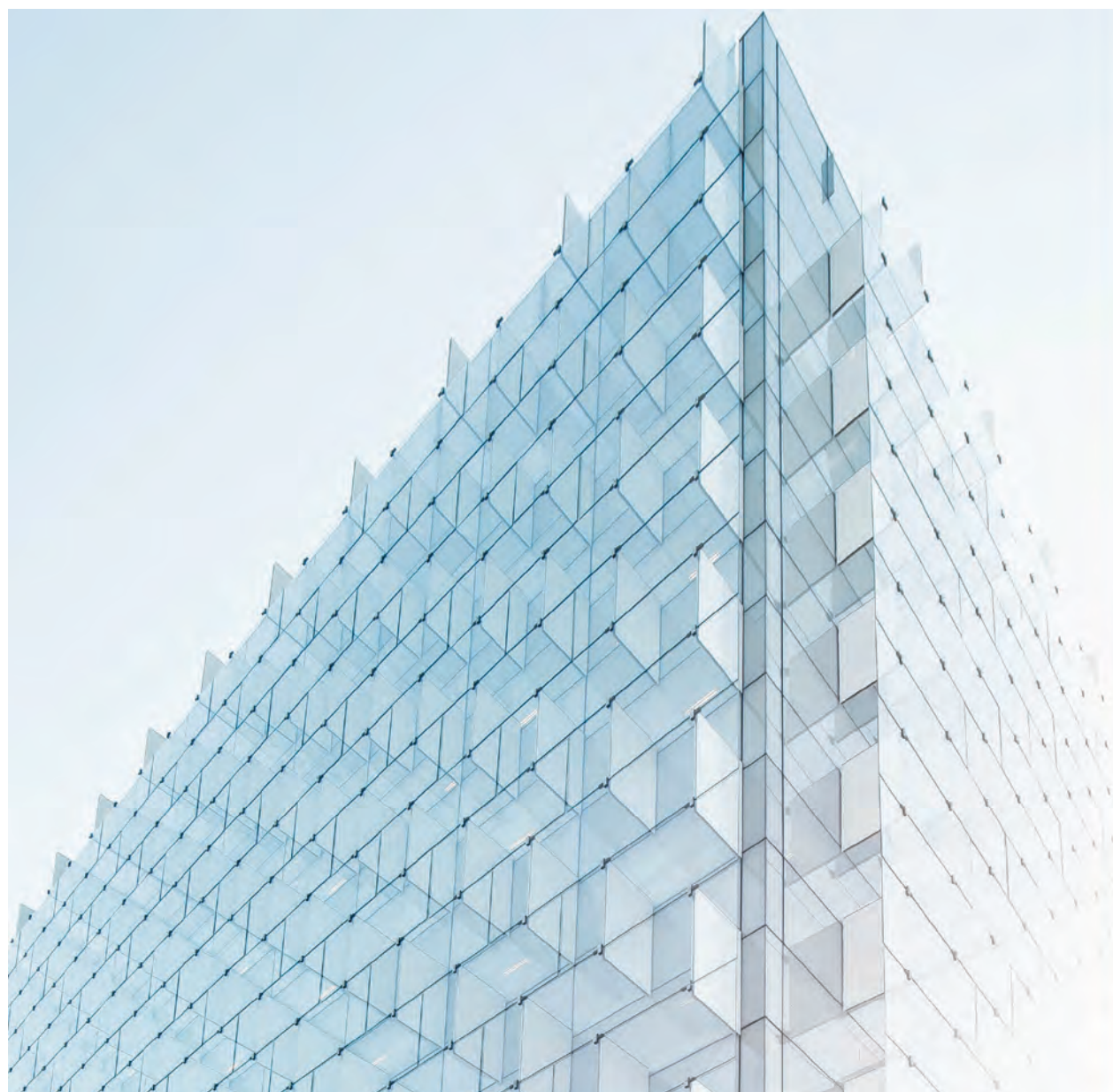
The requirements for data privacy security extend out from your organization and into all the third-party vendors you use in your day-to-day operations. If your customer or employee data is shared with a third party, it's your responsibility to

ensure it complies with all applicable data privacy regulations. To protect your organization, all Service Level Agreements (SLAs) should be updated to reflect your specific data privacy requirements, and how your organization expects your customers' data to be handled.

Creating a Data Privacy Policy and Maintaining Compliance

Liability insurance may not be enough to cover your company in case of a data breach or lawsuit. That's why it's important for your organization to take every measure possible to protect the business and comply with data privacy regulations. Start by creating a Data Privacy Policy that classifies PII and defines the necessary usage of PII, as well as describes the data flow process (collection, usage, retention and destruction). In addition, create a Security Awareness Training to give to employees upon hire and annually that addresses data privacy. These tasks are critical for California companies going forward. For help protecting your company and customers, reach out to BPM's IT Security Advisory group for data privacy compliance information today.

Sarah A. Lynn is a Partner in BPM's IT Security Advisory practice, which helps businesses around the country identify cybersecurity threats, minimize liabilities, prepare for audits and more. She has nearly two decades of advisory experience and has extensive experience assisting clients with data privacy compliance. To learn more, contact Sarah A. Lynn at SALynn@bpmcpa.com.



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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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Q&A with Richard McCune

Founding Partner of McCune Wright Arevalo, LLP

Richard D. McCune is a senior partner of McCune Wright Arevalo, LLP. He has 30 years of experience in representing plaintiffs throughout the United States, California and the Inland Empire in class action, government UDAP civil penalties, product liability, catastrophic personal injury, and business fraud cases.

What inspired you to start the firm? In litigation, big businesses use their size and financial advantages to bully consumers and smaller businesses. I wanted to start a firm that provided an even litigation playing field for harmed consumers and smaller businesses.

How do you differentiate your business from the competition? Our competition tends to be smaller firms without the resources of MWA to take on the largest businesses or large firms that charge upfront legal fees that drown even successful mid-sized businesses. We offer superior service from a national firm willing to take on any size case on a contingency basis.

What drew you to the contingency model? The contingency model perfectly aligns the law firm with the client's interest. We only get paid if we are successful for the client, and the more successful we are, the more we get paid. It incentivizes the law firm to produce results for our clients instead of churning out billable hours win, lose or draw.

As a law firm entrepreneur, what is the most significant challenge? The main challenge to a law firm entrepreneur working on contingency cases is surviving the first few years because there is a lag between doing the work and getting paid. In my \$203-million verdict against Wells Fargo Bank on behalf of over 1 million customers, it was almost 10 years from when I filed the first case to when we were paid our fees. That is a long time to carry the business without payment and is a significant barrier to entry for most firms.

What do you have planned for 2020? We expect targeted growth of at least 25% in number of lawyers, offices and cases for 2020 and are already off to a very good start.



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Joe Duran CEO & Founding Partner



Joe Duran is Chief Executive Officer and Founding Partner of United Capital, the nation's first and largest Financial Life Management company, and now a Goldman Sachs company.

A proven entrepreneur, investor, best-selling author, and sought-after industry speaker, Joe previously built Centurion Capital as President of the company, which he sold to General Electric Financial (GE) in 2001.

He is a renowned industry visionary with featured columns in both InvestmentNews and Time Magazine's Money.com. Joe is a frequent contributor to CNBC, Fox Business, Bloomberg, and PBS and appears regularly in both traditional and online media, and was a recipient of a prestigious Ernst & Young Entrepreneur of the Year award in 2015 and the Schwab Pacesetter Impact Award.

His most recent book, "The Money Code: Improve Your Entire Financial Life Right Now," achieved best-seller status on both The New York Times and USA Today lists. Joe has an undergraduate degree from Saint Louis University and MBA degrees from the University of California, Berkeley and Columbia University. He earned his Chartered Financial Analyst designation in 1997.

Most importantly, Joe is lucky to have a wonderful family who inspires him every day. Joe, his wife, Jen, and their daughters, Charlotte, Juliette, and Samantha, live in Newport Coast, CA.



Luncheon & Awards Program

March 19, 2020
12:00 p.m. - 2:00 p.m.

HOTEL IRVINE

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

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Patrick Dumas riding a Waterborne skateboard.

Riding an Entrepreneurial Wave

“This thing shreds!”

“This is sick!”

“So unbelievably stoked!”

This is the praise rolling in from skateboarders across 30 countries who love UCI undergraduate Patrick Dumas' invention: a simple adapter that makes skateboarding feel more like surfing.

The adapter went from prototype to patented technology to internationally marketed product with the help of experts and funding available through the Wayfinder program at UCI Beall Applied Innovation – an incubator that connects UC-affiliated startups with resources needed to launch, grow and succeed.

Dumas learned to ride the waves growing up in Huntington Beach, California, and took up skateboarding at UCI. Like many skaters, he craved the tighter turns and faster curves of surfing on waves, but that feeling required pricey specialty skateboards.

One day, after a friend bet he couldn't do it, Dumas set out to create a skateboard adapter for less than \$20. Using scrap metal and a few screws, he built his first Surf Adapter.

Studying business information management – a cross-disciplinary program of both The Paul Merage School of Business and the Donald Bren School of Information & Computer Sciences – Dumas understood business fundamentals. But he knew he needed help to take his startup, Waterborne Skateboards, to the next level.

Through the Cove, Applied Innovation's headquarters, Dumas connected with Wayfinder, learned how to pitch and secured investments from the Cove Fund. Most importantly, he gained mentors such as Ken Fairbanks, an Innovation Advisor at the Cove.

“The biggest resource at the Cove is people – entrepreneurs and investors,” Dumas says. “These are people who have spent time in industry and who know how it works.”

Cove advisors helped him raise \$42,000 on Kickstarter, and today, sales of Waterborne's Surf Adapter continue growing exponentially, fueled by a partnership with Australia-based Penny Skateboards, which sells millions of units in 60 countries. Penny recently launched a new line of boards featuring Waterborne's patented technology.

“Waterborne Skateboards has long surpassed all of my initial expectations for scale and success,” says Dumas, who doesn't have to worry about job hunting when he graduates this year. “And it's all thanks to mentorship from some key individuals at the Cove.”



UCI Beall Applied Innovation @ the Cove

The Sky's the Limit at the Cove

Recently, UCI Beall Applied Innovation moved its headquarters, the Cove, into a three-story, 100,000-plus-square-foot building to better address the needs of campus innovators, entrepreneurs and the Orange County ecosystem.

The newly renovated Cove features a large event facility with a 132-foot-long Hiperwall screen that provides a 180-degree viewing experience, several additional meeting rooms of varying sizes as well as work spots for ecosystem partners, tenants and staff, and a much-needed wet lab to conduct vital experiments and validation testing.

We invite you to check out UCI Beall Applied Innovation and the Cove at the Grand Opening!

Wednesday, February 12, 2020, 5 p.m.

