IPOS, ROLE CHANGES, WHITE HOUSE SUMMIT, AND RECORD YEARS FOR 2021 EIE HONOREES

PAGE 26, 28

2022 NOMINEES

PAGE 44
By KEVIN COSTELLOE

Deepak Garg sometimes sounds more like an activist for water and electricity resources instead of a typical businessman at the helm of a 1,200-plus-employee company. For the most part, he’s both. As the CEO of Irvine-based Smart Energy Water, Garg uses technology to help utilities and their consumers conserve water and energy, a mission that he says goes well beyond the profits and losses of a typical business.

He founded the company a decade ago to “save every drop of water and every electron” so that no resource goes to waste. “We as a technology platform are really making sure that people around the globe are empowered, educated and engaged, which is billions of people,” Garg said.

Access to water and electricity is “a fundamental human right,” Garg said. His firm, also known as SEW, is rapidly expanding globally to realize that goal, with a growing climate change–focused team in Europe, the Middle East, Asia, Australia and New Zealand.

The company will add another 800-plus employees this year, according to Garg, who says the company has been profitable and growing since its founding in 2012. “We have been growing over 50% every year-right year after year and the company has over 400 clients, he told the Business Journal on April 15. The company, which had about 40 job postings on its website last week, has “a focus on digital, the focus on mobility, AI, and machine learning.”

“We are in the business of connecting billions of people to energy and water ecosystems,” Garg said. He holds degrees from Stanford and MIT.

Last year, Garg estimated there were 2.8 billion people in the world without clean water, while 3.2 billion people don’t have constant power.

Energy and utility companies pay SEW for subscriptions to its cloud-based platform, and then let their millions of customers—households, businesses and others—use the service to save on water and energy consumption, as well as pay bills and manage their accounts.

Some of SEW’s local energy and utility clients include San Diego Gas & Electric Co., Imperial Irrigation District, Moulton Niguel Water District, Southern California Edison and Southern California Gas Co.

In addition to serving individual customers, SEW’s platform provides analytics to the utilities themselves, so that they can better monitor field operations, manage assets and inventory, support franchise development and perform other resource-saving services better.

Deepak Garg: Expanding SEW’s Global Reach

By AUDREY KEMP

Scott Shreve: ‘Best Year Ever’ for Crossover Health

Deepak Garg CEO Smart Energy Water

Anthony Geisler: Chasing Xponential’s Full Potential

By AUDREY KEMP

Business Keeps Booming for Top Entrepreneurs

Last May, the Business Journal honored five local executives shaping Orange County’s business community at the 20th annual Excellence in Entrepreneurship Awards. The industries varied—the winners ranged from a clean energy enthusiast to fitness franchise to a real estate developer.

Since then, one exec took his company public, another changed roles, and others saw record years in 2021. The Business Journal caught up with the execs to see what’s changed in the past year, with write-ups on this page and page 28.

The next Excellence in Entrepreneurship Awards ceremony is scheduled for May 26 at the Irvine Marriott; keep an eye on our website for information about the upcoming event on page 44.

Anthony Geisler CEO Xponential Fitness

Scott Shreve

Scott Shreve CMO Crossover Health

Anthony Geisler

Anthony Geisler Xponential Fitness

Smart Energy Water

Deep Energy Water

Anthony Geisler: Chasing Xponential’s Full Potential

Deepak Garg: Expanding SEW’s Global Reach

Scott Shreve: ‘Best Year Ever’ for Crossover Health

Business Keep Booming for Top Entrepreneurs
SERVICING BUSINESSES IN SOUTHERN CALIFORNIA

Do you need a business loan or commercial real estate loan with more flexible terms?

We customize loans and deposit accounts to meet the unique needs of your small to mid-sized business.

One of the STRONGEST and SAFEST Banks in the Nation

CONTACT US TODAY

www.cwbk.com (866) 521-CWBK info@cwbk.com
Michl Binderbauer: Energy Exec Goes to Washington

Michl Binderbauer, an Orange County scientist in the race to harness virtually limitless supplies of fusion energy, took his ideas to the White House last month as part of an energy summit.

The timing of the event, planned months in advance, ended up being crucial—it occurred on March 17, less than a month after Russia’s invasion of Ukraine, which sent world leaders scrambling for energy solutions.

Binderbauer, the chief executive of $5 billion-valued TAE Technologies Inc. in Foothill Ranch, is one of dozens of scientists across the world working on nuclear fusion. The idea isn’t new—scientists for decades have explored how to practically and economically produce energy from the same process that powers the stars—but it has certainly gained traction in recent years.

Binderbauer was one of the five winners at the Business Journal’s Excellence in Entrepreneurship Awards last May, and has been pushed further into the spotlight of elite physicists in the months since.

Binderbauer discussed the long and difficult road to fusion energy during a panel at the White House summit, hosted by the White House Office of Science and Technology Policy and the Department of Energy.

“I liken this to climbing a mountain,” he said during the panel. “When you get out of the fog of the inversion layer and suddenly you see the summit, it’s way up there.”

White House, which emphasized the “opportunity to keep these companies growing within our borders and cement U.S. technological leadership on fusion.”

Binderbauer’s TAE expects early commercialization of fusion energy to begin in the 2030s, with a gradual and then increasing penetration into commercial markets that will go through mid-century.

During the Fusion Industry Vision panel, Binderbauer noted the “20 years of just a bear of making technological components work.”

“We’re talking about building not science projects, but actually delivering energy,” Binderbauer said.

Other speakers at the event included U.S. Energy Secretary Jennifer Granholm and U.S. Rep. Donald Beyer, the chairman of the Bipartisan House Fusion Caucus.

“Considerable progress toward achieving commercial fusion, significant science and technology challenges remain,” the White House said in a summary following the event.

Of the 30 fusion companies in the world, about 20 are based in the U.S., according to the

TAE Technologies employees working on key components of ‘Norman,’ a fifth-generation fusion device

Emile Haddad: Big Picture Focus Amid Changes

Much has changed for Emile Haddad, and Five Point Holdings LLC, in the past year.

After leading his $900 million-valued company’s team through the pandemic, which caused him to rethink the way the developer approaches its communities throughout the state, Haddad stepped down from the top spot of the Irvine-based real estate developer in September.

Dan Hedigan, who previously served as president of land sales and homebuilding at Irvine Co., was named CEO of the company (NYSE: FPH), which operates under Five Point’s name, in February. A round of job cuts, representing about 20% of the company, followed in March.

Haddad, who has kept a low profile since the exec changes, is set to deliver the keynote address at the Business Journal’s 21st annual Excellence in Entrepreneurship Awards to be held on May 26 at the Irvine Marriott.

Adapting to Change

The longtime local real estate executive is no stranger to change.

From leaving his home country during the

Lebanese Civil War, starting over in America, plotting homebuilder Lennar Corp.’s expansion into California and now serving as chairman emeritus and adviser to Five Point, the Beirut native never seems to slow down.

“Life changes quickly. The [pandemic] gave evidence to that,” Haddad told the Business Journal last year. “As the world changes, you must change with it, or you risk becoming obsolete.”

As a former White House task force member and perennial big picture thinker, one of Haddad’s areas of focus is now working with city and state officials to solve housing and development challenges.

Mixed-Use

Five Point’s three communities, including Irvine’s Great Park Neighborhoods, will ultimately include about 40,000 residential homes and 23 million square feet of commercial space.

The Great Park Neighborhoods are currently designed to include 10,500 homesites, though that figure could increase given the state’s need to boost its stock of affordable housing.

At the end of 2021, 7,099 home lots at the Great Park Neighborhoods had been sold to builders, and FivePoint reported 655 home sales on its land in 2021, which is an 11% increase compared to 2020.

“The continued strong pace of home sales, we expect builders to purchase approximately 800 homesites in the fourth quarter of 2022,” Hedigan told analysts last month.

Hedigan also emphasized an increase in commercial and mixed-use developments for FivePoint, in line with Haddad’s goal of creating holistic, sustainable communities.

TAE Technologies Inc.

- **FOUNDED:** 1998
- **CEO:** Michl Binderbauer
- **HEADQUARTERS:** Foothill Ranch
- **BUSINESS:** nuclear fusion, related fields
- **EMPLOYEES:** about 100 overseas (as of March)
- **NOTABLE:** CEO Binderbauer took part in White House Summit on fusion energy

Five Point Holdings LLC

- **FOUNDED:** 2009
- **CEO:** Dan Hedigan
- **CHAIRMAN EMERITUS:** Emile Haddad
- **HEADQUARTERS:** Irvine
- **BUSINESS:** real estate developer
- **2021 REVENUE:** $224.4M
- **Q4 REVENUE:** $900M
- **NOTABLE:** Hedigan to deliver keynote address at 21st annual Excellence in Entrepreneurship awards
Work Where OC’s Innovators Connect to Everything

+ Space for small to enterprise teams
+ Oversized roll-up doors & operable windows
+ Destination-worthy amenities
+ Located in Irvine Spectrum’s tech corridor

Join a Like-Minded Community of Innovators

Innovation Office Park

INNOVATIONOFFICEPARK.COM

All properties for lease by Irvine Management Company, a licensed real estate broker. DPR LEC #01234567. Product and amenities are subject to availability. Images may not be to scale. Not all features available in all communities. Not a representation or warranty. © 2023 Irvine Management Company. All Rights Reserved. The Sunways, Irvine Company, and Success Works here are registered trademarks of Irvine Management Company.
Ten Business Tips for Technology Entrepreneurs

By Kenneth Johnson, CPA, Partner in Charge, Irvine, CA

The technology industry is a fast-paced, dynamic environment that requires you to continuously focus on your business operations in a highly competitive market saturated with innovation, disruption, data privacy considerations and even ethical issues. What can entrepreneurs in the tech industry do today to survive, thrive and grow in the face of numerous challenges?

Whether you are running a Software-As-A-Service (SaaS) company, starting up in AdTech or setting up a cryptocurrency strategy for your business, here are some tips and best practices for technology entrepreneurs to navigate current trends, opportunities and challenges to stay ahead of the tech game.

1. **Take advantage of tax credits**

   One of the most impactful benefits a company can enjoy is the opportunity to claim tax credits for the R&D expenditures incurred for early-stage and development-stage companies. These credits are important to early-stage companies and can be used to reduce tax liability and cover the cost of supplies and third-party contractors by qualifying for a refundable R&D tax credit. The R&D tax credit is just one example, and your company may benefit from other federal and state tax incentive programs.

2. **Going public? Start preparing early**

   Preparing for an IPO (initial public offering) is an enormous task. Going public requires credible, audited financial statements under PCAOB guidelines to comply with strict SEC regulations. Preparing for an IPO typically involves the following:
   - **Internal control reports** provided by a licensed CPA firm. For example, if a company has not already prepared their internal controls in accordance with the Sarbanes-Oxley Act, they may need to do so.
   - **SOC Audit reports** must be completed. There are different levels of SOC reports, including a cybersecurity SOC report.

3. **Keep current with accounting technology**

   The future of auditing is evolving into a collaborative experience and can bring better value and broad insight to your business. Promoting an innovative internal mindset and ensuring your business advisors share this outlook will help your company adopt innovative technologies more effectively. Side-stepping advancements can cause your business to fall behind in value-add data analysis, business intelligence and data security.

