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EXCELLENCE IN

Entrepreneurship



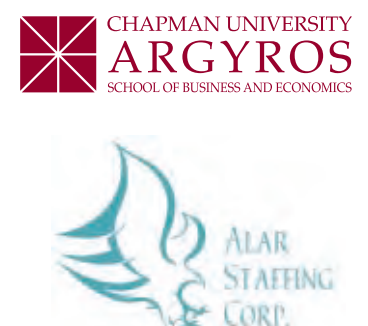
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EXCELLENCE IN ENTREPRENEURSHIP AWARDS



How Global Entrepreneurs are Thriving in the Downturn

by Kim Letch Partner, Ernst & Young LLP

How have fast-growth entrepreneurial companies weathered the economic downturn? What strategies have they employed to keep their businesses afloat in these troubled times? To find out, Ernst & Young surveyed 3,100 of the world's most successful entrepreneurs across fifty countries. We combined those survey results with insights we've gathered from conversations with thousands of entrepreneurial leaders around the world. The result? The eight performance challenges presented here, with the goal of defining a performance agenda for the "new normal."

1. Re-evaluate your business model.

Entrepreneurial companies are distinguished by their willingness to innovate when confronted with challenges. In a stagnant economy, this ability is more vital than ever. Successful businesses have been evaluating their existing strategies, ensuring that their business models and organizational structures are still the best fit for the new economic climate.

Entrepreneurs tell us that they are forging new partnerships to drive innovation and finding inventive ways to work more closely with customers, suppliers, distributors and, in some cases, select competitors. By challenging existing business models, they are able to focus on seizing transaction opportunities, targeting weakened competitors, expanding geographic reach, and securing new customers and service lines.

2. Optimize your market reach.

Over 78% of entrepreneurs indicated that their focus on customer satisfaction has become more important in the last six months. As the global economic landscape changes, we expect to see a continued focus on customers with more companies emerging from current economic challenges ready to capitalize on new market opportunities.

Many entrepreneurs are investing in and developing customer relationships as a vehicle for future growth, while simultaneously expanding into emerging markets. They are taking advantage of weak competitors by working toward market dominance in new geographies, securing greater growth and profits. By thinking creatively about what they offer already, they are finding new market opportunities in emerging locations beyond the well-served global mega-cities.

3. Optimize the flexibility of your operations.

Over 60% of entrepreneurs surveyed acknowledged the growing need to build alliances, reduce costs and deploy technologies aimed at achieving efficiencies and accelerating growth. Entrepreneurs are rewarding suppliers for innovation and passing cost savings onto customers. By finding innovative ways to manage costs without compromising their long-term vision, they are maximizing operational flexibility and driving their businesses forward.

A successful operating model should be flexible across people, processes and technology to take advantage of emerging opportunities. It needs to adapt to changes in volume rapidly without being dependent on large-scale changes in recruitment, training and capital investment.

4. Revitalize the way you manage risk.

Companies need to balance risk with value and cost to decide where an investment will have the greatest effect on performance. The benefits will not only be realized in cost reductions, but also in increased revenue and profitability.

Entrepreneurial companies have always been willing to assume risks that more cautious businesses might shun. But an effective risk-taking culture can only thrive within a solid framework of internal control. Entrepreneurs tell us they are improving methodologies for preventing and detecting fraud. They are also anticipating the increased risks created by regulation. Many are broadening the scope of their risk management practices to include new areas, such as third-party and counterparty risk. While firming up their internal control environments, companies have been careful to ensure that risk management does not stifle their entrepreneurial drive and that controls remain effective and efficient.

5. Optimize capital availability and deployment.

Fifty-four percent of entrepreneurs surveyed recognize the increasing importance of improving working capital. By improving their working capital management, they are ensur-

ing that their finances remain strong, yet flexible. They are optimizing their capital structures for flexibility and strengthening the role of treasury management in their organizations.

Entrepreneurs are also intent on improving their ability to forecast and analyze market volatility. In addition, many are capitalizing on tax credits or incentives that support investments in innovations (e.g. environmental sustainability). A company's ability to access liquidity, manage and release cash; and maintain cost controls is essential to reducing overall risk from market changes.

6. Strengthen your management talent.

Recruiting, retaining and motivating talented people who have both a sense of mission and the capacity to address the complex market will be essential for success in the new economy. During the downturn, entrepreneurs maintained their commitment to working with exceptional people, and are using incentives to retain top talent. They also retrained their existing workforces to reflect changing business models. To foster an effective business culture, 57% of entrepreneurs agree that greater internal communication, transparency and employee involvement is more important in the new environment.

7. Accelerate your decision-making and execution.

In a changing environment, the speed of strategic decisions affects performance. Opportunities are fleeting, customers can't wait, competition is fierce and decision makers learn by taking action. To seize new opportunities, entrepreneurs are increasing the speed of decision-making and the effectiveness of project execution to take advantage of shorter windows of opportunity. They have been fostering a sense of urgency at the board level and reducing decision-making cycles through improved situation analysis and meeting management. In addition, they have been leveraging data analysis for faster and smarter decision-making and assessing results after an event occurred. Identifying and measuring gaps between strategy, planning, budgeting and monitoring processes have helped them to adopt leading-edge project management disciplines.

8. Strengthen your stakeholders' confidence.

Entrepreneurial companies have always understood the need to maintain close relationships with their financial backers. But the economic downturn has put renewed emphasis on the importance of frequent and transparent communications with stakeholders with regard to current or future performance. Fast-growth companies are improving corporate governance arrangements and introducing more transparency and accountability, embedded at all levels of the organization.

Innovation drives growth

The bottom line is that the economic climate is a challenge for all businesses, from the most cautious established players to the most dynamic entrepreneurs. Future market leaders understand that amid uncertainty there is opportunity. They are responding by drawing on something that makes them special: their extraordinary ability to innovate.

Kim Letch

Kim is a partner in Ernst & Young LLP's Orange County office. She previously led the firm's Strategic Growth Markets practice for Southern California, Nevada, Arizona, Colorado and Hawaii.

Kim has more than 18 years of experience providing assurance and business advisory services to clients across industries. She brings a global perspective to her clients, having worked with Ernst & Young in London, England and Melbourne, Australia, and in the United States in Chicago, San Diego and Orange County. She can be reached at 949.437.0244.



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The MBA programs at Chapman University's George L. Argyros School of Business and Economics prepare students to assume leadership roles in business organizations by combining leading edge business theory and the best of business practice within a personalized and focused setting. The Argyros School develops business leaders who create value for their organizations by blending the capacity for sound economic reasoning and a global perspective with the qualities of individual initiative, accountability, effective communication, and integrity. MBA students acquire the ability to identify and evaluate opportunities throughout the world and to execute the strategies necessary to take advantage of them. Students learn not just theory but how to apply cutting-edge concepts to real business problems thus preparing students to lead from day one.

Real-world business education

Chapman University's Argyros School is an international leader in delivering a real-world business education. An idyllic campus in the heart of Southern California's dynamic economy, Chapman University provides the ideal setting to provide MBA students with access to outstanding teachers and scholars as well as to a network of top executives in one of the nation's most vibrant business communities. We continually create opportunities for students to interact with business leaders by hosting events and programs like the Distinguished Speaker Series, mentorship programs, the Dinner for Eight program (small group dinners with business leaders), and Executives in Residence. These programs bring both a real-world perspective to the MBA and serve as outstanding business contact opportunities for our students.

Research centers

Similarly, the School's research centers and institutes create collaborative opportunities for students, faculty and the business community. Students in the Argyros School take advantage of the classes, seminars and other diverse opportunities afforded by our research centers to enhance their MBA experience. The Anderson Center for Economic Research, which forecasts key economic indicators, plays a major role in bridging the gap between academics and the business community. The annual Chapman University Forecast Conference attracts more than 2,000 business leaders who use the forecast results to make more efficient planning and investment decisions. The Leatherby Center for Entrepreneurship and Business Ethics leads our nationally ranked entrepreneurship program and offers students the knowledge and resources to plan and launch new businesses through coursework, internships, business plan competitions, consulting team projects, and the mentorship program. Our Schmid Center for International Business enhances the global perspective of the MBA program specifically through the provision of a variety of international experiences for our students as well as exposure to distinguished speakers on contemporary global issues. The Hoag Center for Real Estate and Finance offers seminars, conferences and forums on important issues in real estate and finance in addition to providing students with access to real estate industry practitioners, mentors, internships, and industry data and information. The breadth and depth of the Centers' offerings all serve to significantly enhance the



Chapman University's location in central Orange County, California, located 35 miles south of Los Angeles, offers the safety and charm of a small town and the unlimited career, social and cultural opportunities of one of the nation's top metropolitan areas.



Chapman's Argyros School offers three MBA programs at its Orange County campus.

opportunities and exposure for our MBA students.

Close-knit community

MBA students in the Chapman's Argyros School benefit from being part of a close-knit community. Both faculty and administrators make students their priority. Dedicated to providing exemplary classroom experiences as well as to offering students individual help and advice, the people in the Argyros School set our programs apart. Faculty places a high value on teaching as well as interaction and communication with students. The School provides students and alumni with unmatched access to exceptional teachers and scholars. The distinguished faculty of the Argyros School includes Nobel Laureate Dr. Vernon Smith.

Programs

Chapman's Argyros School offers three MBA programs at its Orange County campus – the Full-Time MBA, the Flex MBA and the Executive MBA program.

The Full-Time MBA

The Full-Time MBA program is a challenging and rewarding 16-17 month accelerated track that is perfect for students looking to start their business career or wanting to make a career transition. All core courses are taken during the day in a consecutive, planned format and supplemented with four electives. Students also receive in-depth, hands-on career guidance from our MBA Career Management Center. Within the fulltime program there are two joint degree programs offered – the JD/MBA and the MBA/MFA in Film and Television Producing.

The Flex MBA

The Flex MBA program provides students with the flexibility to create their own schedule and complete the program at their own pace. With all classes in the evening, this program is ideal for students who are working. The Flex MBA program also includes the joint MBA/MS in Food Science, as well as the International MBA which allows students to study on three continents in a 17 month program.

The Executive MBA

The EMBA program is a "Premium" program designed for mid-career managers and senior executives. This carefully structured, sequential course of study allows students to gain a degree in just 21 months. Participants develop new competencies to add value to their organizations, using the EMBA as a springboard to the next level of their careers.

The Argyros School also offers another international program based in Prague, Czech Republic and our Economic Science Institute features an MS in Economic Systems Design.

Location

Chapman University's location in central Orange County, California, located 35 miles south of Los Angeles, offers the safety and charm of a small town and the unlimited career, social and cultural opportunities of one of the nation's top metropolitan area. The Disneyland Resort and the Orange County Performing Art Center are both about ten minutes from campus. For sports fans, the Los Angeles Angels of Anaheim and the Anaheim Ducks play their home games within 5 miles of campus. West coast beaches such as Huntington and Newport Beach are less than 15 miles away yet we are only 90 minutes from snowboarding in the mountains.

Chapman University—Argyros School of Business and Economics is located at 1 University Drive, Orange, CA. Visit www.chapman.edu/argyros.

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EXCELLENCE IN ENTREPRENEURSHIP AWARDS

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THE TENANT'S ADVANTAGE

Something That You Might Have Overlooked!

by David L. Willis, MCR, CresaPartners Orange County

Your broker has found the perfect office suite in a beautiful building close to your home. The asking rate and the parking charges seem reasonable and the listing broker tells you they can improve the space exactly the way you want. Things are looking good. You tell your broker to prepare a Proposal to Lease and serious negotiations begin. Invariably, one component of the Proposal to Lease that gets very little attention is one that will have a serious impact on several economic issues later on. What is that overlooked component? It is the escalation of rent over the term of the lease.

How a base lease rental is increased over the term is typically based on local practice. A market consensus is reached at some point in time and every landlord soon jumps on the bandwagon. Right now in Orange County, commercial property owners are looking to achieve 2-4% annual increases or possibly fixed amount increases ranging between \$.05 and \$.10 per square foot per month. Today, every proposal changing hands has a rental escalation along these lines.

Current market standards for annual rate increases...negotiable!

Over the last 25 years, Orange County brokers have seen flat five-year rates, single mid-term increases and even Consumer Price Index based increases. The point is, the current market standard for annual increases is just the current methodology – it is not set in concrete. It is negotiable, and rightfully, it should be negotiated.

Consider the following example. Your initial rental rate is \$2.50 Full Service Gross (meaning that taxes, utilities, maintenance and insurance are included in the rate and any increase in those costs will be passed-through to you each year). The landlord proposes a 4% annual increase each year of a five-year term. The common argument for needing a rental increase is to account for the erosion of the landlord's profit due to inflation. This seems reasonable and fair. In reality, the 4% increase jumps the base rent from \$2.50 to \$2.60 in the second year. The landlord's profit is actually only a fraction of the total lease rate. The profit percentage is determined by deducting debt service, operating expenses, reserves for capital replacements, amortized expenses such as tenant improvements and broker's commissions and overhead from the lease rate. Since the operating expense increases get passed through to the tenant each year and the debt service and the amortized expenses are typically fixed over the term, the rate increase goes solely toward overhead, profit and reserves. A 4% increase in your rental rate may result in a 60% to 100% increase annually in the landlord's overhead and profit depending on the amount spent on capital expenditures that year.

But wait, it gets worse, this increase keeps happening every year and now it is compounding itself too. At the end of the five-year term, the lease rate will be \$3.04 FSG. The total \$.54 increase over the initial lease rate will provide the landlord with a huge increase in overhead and profit. The problem arises because the inflation-busting increases are being applied to the total lease rate, not just the landlord's profit percentage. Landlords will argue until they are blue in the face that the 4% annual increase is absolutely necessary. You now know better.

And consider these lease components...

What are the other lease components affected by rate escalations? The Security Deposit is typically based on the value of the last month's rent or even 110% of the last month's rent. Obviously, compounding the rent every year by a fixed percentage will make that number much larger than it needs to be.

Another problem arises if you have a renewal option with the nasty little lease phrase in it that states "In no event shall the Lease Rate during the Extended Term be less than the Lease Rate being paid during the last month of the Initial Term." It doesn't take a

genius to figure out that those innocent little rent increases may now place your renewal rate well above current market rates. Your option just became worthless and you have to enter into open negotiations as a captive tenant.

Finally, you may have had the cost of some above-standard tenant improvements amortized over the term of the lease at the landlord's cost of funds. That amortized amount frequently gets added in with the monthly rent figure. If only the base rent gets escalated, then you are fine. If they escalate both the base rent and the amortized improvements, it will result in a big windfall for the landlord. You always need to segregate those monthly line items.

The next time a landlord or his agent casually states that the rent will escalate at 4% per annum, ask them to explain exactly why such an increase is necessary. Better yet, engage a trained professional to represent your interests in the transaction and you will never have to worry about overlooking the little things again.

David Willis

David Willis, Co-Founder and Principal of CresaPartners Orange County, has extensive experience representing the interests of corporate real estate clients in lease and purchase transactions. For more than 25 years, he has represented clients in acquiring properties in thirty-two states and over forty-six major cities. Prior to joining CresaPartners, he was President of Corporate Real Estate Advisors. Before that, he was Principal in Charge of the corporate real estate consulting practice at Arthur Andersen overseeing all of Orange County, San Diego and the Inland Empire. During this time, Willis completed hundreds of office, retail and industrial leases



Clients include Paychex, Inc., Pacific Life, CO-OP Financial Services, Fluor Daniel, Ryland Homes, HOK, Steelcase, Tangram, Star Trac, Sony Electronics, Guardian Insurance, Resources Global Professionals, among many others.

Arizona State University, B.S. Marketing 1971 (summa cum laude), M.B.A. 1973 (magna cum laude)

Willis is a member of CoreNet Global and has been awarded the designation Master of Corporate Real Estate (MCR) by that organization. He also served for 9 years as a board member of the Orange County CoreNet chapter. A frequent lecturer on corporate leasing, he's also written a number of articles on corporate real estate topics. Willis has been named a "Broker of the Year" by The Irvine Company, Trammell Crow Company, South Coast Metro Alliance and Equity Office Properties. He is actively involved with Children's Hospital of Orange County, Intervention Center for Early Childhood and ATSC.

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On the Wings of Success: One Entrepreneur's Story

Alar Staffing Corp. is a Santa Ana-based light industrial staffing company that grew from humble beginnings to the multi-million dollar enterprise it is today. The success of Alar is due to a number of factors, not the least of which is the spirit and resolve of its founder, entrepreneur Pati Cinkle.

With Pati at the helm of the company for the more than 20 years, Alar Staffing Corp. is a different type of agency. It is a multi-million dollar business with clients that specialize in the manufacturing and distribution industry in Orange County and the Inland Empire.

By never compromising integrity and a strong dedication to service, Alar has earned the trust of its clients. The company's strength is due not only to the loyalty of its customers, but also in the values that are at its foundation and that have sustained it through past hardships and the current recession. In 2009, Alar posted a 7% increase of sales while remaining debt-free.

This is the story of how a young, single mother started a company with nothing but her own talent. It is a testament to the strength of the human spirit, and an example of how – through belief in oneself and hard work – even the most difficult challenges can be overcome. Faithful to its name, which means “with wings,” Alar Staffing Corp. ascended from humble beginnings to the become a leader in its industry.

The Early Years

Patricia Sotelo Cinkle, President and Founder of Alar Staffing Corp., was born in Acapulco, Gro., Mexico in 1963. In 1968 she emigrated to the United States with her mother and settled in Orange County. Pati excelled at school, learned to speak English fluently, and was accepted to college at the young age of 16. However, her family was not able to afford the tuition and Pati was forced to drop out.

A divorced mother by age 21, Pati struggled to make ends meet for her and her young son. Armed with a strong work ethic, she worked until the recession of 1989 hit and left her among the unemployed. Remaining jobless was not an option for the young, single mother and so determined to find work, Pati went from one temp agency to another, applying for work.

“I applied to several employment agencies, but became disillusioned with their process,” Pati remembers. That disillusionment compelled her to strike out on her own to find a temporary assignment without the help of a temp agency. Armed with her people skills and administrative talent, she eventually landed a position at a very high profile company in Costa Mesa.

She excelled at that job, and when they needed more temps, they asked Pati to find them. Because she didn't want to disappoint the client, Pati stepped up to the challenge and did what they needed. Soon, she was consistently placing the right people in the right jobs, and it wasn't long before that client was recommending her to other facilities in Norwalk and Los Angeles.

“I knew things could be done differently than the other temp agencies were doing it, and the clients seemed to enjoy someone who was genuinely interested in solving their problems,” recalls Pati. “I made it a commitment to always care about what was in the best interest of the clients and the applicants, and never compromise integrity.”

By taking the time to screen applicants well and to only send candidates that matched the corporate culture of each client, Pati was able to secure their loyalty and trust. Eventually word of her expertise spread, and her clients started to recommend her to their business partners and associates.

In this way, almost inadvertently, Alar Staffing was born. Within a few years, Pati had over 200 temps and 40 different clients, 100% of which came from client referrals.

Growing through Challenges

Alar's growth, however, was not an accident. It was the result of a passion for excellence and an unparalleled work ethic. “When you start a business in a recession, you sort of train yourself to work in survival mode,” Pati says. “You work 60 to 80 hours per week. You put everything into your business...your time, your energy, your heart and soul. You are never 100% certain that your company will live to see another day, month or year. Being in survival mode is great for business because you're determined, focused and hungry!”

Limited resources in the 1980s and 1990s presented a unique set of challenges for Pati

to overcome. “Sometimes things were difficult. There were obstacles to be met, such as staying out of debt and floating payroll in lean times,” she recalls. “But I knew that by keeping the company debt-free, I would be able to pass along very competitive rates to my clients.”

With low rates and a level of service that was unavailable through other temp agencies, Alar gained a reputation among its customers as the go-to agency when they needed a staffing partner that could deliver high-volume placements and a world-class safety program. But what differentiates Alar from its competitors is that it is the only agency that includes criminal background checks and DHS E-Verify as part of its screening process. It is the only agency that offers a Workforce Guarantee. This Guarantee protects clients and allows them to recapture their training costs if a temporary worker is not screened properly.

The Secret to Success: Hire the Right People

Pati is the first to say that the success of Alar is due in large part to the dedication the executives, managers and staff who are the backbone of Alar. “I hire people I trust, who I believe in, and who I want to help succeed,” says Pati. “Because we share personal values, they easily become the true strength of Alar, and they are in charge of the day-to-day operation of the business.”

“With a quality group of people, Alar is able to still do things like no other agency does, and continually raise the bar,” Pati explains. “For example, we screen out approximately 67% of our applicants due to identity fraud, criminal backgrounds, and predatory behavior.”

Working with a trustworthy staff not only creates a stronger company and better results for clients, but it also frees Pati's time so that she can pursue other passions, among which are working within the Hispanic and nonprofit communities.

Making a Difference in the Hispanic and Nonprofit Communities

Pati's strong connection with the Hispanic community compelled her to create a business model that offers unique opportunities for unskilled light industrial workers in the Hispanic community. Alar's bilingual staff is able to screen applicants in their native language, and cater to the unique needs of the community, making a difference in individuals' lives.

One such way that Alar makes a difference is in the way it is able to adjust to the needs of its workers. In 2008, realizing that transportation was a major issue for light industrial workers, Pati started Griffin Transit, an employee shuttle program that provides transportation to and from jobsites. Without the shuttle service, many otherwise employable workers would not be able to get to work. Currently, Griffin Transit has two shuttle busses and runs daily routes. The passengers pay \$10 per week for this service.

The company also accounts for the personal needs of its employees in numerous ways. For example, each year, Pati holds an Annual Christmas Yacht Party for her light industrial employees. “I know this is the only party many of my employees will attend,” she explains. “So I do everything possible to make it an event of a lifetime.” Alar also hosts “Photo with Santa Day” for the children of employees. Kids get to spend time with Santa and each receives a free photo with Santa. Since most employees only make minimum wage, this photo would cost them almost one day's pay if they had to purchase it at the mall.

The nonprofit community also benefits from the generosity that business success allows. Pati currently serves as a Trustee for Olive Crest, a non-profit organization dedicated to the prevention of child abuse. She speaks to teen moms for organizations like The Girl Scouts of America, and gives career assistance to battered women through her work with Human Options. “The holidays can be especially difficult for abused women and their children. So, we arrange for Santa to personally deliver toys to the children during Christmas. We hope to provide a brief escape from their harsh reality.”

Full Steam Ahead

The past twenty years have been ones of struggle and success for Alar. Building upon the strong foundation that the past two decades have provided, Alar is well positioned to enjoy more success in the coming decade. It is committed to expanding its client base, increasing efficiency and effectiveness, and expanding its services across the board.

“I'm looking forward to growing Alar in this challenging economy,” says Pati. “There are several forward-thinking projects in the works for us, and we are very motivated to tackle them. We've only just begun to build this company!”