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Please RSVP
bit.ly/BAI-grand-opening

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Patrick Dumas
UCI Undergraduate Student
CEO, Waterborne Skateboards

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Timeless Artistry

Celebrate Valentine's Day with femininity and intrigue. Our Conch and Clam Pearl earrings dazzle with coveted conch and opaque white pearls enveloped in 18k rose gold. Sun-setting pink tones come to life with nearly four carats of fancy pink diamonds and 11 carats of round brilliant collection VS diamonds.



Passion Unleashed

This breathtaking, one-of-a-kind Blue Diamond Cuff exudes impeccable style and is equally stunning when worn as a bracelet or a ring. The cuff is designed around a rare, nine-carat cushion cut blue diamond, with nearly five carats of pink, yellow, and blue diamonds surrounding it in an intricate pattern. The ornate design is further brought to life with nearly 33 carats of collection VS diamonds, all set in 18k white gold.



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Impress Your Guests with Andrei's Artful Catering for Your Office, Home or Private Event

With an abundance of culinary choices to choose from around Orange County, let Andrei's set your next private event apart from the rest with its classic and sophisticated catering options. From casual artisan sandwiches to elegant seafood displays, the dedicated catering and events team will ensure that whatever the occasion, nothing but first-class service and conscious cuisine will be delivered.

Whether it's for business or pleasure, Andrei's can accommodate everything from off-site office lunches or intimate private dinners to larger social gatherings or weddings.

Andrei's kitchen sources ingredients from local farms and ranches to invent dishes that delight the senses and provide a creative alternative to standard catering. The catering menu options abound with a large selection of fast casual cuisine, tray-passed hors d'oeuvres, prix fixe menus featuring items like Mary's Farm Organic Roasted Chicken and sustainable Wild-Caught Lingcod, plus sumptuous buffets and stations serving everything from fresh seafood to custom pastas.

For those looking for a perfect venue in the heart of Orange County, the restaurant and event space is also available for semi-private and private events. Presenting friendly and professional service, artfully-presented cuisine and beautiful surroundings, dining at Andrei's will surely impress you and your guests throughout the experience. Andrei's has consistently proven to be an excellent choice for corporate meetings, charity events, weddings, Bar & Bat Mitzvahs, holiday parties, tradeshows, anniversary & birthday celebrations and offers several venue options depending on your group size. Andrei's event facility can host as few as ten guests or as many as 175 seated guests and up to 300 cocktail reception guests. Enjoy a large private patio, stunning onyx bar, 120" projection screen for presentations, a podium and wireless microphone, as well as Andrei's signature cuisine and bar offerings.

Owner Natalia Ostensen opened Andrei's in 2009 as a tribute to her late brother Andrei and his belief in eating natural, local and sustainable food while also supporting a relaxing, friendly and inspiring atmosphere for guests. In order to further these ideals, all of the restaurant's profits are donated to the Andrei Foundation (www.andreifoundation.com), which supports a number of local charities.

For information regarding catering, private dining or events, please contact Jennifer Simmons at (949) 387-8750 or Jennifer@andreisrestaurant.com.

Andrei's is located at 2607 Main Street in Irvine at the corner of Jamboree and Main, with convenient access to the 405 and 5 Freeways. The restaurant is open to the public Monday through Friday 11:30am to 9pm and Saturdays from 11am to 9pm and can be reached at (949) 387-8887 and www.andreisrestaurant.com. Valet and Self-Parking are available.

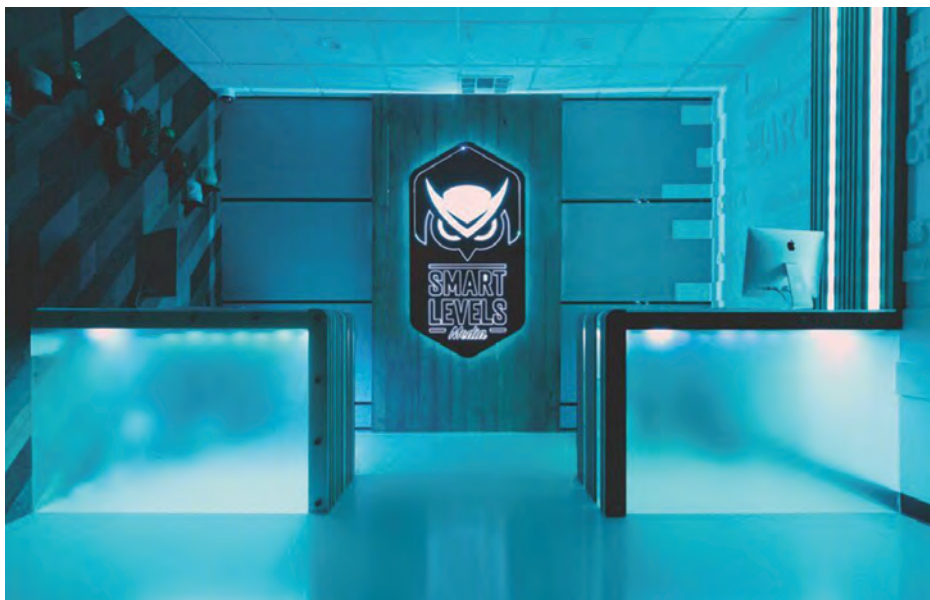
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Smart Levels Media has proven its staying power by surviving economic crises and overcoming the continuing challenges by an ever-evolving technology-driven industry which demands constant updating and upgrading.

Smart Levels Media, following the vision of its founder, has always been quick to adopt and invest in the latest, most efficient equipment, software and technologies.

Smart Levels Media has embraced the change brought by these new technologies and has in fact used it to propel the company into new opportunities by becoming able to offer new lines of products, much faster turn-around times and all with a superior product quality. Couple these positive traits with a company-wide culture where the "Customer is King!" and the results are inevitable: continued success, a growing list of raving customers, and a never-ending thirst for improved efficiencies.

Smart Levels Media is thus poised for continued growth through innovation and a relentless desire to "be better."

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2020 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Accurate Background Inc., Irvine*Dave Dickerson, President/CEO*

Under Dave Dickerson's leadership, Accurate Background has won a variety of awards related to exceptional growth and customer service. Accurate became a Hall of Fame member of the Inc. 5000 list of fastest-growing private companies after being included in the list for five years in a row. Accurate was also included in Deloitte's Technology Fast 500™ award five years in a row as one of the fastest-growing technology companies in North America. Additionally, Accurate has been added to the Orange County Business Journal list of fastest-growing private companies over multiple years, with the latest inclusion coming in 2019. With a reputation for exceptional service, Accurate also received a 2018 Stevie Award for Customer Service Department of the year as a result of customer satisfaction and public voting. Accurate also prides itself in community outreach, working with employees to partner with many local and global non-profit organizations such as Working Wardrobes, Operation Gratitude, Kids Around the World, Olive Crest, and more. In addition to success at Accurate, Dickerson previously founded a successful internet retail company, which ranked on the Inc. 5000 fastest-growing private companies list twice.

**Agapay, Tustin***Daniel Han, President*

Daniel Han is an avid believer that businesses should give back to the community. Along with his involvement in community organizations, working with various task forces and chambers of commerce, Han is also heavily involved in community and cultural outreach with several non-profit organizations in and around Orange County. Han has worked in the payment processing industry for more than six years. In the early stages of his career, he learned of the tips and tricks used to confuse merchants into paying more. He felt that this was unethical and wanted to do something different. Starting in 2012, Han worked to build a portfolio based on doing what's right for his customer. With honest cost disclosure and taking an educational approach, he has built a reputation of trust and credibility among his clients. Han's previous experience with sales and startups and his passion for giving have culminated into the formation of Agapay, a unique idea in an old industry.

**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.

**All-American Leadership, Irvine***Rob Nielsen, CEO*

Rob Nielsen is a dedicated entrepreneur who leads a talented and dynamic team of accomplished professionals that actively engage with organizations in establishing and maintaining high performing cultures. Nielsen created AAL in 2015 and assembled an experienced team of like-minded industry leaders, fellow veterans, and educators. He works collaboratively with the AAL team to provide consulting services on culture and leadership in the form of workshops, academies, forums, speaking engagements, and roundtables. Nielsen and the AAL team create and facilitate innovative leadership programs with a wide range of organizations, including Toyo Tires, US Forest Service, Lennox Commercial, Ascent Aerospace, CFO Leadership



Council, and most recently, the Orange County Fire Authority. Through his vision, nurturing, collaboration, and determination, these programs have improved organizational cultures by developing tangible and effective leadership skills. His masterful leadership approach, coupled with the compelling curriculum materials and seasoned facilitators, empowers program participants to take ownership. The participant ownership occurs because the AAL team creates an environment of trust, and they learn that culture development is about leadership behaviors—theirs and the people they lead. What is most impressive of the AAL programs is that it is a sustainable development process that creates leaders of character and transforms organizations.

Allied Universal, Santa Ana*Steve Jones, CEO*

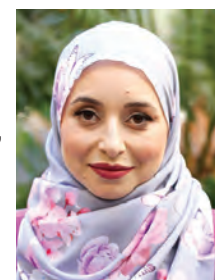
Steve Jones began his career with Universal Services of America in 1996 after holding executive level and management positions within two Fortune 500 companies. He presided over four major Universal Services of America divisions: Universal Protection Service, Universal Protection Security Systems; Universal Building Maintenance and Universal Fire/Life Safety Services. Due to his vast experience in sales and operations, national service companies made him a perfect fit when Universal Protection Service was beginning to grow and expand from a small local Orange County-based security company to a multi-billion dollar organization. In December of 1999, he and his partner acquired the sale of equity from Universal's original founders. He then led several subsequent transitions of equity transfers, culminating with the final management buy-out of the firm. In 2016, Allied Universal merged with AlliedBarton to create Allied Universal, the largest security services company in North America.

**Alternative Divorce Solutions Inc., Newport Beach***Lani Baron, Founding Partner*

Lani Baron founded Alternative Divorce Solutions shortly after graduating law school. She has been driven by the belief that an amicable divorce is possible, given the right tools. The key was to develop the rights tools for client's to successfully choose mediation. Baron created a 7-step proprietary system that streamlines the divorce mediation process. More importantly, it places the clients and the A.D.S staff on the same page. Thus, the client is always aware of where they are in the process and the full ADS Team is always aware of the next steps for each individual case. Through Baron's innovative thinking, ADS has grown into Orange County's leading mediation firm. With a firm understanding of the divorce mediation process and its complex nature, Baron developed a divorce mediation training course that provides a unique approach to divorce mediation. Individuals who have completed the full course have gone on to open successful mediation practices.