4. **Use data analytics to create a competitive advantage**

   Properly capturing and understanding company data can be challenging, especially for early-stage companies, without the right tools. Using data analytics and Artificial Intelligence (AI) can help you capture, store, share and analyze your data to make smarter decisions for your business. Are you harnessing the information in your databases and your content repositories? If not, these tools will help you spearhead innovation in data analytics:
   - **Microsoft Power BI**—Turns disparate data into real-time visual reports.
   - **Azure Analytics**—Data analytics tools to support enterprise-scale data needs.
   - **Cloud Computing**—Data security and a gateway to developing AI tools.

5. **Prioritize internal controls with SOC Audit reports**

   System and organization controls (SOC) audit reports are a series of comprehensive internal control reports that a licensed CPA firm can only prepare. For example, if a tech company uses third-party vendors to process or store data, a SOC report will provide transparency surrounding the supplier’s IT and business process controls. There are different levels of SOC reports, including a cybersecurity SOC report.

6. **Focus on cybersecurity**

   All companies are targets for cybercrime, and thorough cybersecurity controls and assessments go beyond a single engagement with your cybersecurity team. You need to plan to ensure your information security solutions and strategy implementation protect your business’s critical assets and operations. And, if the worst does happen, you must have an incident response strategy in place to contain a cyberattack and recover quickly. A crucial first step is for a business to monitor its Cyber Risk Score, which predicts the likelihood of a significant data breach and identifies measures to strengthen systems.

7. **Consider outsourcing operations to keep up with growth**

   As a business leader, you need time to focus on your trade secrets, R&D, drive growth and provide unique value propositions within the market. If you find day-to-day operations are taking up too much time and it is proving difficult to scale your in-house finance and accounting function, outsourced accounting systems and services (OASys) may be an excellent temporary or permanent option. Sub-contracted accounting, finance and CFO services can create greater flexibility, compliance and cost savings in a scalable manner to support the growth of your business.

8. **Watch out for ASC 606 revenue recognition**

   Public, private and not-for-profit entities that enter into revenue contracts with customers must be ASC 606 compliant. Consequently, most tech companies will see the impact of ASC 606 on their revenue accounting and potentially their financial reporting, processes, systems, internal controls, financial ratios and contract language. These changes may be significant, notably when a business offers implementation or upfront customization services. Accurate revenue recognition is essential as it directly affects the integrity and consistency of a company’s financial reporting.

9. **Prioritize ESG considerations upfront**

   It is more important than ever for founders and entrepreneurs to consider Environmental, Social and Governance (ESG) issues from day one to bolster the health and longevity of their business plans. Here are some examples of strategies delivering on the bottom line while making the world a better place:
   - **By reducing energy consumption, a company can reduce costs and better manage its carbon footprint**—a strategy that consumers increasingly demand and is soon to be regulated by the SEC. And using renewable energy sources may lower energy costs while avoiding price spikes associated with fossil fuels.
   - **The Great Resignation has called for an even greater focus on company culture.** A company with an aggressive growth plan needs to implement a robust employee recruitment, retention and training strategy to support its growth and remain attractive to talent. As leaders and entrepreneurs, it is our responsibility to create an equitable path of opportunity for the upcoming generation of tech leaders.

10. **Don't forget about personal tax and estate planning**

    Founders and executives of tech companies face unique situations and tax issues, especially when a business is a startup or in a high-growth phase. Making the right choices about how and when to pay senior team members can mitigate personal income taxes and maximize wealth, so long-term personal and financial goals can be met. Qualified Small Business Stock (QSBS), sometimes called founder’s stock, is one-way entrepreneurs are rewarded for their hard work and dedication in getting a company up and running.

    Contact us to learn more about our Technology and Emerging Growth Services at www.withum.com/tech.

    Withum is a forward-thinking, technology-driven advisory and accounting firm committed to helping our clients be more profitable, efficient and productive in today’s complex business environment. We provide the industry expertise and innovative solutions you need to Be in a Position of Strength™. Get to know us at www.withum.com.
innovate to succeed

Withum proudly supports the Orange County Business Journal’s 21st annual EXCELLENCE IN ENTREPRENEURSHIP awards program and congratulates all of this year’s nominees.

Visit withum.com to see how we can help you and your business.
UCI Health
Bringing Healthcare Home

Advances in technology have long made remote monitoring and virtual healthcare possible, even optimal for some patients and conditions.

Not until the COVID-19 pandemic, however, have patients begun to connect with their health providers from the comfort of home.

As consumers rethink how they want to receive medical care, UCI Health already is taking steps to deliver a better, more cost-effective patient experience from home to hospital and back, says Chad Linfield, chief executive officer of UCI Health, Orange County's only academic medical system.

In November, UCI Health became the first California system to partner with DispatchHealth to offer same-day, in-home care. DispatchHealth is the nation's premier provider of comprehensive, top-quality home medical care.

DispatchHealth mobile teams now provide acute and advanced home care for many conditions that might otherwise require a visit to an emergency room or hospital, which may be overcrowded by a surge in COVID-19 cases.

Patients at high risk of readmission also get a proactive home check within the first 72 hours of their hospital discharge. In 2022, we plan to extend this to emergency department patients, who would receive a follow-up visit within 48 hours of release. Known as bridge care, this service ensures continuity of medical care and helps get patients back to their primary care physician or community specialist.

“DispatchHealth helps us meet our patients where they are and where they want to receive care — in their homes,” says Susanna Rustad, executive director of virtual care for UCI Health.

DispatchHealth — which delivers care seven days a week, including evenings and holidays — partners with most major insurers. Its out-of-pocket costs are often the same as a visit to an in-network urgent care center.

“We are investing in partners and building bold programs that make use of innovative ideas and capabilities to deliver remarkable patient experiences and convenience, simplifying and redefining healthcare in the process,” Rustad says.

Eventually, UCI Health envisions a hospital-at-home service offering advanced care for a broad range of acute conditions as well as a clinic-without-walls program to bring high quality academic medicine to homes and senior communities.

“Our goal,” Rustad says, “is to treat each patient at the right level of care, in the right place, in a high-quality, safe and sustainable way by offering a new spectrum of in-home care options.”

UCI Health DispatchHealth services are available from 8 a.m. to 10 p.m. daily, including holidays. Call 949-594-0447 or visit uchealth.org/inhomecare to learn more.

ucihealth.org/inhomecare
The new chapter of healthcare begins here

At UCI Health, we don’t just practice medicine, we create it. Now we are writing the next chapter for healthcare in Orange County.

With UCI Medical Center — Irvine, UCI Health will bring our patients unparalleled expertise, leading-edge treatments and the finest evidence-based care that only an academic medical system can offer.

The 800,000-square-foot medical campus will be anchored by a state-of-the-art hospital, which will offer 24-hour emergency care and personalized cancer treatments, including hundreds of clinical trials by our NCI-designated comprehensive cancer center. Our world-renowned experts will also deliver exceptional care in other specialties, such as digestive diseases, neurosciences and orthopaedics, all powered by the University of California. We stop at nothing to build a healthier tomorrow.

Learn more at ucihealth.org/irvinehospital

UCI Health
To say that 2021 was a challenging year for businesses is simply an understatement. No one knew at the beginning of the year how much all our lives would change forever. The significant events that unfolded challenged us for the last two years as individuals, as businesses and as a community.

Many years ago, we discussed the three reasons that businesses fail. The first reason was growth. Business owners must manage growth, understand growth, and realize that once you grow extremely fast, you either need to have a rich uncle or aunt, or a Banker to provide you working capital to fuel the growth. Second is proper debt structure, which is important to the long-term success of your company, whether it is growing or not. It includes everything from real estate loans to lines of credit. Putting in place the correct structure on your loan before the loan funds could prevent a future default. Third is really understanding your company’s cash flow. I mean “real cash flow”, not EBITDA or net income.

Last year we learned that there is a fourth reason why businesses may fail … their Banks. The events of 2020 & 2021 showed the importance of making sure you have the right banking partnership for your business.

“All banks are not created equal and bigger is not always better.”

As others continued to adapt to the changing technology driven environment, CommerceWest Bank pioneered the concept since inception and pursued a digital banking approach. This allowed the Bank to be a key factor in the success for many businesses throughout California in 2021. Our forward-thinking approach to business, navigated our company to be one of the first Banks in the nation to fund a PPP loan, one of the first lenders in the country to be approved to participate in the Main Street Lending Program (MSLP), which lead CommerceWest Bank to rank as the #1 Bank in the state of California for MSLP funded loans ($390 million). We also opened hundreds of millions of dollars of new depository accounts by providing individuals and businesses a full-service digital banking platform to seamlessly manage their banking during the pandemic.

“Take market share NOW in 2022.”

This is YOUR opportunity to aggressively take market share while businesses in California are all reopening or trying to figure out their strategy. Our recommendation is that you don’t get attached to an outcome, but instead focus on the process of taking market share. This is your chance to expand your business, increase your sales and hire the best people in the market to plant the seed for your future success.

This is what we call the “secret sauce.” CommerceWest Bank has always been forward thinking and ahead of the industry when it comes to defining a business model vs. a traditional bank model. We can be there for you when you really need it and educate you on how to avoid the four reasons that businesses fail.

Ivo A. Tjan, Chairman & CEO

Ivo A. Tjan is Chairman, President and Chief Executive Officer of CommerceWest Bank, a full-service commercial bank with a unique vision and culture of focusing exclusively on the business community. Mr. Tjan is the Founder of the company and launched an Initial Public Offering in 2001. The Bank is headquartered in Irvine, California and serves businesses throughout California. Mr. Tjan previously held a wide range of management roles at Eldorado Bank, Home Savings of America and Great Western Bank. He was named among Orange County’s Most Influential Business Leaders on “OC500” List. He was honored as the Robert Ross Founders Award Recipient from the MDA. Mr. Tjan was recognized as one of Vivid Magazine’s Annual Top 10 Asian American Entrepreneurs and was also named one of OC Metro’s Hottest 25 People of Orange County, California. He is an active member and/or board member of several corporate, social and charitable organizations. He is a member of the Young Presidents’ Organization (YPO), CEO Affiliation Group, Bank CEO Network and The Pacific Club. He is also a former Board Member for California State Fullerton University, New Majority, Marconi Foundation, The Children’s Museum, Advisory Board for CASA and American Bankers Association Government Relations Committee.

He can be reached at (949) 474-5278 or email at itjan@cwbk.com.

About the Bank

“Bank on the Difference”

It is prudent for businesses to have a long-term Banking Partnership that is safe and secure. CommerceWest Bank is FDIC insured and operates with a Fortress Balance Sheet, Strong Liquidity and Strong Capital Ratios that are well above regulatory required levels. The Bank is simply built to last!

Our Bank embodies a culture of Bankers whose only objective is to deliver unparalleled service to the business community versus being all things to all people like most banks today. By being all things to some people, CommerceWest Bank can provide customized and personally tailored banking services to businesses throughout California.
Throughout Orange County and beyond, the collective sigh of relief is practically audible, as small business owners, multinational executives, and every leader in between ties the bow on their 2021 tax returns.

But with tax season coming to a close, the majority of business leaders are also set to mark another ending, at least until next year. For most, the end of tax season marks the end of thoroughly looking at their financial performance (good or bad). Too often, the end of tax season is when companies stop seeking out opportunities to improve their business from a financial perspective, whether in the form of creating efficiencies, cutting costs, or taking advantage of new revenue opportunities.