If you are interested in learning what Alar can do for your company, visit the company's website at www.alarstaffing.com or call (714) 667-3100 to speak with a representative.



Pati Cinkle

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Finding Your Way Through the State-Tax Maze

Expansion's fun, but the taxes next door can bite

by William Mueldener, CMI, Tax Principal, **HEIN & ASSOCIATES LLP**

So you've decided to launch your business in a neighboring state. Terrific. Conquer that state and then the rest of the U.S. There's something to consider first, however, before you get in too much trouble: State tax laws.

I know it's not exactly what you wanted to be bothered with amid the excitement of your expansion, but businesses operating in other states possibly owe taxes there. It's easier to avoid problems than to get hauled before a state tax judge who can impose audits, back taxes and fines.

People tend to put state tax considerations aside because federal taxes represent, on average, 30 to 35 percent of income. State taxes can bite as well. Sales taxes, state income taxes and property tax on all business-owned assets are standard and could add up to a cost of 15 percent or more on a cumulative basis. Here are some important factors to consider as you make your move into other states.

Where will you be in five years?

What's the 5-year plan look like? Try to project where you are and where you plan to be in five years. If you open a distribution center in one state, it might be simple; but if the plan is to expand into a third state in two years and a fourth two years after that, it's going to become more complicated.

Most states have an income tax on revenues earned in that state. But there also might be a sales tax on all of the assets your business buys at 7 or 8 percent, plus personal and real property taxes.

The total of all the taxes imposed on you is not represented by one tax but by the cumulative total of all the taxes that come into play. Ask yourself, "What kind of business am I doing? Services? Retail of tangible goods?" Overlay that knowledge with the specific state taxes that are imposed and you'll get a clearer picture on how that state tax will impact your business. Avoid the mistake of assuming all states will tax your business in the same manner.

Multiple state operations – multiple complications

Multiple state operations complicate taxes. A business owner needs to determine what dictates whether he has a taxable presence in those states and what dictates the taxes that relate to his business. Then consider that analysis in light of the multiple states in which the business will operate.

Let's take state income taxes for an example. Each state determines the portion of taxable income that may be taxed by various factors. One method used by an increasing



number of states is to look at the ratio of sales made in their specific state versus sales everywhere and then apply that ratio to the business' adjusted federal taxable income. While multiple states may use the same "sales" factor method to allocate income, each state may define sales and how they are sourced differently which can have a dramatic impact on the end result.

Avoid competitive disadvantages

Don't pay more than your competitors. The last thing you want to do is create a competitive disadvantage to yourself by paying more than your share of taxes. We have clients in the energy business who have paid 10 percent more tax on pipe than their peers. Simple planning and understanding of state laws regarding purchasing and warehousing could have increased the company's profits by 10 percent.

On top of that, states routinely push tax incentives to locate in certain depressed areas. If your competitor has a distribution center in one of those areas, they are going to beat you on the total profit of their goods or services.

With all of this said, don't put tax considerations in front of your business objectives. Take everything – taxes included – that will impact your costs into consideration before expanding. It's painful to do the analysis up front but you can save a lot of risk and expense on the back end that could occur if you get an audit and assessment from a state for not paying the proper taxes.

William Mueldener, CMI

William Mueldener, CMI, is a tax principal with HEIN & ASSOCIATES LLP. He leads the firm's state and local tax practice, specializing in state income/franchise tax, sales/use tax, other transactional/excise taxes and incentives. He can be reached at wmueldener@heincpa.com or 303.298.9600.



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industry knowledge to forge customized solutions for your business. We are ranked as one of the top 60 accounting and advisory firms in the country¹, and our SEC practice is recognized as among the largest in the nation.² In addition, **HEIN & ASSOCIATES LLP** is consistently recognized by Inside Public Accounting as a "Best of the Best" firm, an honor bestowed on only 25 firms per year based exclusively on management performance.

¹ *Accounting Today*, April, 2009

² *Public Accounting Report*, March, 2009



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EXCELLENCE IN ENTREPRENEURSHIP AWARDS



Working Capital Solutions to Strengthen Your Business

by Paul Kaufman, Market President, Chase Middle Market Commercial Banking

In today's challenging economic environment, companies and public sector organizations need to manage cash flow, gain efficiencies and reduce expenses in order to optimize their working capital. By properly leveraging the right treasury services solutions, businesses can accelerate funds availability, reduce risk exposure and increase bottom-line performance.

Automated Payables Meet the Need

The accounts payable (A/P) process is becoming more automated as buyers focus on reducing costs and delivering greater self-service and transaction transparency to suppliers. More organizations are starting to move up the payables continuum and choosing solutions – either individually or in combination – that match their needs so they can address their long-term processing objectives while relieving their working capital and operational pain points. Regardless of the organization's size, A/P situation or cash management requirements, automated payables solutions are within reach. Scalable, customizable and cost-effective, they can be designed to meet the needs of businesses and public sector organizations of all sizes.

Not only can you begin driving paper from your payables process, your organization can increase opportunities to optimize working capital hidden in a range of business and consumer payment processes by using electronic payment tools. These tools include the Automated Clearing House (ACH) Network, where payments are faster and cheaper than traditional paper check processing options, cards and fully integrated, total payables processing solutions.

Card Programs Deliver

The variety of solutions in a comprehensive card program delivers best-in-class working capital management practices and represents a cost-effective method to meet your accounts payable and payroll needs. For example:

- Purchasing Cards combine payments and financing and are ideal for managing supply chain finance;
- Corporate Cards simplify travel and entertainment reporting for increased productivity;
- Single Use Accounts provide an integrated approach to payment, reporting and reconciliation;
- Debit Cards transform payroll and daily commerce into cost-saving paperless transactions.

The Case for Integrated Solutions

More sophisticated needs require robust solutions, and a fully integrated, total payables processing strategy accomplishes that mission. Scalable and cost-efficient, this approach offers numerous advantages, including:

- Multiple payment options – ACH, card, wire and check – to expedite processing and provide remittance data with every payment;
- A supplier portal that offers real-time visibility to payment status;
- Improved supplier management using analytics for benchmarking and performance measurement to increase participation in discount programs;
- Pro-rated payment terms to capture supplier discounts past the discount due date on a sliding scale;
- An on-demand service model that lowers the cost of ownership;
- Disaster recovery capabilities to protect your critical data and image files from loss or damage.

Integrated Payment Data Files

The check printing process, along with a full range of payment types, is offered by providers with the ability to accept an integrated payment data file to consolidate and process your payments. Using this method, you can send a single file with instructions for wire transfers, checks, ACH and card transactions. The file is authenticated, contents validated and then routed over the appropriate settlement channel cost-effectively. Make sure encryption security is provided to protect your data.

Using a Phased Approach

Initiating an automated payables strategy does not mean getting in over your head. You can phase in your plan without significant capital investment starting with ACH or move directly to total payables processing. In most cases, available solutions are compatible with existing accounting systems and require little or no hardware investment.

Expediting Receivables Collection

Electronic payment strategies provide a number of benefits and are being used in both

business and public sectors to help expedite receivables collection to:

- Improve days sales outstanding;
- Minimize financial risk;
- Create processing efficiencies;
- Gain a competitive edge.

Upgrading Your Processing

Today's robust electronic payment systems present business leaders and municipal officials with attractive cost and efficiency incentives to move beyond the lockbox, ACH and credit cards to upgrade their payment acceptance and remittance processing operations. Many are consulting and partnering with industry-leading technology providers to guide their conversion to automated processes that are scaled to their needs.

Centralizing all remittance data and images in a single repository hub, enables credit, accounts receivable and customer service managers to get a head start on forecasting cash flow, cash allocation and exception management and resolution. The features and functionality of a customized electronic payment solution will help them:

- Accelerate collections and lower DSO numbers;
- Receive electronic alerts on check returns and important payments;
- Archive and retrieve images and indexed data online;
- Capture and upload data throughout the day, including check payments sent to a lock box, ACH payments and wire transfers;
- Ensure data security and disaster recovery.

Best Practices for Accelerating Receivables

Focus on leading-edge technologies and make developing a robust receivables and collections processing infrastructure a priority.

Promote the switch from paper-based to paperless, electronic payment to your stakeholders and the media. Implementing green initiatives will position your company as an eco-friendly corporate citizen and increase brand recognition.

Market the benefits of electronic payment to your customers by offering communication and guidance to ensure all involved in the A/P and A/R functions view the shift as simple and seamless.

Analyze the cost and benefits of remote deposit capture for your receivables management strategy. This Web-based solution makes it possible to capture and scan checks and full-page documents sent from multiple locations and process payments the same day.

Chase Can Help

Recognized as a technology innovator in the automated processing field, Chase offers a full suite of electronic solutions. These solutions can consolidate all accounts receivable transaction data and images into a single, secure repository that's accessible 24/7 via the Internet, enabling expedited exception resolution, improved workflow processes and the application of insightful analytics.

Organizations are turning to Chase for payables automation solutions that can be optimized cost-effectively to meet working capital goals. Whether simply outsourcing check print, enabling electronic payments using ACH, a card program that offers electronic settlement or a total payables processing solution for more sophisticated needs, we can design, implement and support payables automation strategies that meet our clients' unique needs.

Paul Kaufman

Paul Kaufman is the Market President for Chase Middle Market Commercial Banking, based in Irvine. He is responsible for Orange County and the Inland Empire. Paul's experience encompasses more than 18 years in middle market banking and credit. He can be reached at 949-838-1604 or paul.j.kaufman@chase.com.



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EXCELLENCE IN ENTREPRENEURSHIP AWARDS



From Entrepreneur to Investor: Successfully Navigating the Transition

The decision to step back from running a business is never an easy one. Whether to sell the business or keep it in the family, the deciding factors fall roughly into two categories: the hard facts and the softer factors. The hard facts include issues such as: market conditions, stage of business lifecycle, economic conditions, opportunities for organic vs. acquisition growth, foreign competition, and a litany of other business indicators. These factors are relatively easy to divine.

More difficult is the task of sifting through the less tangible inputs, which might include certain characteristics or life stages assignable to the business owner – changing appetite for risk, energy and enthusiasm for running the business, desire to pursue other interests, and compulsion to retain control of the business. Those factors involve introspection, which is a difficult task for most of us. Some of the other soft factors include assessment of other individuals, which can be even more difficult, especially when those being examined are family members or trusted employees. The business owner must consider the aspirations of the children, the nature of his or her relationship with and among them, and the likelihood that the business will remain a viable venture if left in the hands of existing management and leadership.

Building the Right Team

Regardless of the industry or type of business, a business owner will need a core of advisors when the decision is made to sell or transfer a business. The team will likely include an investment banker, an accountant familiar with corporate and personal taxes, an attorney familiar with business law issues and wealth transfer matters, a business valuation specialist, and a wealth manager.

Assembling this team can be a challenging undertaking. Often, the first impulse is to engage the advisors who have been advising the business since its inception. Although that might be the right decision, the danger is that, as the business, the family and the wealth have grown, the complexities of that business and the nuances around the transfer of that business may exceed the capabilities of long-standing advisors. Prudent advisors who recognize this will be candid with the business owner about the situation, and will work to stay involved in the business while also referring the owner to a specialist. It is important to remember that bringing in a specialist does not necessitate the end of a long relationship with an advisor. In addition to advisor referrals, personal networks such as other business owners, trade associations and professional groups are a valuable resource for referrals to qualified and specialized advisors.

Once the right team is assembled, it is up to the business owner to oversee the activities of the advisors, which begins with drafting a timeline and order of activities. Before discussions of the deal begin, the business owner must consider his or her own family financial dealings.

How Much Is Enough: Forecasting Your Spending Needs

Independent of any discussion about an anticipated deal for the business, the business owner and family must consider how they would like their family's wealth to work for them. This discussion can be framed around one deceptively simple question, "How much is enough?" The answers to this question will drive the family's wealth management strategy.

Determining how to pay for a certain lifestyle after the sale of a business can be a huge challenge for former entrepreneurs. Many business owners are able to finance their lifestyle out of cash flow from the business. Upon the sale of the business, however, that cash flow dries up and the former business owner will have to rely upon the proceeds to finance his or her lifestyle. The analysis of what type of lifestyle those proceeds can support is often an eye-opening and sometimes unsettling experience. I think we need something here about how a wealth manager or the team of experts can help assuage these fears, otherwise it's just hanging out here.

Prepare the Money for the Family and the Family for the Money

Once the discussion of "how much is enough" is underway, attention usually turns to tactics for passing on the wealth in the most tax-efficient manner possible. Often, little consideration is given to ensuring that the children and grandchildren, who will be the beneficiaries of the family wealth, are prepared to handle it. Any complete plan for family wealth management must address issues of wealth education and stewardship, the role that philanthropy may play, and the impact of the wealth management strategy on the family.

Transferring Assets

Once the wealth transfer strategy has been determined, the next step is to identify the appropriate techniques to carry out the family's goals. These techniques are created, at least in part, to mitigate taxes.

The techniques available to transfer assets within the family in the most tax-efficient manner fall roughly into four categories: outright gifts, discounted gifts, gifts in trust and sales. These options should be discussed with the appropriate tax or legal counsel.

Outright Gift

An outright gift is a direct transfer of some or all of a transferor's interest, unencumbered by any other entity. After the gift, the transferring entity owns those shares in his or her name and has full control over them. The outright gift is attractive for its simplicity, but likely will not afford as wide an array of discounted valuation opportunities.

Discounted Gift

By simply placing shares of the business in another entity and gifting interests in that new

entity, the business owner might be able to take advantage of more significant valuation discounts while retaining an ownership stake.

Gifts in Trust

Creating trusts and funding them with business interests also can have tremendous transfer tax advantages. The most basic type of trust planning involves transferring assets to an irrevocable trust for the benefit of a group of beneficiaries. The trust can be drafted to meet the business owner's wealth transfer goals and an appointed trustee controls the trust assets. The issue of trustee selection is critically important, immensely technical, and can dramatically impact the management of the shares within the trust.

Note that there are many different trust structures available. Consult your tax or legal counsel for the structure most appropriate for your situation.

Sales

The sale of business interests can be as varied in form and shape as the businesses involved. One technique is an outright sale, which is a simple transfer from party A to party B for fair value. An installment sale obligation can be implemented to defer capital gains tax. Another popular technique is the sale to an intentionally defective grantor trust, which involves the sale of business interests to a trust created by the business owner for the benefit of his or her family.

Transferring Assets to a Charity

Charitable planning can provide tremendous tax advantages for a business owner who is philanthropically inclined. There are myriad techniques available for transferring assets to charity, including outright gifts, split interest gifts, and perpetual gifts.

Outright Gift

An outright gift is a transfer to a charity that affords no continued control to the donor. It can be a useful tool for creating deductions and mitigating tax due in the year of a liquidity event for a business owner.

Split Interest Gift

Unlike an outright gift, a split interest gift involves more than just the interests of the charitable organization. Two primary types of split interest gifts are charitable remainder trusts (CRT) and charitable lead trusts (CLT).

A CRT is an irrevocable trust, created by a donor/business owner that instructs that a certain amount be paid each year to a person or people holding an income interest in the trust. Upon termination of the trust, the amount remaining in the CRT passes to the charity designated by the donor.

The CLT is the opposite of a CRT. A business owner creates a CLT and contributes some business interest. The trust makes annual charitable distributions for a designated period. Upon the trust termination, what is left in the trust passes to the non-charitable beneficiaries.

Perpetual Gifts

A private foundation is a charitable entity that can have perpetual existence. It is a grant making organization that is required to make regular distributions to other charitable organizations. The foundation can last as long as the assets distribute.

Life after the Business

Prior to the sale, restructuring, or transfer of a business, much attention is paid to the details of the transaction and to the subsequent structure of family finances. In most cases, however, little attention is paid to what the business owner will do after the sale of the business. Concerns about control or personal fulfillment often arise when a type-A business owner transitions from running the business.

Most successful business owners are successful because they have dedicated themselves almost entirely to running their business. The owner knows where every asset is, turns the lights on every morning and can feel and touch the business' assets. This contrasts markedly with a former business owner who is faced with the task of investing the proceeds from the business sale. That person might now be in the position of moving from active control of all investments to being a passive investor, and that often does not sit well with individuals who built and controlled an enterprise. One difficulty is the inability to "see" the assets in an investment portfolio. The investor of course knows what investments are owned, but doesn't have great vision into those assets.

To smooth this transition, it is critical that a business owner open a dialogue with a wealth manager before receiving the proceeds of a business sale. The wealth manager should be charged with understanding the needs and concerns of the business owner and creating an appropriate investment plan, which is clearly documented in an investment policy statement, and followed diligently once the investment plan is funded. The investment policy statement can serve as an anchor for the investor, reminding him of the portfolio objectives and strategy in times when the investor might be tempted to stray from his or her long-term investment goals.

Many entrepreneurs sell their business with thoughts of retiring to a life of leisure, only to wind up starting another business shortly thereafter. This is endemic of the type of personality often seen in entrepreneurs – they aren't good at being idle. This might seem like a trivial issue, but

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EXCELLENCE IN ENTREPRENEURSHIP AWARDS



The Road to Global Healthcare Connectivity is Just Around the Corner

It is hard to believe that over the course of the next five years, our nation's healthcare system will become part of the digital age. By 2015, entities that span the entire continuum of healthcare delivery will have the capability to communicate with one another electronically and seamlessly. Could Marcus Welby, M.D. ever have imagined such triumph? During his time, simply making house calls was no small feat.

We are now living in these unprecedented times – when one can hardly begin to conceive of the notion of such a dramatic yet highly necessary transformation. Is it possible that a traditional, paper-laden healthcare system can – in just five years – advance itself into the digital age successfully?

With companies like Quality Systems, Inc. (QSI) of Irvine, Calif., the electronic foundation has been in place for more than 35 years.

Pioneer of electronic-based medical solutions

As a pioneer of what has now evolved into a fully developed specialty sector within the healthcare services arena, Quality Systems has emerged a leading participant, serving both the medical and dental practices with electronic health records (EHR) solutions. Today, 55,000 physicians and dentists spanning approximately 2,200 practices throughout the country use Quality Systems' electronic-based medical solutions.

More than three decades ago, Quality Systems founder Sheldon Razin had the foresight to recognize the benefits and importance of automating healthcare practices. Initially, when he identified this niche, he was clearly way ahead of his time. Now, finally, the U.S. Government is recognizing that very same need – to fully automate medical practices – and is prepared to dole out large incentives to foster the transition to EHR.

In 1974, Quality Systems began operations as a computer consulting company. The company quickly identified an opportunity in the computerization of dental practices and began developing systems to automate them, introducing to the industry the first customizable practice management solution that could meet the needs of any size dental practice. At that time, no formal healthcare information technology (HIT) sector existed. Today it is a closely followed, carefully watched, full-fledged sector, particularly by Wall Street.

In the first few years since its founding, QSI quickly became a leader in the development and delivery of healthcare information systems for the dentistry industry, concentrating mainly on complex tasks geared toward large group practices that boasted multi-location networks. In the early 1990s, Razin realized that the company had already penetrated the large dental group market (with a 90 percent market share), at which point, QSI identified the need for automating patient medical records – known today as EHR and determined that it also needed medical applications in its offering. As a result, QSI completed an acquisition in this space, affording it EHR capabilities. Later, another acquisition brought the practice management component of a fully integrated medical platform necessary for success to QSI.

From the mid 1990s until now, QSI has captured significant market share in the medical marketplace with its comprehensive, novel healthcare informatics solutions. Moreover, QSI continued to consistently grow about 30 percent per year in revenue, earnings and cash flow. It has remained debt free and continues to generate significant cash.

Federal dollars encourage HIT investment

In addition, in 2009, with the unveiling of the government's economic stimulus plan, designed to automate and reform our nation's healthcare system, QSI again realizes it is well positioned to capitalize on this once-in-a-lifetime opportunity. Under the newly established American Recovery and Re-investment Act (ARRA), more than \$60 billion in incentives and grant money will be awarded to stimulate the adoption of healthcare information technology platforms nationwide. These political incentives will prompt hospitals and medical entities to purchase and/or implement HIT systems and more physician offices to incorporate EHR software into their practices. This will streamline processes and reduce costs while improving patient care. Managed care has already been proactive in linking providers to their organizations, a highly cost-effective and efficient measure. It is imperative that government and commercial payers get providers electronically linked so they too can better manage, control and care for the coming-of-age baby boomers with better efficiency.

In the spring of 2009, the Obama Administration enacted the Health Information Technology for Economic and Clinical Health (HITECH) Act. The HITECH program encourages physicians and hospitals to completely adopt HIT systems by 2015, and for doing so, they would be eligible to receive up to \$36 billion in overall incentives from

Medicare and Medicaid programs. The systems purchased by physicians and hospitals must be certified EHR's, and demonstrate meaningful use. Meaningful use indicated the minimum criteria that must be met to demonstrate the viability for use of an EHR. This same Act also earmarked \$1.0 billion in grant money allowing for Federally Qualified Health Clinics and Indian Health Centers to purchase new healthcare IT systems. And finally, the HITECH Act stated a provision for funding to create the exchange of information through networks, the ability to train new healthcare professionals and the offering of technical support to stimulate provider HIT adoption. It is believed that the Obama HITECH Act will propel healthcare IT sales over the several years.

This is truly an opportune time for EHR providers such as Quality Systems and for all engaged within the healthcare system. This is a chance to be part of a sea change that affects the way in which our nation, government entities, healthcare providers and medical professionals work and interact. Quality Systems is poised to benefit from the expected transition based on its proven track record and solid leadership position.

QSI Dental Division / NextGen

The company is comprised of the QSI Dental Division and a wholly owned subsidiary, NextGen Healthcare Information Systems (NextGen), both of which focus on EHR to dental and medical practices, respectively. Both divisions create the software that automates and streamlines all administrative functions required for the successful operation of a medical or dental practice such as practice management solutions includes varieties of scheduling and billing software.

The QSI Dental Division in Irvine, Calif., focuses on developing, marketing and supporting software suites sold to dental and certain niche medical practices. NextGen Healthcare, with headquarters in Horsham, Pa., and locations in Atlanta, Ga., Southlake, Texas, St. Louis, Mo. and Hunt Valley, Md., primarily develops and markets products and services for medical practices.

Over the years, both the QSI Dental Division and NextGen Healthcare have built strong positions among large practice markets in their respective arenas. The market leadership role the company has secured will bode well for it in the future, as the shift to an electronic-based healthcare system takes shape and becomes closer to reality.

From vision to reality

Throughout the years since Razin's vision became reality, Quality Systems has continually remained on the cutting edge of EHR. NextGen Healthcare is one of the industry's leaders in the development and provision of EHR and practice management systems (PMS), connectivity solutions and billing services for medical practices. Its revolutionary suite of services fully automates the medical practice. Its enterprise practice management system (NextGen EPM) provides a common registration system, enterprise-wide appointment

scheduling, referral tracking, a custom report writer and patient financial management.