**Alternative Divorce Solutions Inc., Newport Beach***Jeanann Khalife, Partner*

Divorce Mediation was an unexpected path in Jeanann Khalife's legal career. She rose to partner within a year of joining the firm in 2015. She stood side-by-side with her business partner, Ms. Baron, advocating for the alternative: mediation. Khalife saw the benefit of mediation, but she also realized the lack of awareness regarding mediation. The only solution was to educate the public, which led the duo to developing the Podcast, Divorce Demystified. Khalife's ingenuity has allowed her to create enhancements to the 7-step proprietary system that the firm is modeled on. The duo has successfully opened two more locations to their practice and Khalife has successfully managed all three locations. Khalife serves as a mentor and guest lecturer in her community. Khalife has also served as a panelist for the MBASC solo practitioner workshop and as a guest speaker for the Inclusive Education Project Podcast.

**Alteryx, Irvine***Dean Stoecker, CEO/Chairman/Co-Founder*

Dean Stoecker is chairman, chief executive officer and a founding partner of Alteryx, revolutionizing business through data science and analytics. Stoecker's leadership and motivational skills, along with his ability to create, communicate and realize a vision, are a driving force behind bringing back the thrill of solving to analysts and data scientists across the globe. Alteryx is a 20-year overnight success with Stoecker leading the company through solid organic growth, three rounds of funding and a successful IPO in March of 2017 to deliver a transformational experience to customers of all sizes. Alteryx has continued to experience tremendous growth, with Q3 2019 revenue up 65% year-over-year, earning a spot on Deloitte's Fast 500 list. Stoecker's unique vision and strategy around bringing a code-free and code-friendly experience unleashes the line-of-business analyst from the menial and mundane to truly loving their work again. His leadership and drive feed into career development and community outreach programs that help associates succeed in and out of the office. He launched the Alteryx For Good (AFG) volunteer program in 2016, which delivers the benefits of breakthrough analytics into universities and nonprofit organizations to help build the next generation of data scientists.

**American Technologies Inc., Anaheim***Gary Moore, CEO*

After working in the insurance restoration industry for 15 years, Gary Moore took an

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equity line of credit on his home and opened American technologies Inc. in 1989. Today, ATI is the nation's largest family-owned and operated restoration contractor with over 1200 employees. He has over 35 years of experience in construction management involving hazardous waste remediation, asbestos, lead and mold abatement as well as commercial, industrial and residential emergency response. In addition to the above, Mr. Moore has provided catastrophic emergency restoration in the residential, commercial and industrial settings to mitigate damages caused by natural disasters. ATI has 20 offices across the country, 21,000 pieces of equipment, 517 vehicles, and 14 catastrophe trailers.

**Architecture Design Collaborative, Laguna Hills**

Craig Chinn, Principal/Founding Partner

Craig Chinn is a principal and founding partner of Architecture Design Collaborative. His drive to work collaboratively with his clients/consultants inspired him to create a truly-diverse architecture firm that is an integral member for any development partner. By collaborating in an open environment, he works to bring out the best of people and the project, leading to record growth of the firm. A licensed architect responsible for all aspects of project design, client relationships and business development for the company, Chinn utilizes his expertise and leadership savviness to guide the successful design and planning of a diversity of commercial, office, retail and mixed-use projects. His mastery of the workings of the governmental process, permitting process, and the demands of the construction program always yields a smooth project and a timely and enduring design. Chinn has led his team in the successful completion of more millions of sq ft of retail and commercial buildings, thousands of residential units, 100's of project, and have worked on hundreds projects in over 35 states.

**Austin Taylor Inc., Irvine**

Ron Viggiano, President

With more than 34 years of experience, Ron Viggiano has become the area's premier clothier by asking the right questions and understanding clients' wants and needs to help guide them into creating distinctive and personalized wardrobes. Using creativity and contemporary styling details, Viggiano has built a loyal following of successful business leaders and athletes in Orange County. 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.

**Avatar Partners Inc., Huntington Beach**

Marlo Brooke, CEO/Founder

Marlo Brooke founded AVATAR Partners in 2003 with the mission of protecting the democratic rights that are embodied in the vision of America and its Allied Countries, and those the world over who urgently seek and need such rights. As founder and CEO of AVATAR Partners, Brooke is a recognized thought leader in warfighter readiness and innovative, advanced training systems, job aids and software systems. Brooke provides vision, leadership and oversight of all programs and customer relationships that support the Department of Defense and Commercial Industry. Under her leadership for 17 years, AVATAR Partners continues to invent disruptive, high-quality enterprise solutions. Her latest innovations have transformed the Augmented Reality (AR) Ecosystem by helping to eliminate three showstoppers for global AR adoption: drift, jitter, and the inability ability to lock 100% on target. In doing so, AVATAR has achieved a 4800% accuracy for Augmented Reality above industry average, surging AVATAR 3-5 years ahead of its competitors.

**Beacon Pointe Advisors, Newport Beach**

Shannon Eusey, CEO

Shannon Eusey is co-founder and CEO of Beacon Pointe and a member of the Beacon Pointe Investment Committee. She also co-founded the firm's Women's Advisory Institute, a forefront leader in the financial services industry to bring women further into the conversation focused on investments and personal finance. Eusey most recently co-authored, "Your Dollars, Our Sense: A Fun and Simple Guide to Money Matters," which makes sense of a variety of financial topics and seeks to educate readers in an entertaining, informative manner, capturing a multigenerational audience. The book is now an International Best Seller, having ranked No. 1 in six different business and finance categories. Eusey is a member of the CNBC Financial Advisor Council and is regularly featured in The Wall Street Journal, InvestmentNews, Barron's, Financial Planning Magazine, among other publications. Nearly two decades after founding the firm, Eusey has grown the firm from baseline to over \$11 billion in assets, 16 office locations and over 160 employees nationwide. Eusey was a 2017 OCBJ Women in Business award winner.

**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.

**Bioniz Therapeutics Inc., Irvine**

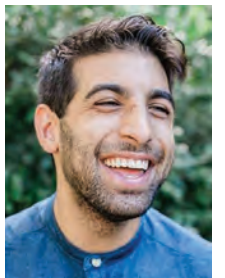
Nazli Azimi, Founder/President/CEO

Dr. Nazli Azimi is the founder and CEO of Bioniz Therapeutics, as well as the co-inventor of its core-technology. Bioniz Therapeutics is a biopharmaceutical company leading the discovery and development of first-in-class therapeutics to address autoimmune diseases and cancer. Bioniz leverages world-class expertise in immunology, originating in research conducted at the National Institutes of Health, to create an entirely new class of medications that will be potentially safer, more effective, and less expensive than current standards of care. The Company's technology has the opportunity to transform the therapeutic landscape with the market opportunity of over \$100 billion. Bioniz Therapeutics' management has raised about \$30 million of capital. The company is conducting a phase two trial with its lead drug, BNZ-1, in some form of blood malignancies. The company has partnered with Takeda Pharmaceuticals, Japan's largest and world's 7th largest pharmaceutical company, to develop first-in-class therapies for a variety of diseases with high unmet medical needs.

**Branch Startup Studio, Irvine**

Dalip Jaggi, Principal

By trait, Dalip Jaggi is a software engineer. This past decade, he started & sold a few companies which transformed him into a serial entrepreneur. His interests lie at the crossroads of business, finance, & technology. Tech-centric startups excite him especially those that are built with a purpose, which is why he founded Orange County's first startup studio, Branch. Prior to founding Branch, he founded Devise Interactive in 2014 which led to the successful exit to Vincit in 2018. Jaggi is also the founder of Forge54, a local non-profit that has provided seven local nonprofits with a free marketing makeover. In addition, Jaggi is the president of OC Tech Happy Hour, a non-profit designed to be the welcome mat to tech entrepreneurs in Orange County.

**Branded Group, Anaheim**

Michael Kurland, CEO

Founded in 2014 by Michael Kurland, Branded Group is a full-service facility maintenance company that promptly diagnoses and efficiently resolves multi-site commercial facility issues. With a mission of providing superior service, Branded Group offers on demand retail and restaurant maintenance, construction management, special project implementation, and focused consultation services. As a full-service facility maintenance company with over 20 years of combined experience, the company's team of experts promptly diagnoses facility issues and efficiently resolves them – quickly returning the client facility to its brand standard. Kurland has led the company's year-over-year exponential growth, cultural transformation, and the cultivation of a highly regarded team of industry experts. His desire for the company to #BeBetter has resulted in deep and long-lasting customers, vendor, and non-profit partner relationships, innovative programs that drive customer satisfaction, and a respected position in the industry.

**CAIN Group Pacific Sotheby's International Realty, Newport Beach**

John Cain, Founder/Principal

As founder and principal of CAIN Group and Broker Associate at Pacific Sotheby's International Realty, John Cain is an accomplished business professional with an impressive list of accomplishments and experiences that led him to be the #1 ranked real estate agent in Crystal Cove and Newport Coast and the #2 ranked real estate agent in all of Orange County for 2019 as ranked by the California Regional MLS. Trusted by discerning clients, ranging from celebrities and professional athletes to premier homebuilders and captains of industry, Cain is renowned as the agent of choice in the luxury real estate market throughout coastal Orange County. Cain is also known for his exceptional negotiation skills and best-in-class service, in addition to his ability to create innovative marketing strategies. He and his team continue to set new records for sales and standards of service along the California Riviera.

**Channel Bakers, Anaheim**

Joshua Kreitzer, Founder/CEO

Founded as one of the first agencies purely focused on Amazon Advertising in 2015 by CEO Joshua Kreitzer, Channel Bakers is a full-service, global agency founded



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upon a core tenet to help brands find the right audience at the right time to tell their story and drive sales. The agency utilizes its decades of experience leveraging data and analytics to grow revenue within specific retailers and verticals. With this strategy Channel Bakers has helped clients become top brands on Amazon. Channel Bakers is one of the selected partners featured in Amazon Advertising's find-a-partner directory. Joshua Kreitzer is a data-minded marketing, merchandising, and advertising professional with more than 20 years' experience in the Retail, Distribution, and eCommerce industries. His strengths and skill set lie in developing the Internet Retail Channel for manufacturers and driving merchandising programs for retailers. Kreitzer is a proven strategic thinker with an outstanding record of initiating and managing multiple accounts with exceptional results. He has also had success in creating live events with regard to planning, selling, and creating opportunities for exposure at each event from concept to final production.

**CISOSHARE, San Clemente**

Mike Gentile, President/CEO

Mike Gentile has established and successfully sold two (one service and one cyber security) businesses and is currently the CEO and president of CISOSHARE. Founded in 2015, CISOSHARE has grown rapidly over the past few years, having been recognized as one of the fastest-growing companies in OC by the OCBJ and #88 on the 2019 Inc. 5000 list. CISOSHARE has always been involved in the community and views itself as a socially conscious enabler of cyber progress. In 2019, CISOSHARE worked with Orange County United Way and UpSkill OC to develop a free cybersecurity professional development program. The program is designed to solve the livable wage gap and the shortage of needed professionals in the cybersecurity domain through the successful transition of people that are under or unemployed into higher-paying cybersecurity careers. CISOSHARE employees actively participate in this program as well as other volunteer activities and CISOSHARE donates a percentage of profits to multiple organizations within the community.