Due to the past-focused, tax-focused engagements most business leaders have with their tax preparers, most leaders fall prey to a prevalent myth: the myth that accounting is merely reporting, and that its main function is to recap and present historical data so that they can file their tax returns. In viewing accounting through this lens, leaders fail to recognize the strategic gains that would arise if they had accurate and timely financial information they can use every month, and if they utilized the power of financial data to drive business forward, not just recap last year's revenue and costs.

Not only is the “once-a-year” approach to accounting detrimental from a monetary standpoint; it is also a stark reflection of your behavior as a leader — and whether you are being reactionary or responsive.

When you solely place focus on your financial statements at tax-time, the results are likely as much of a surprise to you as anyone, as you set yourself up to frantically address whatever your totals signify. While you may be able to get the job done, this reactionary approach is no more than a band aid. And who knows when that band aid might be ripped off, revealing the nonexistent financial planning underneath?

While you can’t always determine what outliers or external circumstances may impact your company’s financials, you can certainly minimize the impact by taking a more responsive approach. With a consistent eye on your numbers throughout the year, paired with a forward focused approach to navigating the data you find, you will be well-equipped to handle anything that comes your way, as you nip ineffective spending and unearthed costs in the bud and steer your company towards long-term goals.

Many businesses hope for profitability but crossing your fingers at the end of the year and holding your breath with your tax forms and calculator in hand is not enough to achieve it! Rather, you must map out where you want to be, and take consistent actions to carry you there. That way, when tax season rolls around again, you are prepared… Not panicked.

Ready to embark on your path to profitability? For more information about Blueprint CFO, contact us at (800) 651-9568 or info@blueprintcfo.com.

As Tax Season Ends, Don’t Stop Looking at Your Company’s Numbers

By Jim Downes, Founder of Blueprint CFO
Celebrating

ENTREPRENEURIAL PASSION

We believe passion is the most intrinsic attribute for every entrepreneur. It is passion that fuels the entrepreneur to commit and put their whole self into achieving a goal and to be innovative in their approach.

Lugano Diamonds was founded with a passion for creating beautiful, one-of-a-kind jewelry. "Our skilled team is dedicated to creating exclusive, bespoke pieces. Our passion shows in all we do, from the procurement of the rarest, most prized gemstones to the meticulous attention to detail we take in creating unparalleled wearable works of art," says Moti Ferder, CEO of Lugano Diamonds.

Lugano Diamonds congratulates the entrepreneurs honored in this issue.

Flexible Orange & Yellow Diamond Bangle

Nothing looks as stunning or shines as brightly as Lugano's exquisite flexible bangle. Enchanting and sophisticated, it features nearly 45 carats of stunning marquise-shaped yellow diamonds and rare orange diamonds enveloped in 18k yellow gold.

Champagne Diamond Center Ring

The celebration of a Lugano design comes alive in this head-turning ring that showcases a 10 carat emerald cut champagne diamond that steals the show. An instant classic, this piece is set in 18k rose gold and destined to be a cherished ring for generations to come.

Multicolored Diamond Drop Earrings

As eclectic as the wearer, these dazzling earrings showcase a stunning variety of diamonds. Nearly 25 carats of different shapes and colors of diamonds are set in 18K yellow gold and titanium — making a casual yet equally sophisticated statement!
Sally is a community and environmentally conscious and successful businesswoman. She is exploring options to invest in socially conscious projects while reducing her income taxes. Sally's financial advisors introduced her to the concept of investing in commercial solar projects which improve the environment, generate long-term reliable cash flow, and help shelter some of her taxable business income.

Since she has a goal of reducing dependence on fossil fuels, not just electricity in general, Sally appreciates that green energy production has strong potential as a long-term investment. Because a notable number of governments and industries have recently joined the call to reduce or eradicate carbon emissions, the demand for clean energy is high. However, the supply of clean energy is relatively low. This has inspired state and federal governments to offer incentives to the private sector to increase production. In the U.S. those incentives are primarily in the form of tax credits and bonus depreciation deductions.

How do Tax Advantages Work When Investing in Solar Energy?

Knowing these generalities, Sally is interested in the details. If Sally begins this project in 2022, the tax credit will be 26% of the amount invested in the solar business. If the tax credit is larger than the taxpayer can use in a single year, the investor can carry the credit forward for up to 20 years. At this time, that credit will decrease in future years. However, the current administration is eager to promote clean energy development and is working to extend – and possibly raise – the current credit rate.

A commercial solar project is eligible for an 87% depreciation in the year of the investment. The deduction on that depreciation can also be spread out over 20 tax years.

Further, these are just federal tax credits. Individual states may also offer tax credits on commercial energy projects. To clarify these points, Sally’s advisors provided an example of a $3 million solar energy project.

- 26%, or $780,000, would be the immediate tax credit for the investment.
- An 87% depreciation of the $3 million is $2,610,000. This assumes a 37% federal tax rate, the credit on the depreciation is an additional $965,700.
- Therefore, the $3 million investment is worth $1,745,700 (over half the investment) in federal tax credits applicable immediately and can be spread out for up to 20 years.

Sally likes this investment and decides to investigate a suitable solar project for 2022. If you are interested in investing in a commercial solar project to help the environment while generating a long-term income stream, tax credits, and deductions to mitigate tax liability, feel free to reach out to us so we can walk you through your specific ROI details.

By Jeffrey M. Verdon, Managing Partner, Jeffrey M. Verdon Law Group, LLP
As you work to secure financing for your small business, there is a multitude of considerations that go into your decision. From loan amount to collateral requirements and fees, not all loans are created equal. Business loan interest rates are one of the most common hang-ups when it comes to small business loans, and many questions can arise around this.

At Live Oak Bank, we make a commitment to guide our small business loan customers through the lending process. When it comes to business loan interest rates, we’re breaking down the pros and cons of fixed interest rates vs. variable interest rates, and the importance of leaning on your seasoned lender to help you make the right decisions for your business.

**Fixed Interest Rates**
- **What is it?** With a fixed interest rate, your monthly payment and interest rate do not change. You’re essentially locked into that same amount for the life of the loan, regardless of whether the base rate goes up or down.
- **What are the pros?** There are several benefits to selecting a fixed interest rate, namely knowing that your monthly payment will remain the same. This can help with long-term budgeting and planning. Additionally, if the interest rate does begin to rise, you’ll be locked into the lower amount, potentially saving you some cash.
- **What are the cons?** If the interest rate goes down, you won’t be able to reap the benefits of that. Also, the interest rate on a fixed rate is generally higher than the variable rate.

**Variable Interest Rates**
- **What is it?** Variable rates fluctuate over time, depending on the established prime rate. These rates can go up or down over time, meaning your monthly payment will change over the life of the loan.
- **What are the pros?** Quite often, the rate for variable rate loans is lower than a fixed rate. The prime rate is determined by the Federal Reserve Board and can often stay the same for years or change sporadically. Your initial rate may change over time, but it could often start out low enough to counteract the higher rate down the road. If the base rate goes down, you’ll enjoy lower monthly payments and won’t be locked into a single rate, like the fixed rate approach.
- **What are the cons?** Your monthly payment and rate could go up, depending on economic circumstances, including inflation. This makes it more challenging to budget and predict operational expenses, which would impact your cash flow.

Work with your lender to decide which business loan interest rate option is best suited for your small business and your long-term goals. If you’d like to explore your small business loan options with a Live Oak loan specialist, visit liveoakbank.com/get-started
Why Maintaining a Strong Cash Flow is Key to Business Success

The importance of cash flow in running a business cannot be overstated. Profits, sales and expenses are critical to monitor, but cash flow is possibly the most crucial. Simply stated, having the best grasp on your cash flow is essential for a company's survival and growth.

Optimal cash flow management allows you to effectively budget, plan business cycles, even figure out how much to change your customers, yet it is a skill that few businesses in Orange County have mastered. When you think about cash flow, you think about the net amount of cash coming into and out of a business at a given time. Yet what many don’t take into consideration is the time it takes to manage your cash flow, such as bookkeeping, creating invoices, following up with clients to get paid, managing payroll and other expenses, and more.

That enduring adage “time is money” is still true today, especially if you own a small or mid-sized business. In this age of financial technology innovation, there is finally a tool that can help improve not only your cash flow, but also optimize your internal operations. Before we get into that, let’s discuss the details of cash flow management. However, what many entrepreneurs and business leaders don’t yet know is that your cash flow management process can be optimized. We’re here to tell you that you can!

Why is Cash Flow Management Key to Business Success?
Cash flow management involves a tremendous amount of attention and frequent reporting. Without proper cash flow management, your business could struggle and be on the verge of taking on new debt, having poor profit margins, insolvency and even bankruptcy. While cash flow management requires time and energy, it is critical to the success of your business because it helps you to:

1. Better Understand Your Spending
2. Maintain Good Business Relationships
3. Improve Financial Planning
4. Grow and Expand your Business
5. Hire and Retain Top Talent

The Most Common, Yet Ineffective Ways Businesses Manage Cash Flow
One of the essential aspects of maintaining a strong cash flow is having the right cash flow tools. There are a lot of great tools out there to manage your cash flow, however most often they create fragmented processes that bog down your or your team.

Most businesses use many different, disjoined tools to manage their cash flow, such as:

- QuickBooks or Excel for accounting
- Freshbooks or Zoho for invoicing
- Stripe, PayPal or Square to collect payments — or even snail mail checks
- Bill.com or MineralTree for paying bills

That stack looks accurate? What if you could do all of these things in one plus shrink the number of days it takes to receive money once your invoices have been paid?

The Newest and Best Way to Manage Your Cash Flow
Thanks to CBC’s smart innovation, our CBCashflow tool allows you to manage your cash flow, get paid faster and track your growth directly within your business checking account — and it integrates with essential tools like Quickbooks. Here are the top 3 ways CBCashflow can help your business:

- Streamline the time it takes to create and send invoices.
- Get paid directly into your CBC business checking account, bypassing third party payment processors.
- Know your payment activity and your funds at a glance.

A Better Way to Get Paid
One of the ways that CBCashflow helps you to improve your cash flow and optimize your operations is by bringing the invoicing and payments feature directly into your online banking portal.

Create Invoices and Get Paid Online
- Create & send invoices electronically and stop waiting on snail mail
- Get paid directly into your bank account in two business days without having to transfer your money from a third-party app
- Let people easily pay you online with credit card, debit card, or electronic bank transfers
- Always know exactly who’s paid and who’s due
- Set up recurring invoices so you can automate your invoicing process
- Automatically add late fees for past due invoices so you don’t have to track down customers

Accept Payments Quickly and Avoid High Fees
- Accepting payments directly inside online banking
- Streamlining the process of accepting credit cards and avoid a lookup period with a third-party payment app
- Customizing your payment form with your business logos and color for a professional way to accept payments
- Easily tracking payments received online so you can know who has paid
- Sharing your link everywhere you communicate with customers including on invoices, via text message, email, your website and more
- Setting up recurring payments so you have the reassurance of consistent cash flow every month
- Telling your customers they can conveniently pay online via credit card, debit card or an electronic bank transfer

A healthy cash flow isn’t only about earning more than you spend or sitting on a large sum of money. It’s about ensuring that your company can respond to new opportunities swiftly and cost-effectively, which is critical for both short- and long-term success. It’s about staying out of debt, reinvesting in your business, paying your employees on time and rewarding them often, protecting your mental health and seizing opportunities to grow.

Are You Ready to Improve Your Cash Flow?
At Commercial Bank of California, we believe it shouldn’t take several days for your hard-earned cash to get to you after customers have paid your invoice.