NextGen Healthcare's EHR platform is designed to improve patient care, increase revenues, decrease expenses, reduce risk and improve overall patient satisfaction. NextGen EHR allows physician specialty providers to document and manage patient care, automatically create documents and letters, manage prescriptions and clinical images, provide patient education and exchange data with other systems within, and external to, the enterprise. NextGen EHR is capable of linking financial and clinical information, improving healthcare delivery and eliminating paperwork for medical practices of any size.

QSI's Dental Division offers dental practices powerful, feature-rich and flexible software solutions that allow hundreds of dental practices to operate more efficiently and cost effectively. The dental suite of software solutions and services consists of a range of components including those that assist with patient scheduling/registration, accounts receivable, billing, management reporting, electronic claims and statement processing, and comprehensive electronic patient records, along with other internet applications.

The HIT industry is truly coming of age. The sector and its key players will emerge and stands to benefit from the transformation of the healthcare industry. The new government regulations and much more stringent reimbursement rules coupled with rapid provider consolidation and Obama's HIT funding will fuel spending on the part of physicians and hospitals.

The digitizing of healthcare will affect every American – young and old. Perhaps it is hard to envision a nation tied together by medical information but the importance of such a monumental task could not be more significant. Tomorrow's doctors are growing up with technology today that Marcus Welby could never have even dreamed of.

For more information please call Quality Systems Inc. at 949.255.2600 or visit our website at www.qsii.com.



The QSI Dental Division in Irvine focuses on developing, marketing and supporting software suites sold to dental and certain medical practices.



QSI's NextGen Healthcare develops and markets products and services for automating and streamlining medical practices.

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EXCELLENCE IN ENTREPRENEURSHIP AWARDS

360 Commercial Partners Set to Revolutionize Commercial Real Estate Sector

Industry Veteran Louis J. Tomaselli Launches Innovative New Firm to Represent Landlords, Tenants and Investors

For more than two decades, Louis Tomaselli has been a driving force in the commercial real estate industry, setting records for productivity and standards for client service. Now, Tomaselli has set his sights on revolutionizing the industry with the launch of his new full-service commercial real estate firm, 360 Commercial Partners (www.360CommercialRE.com). Based in Irvine, California, the firm offers global commercial real estate representation to discerning corporate, investor and developer clients seeking to buy, sell, lease, or develop industrial and office properties.

"Today's increasingly dynamic marketplace demands a sea change in the way commercial real estate is done," said Louis Tomaselli, founder and managing partner of 360 Commercial Partners. "Our company has been thoughtfully and intentionally designed – from the ground up – to help clients navigate the increasingly complex and changeable waters of the commercial real estate market."

With its headquarters at 2211 Michelson in Irvine – and a network of hand-selected affiliates worldwide – 360 Commercial Partners offers clients the expertise of a top-performing team of commercial real estate professionals with an unwavering dedication to delivering best-in-industry results and five-star client service. The firm's five advisory groups specialize in industrial, office, investment, development and consulting for commercial real estate clients, including many Fortune 500 companies.



"We have relied on Louis Tomaselli for the marketing and sales of some of our larger holdings, and we also depend on his keen assessment of market conditions on an ongoing basis," said Annie Kodak, Senior Vice President and Asset Director, ING Clarion.

Prior to founding 360 Commercial Partners, Tomaselli served as Senior Vice President for Voit Commercial Brokerage in Anaheim, California. During his 23-year tenure with that firm, he was consistently ranked among the top five producers companywide; while his team – Team TZ – was consistently recognized as the organization's #1 Orange County brokerage team. Tomaselli has brokered a large number of record-setting transactions in Orange County, Mid-Counties, Los Angeles and the Inland Empire.

"Commercial real estate is in a down cycle, but that opens the door for those who can be nimble to create and seize opportunities, which is what we're doing at 360 Commercial Partners – and what we are doing for our clients," said Tomaselli. "Savvy clients understand the importance of securing the services of a firm where the industry's leading thought brokers will develop and deploy a cutting-edge commercial real estate strategy for your company. We're looking forward to delivering the future of commercial real estate to our clients, starting today."

For more information visit www.360CommercialRE.com or call 949.296.3600.

Q&A with 360 Commercial Partners Founder and Managing Partner Louis Tomaselli

Q: Why are you launching a new commercial real estate brokerage?

A: Today's increasingly dynamic marketplace demands a sea change in the way commercial real estate is done. After 24 years in the business, I've seen what works, what doesn't, and where the opportunities for improvement lie. It's time to bring innovation to commercial real estate, and that's what 360 Commercial Partners will do.

Q: You mentioned the need for a "sea change" in commercial real estate. How will 360 Commercial Partners drive that change?

A: 360 Commercial Partners represents a revolution in commercial real estate. Our company has been thoughtfully and intentionally designed – from the ground up – to help clients navigate the increasingly complex and changeable waters of the commercial real estate market. In addition to applying new strategies and tactics, we've also addressed our clients' need for a turnkey, full-service commercial real estate solution they can trust. We deliver that – and augment it with a host of value-added features and five-star client service.

Q: What else sets 360 Commercial Partners apart?



A: Our people are our greatest asset. We are building a team of the most talented commercial real estate professionals – brokers who have the proven ability to produce results and, more importantly, who are dedicated to providing the utmost level of client service. At 360 Commercial Partners, we work smart, we work hard, and we go above and beyond to get the job done well.

Q: How has the commercial real estate market changed in the last year?

A: It's no secret that commercial real estate is in a down cycle, but that opens the door for those who can be nimble to create and seize opportunities, which is what we're doing at 360 Commercial Partners – and what we are doing for our clients. In this market – and, I argue, in any market – it's not about placing an "Available" sign in front of a property and waiting for phone calls. For savvy clients, it's about securing the services of a firm where the industry's leading thought brokers will develop and deploy a cutting-edge commercial real estate strategy for your company. We're looking forward to delivering the future of commercial real estate to our clients, starting now.

Protecting the Assets of Southern California Businesses

Family owned and operated for over 45 years, Shield Security is Southern California's premier provider of private security service. If you are doing business in this area, you know there is no other place like it. *The culture. The experience. The opportunities.* By protecting the assets of our clients' businesses, we've built our reputation through commitment, trust, and quality of service – these values are the hallmark of Shield Security.



Businesses and institutions understand that their responsibilities and security requirements have changed dramatically over the last few years. Today, threats and risk come in all shapes and sizes. No longer is it acceptable to settle for less than the absolute highest standards of quality when it comes to protecting people, facilities and assets. No one understands the unique security challenges of this dynamic region better than Shield Security.

Five locations serving Southern California

Serving the Southern California area, Shield Security has five branch offices located in Burbank, Long Beach, Orange, San Diego and Upland to strategically protect our clients. Offering innovative security programs, Shield Security delivers the experience, versatility and resources needed to handle your security requirements. Our client base includes office buildings, corporate campuses, gated communities, retail centers, industrial complexes, high-rise buildings and much more. Some of the services offered include private security officers, access control to your facility, security console monitoring; and authorized badge services.

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Client-requested specialized resources have included: fire and life safety; floor warden and emergency action planning; executive protection and surveillance; plain clothes and off-duty officers; private investigation including sub-rosa; internal and independent security consultations; and law enforcement liaison. Each client is unique and a customized program is designed for your total protection.

The Shield Security Team develops and follows a written plan with your established goals and objectives and guarantees your complete satisfaction. Shield Security is committed to bringing the highest caliber personnel to your security assignment and professionalism at every level. Qualified personnel are licensed by state standards in addition to Shield Security's background and history validations to confirm honesty, trustworthiness, and a strong work ethic.

If you are responsible for your organization's safety and protection, then you know there is a direct relationship between the quality of security service you expect and your peace of mind. Join the many clients who have entrusted Shield Security for over 45 years to protect their business. **"Your security is the highest priority for Shield Security."**

For additional information, please visit our website at www.shieldsecurity.com.

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EXCELLENCE IN ENTREPRENEURSHIP AWARDS

The Mihaylo MBA

A world-class business education

There are many reasons that Mihaylo College of Business and Economics at Cal State Fullerton is the fourth largest B-school in the nation. The combination of a world-class education from faculty with Ph.D.s from some of the top schools in the country and the College's position as a well-connected and vital influence on the business community in Southern California are just two of them. Added to that, the overall affordability of the MBA program in relation to Southern California institutions, both public and private, and an unmatched alumni base in Southern California makes Mihaylo an unbeatable choice. "Earning my MBA from Mihaylo gave me the opportunity for success in my career; it was the best investment of my life," says Greg Waller '78 MBA. Waller is the chief financial officer of Universal Building Products, Inc., and sits on the boards of four companies with annual revenues up to \$100 million.

Mihaylo College features nationally recognized faculty, award-winning students, forward-looking curriculum and flexible programs which attract talented and diverse students from around the globe. Mihaylo is one of three schools in Southern California and one of only 171 schools worldwide holding the prestigious dual accreditation in business administration and accounting from AACSB, the international accrediting body for business schools. In addition, Mihaylo College is recognized annually by Princeton Review as one of the "Best Business Schools."

Mihaylo and Orange County: an economic powerhouse combination

Mihaylo fuels the economic and corporate success of Orange County and Southern California. Through its educational programs, the College instills in its vast corps of graduates strong core business knowledge, critical thinking skills and motivation, thereby putting them in position to contribute to the success of area businesses. The College's impact is far-reaching because it serves as a thought leader contributing to the economic progress of Southern California. Even with the focus clearly on Southern California, the reach and impact is felt worldwide. Mihaylo graduates work across the country and internationally, and with over 40,000 grads living in Southern California, this advantage really does make Mihaylo College of Business and Economics the dominant driving force of business in our region.

An MBA in Entrepreneurship

An MBA in Entrepreneurship is about nurturing the creative spirit. More than just imagination, Entrepreneurship is a process of continuous improvement in large and small organizations. The CSUF MBA in Entrepreneurship is an environment for men and women to explore their entrepreneurial potential with the help of seasoned industry-savvy faculty, the latest in real world technology, and the stimulation of fellow students who share similar dreams of new venture creation or innovation in large company environments. Says Travis Lindsay '09, "I'm glad I earned my MBA at CSUF; the course work provided me the opportunity to work directly with entrepreneurial businesses in the area, allowing me to apply concepts I learned in class to real world situations."

Southern California: The region of the world

In business, place matters, especially when you are talking about impact and position. Being a force in Southern California is markedly different than owning the Texas panhandle or Great Lakes region. Southern California is the most population dense and second largest region in the country with a wide diversity in industries and is one of the most vibrant business communities in the United States. It is a gateway to the Pacific Rim and a global nexus for business. Being a major force in this region coupled with the largest alumni base of any Southern California B-school is an advantage few can match.

The MBA and other graduate curriculum at Mihaylo

The part-time MBA program is our largest and most dynamic program; however, some students elect to



Our new state-of-the-art home, Mihaylo Hall, opened in 2008.



MBA students enjoy the many amenities of Mihaylo Hall.

accelerate their studies into full-time status. Those students with significant professional experience gravitate to the Fully-Employed MBA (FEMBA) program offered at the CSUF Irvine campus. This accelerated, cohort-based program creates an immediate professional network and all courses are scheduled to accommodate working professionals. Rochelle Reiter '00 MBA, Partner and Vice President of Business Development for Orange Label Art + Advertising, agrees: "The CSUF Irvine campus MBA program fit my schedule and provided one-on-one interaction with industry-savvy professors." Other Master's options include the Master's in Accountancy, Master's in Taxation, Master's in Information Sciences, Master's in Information Technology (online) and Master's in Economics.

The 33-45 unit curriculum challenges and develops students through case method, team building, integrated curriculum and working with area businesses. It gives a broad, strategic managerial perspective, balancing theory with practical application, and strengthens leadership skills. The program gives students a comprehensive, world-class education which students tailor specifically to their professional goals with 10 foundational/interdisciplinary courses and a four course concentration. The 12 MBA concentration options are: accounting, business intelligence, economics, entrepreneurship, finance, general, information systems, international business, management, management science, marketing, and risk management and insurance. The program culminates with the Business Strategy Capstone where students consult for area businesses. Mihaylo students have placed in the top ten for the last 18 years in the Small Business Institute national competition. Mihaylo students also finished third in our region for the ACG MBA Cup competition, ahead of many nationally ranked institutions.

Mihaylo Hall and the world-class resources at CSUF

Mihaylo Hall opened August 2008 with state-of-the-art classrooms, technology, computer labs, study areas and meeting rooms. The 195,000 square foot building is home to all faculty, students and 15 Centers of Excellence. These Centers are faculty-led and engage in advanced research, consulting with area businesses and business development activities. The dynamic learning environment utilizes specifically designed classrooms to develop the leadership, teamwork, and technological competence the business community demands. Students have numerous study rooms for team projects and presentations along with dedicated areas for student organizations, the honors program and graduate students.

The strength of a Mihaylo MBA: The faculty and students

More than 140 full-time faculty create strength in faculty diversity in education, experience, and cultural backgrounds. Mihaylo faculty work in the real world, not in the ivory tower, and prepare students for the global marketplace. They do this by integrating the classroom with the best business practices, technology, award-winning research, functional applications and real world experience. At Mihaylo, teaching and research go together. All graduate courses are taught by highly qualified faculty who've proven themselves as researchers and instructors, as well as in industry. This attracts students from across the globe which creates a dynamic classroom experience where students learn from both peers and professors. A challenging curriculum, team projects and intense field experiences give our students a competitive edge.

Pursuing a Mihaylo MBA

The secret about the strength of the Mihaylo MBA is out. Admission is competitive and all interested students are urged to attend one of the regularly scheduled information sessions and to apply early. Take the next step in your career; earn an MBA from Mihaylo.

For complete admissions information including deadlines and checklists, visit <http://business.fullerton.edu/admissions>.

EXCELLENCE IN ENTREPRENEURSHIP AWARDS

Strategic Moves Propel Colliers International to the World's Third Largest Commercial Real Estate Firm

Operational Changes Lay Path for Greater Los Angeles Area Expansion

Colliers International kicked off 2010 with a major shift in its operational structure. Some say the company is reinventing the business model of commercial real estate.

"This is an exciting time in the history of Colliers International and a significant turning point in our business and the industry. Colliers International has made the operational decision not to be a network and will combine the operations of Colliers International and FirstService Real Estate Advisors, operating under the Colliers International brand," said Doug Frye, president and CEO of Colliers International.

This statement, from a press release issued last month, marked the dawn of a new era for Colliers International, elevating the company to the rank of the world's third largest commercial real estate services firm. According to Frye, the common vision and strategy among Colliers International partners had been in the works for the past several years.

The combined organization is different from other global firms because of our partnership model," said Frye. "As we complete the transition from a network to a centrally owned and operated firm, FirstService Real Estate Advisors will control approximately 70 percent of Colliers International globally. The remaining 30 percent equity is retained in the local markets, providing the strength and consistency of a global firm with the accountability and intimate knowledge of local markets."

The fully integrated Colliers International business employs more than 15,000 people in 480 offices in 61 countries, and generates in excess of \$1.9 billion in revenues annually and \$64 billion in transaction value.

Elevating Client Service

Branded Colliers International throughout the world, the integrated firm ensures the delivery of uniform services. This is another step forward in providing clients with a broad range of highly-specialized real estate services in the United States and around the globe through one seamless organization.

"Our clients and professionals will immediately benefit from this integration as our business continues to expand," said Martin Pupil, senior managing director of Colliers International's Greater Los Angeles operations. "Combining our business with the pairing of Colliers International and FirstService Real Estate Advisors enables us to more effectively service our clients on a local, regional, national and global basis."

Greater Los Angeles Area Expansion

The strategic integration is also helping Colliers International attract the best and brightest professionals in the industry, with the first wave of new talent planting roots in the Greater Los Angeles region.

Corporate executives Nick Foussianes and Mark Zehner, along with industry veterans Kitty Wallace, Scott Heaton and Morgan McEvoy, have joined the firm's Greater Los Angeles area operation, which consists of more than 100 real estate professionals working from seven offices throughout the region.

Nick Foussianes is executive managing director, Southern California, for the Client Solution Design division of Corporate Solutions, a newly created position. Based in San Diego, Foussianes is actively engaged with corporate clients throughout Southern California to develop an in-depth understanding of key business strategies, create customized real estate solutions that meet their objectives and then oversee execution on an on-going basis.

Mark Zehner is senior managing director for the firm's Asset and Property Management division, headed by 25-year veteran Mike Kent, who was appointed president of the division last year. Zehner is expanding the company's asset and property management platform throughout Orange County, Los Angeles County and the Inland Empire.



Kitty Wallace



Scott Heaton

Kitty Wallace, ranked the number one multifamily broker in Los Angeles County, is senior vice president specializing multifamily investments throughout Southern California and the Western United States. Adding new strengths and expertise to the multifamily and institutional groups at Colliers International, Wallace is based in the Downtown Los Angeles Office, until the opening of the firm's West Los Angeles office.

Scott Heaton, a 30-year industry veteran, is senior vice president based in the Downtown Los Angeles office, where he specializes in investment sales, redevelopment opportunities and consultative brokerage assignments throughout the Greater Los Angeles basin. Business partners Patrick Barnes and Joseph Williams have also joined Colliers International's Downtown Los Angeles Office as senior associate and associate, respectively.

Morgan McEvoy is senior vice president in the firm's Retail Services Group. Based in the Downtown Los Angeles office, he specializes in the leasing of retail power centers and community shopping centers throughout Greater Los Angeles. McEvoy has closed more than 120 lease transactions valued at more than \$65 million within the last four years.

What Lies Ahead

While seasoned talent is the fundamental key to the firm's success, Colliers International is also dedicated to building and developing a skilled group of young professionals. To support this group of "emerging brokers" in Greater Los Angeles, the region launched a comprehensive training program and sales contest in January. The goal of the year-long program is to help new brokers build their businesses quickly and position them for long-term success.

With a clear focus on elevating the skills and services offered in the local markets, backed by the strategic alignment of its global operations, Colliers International sees greater opportunity in the coming years.

"When others in the industry were scaling back due to the global economic recession, we were setting the stage for an aggressive global expansion," said Pupil. "We've reached a milestone in our company's history and we intend to build upon this momentum within the Greater Los Angeles region, as well as on a national and global level."

In the Greater Los Angeles region, Colliers International will celebrate the opening of a West Los Angeles office later this quarter. Having recruited 30 professionals within the past year, the region looks forward to continued growth in 2010 and what lies ahead in the years beyond.

For more information about Colliers International - Orange County, please call 949.474.0707 or visit the website at www.colliers.com/orangecounty.

EIE 2010 Awards Luncheon: Meet Keynote Speaker Glenn Stearns

The Business Journal is proud to present our 2010 Excellence in Entrepreneurship Awards keynote speaker, Glenn Stearns. As chairman of Stearns Corporation and chief executive officer of a portfolio of financial services companies including Stearns Lending, Stearns Wholesale, Goverline, TriVerify, TriMavin, CU Partners, and First Pacific Financial, Glenn is in an elite class of entrepreneurs.

While recent times have brought less-than-favorable conditions for financial services companies—especially those involved with real estate and lending—Stearns Corporation's most profitable period in company history took place over the past two years. Glenn's ability to transform economic tumult into business opportunity comes from a long, rich history of confronting adversity and rising above it. His extraordinary achievements in business, media, and philanthropy overshadow his humble beginnings, and his admirable work ethic has seen him through countless challenges, both personal and financial.

He is the 2010 Chairman of the Young Presidents' Organization—Southern California Chapter and is a board member of The Joe Foss Institute, Canyon Acres Children and Family Services, Orange County Performing Arts Center, New Majority, and KOCE Public Television.

Glenn has been honored with Ernst & Young's *Entrepreneur of the Year Award* in 2003 and the Business Journal's *Excellence in Entrepreneurship Award* in 2007. He made television history as the first winner of TBS' *The Real Gilligan's Island* reality show—and generously donated his winnings to assist troubled youth. Join us on March 17 for an engaging presentation by one of OC's most dynamic entrepreneurs—Glenn Stearns.



Glenn Stearns

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Our professional Security Officers have been serving and protecting our clients in this dynamic region since 1964. No one understands the unique security challenges of Southern California like SHIELD SECURITY and no one else can apply the knowledge we have gained from pioneering thousands of personalized security solutions for our local customers.

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The size of share purchased determines the number of annual flight hours available to the owner. Buyers may purchase as little as one-eighth of a King Air B200 or King Air 350 and pay fixed monthly management fees. The flexible program even allows you to "borrow" from your next year's allocation, when necessary.

When you buy a fraction of one King Air, you buy access to an entire fleet of King Airs. This means that you do not worry about maintenance down time or flight crew constraints. Availability is guaranteed with minimal advance notice.

West Coast's Southern California-based fleet primarily serves the Western United States, Canada and Mexico. Owners do not pay for aircraft re-positioning within the Primary Service Area of 1000 nm. As an added benefit the program also provides access, through an interchange agreement, to West Coast Charters' fleet of charter jets which includes Hawkers, Citations, Astras and Learns.

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This program provides owners with a turnkey flight department that manages maintenance, flight crews, operations, and administration and ensures quality, convenience, safety, service and dependability at a low cost. And, unlike many fractional programs, owners fly in familiar aircraft with familiar flight crews.

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Contact Chris Andrews at West Coast Aircraft Shares (candrews@westcoastaircraftshares.com) for more information. West Coast is conveniently located at the Atlantic Aviation Center, John Wayne Airport, 19711 Campus Drive, Suite 150, Santa Ana, CA 92707; phone (949) 852-8340, fax (949) 260-3999; www.westcoastaviationservices.net.

360

360 Commercial Partners = 360 Degrees of Reach

Founded by industry veteran Louis Tomaselli, 360 Commercial Partners represents a revolution in commercial real estate. We've selected only the top players in every market—regionally and worldwide—to deliver our innovative, single-source, full-circle commercial real estate solution. If you're ready to receive the highest caliber of service, expertise, responsiveness and results in the business, call us today.

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EXCELLENCE IN ENTREPRENEURSHIP AWARDS

Starting the Business You've Always Dreamed About

So you have a great idea for a business. Now what? The "Complete Financial Office Solutions" department at **HMWC CPAs & Business Advisors** specializes in serving the needs of entrepreneurs. From our experience in helping start-ups, here are ten of the most important steps to consider:

1. Develop a Plan

A well-developed business plan is essential to starting and running a business. Business plans are typically required when applying for business loans or seeking investors. Furthermore, the process of developing the plan will cause you to evaluate many factors that will be essential for your business, including marketing, sales projections, break-even analysis, capital requirements and personnel needs. Since this is such an important foundation for your business, hire a professional to guide and assist in the plan's development.

2. Select the Legal Structure

Selecting the form of business entity is an important decision, full of regulatory, liability and tax considerations. Sometimes the decision is straightforward and clear, while at other times there are key issues that must be carefully evaluated depending upon your current and future ownership structure or tax planning concerns. Your lawyer and CPA should both be consulted to learn more about which business structure is right for your situation, so that you can carefully evaluate the advantages and disadvantages of each type.