**CSUF, Fullerton**

John Bradley Jackson, Director, Center for Entrepreneurship

John Bradley Jackson is the director for The Center for Entrepreneurship and Professor of Entrepreneurship at California State University, Fullerton. Jackson brings practical marketing, sales and operations leadership experience to the classroom from both Silicon Valley and Wall Street. He is also the founder of the CSUF Startup Incubator which supports early stage startups. Jackson is also founder of The BirdDog Group, a marketing and sales consulting firm that specializes in helping small businesses make more money. Jackson founded Titan Angels LLC, an early stage Rule 504 investment fund. Jackson advises numerous startups and is an advisory board member for multiple non-profit companies. Jackson is a best-selling author with multiple books on marketing and entrepreneurship. Using his professorship at CSUF's Entrepreneurship School as a platform; he directly engages with many other OC business organizations like SCORE, SBA, SBDC, local Chambers of Commerce and others to help young entrepreneurs, startups, and existing business owners.

**Cultivation Kitchen, Anaheim**

Dale LaFlam, Owner

Cultivation Kitchen is a fresh fast-casual concept built on the tenets of mindful eating and cultivating human connection. Dale LaFlam wanted to support healthy lifestyle habits through his vision, which is supported by creating a full-sensory dining experience for guests and meals with 100% natural ingredients. From the breathtaking design to the implementation of activities and programs such as yoga in the park, educational workshops in the garden and more, LaFlam's vision comes to life as guests receive the total experience. Additionally, to further its commitment to the earth and community, Cultivation has partnered with a nonprofit tree-planting organization, Shadetree Partnership, to offset the electricity carbon footprint, and donate 1% of the eatery's net profit to local charities annually. To share LaFlam's healthy lifestyle and mindset with the public, Cultivation Kitchen's menu reflects the concept's philosophy by utilizing organic and locally sourced ingredients whenever possible through relationships with more than 20 Southern California-based farmers and ranchers who practice clean and sustainable methods.

**David Meltzer Enterprises, Irvine**

David Meltzer, Irvine

2019 was another banner year for David Meltzer, with the immense growth of his personal brand, and with David Meltzer Enterprises becoming one of the fastest-growing business advisory and consulting firms. In fact, Meltzer was named a Top 100 Business Coach by renowned executive coach Marshall Goldsmith in recognition of the value that he provides for his clients. As a co-founder of Sports 1 Marketing, David Meltzer has continued to build that firm into one of the most recognizable sports marketing agencies in the world. This global marketing agency utilizes its relationship capital to fulfill its Mission Statement to "Make a Lot of Money, Help a Lot of People, and Have a Lot of Fun." S1M has amassed an impressive list of accolades, including being recognized as the Best Employer in Sports 2019 by Front



Office Sports. S1M was named Best Global Sports & Entertainment Marketing Agency for 2019 by the Content Creator Awards and the firm was also recognized as Most Disruptive in Sports Marketing by CEO Monthly's 2018 Global Excellence Awards.

Designers Resource Collection, Costa Mesa

Pamela Kellogg, Principal

Pamela Kellogg co-owns and operates the largest collection of multi-line interior design showrooms on the West Coast-based right here in OC. DRC Showroom, Kenneth McDonald Designs and The Studio at DRC are the go-to showrooms for interior designers at all stages of their careers. The collection of showrooms is celebrating over 30 years of excellence and also includes their showroom DRC San Diego. The Costa Mesa Showrooms all adjoin and span nearly 50,000 sq. ft. of space for designers to shop, collaborate and get inspiration from. The expansive selection of fabric, semi-private client/designer collaboration spaces and comprehensive selection of indoor and outdoor furniture, accessories, bedding, wall coverings, rugs, lighting and wall art make the showrooms a one-stop shopping experience unlike any other.

**Ducere Global Business School, Corona Del Mar**

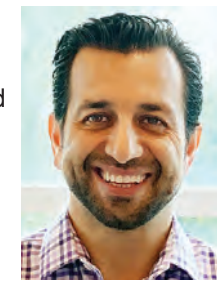
Mathew Jacobson, Founder/CEO

Ducere Global Business School partners with elite public universities around the world to disrupt the university sector. Head-Quarted in Orange County, Ducere delivers education in four continents. The degrees include a global faculty of hundreds of the most inspiring and successful individuals, from Presidents and Prime Ministers to Nobel Prize Winners and global CEO's. The core mission is access to world-class education. Through Ducere and its global university partners, students obtain a world-class, publicly accredited university degree or masters for \$15,000 total tuition (not yearly tuition). In another innovation, degrees are specialized, so students only study courses they are passionate about, not two years of general education. The program at BA or MBA level culminates in students attending a graduation ceremony in the UK.

**Ephesoft Inc., Irvine**

Ike Kavas, 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 Kavas 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.

**Finch PC, Costa Mesa**

Jonathan Pittard, Co-Founder/Chief Number Cruncher

Jonathan Pittard co-founded Finch in early 2015, alongside his business partner, Corey Johnson. In the last five years, this modest finance and accounting company has quickly grown into an innovative and attractive company to work for and do business with. Pittard, the chief number cruncher, leads his two dozen employees to be the best outsourced finance and accounting solution at a reasonable cost. Finch supports small businesses and churches with a wide range of accounting and finance needs, from day-to-day accounting and monthly financial reports, all the way to year-end budgeting and payroll taxes. Finch has been the backbone behind a countless number of organizations getting out of the "red zone," simply by efficiently and effectively tracking the numbers and advising on better financial habits. Aside from being good with numbers, Finch constantly refines their skills to be a reliable business advisor. Even though Finch is not considered a start-up anymore, the culture still feels original and fast-paced because Pittard and his team have maintained their passion and vigor to provide impactful services.

**Fusion of Ideas, Lake Forest**

Russ Taylor, CEO

Russ Taylor founded Fusion of Ideas with a vision to help businesses create immersive brand experiences that would lead to success and growth. He achieved his vision in 2019, when his company, Fusion of Ideas, was named by the consumer electronics giant, Apple, as its preferred U.S. vendor for business personalization. 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



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2020 may be a watershed year for estate planning. Many of the extraordinary transfer tax benefits currently available under the current law could be repealed if there is a change in Administration in November, 2020.

The time to “lock-in” these valuable benefits and be grandfathered if the laws change is now. Heads you win — tails you win. In the field of tax planning we use disruptive technologies to transform your thinking to enhance the protect your legacy from creditors and predators and transfer to your loved ones. You didn't achieve success by being content with the status quo. So, thinking differently should hardly be disruptive.

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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.

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 18 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.

**Idea Hall, Costa Mesa**

Rebecca Hall, President/CEO

Idea Hall, founded by Rebecca Hall, enjoys the reputation and position as Orange County's (OC) agency of choice. While rooted in public relations, Hall identified a gap in the industry and successfully brought marketing, branding, public relations and advertising services together under one roof. Through the integrated marketing model, Hall and her team have been privileged to work with some of the most established commercial real estate businesses in OC, as well as non-profits taking on some of the county's biggest issues – including homelessness and mental health. In addition, the agency has attracted and retained top, local talent through its strong corporate culture where people come first. Under Hall's leadership and guidance, Idea Hall has successfully maintained aggressive growth, averaging +15% YOY, for the last three years. Since establishing the agency in 2003, Hall remains one of the first female heads of an agency and one of the most successful female marketing and PR entrepreneurs in the county. She attributes her success to staying ahead, constantly innovating and developing and maintaining strong relationships.

**INBRACE, Irvine**

John Pham, CEO/Co-Founder

John Pham DDS, MS is a researcher, three-time entrepreneur, team builder, former aerospace engineer and practicing orthodontist. His research is featured in numerous cover articles in the American Journal of Orthodontics and the Journal of Clinical Orthodontics, and he frequently speaks on cutting edge technology topics at industry association meetings, orthodontic conferences and residency programs. Since his first ideas for creating a new orthodontic treatment took hold, Dr. John Pham has closed more than \$70 million of venture funding for INBRACE – the most advanced, invisible orthodontic solution in the world. Dr. Pham was performing research at USC's Ostrow School of Dentistry when he met INBRACE inventor and co-founder, Dr. Hongsheng Tong. Their published research garnered numerous cover articles in the American Journal of Orthodontics and the Journal of Clinical Orthodontics. Consumer demand for better aesthetic treatment options was growing, due to the popularity of Invisalign, so Dr. Pham assembled a team that successfully founded INBRACE in 2012, incorporated in 2014 and shipped the first commercial case of INBRACE in 2016. The Company tripled production capacity moving to new facilities in August 2018 and has now grown to more than 150 employees.

**JobzMall, Irvine**

Nathan Candaner, Co-Founder/CEO

Nathan Candaner is the co-founder and CEO of JobzMall, the world's fastest-growing career community for Gen Z. After struggling to land a job himself while he was in college using traditional job boards, he realized how disconnected the Gen Z and hiring companies are. Since its launch in 2018, JobzMall has grown to the size of 300,000+ job seekers, and partnered over 1,000+ organizations. In November 2019, Candaner was honored as Forbes "30 under 30" in his achievements and contributions to the Technology scene. JobzMall has raised more than 3 million dollars in financing, and partnered with more than 1000 organizations. Among JobzMall's prestigious store tenants are UBS, Microsoft, Amazon and Coca-Cola. With over 300,000 active members, and one of the most visited sites in the USA, JobzMall is planning its international expansion this year.

**JustFoodForDogs, Los Alamitos**

Shawn Buckley, Founder

Shawn Buckley founded JustFoodForDogs in 2010, the first brand in the country to offer scientifically researched fresh, whole-food recipes for pets made from human-grade ingredients and cooked in the industry's first ever open-to-the-public kitchens, with the goal of improving the length and quality of life of pets through the best

possible nutrition. Beyond transforming the lives of pets nationwide, he and the company have donated hundreds of thousands of dollars to benefit pets in need. As the inventor and leader of the fresh, whole food movement for pets, JustFoodForDogs has revolutionized the \$30 billion pet food industry. In 2019, JustFoodForDogs embarked on massive national brand expansion, evolving from its California roots. The company has more than 200 retail locations, including nine open to the public kitchens. A 2019 Series C funding round in the amount of \$68 million, led by L Catterton, the largest and most global consumer-focused private equity firm, will accelerate growth plans to open additional kitchens and hundreds of retail units over the next several years.

**Kingdom Ventures Unlimited Financial Solutions Inc., Irvine**

Ernesto Diapera, CEO

Ernie Diapera joined World Financial Group in February 2014 as a training associate. He got promoted to a Broker position, as senior marketing director in nine months. In 2018, he built his own company, KVV Financial Solutions, Inc. and focused on educating more people by doing workshops on Financial Education That Schools Never Taught in different organizations both for-profit and non-profit. He opened his new office in Irvine in 2019 and has been training new Associates with the objective of developing more Leaders and Entrepreneurs in the financial services that will build their own agencies reaching out to more people and making a difference in people's lives. With the use of social media, he is embarking on a project of conducting monthly workshops in different communities that could educate more families on How Money Works. This would enable them to make informed decisions impacting their lives in terms of improving their financial health through financial education. His organization's mission: No Family Left Behind.