Contact us today learn how we can help you get money into your pocket faster and save precious time running your business at treasuryservices@cbcal.com or (657) 289-2550 or visit www.cbcal.com/cbcashflow to see how this new technology works for your business.

Ash Patel
Ash Patel serves as Chairman of the Board and CEO & President of Commercial Bank of California. He has over 20 years of banking experience, from entrepreneurial orientation to banking with the small businesses. Mr. Patel’s principle management style is based upon investing in relationships and technology to enhance the client experience with CBC. Mr. Patel focuses on human capital investments, and inspiring staff and clients to join the “PJ2B” initiative (also known as the Purposeful Journey to a Billion) that has led to the successful turnaround of Commercial Bank of California. Under Mr. Patel’s leadership CBC has shown significant growth from around $200 million in assets in 2013, to nearly $2.0 billion as of December 31, 2021. This growth was accomplished both organically and through acquisition.
Entrepreneurship skills are invaluable for everyone, whether they plan to open their own business or work in any industry.

The one-of-a-kind Irvine Valley College (IVC) entrepreneurship program offers 13 concise, eight-week classes geared to help prospective and current entrepreneurs start and operate small businesses. Many of these classes are taught by experienced entrepreneurs and can lead to certificates in entrepreneurship.

IVC is one of Orange County’s top community colleges, but it offers area learners more than a pathway to a four-year university. Many established career professionals return to IVC to learn new skills or to develop their own business ideas. Current high school and college students benefit from such knowledge as well. The IVC entrepreneurship program’s focus is on developing the entrepreneurial mindset. This way of thinking is valuable across all disciplines and is applicable both to would-be entrepreneurs as well as to those seeking to work for another company.

Students taking IVC entrepreneurship courses can earn up to five Certificates of Proficiency in entrepreneurship. The available certificates include Entrepreneurial Planning and Presentation; Entrepreneurship Skills; Idea Development and Opportunity Recognition for Entrepreneurs; Research Tools for Entrepreneurs; and Understanding Entrepreneurial Operations.

The IVC entrepreneurship program also participates in partnerships and relationships with other entrepreneurship organizations within Orange County, such as the Tech Coast Venture Network (TCVN), which provides educational workshops, networking events, and mentors to aspiring business startups. TCVN recently elected their first female president, Maryam Edah Tally, who was an IVC entrepreneurship student. Such partnerships give IVC students the opportunity to attend events such as pitch competitions, as well as the chance to acquire mentorships and internships with startup companies and serial entrepreneurs.

Studies have shown the importance of learning entrepreneurial skills at an early age, and how such an education is beneficial to developing career and life skills. IVC’s entrepreneurship program partners with five high schools in the Tustin and Irvine school districts to offer the program through dual-enrollment entrepreneurship and business classes. In this innovative program, high school students earn college credits as well as IVC entrepreneurship certificates. The college has most recently partnered with the Legacy Magnet Academy in Tustin, where junior high students are now able to learn entrepreneurial skills.

The entrepreneurship program at IVC also hosts a weeklong summer entrepreneurship workshop for junior high and high school students to give them a taste of the entrepreneurial journey, helping them develop an entrepreneurial mindset as well as their own business startup ideas. During this workshop, students hear from industry entrepreneurs and take field trips to local maker spaces and innovation centers in Orange County while creating their business idea. Students then pitch their idea on the final day of the workshop.

Each year, the IVC entrepreneurship program hosts an Idea Pitch Competition, open to both IVC and dual-enrolled high school students. The competition creates an opportunity for all students in all areas of study to display their ideas for new and innovative products and services and be judged by local experts.

Last year, the competition format was a combination of The Voice and Shark Tank. In the first round of pitching, nine contestants were selected by entrepreneurial mentors to join their team. Mentors guided students through setting up their business ideas, pitching, and presentation skills. In the final round, the contestants pitched their ideas and business concepts to investors and entrepreneurs for a chance to win cash awards and business startup services.

This year’s two-round competition takes place virtually on April 20 and May 11.

To learn more about the IVC entrepreneurship program, visit link.ivc.edu/entrepreneurship or email Professor John Russo at jrusso@ivc.edu.
How Well Is Your Divorce Attorney Telling Your Story?

By Paul Nelson, Esq

If you ever have the privilege of serving on a jury, the judge is likely to begin the trial by advising you to adjust your expectations. “This isn’t going to be like Perry Mason or Boston Legal or The Good Wife,” the judge might say. “This trial is likely to move slowly. There will be no grand speeches, no surprise confessions on the witness stand. This is a court of law, not a TV series set.”

On one hand, this judge will have a point. Television and motion pictures are designed for entertainment, not the administration of justice. Also, in drama, time is compressed. Dialogue is snappy. Conflict is maximized. Legal niceties can be discarded cavalierly for the sake of dramatic convenience. And above all, any good TV or movie trial requires a surprise twist or unexpected reveal, something that almost never happens in real life.

On the other hand, it would be a mistake to completely dismiss the notion that a trial is not theater. The principles of drama — character, narrative, conflict, theme, catharsis — often do play a significant role in how a matter is decided. In fact, an age-old legal maxim tells us: “In a trial, the side with the best story wins.”

This adage is particularly true in divorce law. Divorce, by its nature, pits two individuals against each other in a high-stakes contest. At play is the disposition of community property, the determination of separate property, as well as the establishment of any long-term financial responsibilities (e.g., alimony, child support) one party may owe the other.

Even when the divorcing spouse claims they are seeking an “equitable” arrangement, the fact is, any such contest likely will have its winners and its losers, and each party wants to be on the winning side. How well the divorce attorneys manage to convey their clients’ cases through narrative, presentation, and the generation of empathy will go a long way in determining the final settlement the judge decrees.

So, what does a good attorney do to plead a divorce matter? And how can you pick the best attorney for yourself, should you ever need one? What follows are the elements successful divorce counsel use to tell a winning story:

Just the Facts, Ma’am

The hero of the TV cop drama Draggin was Joe Friday, a laconic, by-the-book detective who wanted “just the facts” of any case he was investigating. A good divorce lawyer will be similarly diligent, not only taking the time to collect the objective particulars relevant to your marriage and its dissolution but also confirming their legitimacy. When you go to court, you similarly want your evidence to be rock-solid. The last thing you need is the opposing counsel casting doubt on your evidence or, worse yet, revealing key parts of your case to be exaggeration or fabrication.

The Hero’s Journey

In his book, The Hero with a Thousand Faces, literature professor Joseph Campbell famously created a template for storytelling he dubbed “The Hero’s Journey.” Drawing on everything from Greek mythology to Shakespearean drama, Campbell’s “monomyth” has served as the basis for films ranging from Star Wars to The Lion King to The Hunger Games.

Similarly, when preparing to argue your case, a good divorce lawyer will take those facts we just discussed and arrange them in a way that tells an equally compelling tale — with you as the hero. Like any good protagonist, you may at times appear flawed, vulnerable, and even capable of poor decisions. Yet in the end, your counsel will portray you as the person most deserving of a positive outcome.

Workshopping

Unlike movies and TV shows, Broadway plays,
whether dramas or musicals, usually go through an arduous process called “workshopping” before opening night. Beginning with a simple script, the writer, director, and cast, working as a team, will manage to put the show together. Bit by bit, scene by scene, this dedicated group will identify what works, discarding what doesn’t, continuously polishing the production — often with live audience feedback — until they have what they believe is a winning product.

A good divorce attorney works in much the same way. Starting with your story as you present it, they will edit your narrative, role-play with you, coach you, and even help you rephrase testimony so it is as compelling and sympathetic as possible, all while staying within the boundaries of truth.

In this sense, your attorney is akin to a movie director or symphony conductor, coordinating the presentation of elements so emotions rise and fall in a rhythm designed to elicit the best possible effect.

**Reading the Room**

Any live performer knows the importance of “reading the room,” that is, being sensitive to the tenor and mood of the audience. Consider a courtroom as a theater with an audience of one: the judge. As a litigant, you want the judge to like you. To sympathize with you. To be on your side.

Inevitably, this requires you to be humble, courteous, respectful, and most of all, truthful. (Most judges have spent years on the bench and possess heightened B.S. detectors. They can easily sniff out people who are evasive, hostile, snide, or prone to exaggeration and fabrication.)

They also don’t like whiners, complainers, smart alecks, or those given to angry outbursts. A good divorce attorney will therefore advise you how to comport yourself in court and even how to control powerful negative impulses (those damning traits the opposing counsel will try to get you to express).

In my 22 years of litigating divorce cases, I have grown to understand the power of a strong narrative to our most important audience — the judge. The right story must be carefully constructed and executed for this individual to evoke the right response: a positive outcome for the protagonist.
Apex Home Health & Hospice, Santa Ana  
Angela Ponce de Leon, Founder & CEO  
Angela Ponce de Leon is the CEO and founder of Apex Home Health & Hospice Care, one of the Top Home Health Agencies in California (2021 Award from Medicare), and the 2019 Medicare and Sliding Scale for Free Place to Work. Ponce de Leon started her leadership at age 23, fascinated by the concept of community-based health care. The company was founded to support the most vulnerable and to provide jobs to Filipino immigrant women and nurses. 17 years later, Apex Home Health & Hospice Care takes pride in having a 97% workforce, and being 1 of only 13 Woman-owned, Medicare-certified Home Health & Hospice companies in Orange County, CA. Through Ponce de Leon’s leadership and tenacity, often putting patients before profits, Apex Home Health & Hospice Care has grown to a multi-million dollar company serving over 16,000 Seniors with 140+ employees in California and the Philippines.

Apriem Advisors, Irvine  
Harmon Kong, Founding Principal  
Apriem Advisors is an award-winning, multi-generational, wealth management firm. Beginning in 1998, Entrepreneur, Harmon Kong retooled the standards of the finance industry, aiming to care for every client like family. This initiative stems back from his decade spent on Wall Street; Kong once managed more than 500 household accounts with the constant expectation to bring in more. The sheer volume of clients left no room to serve their clients with the conversations to know their personal financial needs or goals. With a recommitment to align the corporate agenda with the client agenda, came the birth of Apriem. Headquartered in Southern California, Apriem services clients nationally in 29 states and globally in four continents. The company was named in Investment News 2022 Best Places to Work, along with a recent staff increase of 35%.  

Artemis DNA, Irvine  
Eunmye Thai, CEO  
Eunmye Thai is a serial entrepreneur who started her first business at the age of 16 and has led five different e-commerce startups to profitability. She is currently looking to revolutionize the world of healthcare as the founder and owner of Artemis DNA, an innovative and full-service, Clinical Laboratory, in Service Horizons, Amendments (CLIA) certified, College of American Pathologists (CAP) accredited, high-complexity clinical diagnostic laboratory that provides cutting-edge laboratory services, with emphasis on genomics, that promote precision medicine. That goal is to make genetic testing inclusive rather than exclusive and to bring affordable, innovative actionable healthcare solutions to patients. In 2022, her plan is to expand her focus even further to key markets in Asia (starting with Vietnam, China, Singapore and Malaysia) where her roots are. Thai has established and grown a profitable enterprise in the genetic testing space. Starting in 2019 with a first location in Houston, Texas, she has grown her business to multiple locations and recently established a commercial clinical laboratory and corporate headquarters for Artemis DNA in Irvine, California.