3. Register Your Business' Name

The legal name of a business is the name of the person or entity that owns the business. For sole proprietorships, the legal name is your full name. If your business is a partnership, the legal name is per your partnership agreement or the last names of the partners. For limited liability corporations (LLCs) and corporations, the business' legal name is the one that was registered with the state government. If you want to operate under a different name, then you may have to do a fictitious name filing (DBA, short for "doing business as").

4. Obtain a Tax ID Number and Register for Taxes

All businesses are required to pay federal, state, and in some cases, local taxes. Most businesses will need to register with the IRS and state and local revenue agencies, and receive a tax ID number or permit. Employers will need an Employer Identification Number (EIN).

5. Obtain Business Licenses and Business Permits

Every business will require one or more federal, state or local licenses or permits. These can range from a basic operating license to very specific permits, so it is important to understand the local rules or you may face expensive fines and put your business at risk. Looking down the road, a common mistake in business expansion is to neglect the potential need for additional business licenses.

6. Secure Financing

Most likely, financing played a role in accelerating or slowing the process of developing your business. Most start-ups have limited options for financing, such as personal assets and lines of credit, family and friends, investors or bank loans. Each of these options bring with them different considerations, such as distribution of ownership and control or loan payments. This is another point in the development of your business when it is very useful to obtain guidance from

an experienced professional who can help you make a good decision and avoid mistakes.

7. Plan for Facilities

The location for your business can be a major factor in its success. Is a high-visibility site necessary? Can you get by with a low-rent location without risking security or image concerns? How will your proposed facility work for current and future employees? Far too many businesses go under because they over-bought in terms of space and length of lease. Consult with a qualified commercial broker to determine the best options for your needs.

8. Select an Accountant

One of the key reasons that businesses fail is due to the lack of financial controls and understanding of financial requirements. At any point in time, it is important to know the status of your cash flow, potential financing needs and profitability. You also need to be prepared to fulfill regular tax filing requirements. Most start-ups cannot afford to hire internal personnel who are qualified to meet these demands. Our "Complete Financial Office Solutions" department is specifically designed to help small businesses with these needs.

9. Hire Employees

Hiring employees is a big step and one that actually stops many budding entrepreneurs from realizing their dreams. Finding the right people, writing job descriptions, interviewing candidates, and managing people is time-consuming enough – but that isn't all that is required. The paperwork process is daunting and can fully consume an owner, resulting in loss of revenue and operating performance (i.e., W-2s, W-4s, I-9s, workers' compensation insurance, unemployment, disability, etc.). Fortunately, there is help available. Our experienced professionals can make the process simple for you and allow you to focus on running your business.

10. Marketing and Sales

Nothing happens until revenues come in the door. In your business plan you should have identified your target audience and how your product or service meets their needs, as well as a branding and positioning strategy to distinguish your business. Each business needs to identify the marketing techniques that will work best to generate revenues, which can include various forms of advertising, direct sales work, promotions, publicity and public relations. Since this can be costly, work with marketing professionals that understand your business and target market to maximize your financial and human resources.

The "Complete Financial Office Solutions" department provides accounting, financial and business management services for those clients who need the regular assistance normally rendered by an in-house Chief Financial Officer (CFO) and staff. Services include bookkeeping and payroll services, tax filings, interim CFO services, financial statement preparation, software selection and implementation, business formation and planning, and succession planning. Contact Susan Levinstein at (714) 505-9000 or see www.hmwccpa.com.



Custom Comfort Mattress Expanding to Los Angeles County

Custom Comfort Mattress, a mattress manufacturing and retail company based in Anaheim, Calif., is expanding to Los Angeles with its anticipated store openings in Pasadena and Beverly Hills/West Hollywood locations.

Custom Comfort Mattress was founded by brothers Marty and Mel Trudell over twenty-five years ago. After working for other mattress companies, both saw the standards of manufacturing going down for the sake of profit. They decided to strike out on their own utilizing the knowledge and expertise they had gained from their previous experiences. They knew that if they used superior materials and time-tested craftsmanship, they could build mattresses that would last. They opened their first store in Fullerton, offering unsurpassed service along with their high quality products. Younger brother Gary Trudell decided to join his brothers in the business.

From their humble beginnings in Fullerton, the Trudells were able to open five more stores in Orange County. In spite of their growth, they continued to produce mattresses using the finest quality materials and the expert craftsmanship of their artisans.

Meeting the challenge

The last few years have been challenging for Custom Comfort Mattress, but with sound fiscal strategy, the company has been able to re-brand itself and has escalated efforts to reach a wider market. With more business coming in from the Los Angeles area, the company has decided to open new locations. Custom Comfort Mattress will be opening two retail stores in Los Angeles County – one in Pasadena and the other in the Beverly Hills/West Hollywood area. The stores are being designed by Roth Interiors and will open in the next couple of months.

As Mel Trudell, President and CEO, states, "Our goal was to manufacture mattresses that should be affordable and long lasting. Our artisans use the finest materials and expert craftsmanship to create mattresses that fit any 'body.' And we can proudly add that we are made by hand in the U.S." The manufacturing plant is located in Anaheim Hills, Calif.

NB: Marty Trudell has retired from the business and Custom Comfort Mattress is now owned by Mel and Gary Trudell.

For more information, please visit the website at customcomfortmattress.com.

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EXCELLENCE IN ENTREPRENEURSHIP AWARDS



The Power of Entrepreneurs Opened the Doors for Providence Speech and Hearing Center

Strong, active members of the nonprofit organization's Board of Directors have long been a staple for the Orange County leader in speech and hearing technology and services.

The powerful improvement in communications Providence Speech and Hearing Center has made in the lives of thousands of people in the community began in 1965, when the nonprofit organization was helped by one of the great entrepreneurs in Orange County history, Carl N. Karcher. Today, entrepreneurs in Orange County continue to support Providence Speech and Hearing Center, and play a vital role in the development, sustainability and future direction of the valued organization.

In addition to groundbreaking innovations and state-of-the-art technology, Providence Speech and Hearing Center continues to serve thousands of children and adults with speech and hearing difficulties. Thanks to an active and supportive Executive Board, and Board of Directors, Providence has been able to weather the difficult recession, and is currently heading a comprehensive, speech and language initiative supported by the Children & Families Commission of Orange County in an effort to improve speech and language services for children between 0-5 in Orange County.

For Providence to remain an industry leader with cutting-edge technology and services, it has always needed – and been fueled by – a strong entrepreneurial spirit.

"We love entrepreneurs," said Providence Board President Bruce D. May, an attorney at law with Stradling Yocca Carlson & Rauth in Newport Beach.

One of May's longtime associates on the Providence Board of Directors, John M. Word III, is one of the most distinguished entrepreneurs in Orange County history, having co-founded The Word & Brown Companies.

Word, who launched The Word & Brown Companies with Edward J. "Rusty" Brown in 1985, and whose company won the 2001 Ernst & Young Entrepreneur of the Year Award, among many other laurels, has donated his entrepreneurial wisdom to Providence since getting involved in the nonprofit organization in 1975.

"I got involved because of (William J.) Bill Reilly, one of founding board members," Word said. "We worked in the same insurance office in Santa Ana, and he would always bug me about this dinner and dance (the Annual Benefit Event), and he'd talk to me about the building, and the mission, and what they needed, and Bill was a huge supporter of Providence."

The Providence Building—An entrepreneurial collaboration

In one of the most recognized structural accomplishments in Orange County nonprofit archives, the Providence Board of Directors, headed by legendary entrepreneur and Providence founding board member Karcher, built the dream, the Providence Building in the city of Orange. Ground was broken in 1980 on a six-story medical complex in which Providence would occupy the entire first floor. With the support of philanthropists such as Word and the late Karcher, whose "wealth and connections," Word said, "made it happen," the Providence Building became a reality and elevated Providence Speech and Hearing Center as not only an industry leader but a nonprofit with one of the largest special-treatment facilities of its kind in the U.S.

Former Newport Beach resident Dr. Margaret Anne Inman, a speech pathologist at St. Joseph Hospital in Orange, founded Providence Speech and Hearing Center in 1965. As a nun with no resources, she started the nonprofit in a little adobe house in Orange, just 12 months after leaving her home at the Providence Order of Sisters at Saint Mary-of-the-Woods in Saint Mary-of-the-Woods, Ind. When Karcher's youngest daughter, Mary, suffered from speech and hearing problems as a child, a long-lasting relationship began between the Karcher family and Providence Speech and Hearing Center.

The lines grew longer for services at Providence, and Dr. Inman was running out of space. By the mid-1970s, a group of entrepreneurs on the Board of Directors formulated a collaborative plan with community friends and supporters, and created the magnificent Providence Building (1301 Providence Ave., Orange, CA, 92868).

"We had three or four small adobe houses," Word said, "and then we acquired a couple more houses on a nice lot of land, and I went to Carl and asked, 'Why don't we consider going to (adjacent) St. Joseph Hospital, and talk to them about building a medical complex, and get our position for next to nothing if we can partner with them.' Carl thought it was a great idea. So, with the powers that be, lo and behold, we were able to build the building you see now – free and clear. I would say it has been a pretty great investment. We were



The Providence Building medical complex in Orange houses Providence Speech and Hearing center.



John & Dawn Word at Providence Speech and Hearing Center's 2009 Annual Benefit "Saddle Up!"



John Nicoli, Robbie Nicoli, Providence board member and benefit event co-chair, Joan May, benefit event co-chair, and Bruce May, Providence board president and Stradling Yocca Carlson & Rauth attorney.

very entrepreneurial back then. We had the capability and did it in a very clever way, and it worked out for St. Joseph Hospital, the doctors and certainly for Providence. It was incredible to be able to pull that off."

The Word & Brown Hearing Center at Providence

Another highly successful entrepreneurial endeavor was The Word & Brown Hearing Center at Providence, which serves adults by providing hearing evaluations, sophisticated hearing aids and fitting, and follow-up care.

The Word & Brown Companies donated \$500,000 towards the center's 2006-07 capital campaign to fund the \$2.5 million expansion, and it opened in May 2007. The successful campaign expanded the center to 18,000 square feet, increased patient capacity by 50%, and provided funds to escalate services and purchase new state-of-the-art audiology and speech equipment to assist children and adults with communicative and hearing impairments.

"We, as a board, were trying to determine if we should start a hearing aid business, because the board wasn't sure if we wanted to get into the retail aspect," Word said. "We were more into therapies than wanting to get into a competitive retail hearing aid business. That was a major decision. But it has certainly been a good revenue generator to help support the issues going on, and the services and programs, and it helps kids and adults get hearing aids."

Continuing the mission

Members of the Providence Board of Directors, like their predecessors, have a heart for those battling, particularly young children, speech and hearing problems.

"It was the mission that attracted me to Providence," May said, "because so many children will go through the early years and struggle, and maybe fall behind in school, or in their social skills because they're not where they should be in terms of their communication, and now we can do something about it with the technology and hearing aids. Part of our struggle is with budget cuts, especially with state-funded programs, because our demand is as high as ever."

To continue Dr. Inman's goal of always being able to help anyone, regardless of age or financial situation, and helping people reach their potential as better communicators, Providence Speech and Hearing Center hosts two major fundraisers a year: The Annual Benefit Event, which is famous for its themes, costumes and décor, and a golf tournament.

"Our Annual Benefit Event has been greatly supported, and earned a reputation as one of the most fun galas in Orange County," said Providence Speech and Hearing Center Chief Executive Officer Linda H. Smith, RN, BSN, PHN.

In addition to the fundraisers, and other special events, Providence depends significantly on its development funds, from grants and individuals, to make up for the huge financial gap created by offering services to anybody, even if they don't have the ability to pay.

Further, an honor that would make the late Dr. Inman proud, the Providence Preschool was ranked as the No. 1 child-care center in the city of Orange in 2008 by the *Orange County Register*.

"When I see the faces on these children every day, it lights up my heart when I see their beautiful smiles and hear their joyous laughter as they walk down the hallway," Smith said.

In January 2010, Providence Speech and Hearing Center established a new executive board, with President May; Executive Vice President Richard Van Dyke, of Imaging Plus, Inc.; Treasurer David Anderson, of UnitedHealthcare; and Secretary Robbie Nicoli, of USI of Southern California Insurance Services. May lives in Newport Beach, Van Dyke in Newport Coast, Anderson in San Diego and Nicoli in Coto de Caza.

Providence Speech and Hearing Center is located at 1301 Providence Ave., Orange, CA 92868. Phone 714.639.4990, Fax 714.744.3841, or visit the website at www.pshc.org. To volunteer or donate to Providence, contact Maria Carrillo at (714) 221-0961, or e-mail mcarrillo@pshc.org. Providence Speech and Hearing Center wishes to thank Stradling Yocca Carlson & Rauth for donating this space to tell our story.

Mihaylo College of Business and Economics MBA in Entrepreneurship

An **MBA in Entrepreneurship** is about nurturing the creative spirit. In addition to spurring the imagination, the Mihaylo MBA offers the tools to build new ventures and to create innovative solutions in medium to large firms. Students receive the help of seasoned, industry-savvy faculty, enjoy interaction with the business community through real-world consulting projects, and benefit from the stimulation of fellow students who share similar dreams: New venture creation or innovation in a large company environment.

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EXCELLENCE IN ENTREPRENEURSHIP AWARDS



UC Irvine's Don Beall Center for Innovation and Entrepreneurship Not Just for Students

Orange County takes pride in its entrepreneurial foundation, so it's little surprise that the business and academic communities alike collaborate year round at The Don Beall Center for Innovation and Entrepreneurship, one of seven Centers of Excellence founded at UC Irvine's Paul Merage School of Business during the past decade.

With a substantial gift and continued involvement from former Rockwell Chairman Don Beall, the Center was founded upon its mission to provide thought leadership in the emerging science of innovation research, education and consulting, with the belief that strategic innovation will be the first and best alternative for sustaining competitive advantage in today's global economy. The Beall Center strives to serve as the vehicle through which a significant proportion of research and thought leadership on the newest and most influential approaches to strategic innovation and entrepreneurship is completed and disseminated to global business.

According to Charlie Baecker, the Center's administrative director, "The Beall Center takes a significant role in providing education and opportunities for graduate students and researchers to understand the process of innovation. There are a myriad of programs available to enhance the process of successfully launching a business and building the right team in today's competitive environment."

Beall Center Programs Support and Inspire

• Annual Business Plan Competition

The Business Plan Competition at The Paul Merage School of Business is one of the nation's premier business plan competitions, offering all UC Irvine students, staff and researchers the opportunity to form a team, create a business plan and potentially fund their business idea all within seven months. The competition started with a kick-off event held in November 2009 at the UC Irvine Student Center and will end with the Final Presentations and Awards Ceremony where \$30,000 in cash prizes will be awarded on Friday, May 21, 2010.

Between the kick-off and finals, four workshops are offered covering a broad area of business plan development skills led by leading practitioners from Orange County. The Competition also provides individual team coaches to all teams that qualify for the semi-finals.

• Tech Coast Angels Seed Track Invitational

The teams placing first, second and third in the 2010 Business Plan Competition at the Merage School will automatically be invited to the Tech Coast Angels Seed Financing Invitational. In addition, at the discretion of the Tech Coast Angels, two "wild card" teams will be invited as well. All five teams will have the opportunity to be assigned a Tech Coast Angel executive as a coach and be screened by the Tech Coast Angel membership for up to \$1,000,000 in seed financing. Teams will have six months to prepare their presentation before the Tech Coast Angels and another six months to secure financing through the Angels.

Teams competing in the Business Plan Competition with the objective of being invited to the Tech Coast Angels Seed Financing Invitational focus on business ideas that have a potential for high growth, a strong market position, and a sustainable advantage. Specifically, Tech Coast Angel investors look for:

- A market opportunity sufficiently large to create a business with at least \$50 to \$100 million in annual revenues within 60 months.
- A compelling, well-articulated strategy for capturing and defending a significant market share.
- Proprietary technology or other strong barriers to entry.
- Strong management (not necessarily a complete team) with relevant and successful experience.
- An exit strategy for the investors.
- A desire for advice and coaching.
- The company valuation must fit within the Team's risk/reward expectations for the investment.

• Vator.TV Adds Value to Startup Funding Process

Vator.TV is a community-based website focused on the business of funding and building emerging technologies for startups. It combines social networking, industry news, and video to organize presentations about business opportunities within a diverse online audience of entrepreneurs and investors. The Don Beall Center for Innovation and Entrepreneurship has partnered with Vator.TV to bring this new technology to the students.

Vator.TV implements a web 2.0 platform for presenters to submit videotaped two-minute "elevator pitches" where they are ranked by the Vator.TV community for quality. By submitting their video to an online community of investors, an aspiring entrepreneur makes one pitch instead of having to repeat the same presentation dozens of times to different investors and venture capitalists throughout the funding process. By viewing the highest rated pitches, venture capitalists save the time of having to sort through numerous business presentations.

• Watch for Hiperwall's Bigger Picture

Tech Coast Works was established in 2007 with the help of Orange County Business Incubation Network (OCBIN) to commercialize technologies from UCI and the community. Today, there are three operational companies in the program and two additional companies are under consideration.

Hiperwall is the most successful Tech Coast Works company thus far. Shortly after formation, Hiperwall signed a global OEM agreement with Samsung based on their technology innovations providing super-high resolution at even wall-sized dimensions, as seen at the annual Consumer Electronics Show (CES) in Las Vegas. That agreement has resulted in a growing number of Hiperwall customers in many countries around the world. Hiperwall's engagement with the university includes the following elements:

- Hiperwall has licensed the core technology from UCI and has already made significant royalty payments to the university.
- Hiperwall has hired a computer science graduate student as a technician/product specialist.
- Hiperwall has enlisted the support of a team of Merage School MBA candidates who are applying their education to help the company's marketing efforts.

• The Les Kilpatrick Students to Start-ups Workshops

The Les Kilpatrick Students to Start-ups Entrepreneurial Skills Workshop Series is an annual series of presentations produced by the Beall Center focused on providing UC Irvine students with practical "how to" information about starting and managing a new venture.

The 2009-10 series is composed of six workshops scheduled between October 2009 and May 2010 oriented toward building a student's skills in thinking about and preparing to become an entrepreneur. Each workshop is taught by successful entrepreneurs and businesspeople who enjoy sharing the secrets of their success. The program is supported by web-based distance learning materials for students who would like to pursue the subject in more detail online.

• ProductCamp Comes to UC Irvine

Saturday, Feb. 27, 2010, UCI Student Center

ProductCamp is a great opportunity to learn from, teach to, and network with professionals involved in the Brand/Product Management, Marketing, and Development processes in Southern California. At ProductCamp, everyone participates by presenting, leading discussions, helping with logistics, securing sponsorships, or volunteering.

Those interested in improving their ability to conceive, build, manage, and market brands or a product are welcome. Participants bring different experiences, and leveraging that collective knowledge is what makes ProductCamp unique and rarely available at other events.

Don Beall's Generosity Supports All Areas of Education

Don believes very strongly in the value of higher education as being crucial to the innovation and entrepreneurial process that will lead to a stronger America. He has volunteered his expertise to UC Irvine's Paul Merage School of Business, the Henry Samueli School of Engineering, and the Beall Center for Art and Technology within the Claire Trevor School of the Arts. He participates on the UC Irvine Chief Executives Round Table and the California Institute for Telecommunications and Information.

Don Beall retired from Rockwell in 1998 after an extraordinary 30-year career of guiding one of the world's most influential companies and launching innovations that literally shaped the trajectory of technology and electronics globally. He served as president of the company for 10 years and then served as chairman/CEO for the next 10 years. Under his leadership, Rockwell became a global leader in aerospace, electronics and automotive markets.

For more information about the Merage School's Don Beall Center for Innovation and Entrepreneurship, please visit merage.uci.edu/go/beall.



The Annual Business Plan Competition is one of The Beall Center's many programs for enhancing the process of developing and launching a successful business.



The Beall Center offers significant opportunities for graduate students and researchers to understand and explore the process of innovation.

EXCELLENCE IN ENTREPRENEURSHIP AWARDS

Meridian Graphics—Providing Environmentally Responsible Quality and Service

Located in the city of Tustin, Meridian Graphics is one of the largest, G7 certified, environmentally responsible commercial sheet-fed printing companies in Southern California specializing in the production of a wide array of products including posters, packaging, brochures, annual reports, mailers and line books, newsletters, catalogs and more.

The company was founded in 2000 by Dave Melin, whose leadership and commitment to the motto "Tradition in Excellence" enabled Meridian Graphics to experience significant success in a fairly short time frame. Thanks to the careful nurturing of client relationships, along with an extraordinary number of consistent referrals, the company's sales steadily grew from \$1.5 million in 2000 to \$24 million (in 2006). This resulted in an expansion from the company's original 15,000 square foot facility to its current 42,000 square foot home. An ongoing commitment to excellence in all areas of the trade has handily set Meridian apart from the competition.

Environmentally responsible

An active member of the Forest Stewardship Counsel (FSC), Meridian adheres to strict environmental guidelines including the use of FSC-certified paper harvested and manufactured from responsibly managed forests, and the use of low VOC soy-based ink that is less toxic and makes the recycling of the paper products on which it's used easier to recycle. In addition, Meridian meticulously recycles paper waste, aluminum press plates and printer ink cartridges. Incorporating environmental responsibility in all facets of its operations is a top priority.

As a dedicated "green" printer, Meridian's employees are devoted to providing the best service in the industry while tirelessly preserving the environment and conserving energy through the innovative use of materials and time. No expense has been spared to satisfy their thirst for progressive industry knowledge and advancement.

Latest technology, superior service

In addition, Meridian has invested in the latest computer, prepress and printing technologies enabling the company to provide the best possible service to customers while sav-



ing time, simplifying the process and providing excellent value for every budget. Meridian staff members have made an art form out of anticipating potential problems before they become critical, saving additional time and expense, as well as consistently meeting deadlines even when they are tight.

Meridian sales and account management staff consider each and every customer a long-term partner, and strive to meet each client's business goals by thoroughly understanding their industry, cultivating strong relationships, and creatively strategizing with clients on their business goals. Problem solving is always part of the mix, and in the rare instance that Meridian can't provide a particular service in-house, it will work to find an appropriate alliance that can. No job is too big or too small if it helps a client achieve his or her objectives.

As an established leader in the printing industry, Meridian Graphics continues to set benchmark standards for service and quality through a commitment to honesty, integrity and environmental consciousness. Through the use of state-of the art presses, a sophisticated prepress department and environmentally conscious supplies, Meridian continues to produce accurate and vibrant printing consistently and responsibly.

For more information about Meridian Graphics, please call 949.833.3500 or visit www.mglitho.com



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EXCELLENCE IN ENTREPRENEURSHIP AWARDS



The UC Irvine Executive Health Physical is designed to be efficient while providing time for an in-depth discussion between patient and doctor.