**KPRS Construction Services Inc., Brea**

Joel Stensby, President

Joel Stensby is the president and founding partner of KPRS Construction Services Inc. a Southern California based general contractor. Having completed over \$4 billion in projects throughout California and nationally to date, KPRS has been ranked as one of the top TI and general contracting firms by OCBJ, LABJ, and ENR Top-400. Founded 22 years ago, KPRS has 300 employees across eight offices throughout California and Hawaii. KPRS has become an integral part in constructing some of Southern California's most notable projects and for some of the world's most renowned brands. A few Southern California projects and brands include Facebook, Microsoft, Broadcom, Coca Cola, Karma, MGM, LA Zoo, Orange County Great Parks, and the Culver Steps at Culver City. KPRS regularly participates in community enhancement projects and has partnered with several organizations including Habitat for Humanity, American Red Cross, and Feed Projects.

**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.

**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. Managed Direct Response also works with some of the leading automotive dealers in the industry. He represents brands such as Mercedes Benz, Lexus, Audi and others.

**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

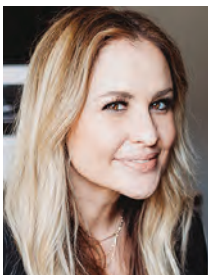
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and only Beauty Simplified System that minimizes the makeup application process to seven minutes or less. The award-winning Beauty Simplified System separates the makeup application process in three steps; Step 1- Prime, Step 2-Polish and Step 3-Perfect. 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.

**Margaux Agency, Long Beach**

Monica Garrett, Founder/CEO

Founded by Monica Garrett with the mission to create modern websites and strategic visual brand identity for companies, the Margaux Agency is a top social media agency. Passionately, she believes branding is at the forefront of everyone's minds. Companies, businesses, and even entrepreneurs are making use of branding in some way or another. The need for a branded identity must occupy the key position in the strategy for success. With Garrett at the wheel, the Margaux Agency offers that and much more. You can expect quick, streamlined, and simplified solutions that also showcase the uniqueness of your brand. She uncovers and captures the distinctive quality that sets her clients apart from others. That is why Garrett insists on an initial Discovery Session before taking on any project. In these meetings, questions are posed, interviews carried out, and research is done for a complete idea of the client's current identity and online presence.

**Mavenlink, Irvine**

Ray Grainger, CEO/Founder

As founder and CEO, Ray Grainger started with an idea to reinvent the way businesses do work: Services organizations were difficult to operate in an ever-changing environment and the right technology was absent. With 25 years of experience in software and high technology, Grainger started Mavenlink. Grainger began his career at Accenture, where he spent 17 years honing his expertise in professional services management as Global Managing Partner, consulting for both large enterprises as well as small and medium-sized businesses. During his time at Accenture, Grainger also invested in several

technology companies through Accenture Technology Ventures, including enterprise knowledge management vendor InQuira. He later became executive vice president of Professional Services and Strategic Alliances at InQuira (acquired by Oracle in 2011), where he met his Mavenlink co-founders, Roger Neel and Sean Crafts. Today, Mavenlink provides enterprise-class Software as a Service (SaaS) that transforms the way businesses work in over 100 countries. Under Grainger's leadership, Mavenlink has experienced rapid growth and accolades, including being named Fastest-Growing Company, North America by Deloitte Technology Fast 500 and achieving 281 percent revenue growth year over year.

**MEESH Boutique Advisors, Dana Point**

Michele Noparvar, Owner/Founder

Michele Noparvar has exemplified impeccable craft in women's fashion design, establishing her own brand and clothing label, MEESH Collection LLC in 2015. MEESH is locally made in Santa Ana and has been a wholesale brand for the past five years. Noparvar redefined customer engagement through strategic content strategy and creative advertising campaigns through social media, especially Instagram. This has ultimately led to extremely high levels of customer's brand loyalty and identity which creates highly effective customer cultivation and retention.

**Miracle Mile Advisors, Newport Beach**

Nella Webster, Managing Director

Nella Webster has over thirty years of experience in providing investment management and financial planning services to clients throughout Southern California. She specializes in providing comprehensive financial planning and sophisticated investment advice using low cost index funds and ETFs to high net worth families, as well as separately managed accounts using individual stocks. Prior to joining Miracle Mile Advisors, Webster ran Palo Capital's marketing and client service activities. Previously, she served in senior management roles at US Trust, Wilmington Trust, and First American Trust. During this time, she developed a deep understanding of the services clients and their family members need to build and maintain their financial security. Webster earned her Bachelor's degree in Economics and Business Administration from Chapman University and an M.B.A. in Marketing and Finance from California State University, Long Beach. She also holds the Certified Financial Planner® designation.



Call for Nominations

Deadline: March 25, 2020



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for his nomination
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Modulim, Irvine*David Cuccia, Founder/CTO*

Modulim Inc. is a 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 Modulim 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. Modulim 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. Modulim received its own CPT code, 0061U, which allows doctors to bill \$28 per scan.

**Montage International, Irvine***Alan Fuerstman, Founder/Chairman/CEO*

Alan J. Fuerstman is founder, chairman and chief executive officer of Montage International, a luxury hospitality management company encompassing Montage Hotels & Resorts, Pendry Hotels & Resorts, Montage Residences, Pendry Residences and management of some of the country's premiere golf courses and clubs. Founded in 2002, Montage Hotels & Resorts includes a collection of ultra-luxury hotels, resorts and residences including Montage Laguna Beach, Montage Beverly Hills, Montage Deer Valley, Montage Kapalua Bay, Montage Palmetto Bluff and Montage Los Cabos. Pendry Hotels & Resorts, a new luxury brand from Montage International which Fuerstman co-founded with his son Michael Fuerstman, includes Pendry San Diego and Sagamore Pendry Baltimore. Prior to founding Montage in 2002, Fuerstman was the opening vice president of hotel operations at Bellagio in Las Vegas. Previously, he served as president and managing director of The Phoenician in Scottsdale, Arizona, where he also oversaw The St. Regis Aspen and The St. Regis Houston, as well as all ITT Sheraton properties in Arizona. He began his distinguished career with Marriott International.

**Natasha Minasian Interior, The Studio at DRC, Costa Mesa***Natasha Minasian, Designer/Owner*

Natasha Minasian operates her namesake interior design firm Natasha Minasian Interiors, and co-owns The Studio at DRC, which is a part of the largest collection of multi-line interior design showrooms on the West Coast. Her interior design work has been featured in a national Container Store ad, Modernism Week, and has been seen in Traditional Home Magazine. In addition to her design work, she helps curate the selection of indoor and outdoor furniture, accessories, bedding, wall coverings, rugs, lighting and wall art in The Studio at DRC, DRC Costa Mesa and DRC San Diego which she also co-owns. The showrooms offer a one-stop shopping experience unlike any other and were designed to be collaborative hubs for members of the trade to connect and collaborate within. Natasha proudly supports the community through donating time and support personally to organizations such as Savvy Giving by Design, Salvation Army, Jessica's House, and Covenant Care at Home.

**NetServe Systems Inc., Laguna Hills***Abdi Ahmed, President*

Netserve was established in 1996 by Abdi Ahmed, an immigrant from Ethiopia. NetServe Systems, Inc. is an Irvine, CA-based high-tech consulting firm that specializes in providing topnotch IT talent to its clients for an on-site and off-site technical staffing augmentation such as software developers, project managers, network engineers and helpdesk professionals. The company's founding engineers have over 40 years of combined IT experience with advanced degrees in Computer Science. Their clients include large organizations such as Honda, Best Buy, Irvine Company, G4S and Oakley to name a few. Ahmed has been recognized as Small Business of the Year by California Small Business Association and won the Supplier of the Year award from Honda.

**Ocean at Main, Laguna Beach***Craig Strong, Chef/Owner*

Chef Craig Strong, whose 25-year career in luxury hotels and resorts earned him a Michelin star from his time at The Langham Huntington Hotel & Spa in Pasadena, has come full circle to his native Southern California roots with the recent opening his own restaurant - Ocean at Main. From the coasts of California to Washington, DC, and Barcelona to Hong Kong, Chef Strong has cooked all over the world; his dishes draw inspiration from the culture and cuisine that make these places unique. From growing up in San Diego and cooking with produce from the family garden, Chef Strong is now sharing his Coastal California cuisine at Ocean at Main with the community he has embraced for the past decade. His restaurant has been recognized as a Best New Restaurant by Orange Coast Magazine; one of Modern Luxury's 10 Most Exciting New Restaurants; and was named among OC Register critic, Brad Johnson's 75 Best Places to Eat. Today, Chef Strong is widely recognized as one of Orange County's most accomplished chefs.

**Old Brea Chop House, Brea***Tony Fasulo, Owner/Operator*

As the owner and operator of Old Brea Chop House, Tony Fasulo has made a name for himself as a restaurateur to watch in Orange County. His recently opened establishment, Old Brea Chop House, is a classic New York-inspired steakhouse with a modern twist. Recently named one of the Top 10 New Orange County Restaurants generating the biggest buzz in 2019 by the Orange County Register, Old Brea Chop House has guests and critics raving. With more than 35 years' experience in the restaurant industry, including 20 years with Morton's The Steakhouse, Fasulo has developed Old Brea Chop House to be an approachable yet upscale dining experience unlike anything offered in North Orange County. The menu has been curated by a team of talented culinary professionals dedicated to bringing together the best of the best in steakhouse dining. Along with his wife Dani, Fasulo is leading the brand-new restaurant into the new decade as it makes a name for itself amongst the fine dining restaurants in Orange County.

**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 in America with recognition on 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. Dyer believes that impersonal, automated background check solutions 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.

**Perfect YOUth, Newport Beach***Yeral Patel, CEO/Founder*

Dr. Patel completed a residency in family medicine at Kaiser Permanente in Riverside, California in 2012 and was named chief resident of her class. Four years



John and Monica McEntee are pleased
to congratulate **DIRK GRIFFIN**, of *Pinner Construction*,
on his nomination for the
2020 Excellence in Entrepreneurship awards.



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later, she completed the requirements for her board certification in anti-aging and regenerative medicine. Compelled to provide more comprehensive and in-depth medical attention to her patients, she left corporate medicine and founded her own practice, Perfect YOUth, and has since dedicated herself to providing truly innovative care to her patients by challenging Western medicine and investigating and identifying the root causes of their health challenges. Utilizing the latest diagnostic testing and state of the art treatments like PRP and BHRT (platelet rich plasma and bioidentical hormone therapy), Patel is able to counteract the negative signs of aging and works with patients to help them achieve their personal health goals.