Austin Taylor Inc., Irvine  
Ron Viggiano, President  
Over 35 years of experience Ron Viggiano has become the area’s premier tailor by asking the right questions and understanding the client’s wants and needs to help them create an individualized and personalized wardrobe. Using creativity and contemporary styling details he has built a loyal following of successful business leaders in Orange County. Viggiano has been creating custom wardrobes for clients since 1986. Viggiano started his own company in 1992 and subsequently has become an expert in fabrics and color coordination. He has met with success every challenge that his company has faced.

Beacon Pointe Advisors, Newport Beach  
Shannon Eusey, CEO  
Eusey founded Beacon Pointe Advisors in 2002 and, having experienced success and rapid growth, it is the largest female-run Registered Investment Advisory (RIA) firm in the country with 33 offices spanning 14 states. In 2011, she co-founded an industry leading initiative with the formation of Beacon Pointe’s Women’s Advisory Institute. The institute is focused on bringing women to the investment table, engaging women in personal finance. She co-authored the international best-selling book “Your Dollars, Our Sense: A Fun and Simple Guide to Money Matters,” seeking to educate readers of all ages and financial circumstances in an entertaining, relatable, and informative manner. The book has been ranked #1 across six different Wealth Management, Finance & Coaching categories. Eusey also mentors high school students and Girl Scouts, hosts a summer internship program and financial literacy workshops at Beacon Pointe, and was an adjunct professor for four years at the UC Irvine Paul Merage School of Business. In addition, she regularly runs marathons at home and abroad, and is thoroughly engaged in her four children’s philanthropic endeavors.

BHE Management, Laguna Niguel  
Maria Hemmel, President  
Maria Bremer Hemmel is the founder and president of BHE Management Corporation, a 28-year strong premiere Homeowners Association management firm representing many major homebuilders in Orange County. Hemmel leads her firm in a manner that pleases both the developers, who hire her firm consistently to create the initial association rules and budgets, as well as the homeowners themselves. This creates relationships that continue for more than a decade in nearly every case. Hemmel is a leader in her industry, serving as Past Treasurer of California’s Chapter of Community Managers, Past Chair of the California Association Institute’s Programs Committee, and an active member and Sponsor of Building Industry of America, Orange County chapter.

Alphabet Soup, Laguna Hills  
Calus Gru, CEO  
Alphabet Soup was founded in 2012 by Calus Gru. Over the past 10 years, Alphabet Soup has completed over 25,000 jobs and achieved over $30 million in revenue. The success of Alphabet Soup is a direct result of the core set of values that Gru instilled in the company and is modeled after the examples he learned during his childhood. Gru recently put his golf cart expertise to work by creating a custom line of golf cart parts addressing key issues of what was on the market that were not meeting the mark. His mission is to bring the technology and ease of use of the golf cart to the mainstream. Gru’s passion is embracing the philosophy of continuous improvement and what comes from it. One way he is revolutionizing his fleet is by installing lithium batteries in all of his golf carts which are more efficient, longer lasting and better for the environment. When he isn’t spearheading the efforts of a multimillion-dollar company, Gru is an active member in the community and makes his presence felt at a top priority. In addition to his own personal efforts, Alphabet Soup also participates in giving back by holding an annual fund raiser where 100% of the proceeds are donated to an annual charity.
The Private Retirement Plan:

Best Asset Protection
Your Lawyer Never Told You About

Fiercely committed to the protection of your legacy, we are the bodyguard for protecting your business wealth from financially ruinous lawsuits. The Private Retirement Plan (PRP) takes priority over many future claims against your personal and business assets, now and in the future.

Hello peace of mind,
goodbye unforeseen creditors.

Jeffrey M. Verdon Law Group, LLP
The Fusion of Planning and Protection.

1201 Dove Street, Suite 400, Newport Beach, CA 92660
303 Twin Dolphin Drive, 6th Floor, Redwood City, CA 94065
949.333.8150  www.jmvlaw.com

JMV Law Group paid for this space and is solely responsible for its content.
Chef Jeoffrey Offer opened his first restaurant Butcher’s House at Jeoffrey Offer, Chef-Owner in 2017 and is a graduate of the UCI Beall Applied Innovation consumer goods, electronic lockers and mobile applications to create consumers who value sustainable living. Brevvie combines renting Brevvie, Huntington Beach 5000 year after year. recently been selected as a member of the Forbes Business Council. As a result of Kurland’s published articles on Forbes.com, Inc.com, Thrive Global, and Huffington Post. Kurland has interviews leaders across all industries about the leadership best practices and their personal social impact. He is the host of the “BeBetter with Michael Kurland” podcast, where he Huffington Post, and Thrive Global on topics including leadership, company culture, and leadership articles in online publications such as Forbes, Inc., programs that drive customer satisfaction, and a respected position in Branded Group in 2014 and has led its year-over-year exponential growth, cultural transformation, and the cultivation of a highly-regarded team of industry experts. His vision to #BeBetter has resulted in long-term progress, cultural transformation, and the cultivation of a highly-regarded team of industry experts. His vision to #BeBetter has resulted in long-lasting client and partner relationships, innovative facility maintenance programs that drive customer satisfaction, and a respected position in the industry. Kurland is a well-established author of industry thought leadership articles in online publications such as Forbes, Inc., Huffington Post, and Thrive Global on topics including leadership, company culture, and social impact. He is the host of the “Belieber with Michael Kurland” podcast, where he interviews leaders across all industries about the leadership best practices and their personal stories of overcoming challenges. He is also an industry thought leader having published multiple articles on Forbes.com, Inc.com, Thrive Global, and Huffington Post. Kurland has recruited top talent from the Fortune 100 to work on the Branded Group. As a result of Kurland’s leadership, Branded Group has grown over 30,000 meals to front line responders during the pandemic.

Branded Group, Anaheim Michael Kurland, Founder & Chief Operating Officer As an award-winning CEO of a successful national facilities management company, Michael Kurland is committed to leading with purpose, giving back to his community, and living a healthy lifestyle. With a wealth of sales and marketing experience, Kurland launched Branded Group in 2014 and has led its year-over-year exponential growth, cultural transformation, and the cultivation of a highly-regarded team of industry experts. His vision to #BeBetter has resulted in long-lasting client and partner relationships, innovative facility maintenance programs that drive customer satisfaction, and a respected position in the industry. Kurland is a well-established author of industry thought leadership articles in online publications such as Forbes, Inc., Huffington Post, and Thrive Global on topics including leadership, company culture, and social impact. He is the host of the “Belieber with Michael Kurland” podcast, where he interviews leaders across all industries about the leadership best practices and their personal stories of overcoming challenges. He is also an industry thought leader having published multiple articles on Forbes.com, Inc.com, Thrive Global, and Huffington Post. Kurland has recruited top talent from the Fortune 100 to work on the Branded Group. As a result of Kurland’s leadership, Branded Group has grown over 30,000 meals to front line responders during the pandemic.

Butcher’s House, Costa Mesa Jeffrey Offer, Chef-Owner Chef Jeffrey Offer opened his first restaurant Butcher’s House at Costa Mesa SoCo Collection in December 2021. Offer’s menu is centered around dry-aged meats and rustic brasserie-style dishes representative of his hometown Toulouse in the south of France. In the weeks following its opening, the restaurant has already garnered critical acclaim from both locals and visitors in the South of France. Offer discovered his culinary inspiration at a young age and has kept a laser-focused vision of creating a life for himself in America. While his studied culinary career spanned the globe, across three continents, his most recent role was executive chef of Momin restaurants for nearly six years. As a classically trained French chef, Chef Offer has 10 years of experience in cooking, kitchen logistics, and operations management to the opening of his first restaurant, Butcher’s House. For Offer, Butcher’s House is more than an homage to his culinary roots; it is the fulfillment of his lifelong American dream.
Entrepreneur. It takes one to know one.
some of its own – Check Capital has a culture of avoiding losses. Therefore, its investment philosophy centers on the acquisition-wisdoms, run by first-class management teams, when those firms are selling at bargain prices.

**PlanSoft.** His vision drives the company to continuously advance performance in plan and document reviews led to the foundation of e-commitment to improve how public agencies and the AEC industry adapt to the future of work. Michael Chegini is a visionary whose drive to innovate and entrepreneur with three ventures and successful exits, exemplifying both technical and business acumen.

**Ike Kavas** is the founder and CEO of Ephesoft, a leader in intelligent document processing focused on accelerating productivity with breakthroughs created from her Personality Coding Technology, including Codebreaker AI. Ephesoft, Irvine

**David Meltzer Enterprises, Ladera Ranch**

David Meltzer, Founder

As our world continues to evolve, David Meltzer prepares each day to meet the challenges head-on. While other business leaders may shy away from investing in themselves and their mission due to uncertainty caused by the pandemic, Meltzer has doubled down on his mission to empower over a billion people to be happy. Since shifting his focus towards content creation, Meltzer has created two business-focused television shows for Bloomberg and Amazon Prime, a pitch show called “I Make It Big,” and the first late-night entrepreneur show “Office Hours.” He’s filmed four seasons since the start of the pandemic, with more to come. Meltzer recently announced a content & distribution deal with Apple TV as a featured influencer, which brings his shows, podcasts, and more to over 1 billion screens worldwide.

**Creating, Ephesoft, Irvine**

Ike Kavas is the founder and CEO of Ephesoft, a leader in intelligent document processing focused on accelerating productivity with breakthroughs created from her Personality Coding Technology, including Codebreaker AI. Ephesoft, Irvine

**Cheri Tree** is a best-selling author, professional keynote speaker, and entrepreneur with three ventures and successful exits, exemplifying both technical and business acumen.

**Designing Women of Orange County, Laguna Niguel**

Sabra Phillips, Interior Designer

As an artist with a business and marketing background Sabra Phillips carved a creative outlet so she began an interior design firm in 1997 in her home town of South of Kansas City. Within four years, her little hobby had become a $500,000/year business. In 2013, she moved to California to fulfill her dream of living by the ocean here and returned to the business of interior design.

**Fable & Spirit, Irvine**

Darren & Jean Coyle own three distinctly different restaurants in Orange County, with Fable & Spirit as their newest, having opened in 2019. This husband-and-wife team has accepted the acquisition of three restaurants with their daughter, Ali, who serves as director of Wines & Sommelier, and son, Ken, who serves as the director of Spirits. The Coyles warmth and hospitality is the reason that all three restaurants are so well supported by our community. Within months of opening Fable & Spirit in 2019, the restaurant established itself as a neighborhood favorite and earned titles such as “Chef of the Year,” “Chef of the Year,” “Best New Restaurant,” and inclusion on internationally recognized Michelin Guide’s list of Inspector Discoveries. The leadership the Coyles demonstrated during one of the toughest years for the culinary industry not only kept their restaurants above water, but it earned Fable & Spirit a prestigious 2021 Bib Gourmand from Michelin Guide. They give the utmost attention to the needs of their restaurant family and the communities they serve, and to me, they exemplify the true meaning of hospitality.

**Gallegos United, Huntington Beach**

John Gallegos, Founder & CEO

Founded in 2001 by John Gallegos, Huntington Beach based Grupo Gallegos (dba Gallegos United) quickly became recognized as a leading creative agency in the U.S. and around the globe. Never straying from their commitment to creative and strategic excellence, theirs has been a mission to help clients realize untapped growth in an ever-changing consumer and business landscape. From content to technology and media is evolving from a volume minority to a multicultural marketing to marketing to a multicultural America. Gallegos United remains independent, minority-owned and certified. John has led the company to become one of the most recognized and lauded agencies in the U.S. Growing his roster of clients from Fortune 500 companies to start-ups. Clients include, Comcast, goDaddy, Cata, Chick-Fil-A, and California Department of Public Health, and Travelzoo, to name a few.