A Management Strategy That Works

For most busy executives, having a physical exam is something to do after everything else is finished (and it never is). But now, UC Irvine Medical Center is offering a prescription for wellness that can easily be scheduled into hectic lifestyles – The UC Irvine Executive Health Physical.

Among the most comprehensive examinations available anywhere, it takes a little over two hours to complete. It includes intensive one-on-one attention, personal follow-up and top-flight testing – all conducted at a nationally recognized medical center complete with the latest technology, highly skilled physicians and experienced professional staff.

“The program is designed to be efficient while providing time for an in-depth discussion between the patient and the doctor,” says Morris Hasson, M.D., Executive Health Program Physician and clinical professor of medicine at UC Irvine. “Our goal is to catch diseases while they’re easily treatable and to prevent illness by encouraging lifestyle changes.”

A real head-to-toe experience

The exam begins with a medical history. It’s a personal conversation between the patient and doctor with time to discuss any specific issues or symptoms. Once this is completed, a thorough physical exam is conducted, including screenings for cardiovascular disease, cancer, respiratory ailments, vision and hearing problems. The exam also includes a comprehensive fitness evaluation and laboratory analysis to detect preexisting disease. All in all, the exam is a real head-to-toe experience. Depending on the participant’s age or risk factors, further tests may be recommended by the physician.

A computerized risk appraisal is also generated, showing participants how lifestyle modifications can decrease their risk of developing certain illnesses. Patients are also given a detailed exercise prescription, if needed, and referred to appropriate UC Irvine risk-factor reduction programs, including those dealing with weight management, cardiovascular risk reduction, and travel immunizations.

Programs tailored to individuals

All risk factor reduction programs are tailored to meet the individual needs of participants. For example, the UC Irvine Weight Management Program provides a continuum of services varying in intensity, including a medically supervised low calorie diet as well as food-based plans. The UC Irvine Travel Medicine Program provides specific healthcare information about destinations worldwide and immunizations for individuals who are traveling the globe.

The complete results of the physical, along with recommendations, are presented to participants in a bound portfolio.

To date, more than 900 companies have participated in the UC Irvine Executive Health Program, with some enrolling their entire upper-level workforce for physicals.

The UC Irvine Executive Health Program: It’s a management strategy that works.

For information about UC Irvine’s Executive Health Program, please call 949.824.8033.

CALL FOR NOMINATIONS

ORANGE COUNTY BUSINESS JOURNAL

is now accepting nominations for two upcoming business recognition programs.

The Inaugural

General Counsel Awards

Designed to recognize legal excellence and the significant role that in-house counsel plays in the success of an organization.

Deadline to submit nominations – March 26, 2010
Dinner & Awards Program – June 10, 2010

The Sixteenth Annual

Women in Business Awards

Designed to recognize professional women for outstanding contributions to their organizations, industries and the Orange County community.

Deadline to submit nominations – April 16, 2010
Luncheon & Awards Program – May 25, 2010

Visit www.ocbj.com/event.asp for nomination & reservation information. Sponsorship opportunities available. Phone 949.833.8373 ext. 209.

EXCELLENCE IN ENTREPRENEURSHIP AWARDS



An example of custom-designed interior.



Beautiful center fountain at Jeffrey Office Park.

Bacchus Development Offers Chance of a Lifetime

Seven years ago, Bacchus Development identified a market for small office buildings for sale rather than lease. Since then the company has established a niche market within the Irvine Spectrum that allows small or young growing businesses the opportunity to purchase premier buildings in a premier location. Buyers were able to purchase “warm shell” buildings and design and build their own custom, personal office environments. Five separate, distinct office parks were designed and built, with over 250 units totaling about 1.4 million square feet. Set in class “A” type campus environments, with upscale, high profile amenities like burnished block construction with 10 foot high windows, entrances lined with olive and palm trees, water features greeting the visitors, Bacchus has set the stage for business owners to thrive upon. Three of the five parks were entirely sold out before the real estate market along with the economy turned in 2007.

Today, Bacchus Development is offering unheard of pricing on the remaining “warm shell” buildings in two of their brand new parks, the Bacchus Signature Series and Jeffrey Office Park, as well as offering sales of privately owned “turnkey” buildings at the Bacchus Office Park. In these uncertain economic times, business owners who can see past the storm are able to realize the chance of a lifetime. Current list prices are approximately 40% below what they were selling buildings for two years ago. Interest rates are still near historic lows and with loan programs that offer as little as 10% down payment ownership can be a cheaper alternative than renting over a ten to fifteen year period. Low prices, long-term low interest rates coupled with tax benefits – there has never been a better opportunity to buy a building than what the conditions bring with them at present.

Today, precisely due to the uncertain economy, many business owners see just that – **the opportunity of a lifetime**, as the company has recently seen a substantial uptick in sales. Last year alone, Bacchus has sold seventeen (17) buildings, or about 122,000 Square Feet, primarily to business owners, while interest in their remaining inventory continues to grow. Greg Endsley, CCIM a co-founder and broker with Madison Street Partners who specializes in representing Orange County owner/users and investors of commercial real estate says:

“The fundamental value considerations of location, quality of construction and timeless/efficient building design have always been important to my client base, but never so more than in today’s market. Being able to control these variables, at a minimum, is what makes the purchase of a Bacchus’ property an attractive alternative to leasing and worthy of exploration – especially after what has been a significant and across the board reset of commercial real estate values.”

Turnkey buildings in three locations



Lush landscaping throughout the office parks is a trademark of Bacchus Development’s establishments.



Bacchus is offering office buildings at three locations and they include the **Bacchus Office Park** located at the corner of Irvine Center Drive and Bake Parkway where “turn-key” buildings with tenant improvements in place are ready for occupancy. They are also offering buildings for sale at this park with tenants in place ranging from 10,000 to 40,000 square feet for an investment opportunity. The second location is the **Bacchus Signature Series** located at the corner of Irvine Center Drive and Lake Forest Drive where the company is offering 8 new “warm shell” buildings ranging in size from 4,950 – 9,900 square feet. In the near future Lake Forest Drive will expand, and will extend all the way from Bake Parkway to Laguna Canyon Road, inevitably making Lake Forest Drive and Bake Parkway major thoroughfares connecting the 5 Freeway to the Laguna Canyon Road.

The third location is the **Jeffrey Office Park**, located along the 5 Freeway and Jeffrey Road. This being the last of the projects developed by the company has become the flagship of the Bacchus properties as it offers not only freeway visibility and easy access but also an unparalleled business environment for those who wish to work close to home. Nestled between the established side of Irvine and the newer neighborhoods of North Park and Woodbury, where The Irvine Company recently began construction of new homes to meet a growing demand, Bacchus offers “warm shell” buildings between the sizes of 4,960 and 9,900 square feet.

Expert assistance throughout the buying process

While Bacchus Development has suffered a reset along with most developers during the last couple of years of the economic downturn, the company managed to retain a core group of dedicated, knowledgeable people who continue to commit their expertise to the survival and success of the company. Their sales team is eager to assist any buyer or business owner in determining if purchasing is the best option at hand, or to evaluate whether a property would be the right product type for them.

Their years of exclusive dedication to the product type also make them an expert in assisting clients through the entire buying process, including the interior build-out of their office space. They have strong relationships with an array of lenders, architects, contractors, as well as the City of Irvine and thus can offer a unique advantage to any buyer who wishes to build their real estate portfolio. While they enjoy and pride themselves on working directly with their buyers and assisting them to realize their dream, they also offer full broker cooperation.

Should you wish to become part of the Bacchus Family of owners, or simply think that this time in our lives is the chance of a lifetime for buying outstanding commercial real estate in the best of locations at the best price, **please call Bacchus Development at 949.453.1000.**

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EXCELLENCE IN ENTREPRENEURSHIP AWARDS

Olive Crest Engages Its Entrepreneurial Spirit—

Seeking solutions for the problems facing families and children today

Every successful entrepreneur has the ability to see a need and find a way to fill it. The same holds true for the founders of Olive Crest, Dr. Don and Lois Verleur. After witnessing first hand the needs of abused and neglected children, particularly those in large institutional settings, the Verleurs acted on their belief that such children would do better in smaller, more family-like settings.

They began by taking teenage girls into their family home to live alongside their three children. Don, who in addition to a private psychology practice counseled teens at an Orange County high school, and Lois could see the need was more than they could handle alone. In 1973, they established their first group home in Anaheim. The olive tree growing in the front yard, along with the notion of a family crest, inspired the organization's name, symbolizing "peaceful family."

Since then, Olive Crest has expanded to serve children throughout Southern California, Nevada and Washington. More than 600 staff members, supported by thousands of volunteers, serve over 5,000 children and families each year.

Transforming the lives of at-risk children

The overriding theme for Olive Crest is transforming the lives of at-risk children through the healing power of family. This is accomplished through a variety of programs and services including foster care, adoption services, family preservation, education, residential care and community involvement.

OLIVE CREST
Strong Families, Safe Kids

Now led by the Verleurs' son, Donald Verleur II, Olive Crest partners with community organizations and companies to fulfill its mission of ending child abuse. By blending private and public support, Olive Crest is able to maximize available resources for the children and families it serves.

Safe Families for Children Program

One of Olive Crest's newest programs is Safe Families for Children (SFFC). This national faith-based volunteer movement is designed to extend and strengthen the community safety net for vulnerable families which, unfortunately, are increasing in number during this economic downturn. With this program, Olive Crest and local churches gives parents something they need during a crisis — hope.

Through SFFC, parents arrange for their children to stay temporarily with a pre-screened volunteer family. They then can focus on resolving crisis situations and bringing stability back to their home. SFFC enables parents to work through their problems without losing child custody.

Churches recruit host families from among their members. The congregation also commits to supporting both the host family and the family in crisis to assist with reuniting children with their families. Ultimately, it is hoped that the family in crisis remains connected to their safe family as well as the SFFC network in an ongoing relationship similar to an "extended family."

Business Partners Program

Our solid 36-year foundation enables Olive Crest to engage its entrepreneurial spirit when seeking solutions for the problems facing families and children today. We invite other entrepreneurs to join with us as members of our Business Partners program; because preventing child abuse is everyone's business.

Please visit www.olivecrest.org or contact Stephen Christensen at 714-543-5437, ext. 1152, for more information.

Olive Crest would like to thank Signature Insurance Group for donating this space for us to tell our story.

BNY MELLON

continued from page A-38

it is critically important to the long-term well being of the business owner and his or her family. Prior to a liquidity event, entrepreneurs should consider how they will fill the days after their business is gone.

Business owners must consider what they value and determine how to apply their considerable talents in what may be many productive years ahead. This time could be spent traveling, pursuing philanthropy, babysitting grandchildren, starting a new business, advising nascent businesses, or managing a portfolio of private equity investments.

Increasingly, the post-business lifestyle seems to be a combination of the above activities. As a result, a cottage industry has emerged to assist with the transition to the "next stages." Many of these specialists advocate a comprehensive life view, which mixes different life opportunities, such as paid work, leisure, family, community, and lifelong learning. This philosophy capitalizes on the fact that life after the business can be much more flexible than while running the business. The key is to find the activities that match the values and preferences of the former business owner.

In Summary

The decision to step back from running a business is never an easy one. Waiting to think about business succession, family issues and life after the business until just before the transaction is complete can result in unneeded difficulty. With proper advice and thorough planning, a business owner can put his or her life's work to work for the family or toward realizing the individual's goals for the next stage of life.

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118 Degrees, Costa Mesa

Jenny Ross, Executive Chef / Owner

Jenny Ross has been preparing raw foods for nearly a decade. Her first restaurant, Taste of the Goddess, opened at the beginning of the raw food rush in Los Angeles. After serving up Hollywood's celebrity clientele she felt like it was time to bring the show down to her hometown, Orange County. 118 degrees—open since 2007—empowers OC diners with fresh, organic living cuisine that's presented in an artful context.

In January 2010, Ross took her original recipes and pioneering spirit to Whole Foods Market at The District in Tustin where she opened the Raw Bar, a new counter featuring a full menu of raw delights and made-to-order salads, entrées and desserts. Jenny's food has been enjoyed from Los Angeles to San Clemente and can also be found pre-packaged at Mother's Markets under Jenny's Raw and Organic.

**All Green Electronics Recycling, Orange**

Arman Sadeghi, Founder and CEO

Sadeghi was born and raised in Iran and moved to Orange County with his family at the age of nine. An entrepreneur to the core, he started his first business when he was 16. Now, at age 32 Sadeghi runs All Green Electronics Recycling, an organization he founded in 2009. Almost immediately following its inception, the business—which collects unusable computers, monitors, televisions and cell phones and breaks them down into sellable commodities—proved incredibly lucrative. By July 2009 Sadeghi moved All Green to its current headquarters, a 20,000 square-foot facility in Orange, and before the end of the year, the company turned a profit.

Sadeghi holds a degree in neuroscience from UC Berkeley.

**Anaheim White House, Anaheim**

Bruno Serato, Proprietor

When Bruno Serato immigrated to the United States he had nothing more than a dream and \$200 in his pocket. Through hard work and dedication, he managed to create one of the culinary world's most respected and lauded fine dining establishments: the Anaheim White House. Renowned for its dramatic and artfully crafted Northern Italian/French cuisine as well as its elegant and historically significant setting in a mansion dating back to 1909, the Anaheim White House has counted celebrities, U.S. Presidents, dignitaries, world leaders and culinary aficionados as loyal patrons since its establishment in 1987. Serato has traveled far from his humble roots as a busboy in Italy to create a culinary legacy that is recognized by critics and patrons alike as among the finest in North America.

**Antonello Ristorante, Santa Ana**

Antonio Cagnolo, Proprietor

A native of Northwestern Italy, Antonio Cagnolo has emerged as a dynamic force in the culinary world. After attending hotel and restaurant management schools in Germany, he was appointed to oversee the food and beverage operations for the Royal Garden Hotel in London and later was involved in managing the Hotel de Paris in Monte Carlo. He moved to California in 1975 and developed a thorough understanding of the restaurant industry in the United States before opening Antonello Ristorante in 1979. In addition to serving as sole owner and operator of Antonello, Cagnolo is a principal partner in several other dining establishments and is acknowledged by many as a leader in his field. He has earned national acclaim for the award-winning Italian cuisine served at his venerable Antonello Ristorante.

**AQUAMANTRA, Inc., Dana Point**

Alexandra Teklak, President/CMO

AQUAMANTRA was inspired by the 2004 film *What the Bleep Do We Know?!*—a movie that discussed the underlying quantum mechanics of our world, showing how reality is changed with every thought. Dr. Masaru Emoto, who was featured in the film, wrote a book called *Hidden Messages in Water* in which he touched on the basic principles of quantum theory, whereby the molecular structure of water was changed by a Zen Buddhist Monk's thought. Based on this premise, AQUAMANTRA uses the design on its labels to affect the molecular structure of its natural spring water, making it more refreshing and wholesome to drink. AQUAMANTRA was the first bottled water company in the country to package its product in bottles that are 100% biodegradable and recyclable.

**ArtsPR, Costa Mesa**

Christopher Trela, President

Christopher Trela launched ArtsPR in August 2009 to provide public relations and creative services to Orange County-based arts groups and nonprofits. Within weeks of launching the organization, his roster included the Laguna Playhouse, Long Beach Symphony Orchestra, Chance Theatre, Classical Mystery Tour and One Earth/One Dream EcoFest in addition to several small arts groups that he helps on a pro bono basis.

Trela, who serves as President of the OC Press Club, is an award-winning publicist, writer, editor, photographer and playwright; what's more, he authored Newport Beach Centennial: Celebrating a Century, a coffee table book published in 2006. He also is the editor of OC Wine, an internet-based wine magazine.

**AURI Footwear, Laguna Beach**

Ori Rosenbaum, President/CEO

A serial entrepreneur, Ori Rosenbaum launched his first company at the age of 19. Entering the footwear industry in 2008 with the launch of AURI Footwear, Rosenbaum presented a collection of men's styles fused with NASA-grade technologies. Upon its inception the brand found itself competing for shelf space against larger, more established competitors—and amid what's been touted as the most difficult retail economy of our time. Still, AURI made it into more than 100 stores, such as world-famous Fred Segal Feet, Nordstrom, and The Walking Company during its first years of operations. It also developed quite a celebrity following, having been spotted on many famous feet including those of Ludacris, Taylor Lautner, John Turturro, Jamie Foxx and Benjamin Bratt. AURI recently launched a women's collection, and expects to see exceptional growth as a result.

**B Scene Advertising, Newport Beach**

Caren Lancona, CEO

A serial entrepreneur who has been making her mark on the business community for more than 20 years by creating innovative organizations and selling them for profit, Caren Lancona sold three companies this past year alone in addition to building two new ones (The Beverly Hills Pageants and Newport Beach Pageants) while simultaneously expanding her bread-and-butter business, B Scene Advertising Agency. Now, the firm complements its Newport Beach headquarters with additional locations in Beverly Hills and South Beach in order to provide exceptional service to clients on a national level.



Past companies Lancona has built and sold include Just Friends and OC Party Pics.

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BandCon, Costa Mesa

Ari Benowitz, CEO & Founder

As a sales executive during the early days of the Internet, Ari Benowitz watched many of his clients struggle to find all of the service providers needed to build the back ends of their websites. Solving that challenge by bundling each of these services together was the seed idea for BandCon, which he founded in 2000. The company faced many obstacles in the beginning, working with no funding out of a garage. In order for business to take off, Benowitz needed an anchor customer with significant revenue—this would afford BandCon the leverage necessary to be competitive in the marketplace and procure more clients. Fortuitously, he found that anchor in MySpace.com.

Benowitz has garnered numerous accolades for his remarkable accomplishments with BandCon.



The Basscom Group, Irvine

David Kim, Managing Partner

The Basscom Group, now a multi-million dollar private equity real estate group, was initially an experiment based on a project David Kim completed in college. For 16 years, the company has competed against the most prestigious multi-family owners in the nation, and is ranked as the 33rd largest apartment owner in the country (NHMC). With transactions totaling more than \$6 billion, Basscom's track record shows 199 communities purchased nationwide since 1996.

Raised in Chicago, Kim is very familiar with the issues of poverty and crime that plague the multi-family industry. When he started The Basscom Group, he found he was able to address these issues through renovations, upgrades and value-added amenities to ensure a safer, healthier lifestyle for families. In addition, he contributes to dozens of charities and nonprofit organizations.



Beach Pit BBQ, Irvine

Tim DeCinces, President and CEO

In 2004, Tim DeCinces, a former MLB Baseball player, decided to enter the restaurant business and opened the Beach Pit BBQ in Costa Mesa. The restaurant has grown to three locations in addition to five outlets at Angels Stadium of Anaheim. It was chosen by the New York Times as "the can't-miss food at Angels Stadium" in the publication's 2008 review of all 31 MLB stadiums' food concessions.

In addition to the numerous awards Beach Pit has earned, it has achieved impressive sales; both the Tustin and Costa Mesa restaurants' gross sales have exceeded \$1 million in every year of operations. The chain's third store opened in Orange in November 2009, while stores four and five are slated to open in South Orange County later this year.



BJ Global Direct Inc., Irvine

Bizhan Fazeli, President & Founder

Bizhan "BJ" Fazeli serves as president of BJ Global Direct, a direct marketing company based in Irvine. One of the pioneers of the Direct Response Television Industry, he has over 35 years of sales and marketing experience and has been at the helm of some of the industry's most innovative companies.

Building on the achievement of BJ Global Direct, Fazeli recently launched his newest business venture. Concept to Consumer, once the service arm of BJ Global Direct, is a full service turnkey operation that will offer other entrepreneurs access to the DRTV marketplace. As if he weren't busy enough as it is, Fazeli is also in the wine business, heading Fazeli Cellars, for which he is now in the process of building a state-of-the-art, environmentally friendly winery and tasting room in Temecula.



Blytheco, Laguna Hills

Stephen Blythe, CEO and Founder

While providing emerging business consulting services to clients at Price Waterhouse and Ernst & Whinney in the early 1980's, Stephen Blythe saw the growing demand for automated accounting procedures and financial reporting in the middle market. With the desire to own his own business and create solutions to automate his clients' accounting tasks and procedures, the concept of Blytheco was born. Blythe has grown his company from the one-person operation it was in 1980 to a national organization that employs more than 130 and generated over \$20 million in revenue last year.

Blythe is a recognized authority in the design, implementation and support of multi-user accounting and management reporting systems (including training procedures), and has been at the forefront of integrating computers and software into corporate accounting departments.



Brand Affinity Technologies, Irvine

Ryan Steelberg, President & CEO

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Acquisition of
Metabasis
Therapeutics, Inc.

Pending



\$20 Million
Series C
Preferred Stock

February 2010



\$4 Million
Acquisition of
Aurora
Discovery, Inc.

December 2009



Acquisition of
Stylehive, Inc.
and Preferred Stock

December 2009



Acquisition of
Applied
Genomics, Inc.

December 2009



\$14 Million
Acquisition of
Neurogen
Corporation

December 2009



Exclusive
Co-Promotion
Agreement with
Abbott Nutrition and
Abbott Laboratories

November 2009



\$3 Million
Series B
Preferred Stock

October 2009



\$15.5 Million
Series C
Preferred Stock

October 2009



Acquisition of
HX Diagnostics, Inc.
and Series A Preferred
Stock Financing

September 2009



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Use License to
Roka Bioscience, Inc.

September 2009



PIPE Offering
of Preferred
Stock

July 2009

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business development and sales, Ryan Steelberg has built a track record as one of the foremost experts in digital and online media. At the age of 35, he is President and CEO of Brand Affinity Technologies, a venture designed to leverage technology to transform market opportunities into business value.

Steelberg is a perennial contributor to Mariner's Church in Newport Beach as well as the Orangewood Children's Foundation, and frequently makes time for community-building and charitable endeavors. Other organizations he supports through event sponsorships and donations include the Angels Baseball Foundation, American Cancer Society and Operation Smile.



Bremer White Brown & O'Meara LLP, Newport Beach

Keith G. Bremer, Founding Partner

Nicole Whyte, Founding Partner

Bremer, along with Nicole Whyte, founded the firm in 1997 as a general civil law firm with two attorneys – Bremer and Whyte. Today the firm employs 141, with offices in Northern California, Newport Beach, Los Angeles, San Diego, Riverside, Las Vegas and Phoenix.

Bremer is a member of the American Board of Trial Advocates, an AV rated attorney by Martindale-Hubbell, and voted 2009 Corporate Super Lawyer. He is experienced in all aspects of civil litigation and has represented auto manufacturers, auto dealerships, contractors and business owners. Bremer is regularly consulted by lobbyists and the insurance industry to provide input on proposed legislation from California to Colorado. Additionally, he is a member of the Southern California Defense Counsel and the Orange County Bar Association.

Nicole Whyte, also an AV rated attorney, has successfully handled hundreds of complex, multi-million dollar lawsuits. In a survey conducted by Los Angeles Magazine and Super Lawyer Magazine, Whyte was named a California Super Lawyer in 2005. She is a member of the Civil procedure and Evidence panels of the Orange County Bar Association's Resolutions Committee, responsible for invoking constructive changes in the legislation.