Pinnacle Petroleum Inc., Huntington Beach

Liz McKinley, President/CEO

Liz McKinley founded Pinnacle Petroleum Inc., a national wholesale marketing and distribution company in 1995. Pinnacle Petroleum, Inc. is a best-in-class provider of fuel and fuel management services to commercial, retail, and government Clients through-out the United States. Since founding the company McKinley has been the sole owner and key component to Pinnacle's growth and success. Operating initially out of her home, the company steadily grew to just under 200 million in revenue. McKinley's greatest achievement was winning the Ernst and Young Entrepreneur of the Year Award in 2010 and served on the judging committee in 2014, 2015 and 2017. McKinley began her career in the petroleum industry at Koch Industries, a large integrated privately-owned company, in Wichita, Kansas. She was the first woman hired at a commercial level as a Petroleum Commodities Trader. In 1995 she decided to leverage her experience and start her own business.


Pinner Construction, Anaheim

Dirk Griffin, CEO

In 1998 Dirk Griffin left his ten-year career as a CPA and took the position as CFO of Pinner Construction. Pinner Construction is a public works general contractor founded in 1919 and is considered the foremost school builder West of the Mississippi. In the fourth quarter of 2016, after 97 years of business, the company fell on hard times and needed a large cash infusion and was forced to sell. After an extensive search for a buyer, and no takers, Griffin was encouraged by many professional on-lookers that he was best suited for the job. He liquidated all his assets (home, retirement assets, personal property), borrowed money and purchased the company on December 31, 2016. Three years later, the state that the Company is out of debt and has almost tripled its credit capacity. Sales have increased over 200%, Single project size has increased over 300%, equity, working capital, and future contracts have increased over 500%. In 100 years of business, customer, employee and vendor relationships are at their best.


Platinum Wealth Group, Orange

Ken Kladouris, President/Wealth Advisor

Beginning his career early on following attaining his MBA at Pepperdine University, Ken Kladouris spent many years working as a wealth advisor before venturing to open his own company, Platinum Wealth Group. As partner and president, Kladouris is a driving force behind the company's growth, which has expanded its assets under advisement year over year. Following the release of his book, which was met with much acclaim, Kladouris has recently announced the development of new material that will be available via workshops later this year. His perspective has received praise and been featured by Yahoo Finance, MarketWatch, and Forbes.


Powerhouse Communications, Santa Ana

Kristin Daher, President/Founder

Since founding Powerhouse Communications four years ago, Kristin Daher has not only made a name for the agency in the Orange County PR community but has built Powerhouse's reputation as a premier national firm specializing in the restaurant, CPG and franchise industries. Under Daher's leadership, the agency delivers an imaginative approach to media relations, communications strategy, and social media for clients including Wienerschnitzel, Mountain Mike's Pizza, Gloria Jean's Coffees, Juice It Up! and It's A Grind Coffee House. In 2019, Powerhouse's work received the top honor of "Best in Show," for the second time in the past three years, at the annual OCPRSA industry awards. Daher also joined the California Restaurant Association Foundation board of directors where she provides strategic counsel to increase awareness of the non-profit. With a huge emphasis on company culture and building a healthy, creative environment for her employees, Daher has designed a colorful workspace for her staff to grow and thrive. Her drive to succeed pushes the agency and its personnel to new heights each and every day.


Profit Recovery Partners LLC/Steiner Innovations/Two Masters Win Club, Costa Mesa

Donald Steiner, CEO

Profit Recovery Partners (PRP) is a professional services firm that specializes in general & administrative expense reduction for Fortune 1000 companies across North America. Don Steiner founded the company in 1997 with the mission to improve firms' profitability through a full-service approach to reducing and managing

G&A spend. PRP has reinvented the consulting practice by providing a complete service of identify savings opportunities, strategic plan, implementation and forensic validation. This innovation has achieved over \$5.8 billion in savings for its clients in over 50 spend categories. Steiner founded Sweet Baby Brands in 2012 with the goal of creating patent products and solutions to improve the quality of life for families. Inspired by his daughter, the brand's flagship product "Sweet Baby Shade" protects babies from harmful UV rays while still allowing them to see their parents and the world around them. Two Masters Wine Club was founded by Steiner in 2010 with the belief that exceptional wines can be found at a reasonable price. Members of the club enjoy a selection of wines from around the world every month, hand selected by a panel of connoisseurs.


Restaurant365, Irvine

John Moody, Co-Founder/Chief Strategist/Board Member

John Moody is a Co-founder of Restaurant365, a software as a service (SaaS) company that has revolutionized restaurant accounting and management. Restaurant365 is the world's only all-in-one, cloud-based accounting, operations and reporting solution built specifically for restaurants. With more than 20 years of experience helping companies leverage technology to streamline operations, Moody shifted focus solely to the restaurant industry and launched Restaurant365 in 2011. Moody has helped cultivate many of the teams at Restaurant365, including customer success, sales, marketing and strategic partnerships. Since the launch of Restaurant365, more than 10,000 restaurants across the U.S. have implemented Restaurant365. The first-of-its-kind software has changed the game for thousands of restaurant owners and operators, like NOVA Restaurant Group, who produced \$850,000 more in bottom line profits as a direct result of implementing Restaurant365 into their accounting operations.


Revealize, Newport Beach

Cole McKeon, President

As a multi-hyphenate entrepreneur who's founded several successful businesses, Cole McKeon created Revealize to bring clarity and solutions to the otherwise vague web design industry. Operating from a strong set of core values and a streamlined process, he's built a team of experts who share his passion for doing things right. Revealize provides inspiring, powerful, and intuitive web design for businesses across the nation. The Newport Beach-based company combines cutting-edge creativity with technical web design and development expertise. Today, Revealize is nationally recognized as the thought-leader in website design and development.


Scarlet Kitchen & Lounge, Rancho Mission Viejo

Paige Riordan, Chef/Owner

As the executive chef and owner of Scarlet Kitchen & Lounge in Rancho Mission Viejo, Paige Riordan exemplifies true leadership. After cooking in some of New York's most prestigious restaurants, Riordan moved to California in 2018 with the dream of opening a restaurant with her family. Today, her restaurant proudly serves heirloom family recipes and East Coast classics brought to life with the finesse and flair of West Coast farm-to-table cuisine. Riordan's husband, mother, and father are all involved in the day-to-day operations at the restaurant. An East Coast native, Riordan has cooked in some of New York's most prestigious restaurants including Reynard at The Wythe, widely recognized for bringing farm-to-table cuisine to NYC. She attended culinary school at the Natural Gourmet Institute in New York City, where she honed her skills in holistic, plant-based cuisine guided by whole foods and wellness.


Seven Gables Real Estate, Tustin

Michael Hickman, President/CEO

Seven Gables Real Estate began as a boutique concept - small but specialized for a certain segment of the market. As such, they were the first local real estate company to advertise full-page ads. And the first to command the luxury market by offering an unprecedented fine homes marketing platform. More than four decades later, although their operation has grown to include numerous prominent office locations in north, central and coastal Orange County, their deep-rooted culture and dedication to always challenge the status quo continues to resonate. Seven Gables stays true to their Core Values of community involvement, happiness and gratitude. With a zest for supporting Orange County, Seven Gables is proud to work with Make A Wish Orange County, Inland Empire and proud to sponsor the Tustin Public School Foundation, just to name a few. With 520 employees Seven Gables Real Estate has been awarded the Most Innovative Brokerage among 550 brokerages worldwide, #1 Top Overall Workplace twice and a Top three workplace over the last five years.


SmartBug Media, Irvine

Ryan Malone, Founder/CEO

Irvine resident and UCI MBA graduate, Ryan Malone, founded SmartBug Media® as one of the few fully remote marketing agencies, and its rapid success proves it is possible to provide employees with challenging careers along with the flexibility to spend more quality time and make lifelong memories with their families. SmartBug Media® is a globally recognized Intelligent Inbound® marketing agency assisting businesses in growing revenue by generating leads, increasing brand awareness,

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and building customer loyalty through content marketing, sales enablement, web development, marketing automation, and public relations. After experiencing 60 percent growth in revenue, SmartBug Media was named to the Inc. 5000 list for the third year in a row. In addition, SmartBug Media has grown from 55 to 85 employees since 2018, quickly scaling to meet the needs of its rapidly growing roster of more than 100 clients. Malone's efforts have been recognized and featured in a variety of publications, including Forbes, Inc., USA Today, ThriveGlobal, Authority Magazine, Buzzfeed, Spectrum Business Insights, the Orange County Business Journal, and UCI's Paul Merage School of Business.



has positioned her as a keynote speaker and workshop leader for nationally recognized brands such as Mindbody Inc, Vizio and Oracle. Through her leadership, Sterling Public Relations has become the in-demand firm for brands throughout California and North Texas who desire a competitive edge.

Stretto, Irvine

Jonathan Carson, CEO

Jonathan Carson serves as chief executive officer of Stretto, leading the charge in outlining go-to market strategies and tactics geared towards company growth. As co-founder of Kurtzman Carson Consultants LLC, Jonathan Carson is recognized as a trailblazer in the bankruptcy industry. Influenced by his significant accomplishments in the corporate restructuring arena, his primary objective is to oversee the development and execution of Stretto's expansion strategy. With more than 20 years of bankruptcy experience, Carson leads the executive management team's efforts to drive market-share growth, and successfully enter new business lines in furthering Stretto's overall market strategy as a leader in bankruptcy services and technology. Under his skillful guidance and direction, the executive management team leverages Carson's invaluable business acumen and market understanding. Working together to identify, target and pursue various industry sectors, Carson instructs this talented group across departments on best practices for increasing market share and solidifying Stretto's position as a leading provider of bankruptcy administration services.

**Spinnaker Investment Group, Newport Beach**

Morgan Christen, CEO/Chief Investment Officer

Morgan Christen is the chief executive officer and chief investment officer of Spinnaker Investment Group, LLC. In this role, he leads the investment committee in building customized portfolio solutions for high-net worth clients. Christen brings 26 years of investment management experience. Christen founded and led Signature Resources Capital Management, LLC in Irvine as the chief investment officer/portfolio manager in charge of research and asset allocation. Prior to joining Signature, he served as the president of Charterwest Consulting Inc., a money management firm in Newport Beach. Additionally, he acted as the vice president of Dolphin Securities Inc., a regional broker dealer and managed the firms' 30 representatives. In just three years since founding the firm has more than \$330 Million in Assets Under Management, and has grown an average of nearly 65% over the past two years, with two employees added to its seven-member firm in that same period. For the second straight year, the Orange County Business Journal ranked Spinnaker Investment Group, LLC among Orange County's fastest-growing small private companies.