**Global Memory Procurement Corp., d.b.a. Memory,NET, San Clemente**

Michael W. Johnson, President

Michael W. Johnson (Mike) is an experienced president, with a demonstrated history of navigating semiconductor and computer hardware industry cycles since 1984. Johnson is known for his business development acumen and professional skills in sales, marketing, strategic partnerships, team building, opportunity risk assessment, and international relationship development and management.

**Haven Laguna, Laguna Beach**

Mara Samuels, Founder

Mara Samuels is the founder of Haven Laguna, a new home furnishing boutique now open in Laguna Beach. As the lead design specialist behind the brand, Samuels brings unique furnishings and one-of-a-kind finds to the Orange County coastline. Throughout her professional career, she’s worked in real estate and home design & renovation. With more than a decade of experience in selling, styling, and beautifying custom homes, Samuels was inspired to create a one-stop shop for people to find items that make their house feel like home. With a background in fine and applied arts, Samuels has a keen eye for style. Much of her inspiration comes from the nature and beauty of California’s diverse terrain and landscape. Many of the items at Haven Laguna draw inspiration from nature and its simplistic beauty.

**Hydration Room, Corona Del Mar**

Dr. Brett Flore, Founder & CEO

Dr. Brett Flore founded Hydration Room®, a vitamin IV and injection therapy clinic, in 2014 with only one location in Newport Beach. Since then, he has opened 17 additional locations across Southern California and treated over 60,000+ patients! Dr. Flore and the team of registered nurses at Hydration Room support patients’ health with nutrient solutions customized for specific symptoms and delivered in a relaxing, comfortable and pristine environment. At the Hydration Room®, that’s their singular goal: to provide effective therapies to help each of their patients get healthy - inside and out. Outside of Hydration Room, Dr. Brett Flore is also a practicing Anesthesiologist (under his osteopathic medical license) and pain specialist at several local Orange County surgery centers and hospitals.

**Idea Hall, Costa Mesa**

Rebecca Hall, President & CEO

Rebecca Hall, APR is a thought leader and celebrated entrepreneur in the public relations,
branding and marketing industries. Hall founded Idea Hall in 2003 as a hub for strategic, creative, and media talent, and has built her firm into one of the most respected and awarded agencies in California. Hall and her team have been privileged to work with some of the most established commercial real estate businesses in OC, as well as healthcare and non-profit organizations. She is known for her keen understanding of the latest issues - COVID-19, homelessness and mental health. Since establishing the agency, Hall remains one of the first female heads of an agency and one of the most successful marketing and PR entrepreneurs in the county. She attributes her success to staying ahead, constantly innovating and developing and maintaining strong relationships.

InBrace, Irvine
John Pharm, Founder
Dr. John Pharm joined InBrace because as an orthodontist, entrepreneur and engineer, he knew there was a better way to serve a community he loves. InBrace is building an entire new category of technology to help orthodontists treat patients in a minimally invasive manner. The market for improvements to orthodontics is a solution that has clinical precision and doesn’t require work or lifestyle adjustments while in treatment. InBrace has created a discreet Smartwire™ that is bonded behind teeth by an orthodontist to gently move teeth into place like autopilot. No tray changes, no monthly appointments, just a completely hidden wire that allows you to live your normal life while your teeth adjust. Brush, floss, eat and drink like you always do, and notices the improvements you can share with the world. After years as a Boeing engineer and startup entrepreneur, he went to USC and graduated with a Master’s degree in Craniofacial Biology and then completed a residency at USC. Past experience includes being a director for several years in the orthopedic devices business. John founded InBrace in 2012.

Indi, Newport Beach
Neel Grover, CEO and Executive Chairman
Neel Grover is a seasoned e-commerce leader who has led great teams and sold $5 billion online running the 3rd largest Marketplace in the U.S. for a decade. His products from 7,000 brands are recognized as well as a top fashion Marketplace with over 1,000 brands integrated. During his tenure, Buy.com went from losing almost $100 million per year to 13 consecutive profitable quarters and over $100 million in profits every year. Indi is a Saas platform that helps brands engage their customers directly in their digital properties rather than in social media. It is the leading provider of customer engagement and data. Customers are incentivized to create: (i) video reviews to be displayed on the brand’s website and app; (ii) commissionable shopping video reviews to be posted by the customer in their own social media to drive online sales for the brand and commissions or store credits for themselves; and (iii) video submissions for contests to Indi. The result is that brands can own all the content, receive email addresses, remarketing rights and robust social media and sales data from their customers.

Ivantis Inc., Irvine
Dave Van Meter, President & CEO
Dave Van Meter, President and CEO of Ivantis Inc. embodies the spirit, grit, and drive of the most successful entrepreneurs. Van Meter joined Ivantis as employee No. 2, having previously led the company’s development efforts on some of the most precedent-setting medical devices in the world. With a Masters degree in Craniofacial Biology and then completed a residency at USC. Past experience includes being a director for several years in the orthopedic devices business. Dave founded Ivantis in 2012.

Jacqueline Thompson Group, Newport Beach
Jacqueline Thompson, Realtor
REALTOR® Jacqueline Thompson has achieved another record year, closing nearly $350 Million in sales for 2021. Setting records from Canyon to Coast since 2008, Thompson is regarded as one of the most respected and trusted names in Orange County real estate. The Jacqueline Thompson Team in 2021 saw Jacqueline Thompson set several sales records for Coastal properties from Corona Del Mar to Crystal Cove to Dana Point, where she sold a record parcel of land in Pint Coral where there had also been a record sale for the County of Orange that had never been built on. She began her career specializing in estates nestled within the coveted communities of Newport Beach and continues to expertly represent discerning buyers and sellers in Newport Coast, Newport Beach, Crystal Cove, Laguna Beach, and Shady Canyon. With over $1.5 Billion in career transactions, Thompson earned 2022 with nearly $1 Billion sold in Shady Canyon - which is by far, more than any other agent ever has sold in Shady Canyon’s history.

Kadenwood Inc., Newport Beach
Erick Dickens, Co-Founder & CEO
After serving over eight years as a platoon commander in the US Army, Erick Dickens began working with Cameron-Brooks, a recruiting firm that specializes in helping former military officers transition into business roles. Through their program, he was able to start his career in brand marketing at Kraft Foods. After he was hired by Doug Weekes, his current business partner and co-founder of Kadenwood. After Kraft, Dickens went on to serve in positions of increased responsibility at Henkel, LifeLock and ultimately became the first chief marketing officer for King’s Hawaiian where he led efforts to double the company’s revenue over the course of two years. In 2018, Dickens joined Kadenwood as employee No. 2, having previously led the company’s marketing teams in Orange County and Nevada. Dickens is providing it to all other retailers.

M&R Engineering, Orange
Natalia Sephton, President & CEO
Natalia Sephton is an innovative leader with a track record of improving profitability through building high-performing teams, establishing effective scorecards, and driving for results. A collaborator and subject matter expert in strategic planning, operations, supply chain management, project management, and lean implementation. Currently she is responsible for a growing contract manufacturing company specializing in high precision CNC Swiss, Lathe and Mill of various metals and plastic products. Sephton is responsible for all aspects of the business from business development, product rationalization, talent development, and company profitability. Sephton earned a Bachelor of Science in Industrial and Systems Engineering (Magna Cum Laude) and a Master’s in Business Administration both from the University of Southern California.

Manna Kadar Beauty, Irvine
Manna Kadar, Founder & CEO
Manna Kadar is a self-made, self-funded minority mom-preneur behind the fast-growing Manna Kadar Beauty family of brands, including Manna Kadar Cosmetics, E.9 Splash, and the just-launched Million Goddess by Manna Kadar, House of Luxury Pet Products, Mason Man Skincare, and Manna Kadar Luxury Bath and Body.

Mitrevi Restaurant Group LLC dba Zesty Olives Mediterranean Grill, Irvine
Borislav Mitrev, Founder & CEO
Mitrev has founded and successfully continues to expand the Zesty Olives Mediterranean Grill (www.zestyolives.com), a fast-casual restaurant concept and a healthy lifestyle brand headquartered in Irvine, California. With two locations currently open in Lake Forest and Irvine, five more in plan for next 12 months, the brand is becoming a local favorite with its delicious, healthy and craveable dishes, inspired by authentic Greek recipes with a modern twist, which are all made fresh daily from premium ingredients and never frozen. Mr. Mitrev’s passion for Real Food & Authentic Hospitality was founded on years working and living high-impact environments, chefs, and unique hospitality and culinary experiences all around Europe where he spent the last two decades before moving to California to start Zesty Olives Mediterranean Grill. Mr. Mitrev has a bold vision for the business, which is to revitalize the restaurant industry and bring back the true meaning of restaurants as places for guests to “be refreshed, restored and made whole again” while maintaining uncompromising focus on quality, service and genuine care for people and our community.

Manna Kadar Beauty, Irvine
Manna Kadar, Founder & CEO
Manna Kadar is a self-made, self-funded minority mom-preneur behind the fast-growing Manna Kadar Beauty family of brands, including Manna Kadar Cosmetics, E.9 Splash, and the just-launched Million Goddess by Manna Kadar, House of Luxury Pet Products, Mason Man Skincare, and Manna Kadar Luxury Bath and Body.

Manna Kadar Beauty, Irvine
Manna Kadar, Founder & CEO
Manna Kadar is a self-made, self-funded minority mom-preneur behind the fast-growing Manna Kadar Beauty family of brands, including Manna Kadar Cosmetics, E.9 Splash, and the just-launched Million Goddess by Manna Kadar, House of Luxury Pet Products, Mason Man Skincare, and Manna Kadar Luxury Bath and Body.

Manna Kadar Beauty, Irvine
Manna Kadar, Founder & CEO
Manna Kadar is a self-made, self-funded minority mom-preneur behind the fast-growing Manna Kadar Beauty family of brands, including Manna Kadar Cosmetics, E.9 Splash, and the just-launched Million Goddess by Manna Kadar, House of Luxury Pet Products, Mason Man Skincare, and Manna Kadar Luxury Bath and Body.

Manna Kadar Beauty, Irvine
Manna Kadar, Founder & CEO
Manna Kadar is a self-made, self-funded minority mom-preneur behind the fast-growing Manna Kadar Beauty family of brands, including Manna Kadar Cosmetics, E.9 Splash, and the just-launched Million Goddess by Manna Kadar, House of Luxury Pet Products, Mason Man Skincare, and Manna Kadar Luxury Bath and Body.

Manna Kadar Beauty, Irvine
Manna Kadar, Founder & CEO
Manna Kadar is a self-made, self-funded minority mom-preneur behind the fast-growing Manna Kadar Beauty family of brands, including Manna Kadar Cosmetics, E.9 Splash, and the just-launched Million Goddess by Manna Kadar, House of Luxury Pet Products, Mason Man Skincare, and Manna Kadar Luxury Bath and Body.
fellow Stanford graduate Ed St. Gme and his private investment fund, Jupiter Holdings, to acquire Mountain Mike’s Pizza - a 40-year-old family-friendly pizza chain with nearly 200 locations throughout California. The acquisition of Mountain Mike’s Pizza, where they also serve as Co-CEOs, was followed a year later by the purchase of 43-year-old, family-owned and operated handcrafted smoothie, juice, and superfruit bowl chains. Since being acquired, and with Brit and St. Gme at the helm, both brands have achieved record-setting sales milestones and unprecedented unit growth, for the OC-based chains with no signs of slowing down. Brit and St. Gme have previously partnered in opening 43筝 of the King’s Restaurant Group, including one of the largest franchise groups in the Burger King system, they gained invaluable franchise experience, which has since been applied to their new brand ventures.