Brokedown Clothing, Newport Beach

Jodi Benavidez, Owner

After graduating college with a degree in fashion merchandising, Jodi Benavidez landed a job in L.A.'s fashion industry. She soon discovered that, to lead the kind of lifestyle she had envisioned for herself, she needed to branch off and form her own business. Accordingly, she quit her job, picked up shifts tending bar at the neighborhood establishment where she worked as a student, and began saving money to make her dream a reality. With only \$5,000, Benavidez launched Brokedown out of the garage of the Costa Mesa home she was renting in 2006. Today, the line is featured in more than 400 stores throughout the United States and 10 other countries. Recently, it was picked up by both Nordstrom and Bloomingdale's. Because of her company's incredible success, Benavidez is now the proud owner of the Costa Mesa home in which Brokedown found its roots.



BuyGreen.com, Irvine

Douglas Farquhar, CEO

Farquhar left a long and lucrative career in the insurance and financial services industry to pursue his dreams, hoping to make a difference in the world. Today, he finds himself at the helm of several organizations, including Green Retail and Wholesale, LLC and associated online brands BuyGreen.com, BuyLEED.com and GreenCouture.com as well as Renovos Global Group, a Zero Waste consulting firm providing strategies for businesses and organizations throughout the west coast area. He also created the Patent Pending Green Standards, which provides product ratings to help consumers better understand what makes any given product "green" and to what extent products are truly eco-friendly.

Farquhar also started and ran a record and entertainment company in addition to a residential construction company. He belongs to the Nature Conservatory, the Sierra Club, Co-op America and the Northern Forest Alliance.



Canaday Group, Laguna Beach

Lee Ann Canaday, Owner/Broker

Canaday is the owner of the Canaday Group & RE/MAX Fine Homes, a residential real estate firm. She is a top producer within Orange County's luxury real estate sector, having sold more than \$1 billion in property over the span of her career. She offers more than 30 years of experience as a leading real estate professional and has been ranked among the top 10 residential sales associates in the world multiple times for her impressive achievements. In addition to holding a real estate Broker's license, Canaday is a Certified Financial Planner, a Certified Property Manager, a Certified Distressed Property Expert and a Professional Community Association Manager.

Though Canaday has her hands full listing and selling many of the area's most prestigious properties, she remains accessible and focused on her craft, promising clients the utmost in personal service.



The Cellar Restaurant, Fullerton

Ryan Dudley, Proprietor

Ryan Dudley purchased The Cellar in 2004 at the age of 27. Since then, he and the landmark dining establishment have been on the receiving end of many honors, including being named the Orange County Concierge Association's Restaurant of the Year. Dudley keeps The Cellar—an Orange County fine dining staple since 1970—relevant by combining new, fresh ideas with established European customs. His passion for fine dining and commitment to excellence have proven contagious among his staff and guests, who enjoy exploring The Cellar's untapped potential.

Dudley started his professional career managing different properties for Lawry's and holds the distinction of being one of that company's youngest wine managers.



Centurion Partners, Newport Beach

Scot Matteson, Co-Founding Partner

With over 25 years in the industry, Scot Matteson is an expert in real estate development, finance, and asset management. In September 2001, he and longtime friend Michael Smith conceived the vision for Centurion Partners. Later that year, the company embarked on its first project in Tustin, shortly thereafter moving into the Aspen real estate market. Since that time, Centurion Partners has skyrocketed, becoming one of the largest landowners and developers of affordable housing in Aspen. The company also is developing two towers in downtown San Diego. Other upcoming developments include major projects in Sun Valley, ID and Miami, FL.



Under the careful supervision of Mr. Matteson, Centurion Partners has accumulated a portfolio valued at \$1.5 billion.

Cerius Interim Executive Solutions, Aliso Viejo

Pamela Wasley, CEO, President, Chairman of the Board, Co-Founder

Seeking work/life balance, Wasley left Corporate America in 2001 and began providing strategic planning consulting services. She enjoyed the experience, noting that "Each new engagement was like launching a new company...my entrepreneurial spirit was always being fed." What began as a "working sabbatical" became the genesis for the founding of Cerius Interim, now a multimillion dollar, 600-member firm.

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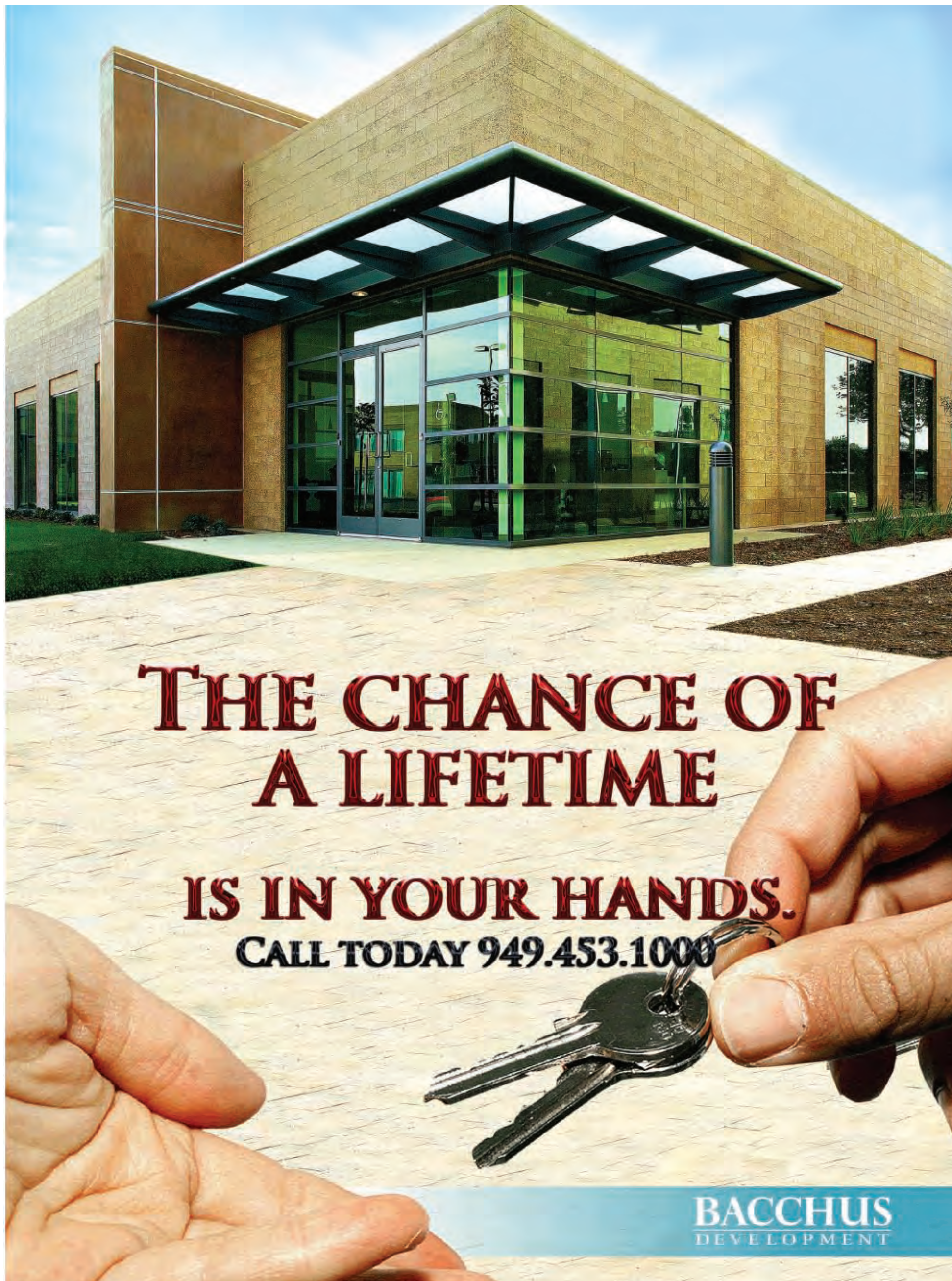
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U.S. was a firm specializing in temporary placement of CFOs and CIOs. Wasley researched the European model of interim executive management and adapted the concept for the U.S., creating the only full-service provider of interim executives for a full spectrum of corporate functions for all industries.

Cerius' success lies in its ability to attract seasoned professionals with a broad range of experience who, like Wasley, enjoy work/life balance along with the opportunity to be "serial" entrepreneurs.

Chase Merritt, Newport Beach

Chad Horning, President

Chad Horning founded Chase Merritt—a privately owned real estate investment firm—in 2005. Under his leadership, the company has acquired, developed, and sold a commercial portfolio valued at nearly \$650 million. Currently, it owns and operates an existing portfolio of approximately 2.5 million square feet of office and flex properties, four hotels and a substantial residential portfolio. It invests on behalf of its private and institutional partners as well as through its discretionary funds, the Chase Merritt Funds.

In December 2009, Horning formed Chase Merritt for Charities, whose kickoff event raised \$50,000 for Higher Ground, a charity that aims to use sports and recreation as a means of therapy, healing and rehabilitation for men and women of the armed forces.

Crescent Solutions, Irvine

Brian Fischbein, Co-Founder & CEO

Fischbein and Crescent co-founder Keith McDonald refused to let a recession, the bursting of the tech bubble or 9/11 deter them from starting up an IT professional services firm. Now a \$30+ million company, Crescent's staffing services focus on the areas of Software Development Lifecycle, Infrastructure and Network, Interactive, Web, Creative and Communications.

In 2009 Crescent Solutions ranked on both the Business Journal's and OC Metro's "Best Places to Work in Orange County" Lists. Crescent has also ranked among INC 500's Fastest Growing Companies in America and the Business Journal's Fastest Growing Private Companies. Fischbein has been recognized as a 2006 & 2007 Ernst & Young Entrepreneur of the Year Finalist and as an Entrepreneur Magazine 2009 Entrepreneur of the Year Finalist.

Crystal Cove Alliance, Newport Beach

Laura Davick, Founder/Director of Public Affairs

When the state of California awarded a developer the rights to turn Crystal Cove and its historic cottages into a luxury resort, Laura Davick (a third-generation "Covite"), formed the nonprofit Alliance to Rescue Crystal Cove in 1999 and proposed an alternative plan: keep the cottages intact through the State Park system by offering them as overnight rentals and for educational purposes. Laura's plan was triumphant, and in 2003, the founding organization transitioned into the Crystal Cove Alliance, shifting its mission from rescue to restoration, conservation and education. Since then, CCA has restored 22 cottages for public use, earning the Governor's Historic Preservation Award, has entered phase two of additional cottage restoration, and provides researchers, students and visitors the resources to study science and nature at Crystal Cove.

Daddy Cakes, Newport Beach

Dan Byers, Founder

In January 2009, Daddy Cakes—a pancake mix purveyor based in Newport Beach—was available only online and in a handful of OC specialty markets. By July 2009, its products were found in more than 50 retail outlets, including Whole Foods Markets, Central Markets, Sprouts Farmers Markets, and the world's largest e-tailer, Amazon.com.

In January 2010, Daddy Cakes announced a partnership with internationally renowned Paul Frank Industries to co-brand the "Boomerang Banana" pancake mix. Providing flavorful and wholesome alternatives to the many pancake mixes on the market, the company utilizes real fruit, whole grains and organic flour, producing ten flavors of pancake and waffle mixes.

DealerSocket, San Clemente

Jonathan Ord, CEO and Co-Founder

Jonathan Ord co-founded DealerSocket in 2001, building on his experience with scalable systems and implementable business processes to create a revolutionary delivery model for industry niche CRM applications. The company has received many accolades, having been named Best Overall Company by the 2008 Stevie International Business Awards. The American Business Awards named DealerSocket's leadership the Best Management Team for 2009. Impressively, it ranked #1 on the Deloitte & Touche Fast 50 List and has been named a Fastest Growing Company nationally for the past three years. Ord is widely regarded as one of the



most successful young entrepreneurs in Southern California.

A graduate of Brigham Young University, Ord earned a Bachelor's Degree in Accounting and Spanish and a Master's Degree in Accounting and Information Systems.

Design Action Studios, Orange

Tanya Salcido, Owner

Tanya Salcido is the founder and lead creative at Design Action Studios, a creative studio focusing on business branding in Orange County. Design Action Studios develops strategies based on business needs by utilizing a combination of traditional and new media, and its ultimate goal is to support businesses with fresh, consistent identities, creating memorable public images.

An important aspect of Salcido's business presence is her incredible knowledge of the ever-changing world of social media. She attends conferences to better understand the complexity of social media in business, and frequents as many social media gatherings as possible to further grow her organization and connect with others.



Don the Beachcomber, Huntington Beach

Arthur Snyder, Owner

Delia Snyder, Owner

Under the ownership of Arthur and Delia Snyder, Don the Beachcomber is experiencing a rebirth with its first new restaurant in 20 years. The organization's goal is to replicate the experience of the original tiki restaurants made popular in the '40s and '50s throughout Southern California, and in Orange County, where Don the Beachcomber first opened its doors in Corona del Mar in 1969. Less than a year ago, the space that once housed the legendary Sam's Seafood, which opened in the early '20s on PCH in Huntington Beach, was given new life after closing its doors in 2006. The towering neon sign that had read "Sam's" for decades now reads "Don's" for its new occupant, Don the Beachcomber.



Earthbound Media Group, Irvine

Blaine Behringer, Chief Operating Officer

Damien Navarro, Chief Visionary Officer

More than ten years ago, Dr. Blaine Behringer, an entrepreneur at heart (he was the top candy bar salesman at his elementary school!) decided to shift careers, leaving behind his days as a physical therapist to start Earthbound Media Group—a multi-million dollar interactive marketing agency he cofounded with partner Damien Navarro. Since its 1999 inception, EMG has garnered a host of accolades; in 2007 and 2008 it ranked on OCBJ's fastest-growing private companies list, coming in at spots three and 17, respectively. In addition, both the Business Journal and OC Metro have named it one of Orange County's Best Places to Work.

EMG's high-profile client base includes State Farm, Scottrade, Universal Pictures, Twentieth Century Fox, Harrah's Entertainment, University of Southern California and Loma Linda University Medical Center.



EON Reality, Inc., Irvine

Mats Johansson, Co-Founder, President, CEO

Dan Lejerskar, Co-Founder and Chairman

In 1999 Johansson and Lejerskar co-founded EON, a privately held U.S. corporation and the world's leading interactive 3D Virtual Meeting and Simulation-Based Learning Software provider for business and education-based Virtual Reality technology. EON delivers productivity to numerous industry sectors, and Fortune 500 companies utilizing its software and solutions include American Suzuki, Bechtel Corp, Boeing, Eastman Kodak, Exxon Mobile, and Office Depot.

Johansson is a Virtual Reality pioneer with more than 15 years experience in the 3D interactive simulation market from the sales, marketing and design perspectives. In 1995 he built the Michigan-based subsidiary consulting company Prosolvica from the ground up, growing it to \$13 million in annual sales in three years. He was previously a Program Manager and consultant for Volvo Car Safety Analysis, and also for Oil & Gas Safety Analysis.

Lejerskar has 19 years industry experience in visualization and was previously the founder and president of Prosolvica Konsult AB, a start-up which he built to over 600 employees with 14 offices and annual sales exceeding \$65 million. In 1996 he took the company public. Lejerskar was also founder and president of PFAB, and Program Manager for Volvo Aero Ariane Rocket Project.

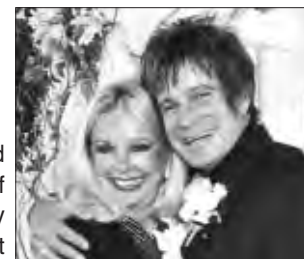


Epicuren Discovery, Laguna Hills

Colleen White Lohrman, Co-Founder & CEO

Michael White Lohrman, President

Colleen Lohrman and scientist Robert Heiman founded Epicuren Discovery after Heiman's research led him to a study of a special protein solution that had positive effects on severely scarred burn victims at the Houston Burn Center. Their concept



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Corporate Finance
Downtown Los Angeles



Darrin Kennedy *
National Managing Director
Government Services
Downtown Los Angeles



Nathan Pellow
Senior Vice President
Downtown Los Angeles



Shadd Walker
Senior Vice President
Downtown Los Angeles



Christopher Sheehan
Senior Vice President
Torrance

In the Inland Empire Market



Steven Bellitti *
Executive Vice President
Ontario



Thomas Taylor *
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was to apply this unique solution, which Heiman developed as Metadermabolic Enzyme™, to healthy skin to minimize aging. Colleen Lohrman shared Heiman's interests in natural healing, wellness, essential oils and aromatherapy, and she had a background in business and customer service which served the duo in starting up their business.

Lohrman's kitchen became Epicuren's first manufacturing facility and distribution center. Ahead of their time in the use of natural ingredients and an environmentally aware approach, Epicuren's products remain true to the company's core priorities. Emphasizing a personal approach, the skin care line is available from affiliated spas and certified aestheticians. Lohrman remains active as CEO, while son Michael Lohrman is the company's current president.

Feinerman Vision Center, Newport Beach

Gregg Feinerman, M.D., FACS, Medical Director

Established in 2001, The Feinerman Vision Center is recognized as one of nation's foremost medical practices dedicated to vision correction. Founded by eye surgeon Dr. Gregg Feinerman, the Center offers a wide array of vision corrections procedures. It's qualified to perform complicated cases and FDA-trials for new procedures as well as highly complicated operations, including laser corneal transplants. A noted author and educator, Dr. Feinerman regularly presents instruction to his peers, in addition to publishing articles and abstracts in medical journals and textbooks read by physicians throughout the world. He serves as Chairman of Ophthalmology at the prestigious Hoag Memorial Presbyterian Hospital in Newport Beach and is board-certified and fellowship-trained in a host of refractive surgical procedures.



Fine Telecommunications, Inc., Costa Mesa

Randy Fine, President

Randy Fine has been leading Fine Telecommunications—the company that LEGO, Hitachi, Net Devil, Gazillion Entertainment, Native Instruments, Cox, and others go to when they need expert advice with voice, data, and internet connectivity—for 15 years. His outstanding accomplishments, strong leadership skills and unique hands-on approach to business have been recognized by a number of prestigious organizations, which include the Orange County Business Journal, The California State Assembly, The International Junior Chamber of Commerce and the Orange County Museum of Architecture.



Finesse Aesthetic & Plastic Surgery, Newport Beach

Nirav Savalia, M.D., Owner

Based in Newport Beach, Nirav Savalia, M.D., is a well-respected, double board-certified plastic surgeon. Known for his skill, compassion and dedication to patient-centered care, Dr. Savalia works closely with each patient to develop an individualized plan of treatment. Dr. Savalia has a thriving practice that specializes in a broad-spectrum of cosmetic and reconstructive procedures. Facial surgery, breast surgery and body reshaping are all expertly administered by his skilled hands. With extensive formal education in both the field of general surgery and the specialty of Plastic and Reconstructive Surgery, including eight years of advanced surgical training, Dr. Savalia understands the complexities of the human body and how it heals. This expertise, combined with his warmth and compassion is what truly sets Dr. Savalia apart within the field of plastic surgery.



First Round Search, Irvine

Nick D'Ambrosio, Founder/Managing Director

Nick D'Ambrosio founded First Round Search in 1999 to offer executive search and career advisory services to individuals and companies within the technology market. He has worked tirelessly to position the company as one of the most respected of its kind.

Over the course of his experience in executive search, Nick has personally completed hundreds of successful placements, building a world-class reputation for consistency in recruiting quality players at all levels. He has been called on by CEOs, Human Resources professionals and other executives to offer insight into a wide range of topics including designing effective compensation plans, lowering employee turnover and improving the recruiting process. D'Ambrosio also founded FirstHire, a company that helps guide recent college graduates in their quest to build successful long-term careers.



FoodPower, Costa Mesa

Phyllis Ann Marshall, CEO

Phyllis Ann Marshall brings more than 40 years of experience in virtually every aspect of the restaurant industry to FoodPower, a restaurant consulting organization.

A graduate of Cornell University who has studied at culinary schools around the world, Marshall possesses a top-tier education that's proven a solid foundation for her many accomplishments.

Founder of the Restaurant Management Certificate Program at UC Irvine and a guest lecturer at UCLA, Marshall also serves as a contributing editor for several publications. Through these endeavors and by co-founding and operating Mr. Stox in Anaheim, not to mention starting her own culinary academy in San Marino, she has become intimately familiar with all cuisines and earned a reputation for being the secret ingredient for many great restaurant success stories.



Foot Petals LLC, Long Beach

Tina Aldatz, President

After 11 years in the fashion industry, Tina Aldatz came to the conclusion that the marketplace lacked a product for stylish women who enjoy wearing heels but want to be comfortable. Determined to solve this problem, she sought out to find the perfect material to create a designer shoe cushion, and Foot Petals was born. Today, Foot Petals consists of more than ten unique products and kits that offer stylish, yet invisible solutions to common problems caused by shoes. Currently, these products are sold at more than 5000 retailers in the United States. Foot Petals has been embraced by the fashion and medical communities alike. In fact, the American Podiatric Medical Association has endorsed a variety of its styles.



Freight Management, Inc., Anaheim

Robert J. Walters, President & Owner

Walters has always made staying ahead of the curve a top priority. In 1969 he launched American Traffic Services, one of the first freight consulting and management companies. However, he would soon realize that he wanted to accomplish even more. He set out to create a company that would assist shippers in choosing the right carriers for both their freight and their lanes. Not wanting to leave the truckers out of the equation, he developed relationships with them, which resulted in a harmonious marriage between shipper and carrier.

Walters leveraged his years of experience in the industry, founding Freight Management, Inc. in 1988. Today, the company has an Orange County location with 58 employees along with a full-service office in Dusseldorf, Germany.



Greer's OC, Costa Mesa

Greer Wylder, Owner

For 14 years, Greer Wylder has written about fashion, dining and trends in Orange County, first as a columnist for the Daily Pilot and now as founder of Greer's OC, a website and free daily e-mail newsletter, Daily Dose of OC.

Greer's OC's origins are rooted in a tragic episode for Greer's family. In 2005, one of her four boys was diagnosed with Type I Diabetes, changing the course of her life forever. She stayed closer to home to take care of her son and, in the process, was able to tap into the then-young world of social networking and online media. Having worked hard her entire life, she decided to take advantage of the Internet and build a presence for her many loyal readers. She could never have predicted what was to come—her online platform became a viral sensation that spread throughout Orange County and beyond. Currently, it reaches an audience of more than ten thousand readers daily.



HappyHourCard, Newport Beach

Nick Crane, Creator

Nick Crane, founder of HappyHourCard is a serial entrepreneur with experience in startups, team-building, marketing, management, fundraising, and most importantly, execution.