**Sterling Public Relations, Corona del Mar**

Paula Steurer, President/Founder

Celebrating the 12 year anniversary of Sterling Public Relations, Paula Steurer founded the company as a Publicity, Branding and Marketing hybrid in 2008. Steurer's innovative vision, strategic approach, and forward thinking philosophy has played a vital role in propelling the brand's her firm represents into the spotlight. 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. Her refreshing perspective on the world of PR, Marketing and Branding

**Stretto, Irvine**

Eric Kurtzman, CEO

As chief executive officer, Eric Kurtzman directs the growth and expansion strategy for Stretto. Respected as a revolutionary in the bankruptcy industry, he has over 20 years of expertise supporting the development of his long-term vision for the company. Drawing on his unique insight and experience as co-founder of Kurtzman Carson Consultants, Kurtzman works with the chief integration officer to conduct risk analysis, evaluate investment potential and provide guidance to the board of directors on investment risk and return. Along with the chief operating officer, he outlines financial, service and development objectives for each business division and establishes metrics to ensure targeted performance goals across multiple service lines are not just met, but exceeded. Leading the company's executive management team, Kurtzman is responsible for strengthening the vitality and sustainability of Stretto as a leading bankruptcy administration services provider.



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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- Consulting
- Tenant Representation
- Expert Witness Testimony
- Investment
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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 few years, 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. In July 2019, Syntiant started shipping its first commercial chips for customer delivery. Custom built to run AI workloads, and now available for use with the Amazon Alexa Voice Service, Syntiant NDP100 and NDP101 processors offer 10x the performance, at a 10th of the power, and half the size of any existing or proposed solution.

**TAE Technologies, Foothill Ranch***Michl Binderbauer, CEO*

Dr. Michl Binderbauer is the chief executive officer of TAE Technologies and is a co-inventor of many of the company's technological advancements. Dr. Binderbauer has dedicated the past two decades to evolving the knowledge and technology of TAE. He is an expert in reactor kinetics, equilibrium, and stability of advanced beam-driven Field-Reversed Configurations and aneutronic fusion systems. Recently, he has focused on reactor physics, engineering and enabling technologies, and a wide array of applications of the core TAE technologies — from medicine to isotope production and chemical processing. He holds more than 40 issued and pending U.S. patents and numerous international technology patents, and he has authored or co-authored many peer-reviewed publications in the areas of plasma physics and fusion. As a founder of the company, Dr. Binderbauer has helped build the team and the company from its very beginning. He has been instrumental in helping raise over half a billion dollars in investment capital beginning with small investors and a \$1 million seed round to multi-hundred million dollar rounds at a \$1 billion-plus valuation from some of the world's largest venture capital firms.

**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.

**The Blind Pig, Rancho Santa Margarita***Tony Monaco, Owner*

Built on "a couple beers and a dream," the critically acclaimed The Blind Pig Kitchen & Bar in Rancho Santa Margarita opened its second location in Yorba Linda in late 2019. Created by Tony Monaco, the restaurants feature a menu of American progressive cuisine paired with an eclectic selection of wines, a rotating craft beer list, and some of the best cocktails in Orange County created using only the best products and freshest ingredients. The Blind Pig's dishes draw global influence from cuisines from all over the world as he recreates them with a Blind Pig twist. Monaco created the first The Blind Pig Kitchen & Bar in Rancho Santa Margarita in 2013, that grew into a critically acclaimed restaurant in Southern California. By January 2015, Monaco opened up the sister restaurant, The Trough Sandwich Kitchen.

**The Butchery, Costa Mesa***Robert Hagopian, Co-Owner*

The Butchery is a full-service premier grocer and butcher shop. Brian Smith & Robert Hagopian came up with the idea to open a butcher shop when they were discussing how Southern California lacked a convenient place to purchase quality meats and saw an opportunity to do it themselves. They opened their first shop in 2008, and have since expanded to four locations (Newport Coast, Brea, Costa Mesa, One Paseo in Del Mar/San Diego). Each shop is stocked with the highest quality beef, pork & poultry from the finest farms, ranches, and purveyors. Selections can be hand-cut to order and include top choice and prime beef, grass-fed beef, all-natural pork, and poultry. In addition, they also have a curated selection of specialty grocery products, such as marinades, spices, cheeses, spreads, and a vast selection of high-end wine and craft beers.

**The Butchery, Costa Mesa***Brian Smith, Co-Owner*

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how Southern California lacked a convenient place to purchase quality meats and saw an opportunity to do it themselves. Smith grew up in Boston working at one of the many small neighborhood butcher shops and found that once moving to SoCal, his options for meats were limited to mostly the industrial commodity beef sold in big box stores. They opened their first shop in 2008, and have since expanded to four locations (Newport Coast, Brea, Costa Mesa, One Paseo in Del Mar/San Diego). Each shop is stocked with the highest quality beef, pork & poultry from the finest farms, ranches, and purveyors. Selections can be hand-cut to order and include top choice and prime beef, grass-fed beef, all-natural pork, and poultry. In addition, they also have a curated selection of specialty grocery products, such as marinades, spices, cheeses, spreads, and a vast selection of high-end wine and craft beers.

**The Collective, Costa Mesa***Tony Oliver, Founder/CEO*

Tony Oliver is the founder and CEO of The Collective, a revolutionary startup digital membership organization designed to leverage unique benefits directly from any and every brand while returning an annual 'data dividend' of up to \$1,000 per member in the form of incremental cash back on any scanned receipt. The Collective is launching an app as the interface to bring deals and discounts to its members, enable 100% verified user reviews and enable receipt uploads. The Collective will reshape the way people and brands interact, while disrupting the AdTech and Marketing Industries in the process. Consistent with and inspired by trends and evolving regulations governing consumer data privacy, The Collective is the first of its kind to retain and safeguard its members personal data.

**The Mark USA INC., Irvine***Traci Shirachi, CEO/President*

Traci Shirachi is the president/CEO of The Mark and oversees all of the company operations, finances, and business development. She bought The Mark in September 2017 and came in with a vision of how to use her business background to grow the company. The Mark has been around for 12 years and has primarily worked in the education sector. Through Shirachi's vision and networking she has helped grow the business to include nonprofit and corporate clients. Shirachi has over 17 years of work experience with consulting companies of various sizes, including PricewaterhouseCoopers. She received a B.A. in political science at the University of California, Davis, and an M.B.A. from Vanderbilt University.

**The Sandwich Society, Tustin***Mi Ho, Owner*

In 2015, sandwich aficionado Mi Ho created Santa Ana's The Sandwich Society with her mother with one goal in mind - to offer shelter to those seeking extraordinary food. In 2019, they expanded and opened up a second location in Orange County's newest food hall, Mess Hall Market. Whether it be through unique sandwiches, fresh salads, heart-warming soups, or refreshing beverages, The Sandwich Society always aims to venture out of their comfort zone to provide guests with the most exciting ways to experience food. Because nobody wants to be boring. With their saying "life's too short to be eating boring sandwiches," it is their passion for cooking and pleasing guests that has created such gourmet sandwich delicacies.

**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.

**Think Together, Santa Ana***Randy Barth, Founder/CEO*

Randy Barth founded Think Together in Costa Mesa's tough Shalimar Street neighborhood following a gang shooting. He invested his personal funds and bootstrapped the organization as volunteer Board Chair while tending to his day job (stockbroker and later corporate CEO). After a successful 20-year business career, he began to apply his entrepreneurial skills to education as CEO of Think in 2004. Since then, he has scaled the organization to \$85 million in revenue and 3,000 employees serving more than 200,000 students in more than 600 programs across California.



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More recently, he diversified the organization into a variety of direct service programs for students and professional services for teachers and administrators around a specific school turn-around model that is data-driven and people centric which produces transformational results. In a little more than two decades, Barth has built the second largest social enterprise in OC and one of the largest education social enterprises in California. Think's current year growth rate is more than 40%.

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 over four years, Trilogy Capital has grown to \$1,202,408,178 million in assets under management – a rate of growth that is unprecedented in the RIA space. In 2018 and 2019, Financial Advisor Magazine named Trilogy Capital one of the fastest growing RIAs in the nation. The firm is experiencing significant growth in revenue as well as hiring 27 new employees in 2019. In 2020, Motske's goal is to grow the firm's assets under management by at least 20 percent, expand into new markets across the country and identify strategic acquisition opportunities.

**US Alliance Group Inc., Rancho Santa Margarita**

Fadi Cheikha, CEO

Fadi Cheikha has worked in the payment processing industry for more than 30 years. Electronic Cash Systems (ECS), was formed in September 1997 with the mission of providing ATM, credit and debit card, check and ACH processing to businesses. Nineteen years later, ECS has grown as a leading provider of marketplace solutions across major payment processing platforms throughout the United States. US Alliance Group, Inc. (USAG) was formed in 2007 with a mission to offer multiple payment platforms across the US. US Alliance Group, Inc, offers complete payment processing solutions for a true one-stop shop experience for its merchants and affiliates, allowing them to expand their product offerings within the electronic payment processing industry. With more than 30 years of wholesale and industry experience, USAG combines business acumen with technology to provide a single source solution for the



industry's leading ISO's. With product offerings such as Credit Card Processing, ATM, ACH, RDC, Check Cashing, Bill Payment, Gift Cards, MasterCard Issuing and Prepaid Products, USAG provides unique integration and collaboration, while bringing true industry expertise vital to its members, affiliates and merchants.

uDirect IRA Services, Irvine

Kaaren Hall, CEO

After 20+ years of experience at Bank of America, Indymac Bank and her own mortgage brokerage experience, Kaaren Hall saw the recession take hold and the mortgage market collapse. Rather than folding up her tent, Hall took her real estate and finance knowledge in a promising new direction – self-directed IRAs. Hall has helped thousands of Americans invest their IRA into real estate, notes and other assets outside of the stock market to improve their financial future. Now, Hall is a passionate educator and facilitator for better retirement through highly diversified and individually controlled IRAs. She has taught tens of thousands of people through live events, podcasts and webinars. Presently, she is working on her first book to be released next year. She is recognized as an expert in her field and serves on the board of directors for the Retirement Industry Trust Association.

**Unbiased LLC, Brea**

Danny Basu, Managing Partner

Danny Basu and Roger Pakalapatty are cofounders of Unbiased LLC - a premier digital marketing company specializing in AI based SEO. In last three years, the company grew double digits (around 33% per year) and has carved a niche in the crowded digital marketing space, with specific vertical experience in medical, home improvement, real estate and other industries. The founders are first generation Americans with the American Dream, and has worked hard in building multiple companies. Their first company has made the INC 5000 two years in a row, and they are on the way to matching the same success with Unbiased.

**Unbiased LLC, Brea**

Roger Pakalapatty, Managing Partner

Danny Basu and Roger Pakalapatty are cofounders of Unbiased LLC - a premier digital marketing company specializing in AI based SEO. In last three years, the company grew double digits (around 33% per year) and has carved a niche in the crowded digital marketing space, with specific vertical experience in medical, home improvement, real estate and other industries. The founders are



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KAAREN HALL

CEO/FOUNDER OF
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first generation Americans with the American Dream, and has worked hard in building multiple companies. Their first company has made the INC 5000 two years in a row, and they are on the way to matching the same success with Unbiased.