Moxxe PR Inc., Tustin
Mona Shah, President
Moxxe PR is a boutique public relations and marketing firm that represents the most distinguished chefs and independent restaurants in Orange County, California. Led by Mona Shah, Moxxe’s client list consists of the region’s industry leaders, including Michelín-recognized restaurants. Most recently, two of Moxxe’s client roster were awarded 4-stars and a Star rating, one of the most prestigious, globally recognized designations that a restaurant can receive. For nearly 18 years, Moxxe has been able to focus on creativity, experience, compassion, authenticity and integrity.

Mutt’s, Newport Beach
Alex & Meghan Murray, Owners
Depending on the era of your tastes, locals Alex and Meghan Murray, Mutt’s in Newport Beach celebrates eclectic Americana while serving as a central gathering place for your community, or breakfast, lunch, and dinner in a family-friendly, convivial atmosphere. Located in the EastBluff Village Center, Mutt’s features the same character and charm as its sister concept, Mutt Lynch’s, but through a refined, family-friendly lens. At 2675 square feet, the restaurant offers plenty of indoor seating and a spacious patio. Its inviting vibe and at-home atmosphere are brought to life through furniture, art, and decor custom-made in-house. The Mutt’s menu features an approachable American menu with fresh interpretations of classic American dishes and a craft cocktail menu highlighting spirits from artisan distilleries across the United States. Meghan’s parents, Gail and Dan Lynch founded Mutt Lynch’s in 1976; as experienced restaurateurs, they have played an important role in the opening of Mutt’s. The Murrays plan to build and operate additional Mutt’s locations throughout the United States. Each location will celebrate its respective community with distinct decor and menu items that reflect unique elements of the town and its history.

N2 Funding, Irvine
Shabi Asghar, CEO
Shabi Asghar is the president and CEO of N2 Funding a leading wholesale mortgage lender that provides non-conforming, non-traditional and conventional loans to the broker community. The key differentiator of N2 Funding is the extreme dedication to the broker community with their tagline of “We Love Our Partners”. N2 Funding’s tagline is dedicated to the broker community from each and every employee of N2 Funding. Asghar created N2 Funding as Asghar knows what brokers want and why. His philosophy is to consistently deliver exceptional customer service, outstanding communication, and industry-leading turn-times with must-loved closing options. Asghar built the N2 Funding leadership team with over 30 years of combined experience in the mortgage industry and many years specifically in wholesale lending.

Old Brea Chop House, Brea
Tony Fasulo, Owner & Operator
Since establishing Old Brea Chop House in late 2019, owner and operator Tony Fasulo has established himself and his premium steakhouse as Orange County success stories. With more than 35 years’ experience in the restaurant industry and 20 years at a global steakhouse chain, Fasulo has led the restaurant to much acclaim and received recognition in various local, notable awards. After only being open for four months, the coronavirus pandemic hit, forcing Fasulo to use his extensive knowledge of the restaurant industry to pivot his business and keep the new restaurant and its staff afloat. By crafting to-go specials, holiday menus and weekly offers, he succeeded in keeping guests both interested and invested in the new restaurant. With the Brea community rallying around him and his staff, Fasulo’s perseverance and creativity established Old Brea Chop House as one of Orange County’s premiere fine dining destinations. Despite all odds, Fasulo and his wife Dani created not only a successful steakhouse, but a place to the community for gathering to celebrate all of life’s biggest celebrations.

Outshine Public Relations, Newport Beach
Taha Samuels, Founder & President
Named one of the “Best PR Agencies in America” by Forbes, Outshine Public Relations specializes in restaurant, hospitality, and culinary public relations. Founded by Taha Samuels in 2015, her agency represents an all-star roster that has included James Beard Award-winning and Michelín-starred chefs, AAA Four-Diamond-awarded properties, and new-to-market culinary brands. With deep roots in the hospitality industry, she has a passion for supporting hotels, restaurateurs, chefs, and food and beverage brands through her creative storytelling platforms. Recognized for her poise, tenacity, and integrity, Samuels is a leader in her field. Her company, Outshine Public Relations, is a full-service agency providing public relations, social media management, photography, videography, and digital marketing.

Pacific Dental Services, Irvine
Stephen E. Thorne IV, Founder & CEO
Stephen E. Thorne IV, BA, MBA, is founder and chief executive officer of Pacific Dental Services® (PDS), a leading dental support organization established in 1994 and headquartered in Irvine, California. PDS currently provides business support services to over 850 dental practices throughout 26 states, located in some of the largest designated market areas in the United States. In 2021, the company exceeded $2 billion in annual revenue, marking yet another significant achievement in the privately held organization’s 27-year history. PDS designed, built, and operated 91 new dental practices and plans to open 100 new dental practices within existing markets in 2022. Additionally, Pacific Dental Services provided $8 million in donated dentistry and $3.5 million in free hours in 2021. For its efforts, the organization was honored in California as one of Orange County’s Most Community-Minded Companies by OneOC and Points of Light for the third time and was recognized by the Orange County Business Journal as a 2021 Companies that Care honoree.

Pence Wealth Management, Newport Beach
Lalla Pence, President
Lalla Pence, CPP®, is the president of Pence Wealth Management. An Egyptian immigrant, Ms. Pence can attribute her success in the restaurant industry to perseverance and creativity. After being born during the Six-Day War. Though she didn’t know anyone and spoke little English, she survived by selling hot dogs with her mother on Staten Island ferries. Eventually, she moved west, attended UCLA and started a successful wealth management business, where she manages over $2 billion in client assets.

Petalast, Irvine
Jasen Vagneytly, CEO
Petalast is the first-of-its-kind sales + marketing agency for cannabis brands in California, primarily growing brands in retail with their talented sales and field +trade teams along with extensive statewide network of retailers. Jason Vagneytly started and co-founded Petalast during the peak of the pandemic, growing the business to $8.5+ million in a remote environment with a great team of experienced cannabis industry leaders and over 42 employees. His past experience includes president/CIO of KushCo Holdings (KSHB), co-founder of Summit Innovations built and acquired in 1-year for $16 million and co-founder of Lawless Jerky (built and acquired by Monogram Food Solutions).

Plutos Sama Holdings Inc., Irvine
Matthew Brownford, CEO
Matthew Brownford represented large private equity and hedge fund consortium(s) in bidding on HUD, Fannie Mae, and Freddie Mac auctions for residential, nonperforming loans in auctions from circa $300,000,000 through $1,500,000,000 including hard-ship community auctions from 2012 through 2018. He successfully assisted a multimillion-dollar asset manager as general counsel in the setup of a $2,500,000,000 receivable management company, purchasing and monetizing non-performing secured and unsecured consumer receivables in the US markets, and managed multiple mergers and acquisitions to complete vertical integration of all service providers used by the client. Brownford has also consulted clients on RABBS and CMBS, operating broker dealers, enforcement proceedings, and regulatory filings before the Securities and Exchange Commission, mergers and acquisitions, consulting, set-up reinsurance and insurance captives in the European and American markets, and was involved in setting precedent in the area of automobile franchising.

Post View Preparatory, Tustin
Edward Miguel, President & CEO
Edward Miguel, Ed. D., is the co-founder and president of Post View Preparatory® School. He opened Post View Prep in 2014 and has grown it from a small classroom in a church to two campuses which span over 100,000 square feet. Post View Preparatory currently serves 171 students across 52 different school districts and four counties. Before opening Post View he was the chief officer and Board Certified Behavior Analyst at Beacon Day School in Orange County, where he was responsible for all internal operations. Prior to that, he was the assistant director of the Olive Crest Academy, Therapeutic Education Centers, a private school for secondary students. Prior to the US military, he founded and led an evaluation and implementation of a positive behavior intervention program. Dr. Miguel has spent his entire career serving individuals with special needs. He has worked in a variety of settings including domestic violence shelters, residential treatment centers, group homes, and non-public schools. He has extensive experience in special education administration, organizational development, special education instruction, and applied behavior analysis. Dr. Miguel brings his leadership skills to Post View Preparatory in an effort to participate in the mission of discovering, creating, and providing a quality educational program that fits each individual student’s strengths, needs, interests, and lifestyle.

Powerhouse Communications, Santa Ana
Krisin Dahrer, President & Founder
Since founding Powerhouse Communications in 2015, Krisin Dahrer has made a name for the agency in the Orange County PR community and built Powerhouse Communications into a preeminent national public relations firm specializing in a variety of industries including restaurant, franchise, consumer tech, CPG and health and wellness. To support its growing portfolio, Powerhouse expanded its public relations, digital and social teams at all levels. Under Dahrer’s leadership, Powerhouse has earned a reputation among colleagues and clients like Mountain Mike’s Pizza, WebA Grill, Juice It Up!, and Tone & Sculpt for delivering an imaginative approach to media relations, communications strategy, influencer relations and social media. In fact, Powerhouse was honored to receive a 2021 PROTea Award in the Media Relations category for its impressive work launching fitness app Tone &
Scout to U.S. media, Klein’s drive to succeed and make a name for Powerhouse Communications remains unwavering. She is dedicated to providing the PR industry and beyond with a platform for growth and development every day.

Rallo, Irvine
Chuck Geischeil, CEO
Chuck Geischeil is co-founder of Rallo. Rallo is a powerful SaaS platform connecting cloud-based social media technology, artificial intelligence, and employee advocacy. As the chief of supply for franchise operators and small businesses, Rallo offers multi-location brands and SMB operators to optimize their social media engagement, while managing their entire social media presence, online reputation, and SEO directory listings in one platform for all locations. Notable achievements include rankings on the Inc.com 5000 national and regional listings of the Fastest Growing Companies, the Entrepreneur magazine Top Franchises Supplier listing for four years running, the Financial Times Fastest Growing Companies in the Americas listing, and the Outstanding Small Technology company award from Octane in 2021.

Reveel, Irvine
Josh Durham, CEO
Josh Durham co-founded Reveel in 2006, and is responsible for creating and advancing the corporate strategy and vision of the business. Under his guidance, Reveel successfully acquired a technology partner and is now the industry leader in machine learning technology and has expanded into Reveel. Durham served as a CEO of several sales roles at DHL. He quickly became a top performer and remained in the top 1% of nationwide sales throughout his tenure. Durham has a Bachelor of Science in International Business from Pepperdine University. Durham serves on the board of Entrepreneurs Organization (EO) and serves as the Orange County President. Durham finds passion in building. Whether it’s Reveel technology products, company culture, high performing teams, strategy, vision, or a motorcycle or truck, he loves creating things and making them great.