HappyHourCard is committed to building profitable partnerships with its advertisers, striving to become the best national entertainment and discount membership organization. It offers people an opportunity to enjoy themselves and try new restaurants and bars at affordable prices—all without the use of coupons. This paperless system is a boon both for the environment and for Orange County's hospitality industry.



Jury Impact, Costa Mesa

Chris St. Hilaire, President & CEO

By taking the skills he acquired in politics and applying them to the courtroom, Chris St. Hilaire founded Jury Impact, a national jury consulting firm that specializes in influencing public policy.

In 2008, the U.S. Small Business Association named St. Hilaire a Small Business Person of the Year finalist. In 2007, he was named one of Orange County's Most Successful Entrepreneurs by OC Metro. Also that year, Jury Impact was honored by the American Business Awards as a finalist in the "Most Innovative Company" category.

St. Hilaire has served as political director to the former California State Assembly Minority Leader and as chief strategist and message specialist for many of the nation's largest political campaigns. He has provided legal and political commentary in USA Today and on national news broadcasts including NBC, CSPAN and Fox News. His first book, 27 Powers of Persuasion, will be published by Penguin Press this summer.



K2 Network, Inc./GamersFirst, Irvine

Joshua Hong, CEO & Co-Founder

Joshua Hong first discovered the potential of the Free2Play market while traveling in Korea for business. (Free2Play games make money via the distribution and sales of virtual goods, such as in-game currencies, weapons, ammunitions, etc.) He decided to introduce this new type of business model to the United States and other prominent markets, and GamersFirst was born.

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Founded in 2001, GamersFirst is the first Free2Play massively multi-player online game (MMOG) publisher in the United States. It's shaping an emerging segment of gaming in the \$13 billion video game industry in America, while taking the Free2Play concept global. In 2006 it was given a Dari Award by the Korea Creative Content Agency, which honored the company's efforts in bridging a cultural gap between Korea and the U.S. In 2008, the Software Council of California named GamersFirst the Entertainment & Gaming Company of the Year.

**Kona Kai Water, Newport Beach**

Kai Beaudoux, Owner

Kona Kai Water is a unique bottled water business that prides itself on a strong commitment to outstanding customer service and old-fashioned personal attention. Company founder Kai Beaudoux enjoys getting to know the organizations and individuals he calls clients not only so that he can address their specialized needs in an educated fashion, but so that he can support and promote them as well. These efforts have resulted in a highly satisfied base of clients who appreciate his friendly nature and relationship-oriented business model.

**La Jolla Group, Irvine**

Toby Bost, CEO, Chairman of the Board

Toby Bost, a native to the San Francisco Bay area, put on his first O'Neill wetsuit at the age of seven. Today, he sits as the Chairman of the Board of the La Jolla Group and Chief Executive Officer of each of its brands, which include not only O'Neill Clothing USA, but Lost Clothing, Metal Mulisha Clothing and Rusty North America as well.

One of the youngest CEOs in the industry, Bost draws on more than 15 years of experience to oversee the La Jolla Group's financial performance and profitability, ensuring efficient operations, innovative design and high-quality performance products.

Bost's charisma and vision have resulted in a noteworthy increase in both growth and multi-channel distribution that includes brick and mortar retail in addition to e-commerce, specialty surf and skate shops, and department stores around the globe.



ing room & culinary positions while earning his degree in hospitality management at Cornell University. After graduating, he accepted a position at P.F. Chang's China Bistro and served as sous chef and manager while opening new locations for the burgeoning chain. In 2000, he joined his father, Thomas Simms, founder of Mimi's Café, and underwent that company's management training program. There, he was involved in construction, real estate, training and information technology departments before leaving in 2001 to develop the Lazy Dog concept.

**Lexipol, LLC, Aliso Viejo**

Dan Merkle, CEO

Dan Merkle's coworkers describe him as a driven genius who faces adversity and challenges with great gusto. His ability to recognize and manage the risks Lexipol faces has allowed the organization—a leading provider of risk management resources for public safety organizations whose services include web-based policy manuals and procedure manuals—to become a major player in its field.

A senior executive with over 30 years of experience excelling at building enterprise value through alliances and strategic partnerships, Merkle is recognized as an innovator in crafting and implementing competitive strategies through collaboration in rapidly changing environments. He has served as chief executive officer of several companies both public and private.

**LifeModeler, Inc., San Clemente**

Shawn McGuan, Founder/CEO

Shawn McGuan, founder of LifeModeler, Inc. is an internationally recognized pioneer in biomechanics simulation. His company's flagship product, LifeMOD, is an innovative human simulation program that helps orthopedic manufacturers to eliminate the traditional cadaver-based design cycle. Complete with bones, joints and muscles, LifeMOD is a virtual human model that can walk, dance and even golf. Currently, it is relied on as the major product design system for the top six orthopedic manufacturers for knee and spinal orthopedic devices. It is now being advanced into the virtual surgery arena, providing a tool for surgeons to operate on the patient before the actual surgery.

A leader in the field, McGuan has recently been elected task leader of Physiological Durability Testing Standards for Knee Replacement Devices, a newly formed ASTM standards group.

**Lindora Medical Clinics, Costa Mesa**

Cynthia Stamper Graff, President

After leaving the real estate business and earning a law degree from Osgoode Hall Law School of York University in Toronto, Cynthia Stamper Graff made her way back to Southern California, where she accepted a position as general manager of Lindora Medical Clinics—the organization that her father, Marshall B. Stamper, M.D. founded in 1971. Shortly after, she was promoted to President. In 1997, Graff authored *Lean for Life* and *bodyPRIDE* (a book directed at teenagers). Both books introduce the Lindora program and philosophy on weight management, wellness, and self-esteem. Graff is currently working on her third book, *Living Lean for Life*.

**Local.com, Irvine**

Heath Clarke, CEO

Heath Clarke conceived the idea for his business, Local.com, while searching online for the local business that manufactured a specific leather reading chair. He founded the company in 1999 and took it public in 2004, marking one of the most successful IPOs in the country that year.

Local.com is the largest and fastest-growing local search network in the United States, acclaimed for delivering the most relevant local search results to more than 20 million consumers every month. Frequently quoted alongside Google and Yahoo!, Local.com enjoys a center-stage position thanks to Clarke's efforts. Clarke is involved with many professional organizations, including The American Enterprise Institute, The Heritage Foundation, and the Young Presidents Organization.

**Lucca Cafe, Irvine**

Cathy Pavlos, Executive Chef

Elliott Pavlos, General Manager/Sommelier

Pavlos grew up in a large Italian family and her childhood memories include cooking with her grandmother for Sunday gatherings. A trained architect and art historian with more than 20 years in architectural practice and as a college professor, Pavlos has always been drawn to cooking. Having traveled to Italy every year for 30 years, she's developed a collection of remarkable recipes inspired by her grandmother's cooking and her favorite restaurants in Italy, France and Greece.

Along with husband Elliott Pavlos, who serves as the restaurant's General Manager and Sommelier, Pavlos opened Lucca in 2005. The restaurant is "an urban concept in a suburban



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center," whose ever-changing menu modifies Pavlos' recipe collection to incorporate the flavors of California with its emphasis on healthy, high quality ingredients. Lucca also offers a unique and extensive wine bar.

Lugano Diamonds, Newport Beach Mordechai "Moti" Haim Ferder, President

A master craftsman and jewelry visionary, Ferder was raised in his family's jewelry business, which was established in 1974. With highly specialized gemological training and business savvy, he plays an instrumental role in the increasing success of the Newport Beach-based company, helping to establish it as one of the world's finest jewelers.

Ferder heads Lugano's development and branding campaigns and has overseen the company's global marketing in 22 countries. Under his leadership, the Fashion Island-adjacent location was opened in 2005. Ferder is a key creative force and jewelry expert, serving as designer, buyer and appraiser for Lugano, and is the primary liaison between the company and international gemological laboratories. Lugano deals only with conflict-free diamonds and can trace each of its stones back to its origins.

Prior to his work with Lugano, Ferder founded Craft Diamonds Ltd., specializing in the manufacturing of large stones and goods in both Israel and America.



Lyndon Group, Newport Beach Ken Jones, Executive Managing Director

Kenneth L. Jones, CPA, is executive managing director of Lyndon Group, an accounting, finance, information technology (IT) and corporate governance professional services firm specializing in project-based engagements. Since 2000, Jones' vision, leadership and client-focused service model, has kept the Lyndon Group positioned as one of the fastest-growing firms in Southern California. With experience spanning two decades in top-tier professional service firms, international middle market organizations and emerging growth companies, Jones has lead Lyndon Group to grow steadily, more than tripling in size and sales volume since its inception. Jones is a member of the American Institute of CPAs and the California Society of CPAs. In addition, he serves as the Chairman of the Corporate Development Committee for local nonprofit, Crystal Cove Alliance.



Madeline Zuckerman PR, Newport Beach Madeline Zuckerman, President & Owner

Madeline Zuckerman launched her career in marketing, branding and public relations on New York City's Madison Avenue nearly four decades ago in 1971. She relocated to the West in the mid-1970s, founding her namesake PR firm in 1978. Over the years, she has worked with an impressive list of clients, which include Tiffany & Co., Escada (USA) Inc., Jaguar Cars, Hermes, Mikimoto and South Coast Plaza Shopping Center.

Zuckerman believes strongly in giving back to her community and supporting nonprofit organizations in Southern California. She contributes time and support to various causes and presently serves on the Boards of the Pacific Symphony and Girls Inc.

Born and raised in New York, Zuckerman holds a degree in Journalism from New York University and is a graduate of the New York School of Interior Design.



Meridian Graphics, Tustin Dave Melin, Owner and President

Melin has been in the printing business for almost 40 years, beginning as an employee in his family's company when he was in high school. In 2000 he joined Meridian Graphics and has managed its growth from a \$1.5 million company to a \$24 million organization (in 2006), as well as its expansion from the original 15,000 sq. ft. facility to its current 42,000 sq. ft. location.

Meridian Graphics is one of the largest G7-certified, environmentally conscious "green" commercial printing companies in Southern California. Its state of the art presses, sophisticated pre-press department, and reputation for honesty, integrity and service allow the company to consistently and responsibly produce accurate, vibrant printing.



Metafuse, Inc., Irvine Steve West, Founder & CEO Wes Kliewer, Founder & Director of Product Training

West and Kliewer are visionaries in the Internet and software market. They founded Metafuse in 1996 as a custom software development house to serve the new, emerging World Wide Web market. The pair focused on functionality, recognizing that companies wanted websites to be able to access data on the back end and create a more interactive experience for their customers. The young company, privately held without outside venture capital or financial assistance, survived the dot com bust by building a portfolio of traditional customers including Crane Valves, Edwards Lifesciences and EMC.

Despite challenges post 9/11, in 2001 the duo pioneered a web-based software product, Project Insight, to serve the project management market. At that time, they had to explain to prospective customers what a web-based solution was; now in 2010, Project Insight leads the mid-market project management software niche with customers like American Honda, DirecTV, JD Power & Associates, Gap, Merrill Lynch and more than 500 more.



MiMedia Productions, Irvine Mike Ivey, President

After graduating high school and enrolling in college, Ivey got a part-time job at Disneyland. Eventually, he parlayed this experience with his DJ skills, embarking on an eight-year stint operating a DJ company and working with KROQ-FM, one of the largest radio stations in the nation. It wasn't long before he shifted his focus toward behind-the-scenes work, adding lighting, projection systems, cameras and other video equipment to his ever-increasing list of services. Live webcasting, his latest offering, can both enhance and replace traditional conferences and conventions.

Whether it's a webcasting conference or a traditional training seminar, Ivey and his dynamic creative team work with clients on a branding level, helping with essential elements such as concepting, motivating audiences, and delivering a message in an interesting and unusual manner.



Mission Center for Longevity & Aesthetic Medicine, Mission Viejo James A. Heinrich, M.D., Founder/Medical Director Charlene Jessup, Managing Director

Jessup and partner James A. Heinrich, M.D. founded the Mission Center for Longevity & Aesthetic Medicine to offer a state-of-the-art facility for enhanced executive physicals in Orange County. Located on the Mission Hospital campus, the Center utilizes the latest technology to determine the quality of the patient's health, lifestyle and potential longevity, combining an extensive physical with features including exercise tolerance and pulmonary function testing, complete cardiac screening, biological age analysis, skin cancer screening, comprehensive explanation of test results, communication with your primary care physician, and a quarterly follow up for one year.

Planning for the Center began in 2007, before the financial crisis caused severe cutbacks in discretionary spending. Jessup and Heinrich persevered, personally funding their venture to maintain control, and moving forward with equipment purchases, hiring, training, web development and marketing. The Center opened in the spring of 2009 and its client base continues to grow.





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Mitch-Stuart, Inc., Laguna Niguel

Michelle Cohen, President

Mitch-Stuart, Inc. president Michelle Cohen is an entrepreneur with a truly altruistic vision; her company has pioneered several programs in the travel industry that have helped nonprofit organizations raise almost a billion dollars in revenue since 1994.

Mitch-Stuart's clients include the United Way, American Red Cross, Catholic Charities, Boy Scouts of America, Rotary Clubs, Boys & Girls Clubs and Salvation Army. The organization works locally with CHOC Foundation for Children, Pediatric Cancer Research Foundation, Anaheim Memorial Medical Foundation, Orange County Museum of Art, Temple Bat Yahm, Heritage Pointe, Coastline College Community Foundation and Orange County Coastkeeper.

Cohen is a recognized speaker at numerous national conventions and is a member of Association of Fundraising Professionals both locally and nationally.



Moxxe Public Relations, Laguna Beach

Mona Shah, Owner

As a one-woman operation, Mona Shah has her hands full with multiple clients—and yet she manages to give them all equal attention. But what really sets her apart as an entrepreneur is her acumen for social media, which serves her clients with tremendous dollops of free advertising. Her social media skills have put her in high demand lately as a growing list of clients have reached out to her to manage their Facebook pages and Twitter accounts.

Shah's client list is impressive. Currently she represents The Winery Restaurant & Wine Bar, Lucca Cafe, SOL Cocina, Prego Ristorante, Don the Beachcomber, American Career College, West Coast University, Daddy Cakes, Food Power, and the Orange County Restaurant Association.



Netlist, Irvine

Chuck Hong, CEO

Led by CEO and co-founder Chuck Hong, Netlist started out designing and manufacturing custom memory and in late 2006 went public. Shortly thereafter, Hong found that expectations for the entire semiconductor industry were out of whack. When Vista floundered, prices in the memory market dove along with it. At the same time, Netlist found competition from companies based in other countries increasing. Faced with heavy losses and impossible market conditions, Hong cut general expenses, lowered operating costs and invested \$10 million in research and development, the result of which ultimately changed the focus of Netlist. His vision also led to two entirely new lines of chip products called HyperCloud and NetVault. HyperCloud, when introduced in November 2009, captured investors by storm—millions of shares traded each day for a week and the stock price shot up to almost \$8, even before the chips had been tested by potential customers.



OC Restaurant Association, Inc., Aliso Viejo

Pamela Waitt, President/Founder

A mother of two and the president and founder of OC Restaurant Association, Inc., Pamela Waitt is at the helm of the organization that has brought us Orange County Restaurant Week, Happy Hour Week, and Kid's Restaurant Week. Passionate about Orange County's dining scene, Waitt strives to create fun and innovative events that appeal to a wide variety of consumers.

Waitt's involvement within the local restaurant industry has opened several doors for her—she relishes having been given the opportunity to sit on the board at Share Our Selves (S.O.S.), a locally based nonprofit that aims to provide free assistance to those in need of basic living essentials.



Olenicoff & Zinser, PC, Irvine

Kelly Zinser, Attorney/President

Kelly Zinser started her law firm just four months after giving birth in 2008 amid the worst stretch of the economic downturn. Her tireless work ethic, attention to detail and compassionate approach to client service have allowed her to build a successful practice not only in a very short amount of time, but in spite of less than desirable circumstances. Zinser's practice focuses on consumer bankruptcy, estate planning and probate. She assists those facing financial difficulties and harassing calls from creditors, enabling them to embark on a fresh start. She approaches each client individually and helps them determine their best course of action, which may or may not include bankruptcy.



Option Investments, Inc. (OpVest), Irvine

Scott Altenburg, CEO

In 1989, Scott Altenburg started his first business, a mobile restaurant, which helped pay for his college education. In the early 1990s, he began working 100-plus hours a week as a broker's assistant and a waiter. Eventually, he became a top broker and sales manager at multiple firms.

In 1999 he started his own firm, Summit Financial Services, with his wife Jennifer, who in

2001 left to raise the family. Altenburg then brought in Andre Julian as CFO to help him build the company. Summit ultimately became Option Investments, Inc. (OpVest).

Since opening its doors, OpVest has traded over half a million option contracts and grown tremendously, employing more than 60 today. The company has received numerous accolades, including a spot on the Business Journal's 2009 Fast-Growing Private Companies List and being named one of INC 500/5000's Top 100 Financial Companies.

Altenburg and OpVest currently donate to multiple causes, including local charity, Project Access and the Special Olympics.



O'Quinn Clothing, Huntington Beach

Dean Quinn, President/Creative Director

At the age of 16 Dean Quinn became one of the hottest up-and-coming surfers in the region—soon after, he found himself getting paid for his passion. Worried that a career as a pro surfer wouldn't last forever, he began working for some now-defunct surf brands, including Team Gear and Gotcha. In the summer of 1994, Bob Hurley (then the licensee of Billabong America) asked Quinn to join their sales team, and he accepted the offer; four years later, Hurley asked Quinn to join him as the VP of sales for Hurley, his new brand. Quinn leveraged this impressive experience to launch O'Quinn clothing in 2007. The Huntington Beach-based lifestyle brand has become well known among trendsetters, athletes and celebrities for its unique fits and impeccable attention to detail.

Today, O'Quinn is a premium surf lifestyle brand selling to more than 150 accounts worldwide with estimated annual sales between \$5 million and \$7 million.



Pacific Pharmacy Group, Mission Viejo

Tom Pascoe, CEO

Scott Tyree, COO

Tom Pascoe and Scott Tyree founded Pacific Pharmacy Group in 2006, working together to implement their business plan of acquiring and opening successful, independent community pharmacies.

With Tyree's wealth of operational know-how and industry contacts and Pascoe's expertise in raising capital and leading high-growth companies, the two were able to concurrently raise nearly \$4 million to start Pacific Pharmacy Group while completing its first three acquisitions in 2007. They have demonstrated the foresight and flexibility that are calling cards of the true entrepreneur, adapting their business strategy and moving quickly to take advantage of new opportunities. Together, they have grown Pacific Pharmacy Group to nine locations with more than \$30 million in revenue.



Palo Capital, Newport Beach

Kevin O'Grady, President & Chief Investment Officer

Palo Capital is an SEC-registered investment advisor that manages investments for individuals and non-profits. Founded in 2005, the company's mission is to deliver investment results that regularly and significantly outperform market averages. Assets under management have increased by more than 100% in the last year.

Palo Capital's strong investment returns have benefitted from O'Grady's unique background which includes training in economics, medicine, and business, and hands-on experience running healthcare and tech companies. Not many investment managers have been CFO for a semiconductor company.

Client assets are invested based on Palo's in-house, research-intensive investment process. Virtually every stock placed in any client account is owned by Palo's principals. All assets are custodied at Charles Schwab.



Paragon Software Group, Irvine

Tom Fedro, President & CEO

Fedro co-founded Paragon Software Group in June 2008 to provide disaster recovery and server optimization software and services to small business and mid-enterprise clients, and also to deliver a unique portfolio of file system drivers to large technology manufacturers and OEMs. Over the past 20 months, the company has become a true tech success story; in the midst of a struggling economy Fedro has navigated the business to profitability and cash flow-positive status, growing it from a startup to a powerhouse with millions in revenue—all the while building up its local team with nothing but the strongest talent in Orange County. To accommodate its rapid growth, Paragon is moving into its new headquarters this year and is poised to double revenues in 2010.



Passco Companies LLC, Irvine

Bill Passo, Founder/CEO/Chairman of the Board of Directors

Bill Passo, CEO of Passco Companies, LLC, has directed the formation of more than 100 private and public limited liability companies and limited partnerships along with the acquisition, disposition, entitlement, management and leasing of more than 150 commercial real estate properties valued at approximately \$3 billion since 1978. Touted as the "Pioneer of the Tenant In Common industry" by the New York Times, he is consistently quoted in major real estate, business and financial publications. An engaging public speaker, Passo has participated in

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numerous industry panels in addition to a major radio talk show.

A lawyer by education, Passo—together with his attorney—approached the Internal Revenue Service in 1994 to allow the 1031 exchange program to be accepted as a Tenant In Common transaction. This was a pivotal move in the evolution of the Tenant In Common industry for the entire country.

Precept, Irvine

Wade Olson, Founder and CEO

Located in UCI's prestigious University Research Park, Precept was founded by Wade Olson and over the years has grown to over 150 employees. The firm's objective is making employee benefits work for America.

Precept has seen its annual revenue increase an average of 16% each year since its inception. That growth rate is four times the industry average, and has been fueled by an increase both in the number of clients and the company's scope of services.

Precept now is a \$25 million-plus revenue firm and one of the 10 largest independently owned employee benefits service firms in the U.S. Precept supports various community organizations including Olive Crest Homes, Orangewood Children's Foundation, the Ocean Institute, Community Action Partnership of Orange County, Komen for the Cure, American Red Cross and American Cancer Society.

Prego Ristorante, Irvine

Ugo Allesina, Executive Chef/Partner

Ruth Bedi, Owner

Tony Bedi, Owner

Husband-and-wife team Tony and Ruth Bedi took ownership of Irvine's Prego Ristorante in hopes of restoring its status as one of Orange County's top dining destinations. From replacing the floors and changing the upholstery to adding a sports bar and new restrooms, they remodeled and refurbished the entire space.

Tony Bedi has been the President of A.R.I. Industries, Inc. Division Airayne Refrigeration (a designer and manufacturer of refrigeration and other equipment for commercial kitchens) for 15 years. His background provides a unique breadth of experience for managing and owning a high-end eatery—he has worked with many upscale restaurant operators, including Tom Colicchio of the Craft Restaurants and "Top Chef" television show.

While attending Colorado State University, Ruth Bedi studied abroad at La Varenne, a famed culinary school in France. There, she had the opportunity to learn some cooking techniques and have lunch with Julia Child.

Ugo Allesina, executive chef & partner at Prego, brings more than 25 years of experience to his position. By working at a number of prestigious hotels and restaurants throughout Europe and the United States, he has become a premier chef of Northern Italian cuisine.

Progressive Lighting, Tustin

Randy Parole, President & CEO

As President and CEO of Progressive Lighting & Energy Solutions, Randy Parole oversees the company's operations, financial and business development. Along with his superb vision, he brings solid credentials and 28 years of experience working with businesses to improve lighting and energy consumption for commercial buildings.