Uplift Transport, Irvine

Greg Krueger, Founder

Greg Krueger is an eight-year Army Veteran Medic, who served as a Non-Commissioned Officer in charge of a medical unit. During his tenure, Greg was responsible for overseeing construction of the 452nd Combat Support Hospital (CSH) and led the Emergency Medical Technician (EMT) room upon the completion of construction of the CSH all before the age of 19. Krueger has brought a new brand of energy and commitment to an existing industry based on a simple principal; transport people who can't transport themselves from point A to point B, with dignity, compassion, immediate response and in a very cool, modernly equipped fleet of vehicles. Krueger leads Uplift Transport through extraordinary customer service, ownership vision, the ability to pivot and react to opportunities as they arise and an unparalleled level of grit and passion. Krueger is an authentic individual who has a powerful passion and purpose that emanates from his core, positively affecting all his business and personal interactions.

**Veronica Kirin Inc., Long Beach**

Veronica Kirin, President

Veronica Kirin is an anthropologist, author, serial entrepreneur, and business disrupter. She is recognized as a Forbes notable graduate of Grand Valley State University and a 2020 40 LGBTQ Leader Under 40 by Business Equality Magazine, is founder of the award winning GreenCup Digital, author of Stories Of Elders, and award-winning Entrepreneur Coach to business leaders making world-wide impact. Her work as a coach is certified by the National LGBT Chamber of Commerce and is known for her trademark programs Self Care Through Scaling(TM), Foundations of Empire Building(TM), and Three Pillars of Business Scaling(TM).

**VF Developments LLC, Costa Mesa**

Victoria Vu, Managing Partner/Founder

A leader and trendsetter in the Halloween costume and lingerie industry, Victoria Vu has taken her passion and skills in fashion design and business and applied them to real estate. In 2016 she founded and is managing partner of VF Developments, LLC. Within three years, she has amassed a portfolio of over \$30 million worth of income properties ranging from condominiums to multifamily residences. Vu's hunts for investment opportunities and creates significant value for her clients and investors. She manages a multitude of processes including finding unique, off market opportunities, syndicating properties, overseeing renovation, and ultimately selling the properties for a considerable profit. With a solid design background from the Fashion Institute of Design & Merchandise, she converts her extensive fashion design skills into unique architecture and interior compositions transforming distressed properties into contemporary, award winning market-ready homes and apartment communities.

**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. Houttu 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. Houttu 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. Houttu also led the 2018 acquisition of Irvine-based Devise Interactive.

**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 \$1 trillion 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.

**Wahoo's Fish Taco, Tustin**

Eduardo Lee, Co-Founder/Partner

Ed Lee is co-founder and partner of Wahoo's Fish Taco, responsible for the expansion and development of what has become one of the most iconic fast-casual restaurant brands in the United States. With more than 35 years of experience in the restaurant and hospitality industry, he has helped his co-founding brothers Wing Lam and Mingo Lee establish Wahoo's as a pop culture mainstay in California and beyond. In addition to forging partnerships with renowned brands like Quiksilver, Billabong, Hurley and Vans, Lee has ensured Wahoo's consistent brand presence at high-profile surf, sporting and music events such as the X-Games, Vans Warped Tour and Coachella among others. The company has 60 locations in the U.S. and Japan, with 33 in California, and continues expanding thanks to the tenacity and hard work of the three brothers.

**Ware Malcomb, Irvine**

Lawrence Armstrong, Chairman

Ware Malcomb chairman, Lawrence Armstrong, is both an accomplished architect and strong business leader. He is well known for his strategic, visionary approach to the company's management and growth, as well as his commitment to fiscal discipline to ensure the overall health of the firm. His strong design ability and focus on creativity and innovation greatly influence all aspects of the organization. His philosophy of embracing change and rewarding achievement and innovation has resulted in a highly successful, dynamic firm. Lawrence is a past winner of the Ernst & Young's Entrepreneur of the Year Award, Orange County/Desert Cities Region and was also a national finalist. Lawrence has led the creation of Ware Malcomb's overarching business strategy, which focuses on innovative measures promoting ongoing success of the company and community.

**WindWater Real Estate, Irvine**

Rudy Caamano, CEO

In 2015, life-long entrepreneur Rudy Caamano invested in WindWater Real Estate (WWR) and transformed it into a technology and marketing-driven real estate service agency. Their customized services approach creates transparency puts the power of the real estate process back in their customers' hands. With WWR's technology platform, clients can choose which real estate services they need, and access information 24/7. They now constantly set new, leading industry standards. Caamano has long been an entrepreneur, acquiring a spice company in 2003 and turning it around by creating a private label program, which was then new to the industry. He sold the brand to McCormick just a few weeks after his 30th birthday. Caamano also started and self-funded his own charity foundation, TG2 Foundation, to give back to organizations that help children build brighter futures. One of the nonprofits he is proud to support is Africa New Day, an organization dedicated to building schools in Congo. His foundation also celebrates children by supporting Project Giving Light, giving homeless children in Southern California special birthday celebrations.

**WurkNow Inc., Irvine**

Sammy Singh, CEO/CO-Founder

Having over 25 years of experience in the staffing industry, it was Sammy Singh's mission to bridge the gap between the temporary workforce and technology. In 2017, he co-founded WurkNow Inc., the only mobile-centric, industrial workforce platform that creates trust and compliance using blockchain technology. WurkNow is a holistic staffing solution which assists staffing agencies in recruiting, human resources, timekeeping, payroll and compliance. All of these modules use the best in technology to empower the temporary workforce with technological advancements such as a bilingual mobile-centric app, intelligent job matching, consolidated timecards, automated alerts, and a centralized database. The company has recently completed their Series A funding. Sammy Singh is a pioneer in staffing technology, having successfully established and scaled two innovative software technologies for time and attendance management. His first venture Time Rack was acquired by FBG Holdings in 2013.

**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.





Congratulations 2020 Nominees

Accurate Background Inc - Dave Dickerson
 Agapay - Daniel Han
 AIVITA Biomedical Inc. - Dr. Hans Keirstead
 All Green Electronics Recycling - Arman Sadeghi
 All-American Leadership - Rob Nielsen
 Allied Universal - Steve Jones
 Alternative Divorce Solutions Inc. - Lani Baron
 Alternative Divorce Solutions Inc. - Jeanann Khalife
 Alteryx Inc. - Dean Stoecker
 American Technologies Inc. - Gary Moore
 Architecture Design Collaborative - Craig Chinn
 Austin Taylor Inc. - Ron Viggiano
 Avatar Partners Inc. - Marlo Brooke
 Beacon Pointe Advisors - Shannon Eusey
 Beeya - Ladan Davia
 Bioniz Therapeutics Inc. - Nazli Azimi
 Branch Startup Studio - Dalip Jaggi
 Branded Group Inc. - Michael Kurland
 CAIN Group Sotheby's International Realty - John Cain
 Channel Bakers - Joshua Kreitzer
 CISOSHARE - Mike Gentile
 CSUF Center for Entrepreneurship - John Bradley Jackson
 Cultivation Kitchen - Dale LaFlam
 David Meltzer Enterprises - David Meltzer
 Designers Resource Collection - Pamela Kellogg
 Ducere Global Business School - Mathew Jacobson
 Ephesoft Inc. - Ike Kavaz
 Finch PC - Jonathan Pittard
 FUSION OF IDEAS - Russ Taylor
 Gorilla Stationers LLC - Rosemary Czopek
 Idea Hall - Rebecca Hall
 INBRACE - Dr. John Pham
 JobzMail - Nathan Candaner

JustFoodForDogs - Shawn Buckley
 Kingdom Ventures Unlimited Financial Solutions Inc
 - Ernesto Diapera
 KPRS Contructions Services Inc. - Joel Stensby
 Leaf Communications - Dan Leaf
 Managed Direct Response - Pat Mercuri
 Manna Kadar Beauty Inc. - Manna Kadar
 Margaux Agency - Monica Garrett
 Mavenlink - Ray Grainger
 MEESH Boutique Inc. - Michele Noparvar
 Miracle Mile Advisors - Nella Webster
 Modulim - David Cuccia
 Montage International - Alan Fuerstman
 Natasha Minasian Interiors, The Studio at DRC
 - Natasha Minasian
 NetServe Systems Inc. - Abdi Ahmed
 Ocean at Main - Craig Strong
 Old Brea Chop House - Tony Fasulo
 Orange Aluminum - Cameron Munson
 Outshine Public Relations - Talia Samuels
 Pendulum Property Partners - Kevin Hayes
 PeopleG2 - Chris Dyer
 Perfect YOUTH - Yeral Patel
 Pinnacle Petroleum Inc - Liz McKinley
 Pinner Construction - Dirk Griffin
 Platinum Wealth Group - Ken Kladoris
 Powerhouse Communications - Kristin Daher
 Profit Recovery Partners LLC/Steiner Innovations/
 Two Masters Wine Club - Donald Steiner
 Restaurant365 - John Moody
 Revealize - Cole McKeon
 Scarlet Kitchen & Lounge - Paige Riordan
 Seven Gables Real Estate - Mike Hickman

SmartBug Media - Ryan Malone
 Spinnaker Investment Group - Morgan Christen
 Sterling Public Relations - Paula Steurer
 Stretto - Jonathan Carson
 Stretto - Eric Kurtzman
 Syntiant Corp. - Kurt Busch
 TAE Technologies - Michl Binderbauer
 Terra Tech Corp/ Blum - Derek Peterson
 The Blind Pig - Tony Monaco
 The Butchery - Robert Hagopian
 The Butchery - Brian Smith
 The Collective - Tony Oliver
 The Mark USA Inc. - Traci Shirachi
 The Sandwich Society - Mi Ho
 The Saywitz Co. - Barry Saywitz
 Think Together - Randy Barth
 Trilogy Financial - Jeff Motske
 U.S. Alliance Group Inc.- Fadi Cheikha
 uDirect IRA Services LLC - Kaaren Hall
 Unbiased LLC - Danny Basu
 Unbiased LLC - Roger Pakalapatty
 Uplift Transport - Greg Krueger
 Veronica Kirin Inc. - Veronica Kirin
 VF Developments - Victoria Vu
 Vincit - Ville Houttu
 ViridiSTOR LLC - Terry Mullin
 Wahoo's Fish Taco - Ed Lee
 Ware Malcomb - Lawrence Armstrong
 WindWater Real Estate - Rudy Caamano
 WurkNow Inc. - Sammy Singh
 Zadara Storage Inc. - Nelson Nahum

Luncheon & Awards Program

March 19, 2020
 12:00 p.m. - 2:00 p.m.

HOTEL IRVINE

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

Reservation Information

Visit: www.ocbj.com/bizevents or contact
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