Prior to joining the team at Progressive Lighting, Parole served as regional vice president of Amtech Lighting Services, managing finances and operations for the company's \$30 million Southwest U.S. region. Before that, he was president of Lighting Management Systems, a commercial lighting retrofit and energy service business. He also was branch manager of ABM Lighting Services' Anaheim location.

Parole is a Certified Lighting Management Consultant (CLMC), a Certified Energy Auditor (CEA) and an active member of the Building Owners and Managers Association (BOMA).

R&D Medical Products, Inc., Lake Forest

David Sheraton, President & CEO

R&D Medical Products, Inc. was originally the research and development department of Sentry Medical Products, Inc., of which David Sheraton was director. Sheraton ran the R&D department along with the QA/QC department for 17 years. During that period, the company increased its annual sales from \$1 million to \$13 million.

In 1996 Sentry Medical Products, Inc. was sold to Ludlow Technical Products and the R&D department was ordered to shut down. In order to sustain the development efforts serviced by the department, some O.E.M. companies provided the necessary capital to allow Sheraton to turn the department into his own corporation.

Ramirez International, Irvine

Manuel Ramirez, CEO/President

A founding member of Ramirez International, which celebrated its 30th anniversary earlier this year, Manuel Ramirez is at the helm of a company that services private enterprises, publicly traded corporations, governmental institutions and non-profit organizations in 13 countries. He's also a co-founder of Hispanic 100, an organization working to help further the develop-



ment of local, national and international Hispanic business and political leaders and to be a conduit to facilitate and implement the strategic resolution of issues critical to the Hispanic community. He also served as the last elected President and first Chairman of the Board for the Hispanic Chamber of commerce of Orange County. Additionally, he co-founded GenNext PAC and the Orange County Catholic Foundation, and sits on the board at Legatus. What's more, he's the audit committee chairman of the Santa Ana Business Bank, the finance and investment committee chairman of Make-A-Wish foundation, and the finance chair for the Boy Scouts of America.

**Recycle Your Media, Newport Beach**

Brian Musil, Owner

After working in the print media and marketing industry for several years, Musil recognized a need for a secure and reliable means by which corporate data centers could recycle their used data tape cartridges and securely eradicate the stored data. He capitalized on this need by launching Recycle Your Media—a company that eradicates data on media storage tapes according to government data sanitization standards and offers the refurbished tapes for sale at discounted rates—in 2005. Musil introduced the eco-friendly company on the leading edge of the green revolution, and the concept continues to be successful and lucrative; the firm employs more than 30 workers between its Newport Beach headquarters and Silicon Valley production facilities and has over 1000 clients in the U.S. and 37 other countries. Recycle Your Media counts high-profile, Fortune 500 organizations such as Sun Healthcare Group, Google and Lockheed Martin as clients.

A homeowner in the burgeoning art district of downtown Santa Ana, Musil added "art gallery owner" to his resume in 2007 with the opening of Art from the Hive, which showcases local artists' work by appointment and during the Santiago Art District's monthly art walks.

**Rent-A-Green Box, Costa Mesa**


Spencer Brown, Founder and Chief Tree Hugger

According to Spencer Brown's research, 20% of the population moves every year and the average person will move 16 times in their lifespan, using an average of 40 boxes per move. In an effort to eliminate the senseless use of cardboard boxes during a move, he launched Rent-A-Green Box.com—a comprehensive pack-and-move solution that is the first company of its kind in America. Rent-A-Green Box converts massive amounts of trash mined from local landfills into a suite of 13 sustainable, cradle to cradle, zero-waste packing and moving products.

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In 2009 Brown won California's "GEELA" (Governor's Environmental and Economic Leadership Award) for new market technologies in recycling. This year, the International Green Dot Awards bestowed upon him two Honorable Mentions. Brown also won the 2010 State of California Cool Climate Small Business Award and he's been nominated for Global Green's 2010 Environmental Leadership Award.

Sambazon, Inc., San Clemente
Ryan Black, Founder & CEO

Ryan Black founded Sambazon in 2000 after discovering the acai fruit during a surfing trip to Brazil. By working closely with the world's foremost conservation organizations, his organization has pioneered the first of its kind Fair Trade, sustainable and certified-organic supply chain of acai. Today, Sambazon Sustainable Acai is enjoyed by world-class athletes and health-conscious people across the globe.

A social entrepreneur, Black is guided by the "Triple Bottom Line" philosophy; that is, he aims for success on economic, social and environmental levels. Sambazon's mission is to enrich the lives of thousands of Amazon families, aid in the economic growth of the region and protect the biodiversity of the rainforest through market-driven conservation.

Saritasa Web Developers, Corona del Mar
Nik Froelich, Owner

In the 1980s, Nik Froelich ran a concrete grinding company, which he grew nationally via word of mouth and the yellow pages. During the early 1990s, he shifted advertising gears, successfully utilizing the Internet long before search engines like Google and Yahoo! were popular. Subsequently, he gained credibility as a web consultant and soon after, he purchased a web development company. Beginning with one web designer and a handful of developers, Saritasa's success story started to take form. Froelich grew his development team to more than 40, and this year is hiring more. The company continues to take on bigger clients and more complex jobs, positioning itself at the forefront of the technology revolution.

Savvy Employment Specialists, Costa Mesa
Kellie Lewis, CEO/Talent Acquisition Manager

Kellie Lewis founded Savvy Employment Specialists in August 2004 after working in the staffing industry for more than a decade. Her devotion to the development of the Savvy team



while delivering a more personal, committed approach to business has proven to be a critical asset to her clients. Lewis has been nominated for many professional awards, including OCBJ's Women in Business and Family Owned Business. When it comes to young business and civic leaders, Lewis is one of Orange County's brightest stars.

Lewis holds the California Accredited Consultant (CAC) and Certified Staffing Professional (CSP) designations, assuring her clients that their employment objectives rest in the most competent of hands.

SEW Creative, Costa Mesa
Ian Elliott, Managing Partner

Ian Elliott is a member of a new wave of socially responsible entrepreneurs. A 2007 graduate of Loyola Marymount University, he leverages the experience he gained doing international marketing for Quiksilver to inform his latest venture: SEW Creative.

SEW Creative aims to advance social causes to a network of supporters via communication, networking, and branding strategies. Now in its second year of operations, the company is relatively new on the scene—but it's already made significant strides in redefining the ways that business and social activism can work hand in hand. Currently, Elliott is leading projects that deal with a variety of causes, benefiting a wide range of organizations.

Sheri Geoffreys Photography, Ladera Ranch
Sheri Geoffreys, Founder

Sheri Geoffreys was diagnosed with Hodgkin's Lymphoma Cancer six weeks after the birth of her first child in 1999. During her nine-month struggle with the illness, she reflected on her life and took the shift as an opportunity to get in touch with her interests and passions, chief among them photography and helping others. By taking college courses in traditional black and white film photography, she honed her innate artistic sense and discovered she possessed a remarkable technical talent for the craft as well as a keen ability to retouch. Today, her namesake business focuses on corporate photography.

A mother of two young children and a triathlete, Geoffreys supports numerous charitable organizations, including the Heart Gallery, Girls Inc., C.A.S.A. and The On Purpose Book & Scholarship, which she founded.

Shield Security, Inc., Orange
Edward Klosterman, Jr., President

Edward Klosterman, Jr. carries on the tradition of service that has been a hallmark of Shield Security since it was founded by his father in 1964. Along with presiding over the Shield team, Klosterman can often be found visiting clients with Shield's Regional Vice Presidents, personally ensuring customers' needs are met and exceeded. Determined to grow the business and provide superior service, Klosterman set forth a solid business plan and strategic goals to help realize his dream. With commitment, integrity and leadership, he continues to grow the company, keeping protection his number one priority. Today, Shield Security, Inc. has locations in Burbank, Long Beach, Orange, San Diego and Upland.

Sipper Photography
Dana Sipper, Co-owner
Jeff Sipper, Co-owner

Voted Top 5 in the MyFoxLa Best of OC Wedding Photographers for 2009, Sipper Photography—a husband and wife team that specializes in weddings, portraits and events—boasts a style that they describe as simple, modern and casual. Clients give the Sippers rave reviews for their trusted ability to capture the essence of the events they cover while maintaining a high level of professionalism.

Jeff and Dana Sipper have been seen in numerous publications, including Broughton Quarterly, OC Family and Foam Magazine. What's more, Dana is the featured blogger for OrangeCountyWeddings.com by The Knot.

Recently, a photograph credited to Sipper Photography was displayed on a Forbes.com feature entitled "The Web Celeb 25."

SOL Cocina, Newport Beach
Matt Baumayr, General Manager/Operating Partner
Rich Howland, Managing Partner/Director
Deborah Schneider, Executive Chef/Partner

Matt Baumayr, Rich Howland and Deborah Schneider bring years of talent and industry experience to SOL Cocina. Having served as regional manager for RA Sushi Restaurant as well as manager at P.F. Chang's in San Diego, Baumayr has a complete understanding of restaurant operations in addition to a solid background in marketing and branding—he holds a B.S. in business administration from Arizona State University.

Howland has enjoyed more than 15 years of entrepreneurial success; his dazzling resume includes not only a tenure as an officer with Benihana Inc., but being a founder at RA Sushi, which was acquired by Benihana Inc. in 2002.

Schneider's accomplishments as a chef are just as impressive—in addition to being touted as "the reigning queen of San Diego chefs" by Bon Appétit Magazine, in 2009 she was nomi-



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Commercial Real Estate Women of Orange County would like to recognize and express gratitude to these notable women who are dedicated to advancing the success of other women in commercial real estate.

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nated for a coveted James Beard Foundation Award for her most recent cookbook.

SOL Cocina plays up the best of Baja in Newport Harbor, offering an energetic, hip and inviting dining experience. Schneider's menu features contemporary gourmet interpretations of Baja street cuisine, which is complemented by a full bar.

Solis Capital Partners, Newport Beach *Dan Lubeck, Managing Director*

Dan Lubeck is the founder and managing director of Solis Capital Partners. He has led as a principal or professional more than 60 acquisitions and divestitures of middle market companies. Prior to Solis, he co-founded Unique Investment Corporation, a similar leverage buyout company. In 1992, he was a founding partner of a Southern California-based business law firm: McIntyre, Lubeck, Borgess & Burns. Prior thereto, he worked as an attorney for several prestigious national law firms, including Paul, Hastings, Janofsky & Walker and Manatt, Phelps & Phillips, specializing in corporate and real estate acquisitions and divestitures.

Lubeck holds a law degree from UC San Diego. He sits on a variety of private company Boards of Directors.

Susan's Healthy Gourmet, LifeSpring Home Nutrition, Xan Confections, Irvine *Susan Johnson, CEO* *Kerry Johnson Anthony, President*

With a family history of both cancer and heart disease, Susan Johnson and daughter Kerry Johnson Anthony are conscious of the benefits of a healthy lifestyle. They have fused this with love of great cuisine via three synergistic entrepreneurship. Fifteen-year-old company Susan's Healthy Gourmet (SHG) pioneered and perfected the concept of delicious and nutritious calorie-controlled meals delivered to homes and offices twice weekly throughout Southern California. Meanwhile, LifeSpring Home Nutrition provides healthy and affordable frozen meals to seniors, and Xan Confections (created with celebrated OC chocolatier Tracey Downey) offers all natural, gourmet artisan chocolates. Susan and Kerry, CEO and president, respectively, are a collaborative team who together foster continued growth of the companies. Combined revenues have surpassed \$9.4 million, and SHG has expanded delivery capabilities to Northern California.

T3 Motion, Costa Mesa *Ki Nam, Founder/CEO*

Ki Nam started T3 Motion to create electric vehicles that would deliver high performance, dramatic cost savings and positive environmental impact for professional and consumer markets alike. Headquartered in Costa Mesa, T3 Motion is dedicated to raising the bar on environmental standards, law enforcement and security capabilities in personal mobility technology.

Past ventures Nam has spearheaded include Irvine-based PowerWave, a successful company in the telecommunications industry.

Thomas Whitelaw, Irvine *Joseph Thomas, Managing Partner*

December 2002 found Joseph Thomas on top of the world. As head of litigation in the Irvine office of a prominent national law firm, he had a flourishing practice and an impeccable trial record. But despite all the high-profile trial wins under his belt, he felt that something was missing. He asked himself if he was truly fulfilling his passion and the answer was "almost." He then made the decision to venture outside his comfort zone, leaving his cushy position to start a law firm of his own. Today, Thomas Whitelaw is recognized as one of the nation's premier litigation boutiques, specializing in high-stakes intellectual property, complex business and real estate litigation.

Topcor LLC, Irvine *Mike Sweeney, President* *Trish Sweeney, Vice President*

Mike Sweeney, President of Topcor, holds several product patents and has applied for two more within the past couple of years alone. He founded a fitness equipment company (Tectrix) in the late 1980s that was successful enough to make Inc. Magazine's 1994 list of Fastest Growing Companies in the United State. Later that year, Sweeney acquired a virtual reality equipment company, which he sold in 1998. Sweeney enjoys thinking outside the box, utilizing his design and engineering experience to solve problems.

One of Topcor's most exciting innovations, Clipa—a handbag hanger designed to accommodate today's larger, heavier purses—was launched July 2009.



Torelli Realty, Costa Mesa *Valerie Torelli, President/Owner*

At the start of her career, Valerie Torelli recognized a common disconnect between realtors and clients. To correct this, Valerie opened Torelli Realty in Costa Mesa, where she created a successful business formula that links realtors to their customers by actively listening and building relationships, rather than only focusing on meeting sales goals. This, coupled with shared literature and establishing a common language among employees, has set Torelli Realty apart from bigger firms. Since opening in 1984, Valerie has led Torelli Realty to achieve a stellar reputation and to become the No.1 real estate office in Costa Mesa year after year. Valerie's success is also evident in her dedication to spreading community appreciation by organizing annual seasonal events and supporting local schools and organizations.



Tracel3, Irvine *Hayes Drumwright, CEO*

Hayes Drumwright works as CEO of Irvine-based Tracel3, Inc., a data storage business that was founded in 2002 with next to nothing in capital. Last year, the company's sales topped \$110 Million, marking a 17% growth from the previous year. This outstanding growth has caught the attention of several business awards recognition programs, including INC's 2009 Fastest-Growing Private Companies, OC Metro's 2009 Best Companies to Work For, and OCBJ's 2008 Fast-Growing Private Companies.

Drumwright believes that giving back will strengthen our communities now and for years to come. As such, Tracel3 supports Talk About Curing Autism (TACA) and is the main sponsor for the Carson Palmer Open charity golf tournament, which directly benefits the Hillview Acres Children's Home.



Traditional Jewelers, Newport Beach *Eric Halfacre, President*

Following in the entrepreneurial footsteps of his father, Marion Halfacre, Erik Halfacre leverages his strong business background, unmatched financial savvy and superb buying skills to carry on a long-standing "tradition" of excellence as President of Newport Beach-based Traditional Jewelers. Since appointed to this position in 2009, Halfacre has expertly navigated the company through challenging economic times with aplomb, managing not only to retain the company's existing staff, but to grow it.

Erik attends annual buying trips to Geneva and Basel, selecting the fine





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PASSCO would especially like to recognize its Chief Executive Officer, William O. Passo, for his nomination.



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watches and jewelry that have become synonymous with his company's name. What's more, he has been instrumental in the opening of the company's second location in Malibu.

Trevino Law, Laguna Hills

Denise Trevino, Attorney

Attorney Denise Trevino has started three lucrative law practices in Utah, Arizona and California. She has successfully litigated cases in the areas of criminal and family law and currently emphasizes her practice in the areas of estate planning and family law. Trevino has been very active in the Orange County Bar Association, for which she served on the board for the Trusts & Estate section, rising to the level of Section Chair. She also served as Section Chair, and frequent speaker, of the Solo/Small Firm section of the OCBA.

Trevino also devotes time and effort outside the legal community, volunteering with organizations including Laura's House and Mike Community Development Corporation. Additionally, she has traveled to Mexico to help build homes for people in need.

Trinet Internet Solutions, Inc., Irvine

John Carley, President and CEO

John Carley continues to embody the entrepreneurial spirit that has helped grow Trinet Internet Solutions into one of Deloitte's Fastest Growing Technology Companies. At just 19 years of age, Carley founded what today is Orange County's largest and longest-running web firm, having 60 employees. The organization turned a profit after only four years of operation, maintaining steady growth year in and year out. Clients Trinet has pioneered web marketing campaigns for include Coca-Cola, Sony, American Red Cross, IMAX, Salvation Army and Toyota.

Currently, Trinet is the nation's 23rd fastest growing media agency according to INC. 5000, and has been listed as one of the Business Journal's Fast-Growing Private Companies for the past three years.

Verengo Solar Plus, Orange

Randy Bishop, CEO

Ken Button, President

In 2008 Randy Bishop and Ken Button purchased a residential siding and window replacement company with the intent to incorporate solar panel installation into the company's offering of services—gradually. Months later, the market for home improvements evaporated, and their plan had to accelerate. The duo hustled to raise additional capital and adapt their plan, and were successful in their endeavors. Less than two years later, Verengo Solar Plus is the leading solar system installer in Southern California, and it continues to expand at a rapid pace. To meet customer demand in 2009, the company created more than 90 new jobs, with plans to add another 200 jobs in the next two years. What's more, the systems Verengo has installed to date are estimated to have saved myriad carbon emissions, accomplishing the equivalent to the planting of 31,000 acres of trees and taking more than 12,000 cars off the road. Over the lifetime of these installed systems, homeowners will save \$26,000,000 in energy costs.

Veterinary Cancer Group, Tustin

Dr. Mona Rosenberg, Founder and Chief of Staff

Dr. Mona Rosenberg—Founder and Chief of Staff at Veterinary Cancer Group—received her DVM from UC Davis, followed by an internship and residency at Animal Medical Center in New York. She has been a diplomat of the ACVIM in Oncology since 1992 and is an active member of the Veterinary Cancer Society and SCVMA where she is a regularly sought-after lecturer. In addition, Dr. Rosenberg heads up the medical oncology residency program at Veterinary Cancer Group. What's more, she recently was honored the ACVIM Foundation for her lifetime dedication to helping animal cancer patients and their owners. She also was appointed Clinical Associate Professor of Veterinary Medicine at Western University of Health Sciences/College of Veterinary Medicine.

In 2008, Veterinary Cancer Group ranked third in the "Growing Companies" category of California's Best Places to Work Program, sponsored by Employers Group.

Visual Lighting Technologies, Lake Forest

Dan Haydt, President & Founder

Since its launch ten years ago, Visual Lighting Technologies—a company that develops, manufactures and distributes high-quality fiber optic and LED lighting fixtures—has expanded at a tremendous rate, leaving its initial two-room office space for an 8,000 square-foot facility while growing its staff to 20. Over the years, Visual Lighting Technologies has acquired an impressive list of clients, which include Cartier, Baccarat, Traditional Jewelers and Guggenheim Museum.

President and founder Dan Haydt graduated from California State University, Northridge and worked for other lighting manufacturers before starting VLT in January 2000.

The Winery Restaurant & Wine Bar, Tustin

JC Clow, Managing Partner

Yvon Goetz, Executive Chef & Partner

William Lewis, Sommelier & Managing Partner

Patrick Quinn, Partner

Having opened in mid-2007, The Winery Restaurant & Wine Bar has created quite a stir by successfully pairing contemporary California regional cuisine with a hip, vibrant setting that results in a cutting-edge dining experience. The restaurant's leadership has played an instrumental role in securing the coveted "Restaurant of the Year" award from the Orange County Concierge Association for the past two years.

Partners JC Clow, William Lewis and Patrick "Irish" Quinn spent more than 12 years together at the second-highest grossing Morton's in the country (South Coast Plaza) before embarking on their own journey to open The Winery. Executive Chef & Partner Yvon Goetz—who joined the team after spending most of his career leading other restaurateurs to success—now directs a team that delivers a culinary experience reminiscent of California's wine country.

The Winery's charitable contributions have included participation in several very prestigious off-site charity events, including Culinary Masters (put on by The Roosters organization) Share Our Strength's Taste of the Nation and Jessica Estrad's "Not So Serious," a women's charity golf tournament that benefits Orangewood Pals.

WiSpry, Irvine

Jeffrey Hilbert, President and Co-founder

Jeffrey Hilbert is president and co-founder of WiSpry, a semiconductor company he founded in 2003. WiSpry designs and manufactures components for leading manufacturers of mobile phones, laptops and wireless data communications products. Hilbert brings to the organization more than 25 years of experience at top companies including Coventor, LSI Logic, AMCC, Motorola and Harris. A noted industry expert, Hilbert is in high demand for speaking engagements all over the world, such as the MEMS Executive Conference and IEEE Conferences. He is an editor and contributing author for a textbook on ASIC technology and has published articles in magazines such as Solid State Technology and IEEE Communications.

Working Wardrobes, Costa Mesa

Jerri Rosen, CEO and Founder

Jerri Rosen is CEO and founder of Working Wardrobes, a nonprofit organization that each year helps 5,000 men, women and young adults in crises re-enter the workforce through career development and professional wardrobing. Currently celebrating its 20th year, Working Wardrobes has served more than 50,000 clients in Southern California in partnership with more than 60 local shelters and social service agencies.

In late 2009, Working Wardrobes moved into a 16,500 sq. ft. multipurpose center in Costa Mesa to serve thousands more clients and offer an unprecedented expansion of services, including life and career skills workshops and career counselor training. To help fund the programs, Rosen has successfully initiated a series of social enterprises, including The Hanger. This chain of upscale resale boutiques is part of a business model that accounts for 75 percent of revenue.

Wright Creativity, Mission Viejo

Kirsten Wright, Owner

Kirsten Wright, owner of Wright Creativity, was a rhetorical communications major at Cal State Long Beach who after graduation launched a career in marketing. During the social media boom of 2007, she worked with her then-employer to connect clients and take advantage of what the "new" Web had to offer. In early 2008, she started the Wright Creativity blog as a creative outlet. Her readers grew, and slowly she picked up some small freelance projects, working with clients on building Twitter followers and improving blog strategies and practices. In April 2009, when the effects of the economic downturn began to wear heavily on her employer, she was laid off. That was when she decided to take the plunge and turn Wright Creativity into a full-fledged business, offering blog management, web strategy, design and copywriting services for businesses that do not employ a full-time graphics and marketing team.

Young Singers of Orange County, Newport Beach

Samantha Smith, Founder

Samantha Smith—a singer/songwriter/musician who has played the piano since the age of eight—is only a senior in high school. In November 2009 at the age of 17, she founded Young Singers of Orange County: a nonprofit community service organization that aims to provide an opportunity for elementary-aged children to participate in a choir that will perform concerts at school, hospitals and elderly care facilities. The organization will generate funds through these and other public performances as well as through private donations, sponsorships and grants, to benefit local nonprofit organizations for children in the OC area.

Overture Young Professionals, a nonprofit organization that raises funds for arts education, has agreed to mentor Samantha and has already held several fundraisers to help pay the costs of getting Young Singers of Orange County off the ground.



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