Revive, Irvine
Dalip Jaggi, Co-Founder & CTO
Dalip Jaggi has been recognized as an active entrepreneur filled with high-energy, passion, and new ideas. His career kicked off by building a brand-focused, engineering studio, Device Interactive. Jaggi lead a team that concentrates on helping entrepreneurs & companies with early-stage concepts & innovations. The agency was acquired in 2018 by an international public traded company, J2 Global. He is a co-founder of Forge54, a nonprofit organization and has taken a position as President at OC Tech Happy Hour. In 2020, Jaggi started a Real-Estate FinTech company, Revive. They believe that everyone should have an opportunity to maximize their biggest asset in our lives — Their home. They created a solution around how homeowners can renovate their home for max profit. Revive, Irvine
Michael Alladawi, Founder & CEO
Michael Alladawi has spent over 15 years as a real estate investor, builder/developer, and entrepreneur. During this time he has moved over $100 million from the banking system into residential assets. Alladawi has built, sold, bought, or invested in and financed over 1000 homes. Alladawi launched Revive in 2018 as the culmination of his broad experience and a desire to innovate in the real estate industry. Specifically, his unique value in leveraging his expertise to help homeowners maximize the value of their homes. Revive has innovated in the traditional concierge model to better serve both real estate agents and homeowners.

Revolve Law Group, Irvine
Kimberly Wright, Founder & Managing Partner
Revolve Law Group’s Kimberly Wright was taught to be vigorously honest, endlessly curious, and immensely resourceful. Wright was a driving force in the development of Revolve Law Group’s core principles. The firm leads with determination, curiosity, compassion, and a dose of humor. Relentlessly committed to offering the solutions of tomorrow, Wright works tirelessly to serve her clientele. Making a difference in the lives of others is not what she does, it is who she is. Based in Irvine, the firm focuses on areas of practice such as civil litigation, appeals and writs, asset protection, business law, and estate law. Revolve Law Group and its partners specialize in building relationships through concierge support. The firm is home to trusted counsel, serving clientele who value the confidence of ingenuity and foresight.

Revolve Law Group, Irvine
Sara Naheedy, Co-Managing Partner
Sara Naheedy, a powerhouse co-managing partner at Revolve Law Group, is known for her unprecedented edge and innovative legal support strategies. Distinguished by her discerning clientele who value her approach, Naheedy is respected for upholding standards of excellence that center on truthfulness, accountability, and a commitment to the betterment of others. Known for her shared respect for others’ time and relentless commitment to conserving resources, she works to curate a common goal of dispute resolution, not contentious litigation. Based in Irvine, the firm focuses on areas of practice such as civil litigation, appeals and writs, asset protection, business law, and estate law. The firm and its partners specialize in building relationships through concierge support. The firm is home to trusted counsel who focus on the solutions of tomorrow, one client at a time. Additionally, Naheedy owns and operates On Demand Escrow.

Rhythm, Irvine
Craig Cooke, CEO
Craig Cooke co-founded Rhythm in 1996 (with $1,300 and a computer) as a digital-first company marketing independent music online. This was done through a website where visitors could discover independent musicians, listen to their songs samples, and buy their CDs through a secure server online. This was before MP3s, broadband, and established comfort levels with online shopping. Rhythm has adapted and evolved over its twenty-six years in business to become a leading digital marketing agency servicing middle market and large enterprise clients across a wide variety of industries. Under Mr. Cooke’s leadership, Rhythm has made Inc 5000 list of top private companies in the U.S. five years, seven out of eight years. Only 7% of recipients have achieved this distinction. Rhythm is acquired by one of the top Digital Agencies in the world, Code & Theory in 2019 on the 23rd anniversary of being in business.

RiverRock Real Estate Group, Irvine
John Combs, Founder & Principal
John Combs formed RiverRock Real Estate Group (RREG) in 2003 in response to the need for a more client-centric property management service. Uniquely, RREG fills the void in what was being provided to owners. Typically, to achieve cost expectations, property service firms cut back on the very thing they were hired to do - provide quality property management. RREG looked outside the real estate industry for new ideas in service, technology, training and pricing. Since then, he has grown RREG to 140 employees across 23 offices in Orange County and more than 40 million square feet of office, industrial and retail properties in California and Arizona on behalf of institutional investors, CRE equity funds and private owners. Combs and RREG are recognized CRE industry and business leaders. Among his many achievements, Combs is a 2018 Institute of Real Estate Management, Orange County ICON award winner and 2018 Real Estate Forum Best Boss in Commercial Real Estate recipient.

Saint Verena Hospice Care Inc, Brea
Amparo Wang, CEO
Amparo F. Wang has earned and graduated a degree in Doctor of Medicine at South Western University in Cebu, Philippines as one of the recognized International Universities in the United States. Her career started as medical record department director at Gou Cain Hospital. She also owned a medical dietictional service company since 1998 and acquired a Hospice Care industry in 2018. Wang is a highly competent and successful small business owner in Orange County. She has earned five-star rating and received the California Outstanding Business Award in Brea for three consecutive years. As the CEO of Saint Verena HospiceCare4You, the business posted a revenue growth of 150% since the business acquisition in 2018.

Scarlet Kitchen & Lounge, Rancho Mission Viejo
Paige Riondan, Chef-Owner
As executive chef and owner of Scarlet Kitchen & Lounge in Rancho Mission Viejo, Paige Riondan pays homage to time-honored family recipes and East Coast classics brought to life with the finesse and flair of West Coast farm-to-table cuisine. An East Coast native, Chef Paige Riondan has cooked in some of New York’s most prestigious restaurants including Reynard at The Wythe, widely recognized for bringing farm-to-table cuisine to Brooklyn, New York. She attended culinary school at the Natural Gourmet Institute in New York City, where she honed her skills in holistic, plant-based cuisine guided by whole foods and wellness. Prior to attending culinary school in New York, Riondan was a professional dancer and choreographer. For several years, she owned a dance company that performed all over New York called Scarlett Fever, which inspired the name of the restaurant. Today, Riondan takes to a new stage as Chef-Owner of Scarlet Kitchen & Lounge.

SGC West Development, Irvine
Brandon Lehman, CEO
Brandon Lehman, with his engineering background, passion for real estate and the building industry, co-founded SGC West Development in 2012. Lehman’s process implementation driven background has helped create the proven formula of synthesizing all aspects of a project into a single point of contact while coupling proprietary technology, and has facilitated the success of growing the businesses from the ground up. The company is now the leader in the development and design-build of retail, restaurants, and medical clinic offices across the southwestern United States. His career has traversed a variety of industry submarkets, including his earlier years in project management constructing multi-billion dollar buildings and transportation projects, to the project management of ground up interior renovations, to eventually entering the industry of commercial real estate development.

SCS, Costa Mesa
James Schiefer, Founder & CEO
Schierer Media was founded in 1996 in Orange County by Carl Schiefer, an avid auto enthusiast who launched the business to initially help automotive aftermarket companies leverage television as an advertising medium for their brands. Carl’s son James Schiefer joined the business in 2001 where he quickly led Schierer Media to digital channels, helping many of those same initial clients like Mothers Polish and Edelbrock understand how to use emerging technologies and digital channels to drive new forms of marketing. From only three people and $1.8M in revenue from those early days, Schierer Media went on to merge the merging, capabilities with creative, acquiring video production house and creative agency ChopShop in 2016 to re-launch the agency as SCS. Within the last five years, James has led SCS through the application of
**2022 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES**

**ORANGE COUNTY BUSINESS JOURNAL**

**EXCELLENCE IN ENTREPRENEURSHIP AWARDS APRIL 25, 2022**

---

**Smart Cups, Mission Viejo**

**Chris Kanik, CEO & Founder**

Chris Kanik is the founder of Smart Cups, a sustainability-driven technology company responsible for the World’s First Printed Coffee Cup. Over 21 years since its formation, Ship & Shore Environmental is now one of the leading providers of clean air technologies, which clean our air and environment. As the President and CEO, Chris Kanik directs the corporate strategy for engineering, product development, sales, and fabrication. He believes there is a balance between keeping the manufacturing industry alive and keeping the air and environment clean. As a leader in the industry, he is first in many professional endeavors, setting new standards, implementing new ideas, and constantly thinking of ways to offer innovative solutions for clean air. As the pollution control industry’s only female CEO, Osokian is unique within the environmental sector. Over the past two decades leading his company to new heights, Anoosheh Osokian has extensive experience in the engineering, design, and fabrication of industrial and commercial projects of a wide range of clean air technologies and expertise in air pollution abatement, carbon footprint reduction, waste heat and reusable energy recovery, and fabrication of “green” solutions.

**Super Renders Farm, Santa Ana**

**Harrison Ta, Founder & CEO**

Super Renders Farm was founded in 2017 in Orange County, with the goal to deliver solutions to customers with the need to process their needs in IT works including 3D services, videos, IT projects and other services over the cloud. Founded just two years before the COVID pandemic, Super Renders Farm remains steadfast, strong and valuable to its customers, weathering through the challenges. Up to date, Super Render Farm’s founder and his team remain in their core business solution driven to the customers. Previously, they were super excited to announce that Super Renders Farm has been acquired and branded to be the Super Powerful Renders Farm - 3000 Super nodes - Super Speed with 2X faster - Super Stable Software. You have long hard days of work. They are now able to shorten businesses’ rendering processes from 30 days to 1 hour. The farm has an engaged, responsive Super Renders Farm team, and the local and Orange County rooted company collaborate and foster relationships with leaderships in many companies and organizations in California and nationwide to ensure excellence in products and services, business/ workplace interactions, embracing business strategies to move upward, despite the pandemic.

**TALG - The Amin Law Group, Irvine**

**Ismaäl Amin, Founder & Partner**

Ismaäl Amin is a multi-jurisdictional practiced lawyer with substantial experience in business and intellectual property transactions and disputes. Amin has handled disputes all over the world and throughout the United States on behalf of clients and mid-sized privately held companies in diverse fields such as healthcare, biotechnology, ICT, financial services, payment processing and hospitality. In the Board Room - Amin has counseled the firm’s healthcare provider and business clients in acquiring or selling assets, while maximizing return and minimizing risk. He has helped clients acquire or sell over $5 billion dollars’ worth of healthcare-related assets, including hospitals. Moreover, Amin has substantial experience in various forms of mergers and acquisitions involving both acquiring and target clients. Moreover, Amin has guided healthcare and biotech clients with various Food & Drug law, and FDA regulatory issues including filing for Pre-Market Approval and 510(k) submissions. Amin advocates education and life-long learning.

**Tebra, Irvine**

**Dan Rodrigues, Founder & CEO**

Dan Rodrigues is the CEO of Tebra, a cloud-based healthcare technology platform, formed in 2021 with the merger of Kareo and PatientPop. Kareo provides technology to support practice management, while PatientPop provides technology to support practice marketing. Together as Tebra, PatientPop and Kareo will support the connected practice of the future. Rodrigues founded Kareo in 2004 with the vision of making medical billing easy for doctors and their staff. Today, Tebra helps over 100,000 healthcare providers run more efficient and profitable practices, while delivering outstanding patient care. Headquartered in Irvine and Los Angeles, California, Tebra has over 1,000 employees that are passionate about improving healthcare. Prior to launching Kareo, Rodrigues started creating technology for the healthcare industry in 2001 as a co-founder and managing partner of Skematix, a software consulting firm based in Southern California. In the late 1990’s, Rodrigues was the co-founder and CEO of Saur, a very popular search engine for finding music and video files online used by more than 10 million consumers. Rodrigues began his career as a software developer for RealNetworks and Visio.

**The Buddy Group, Costa Mesa**

**Pete Deutschman, CEO & Chief Buddy**

Pete Deutschman guides The Buddy Group’s Storydriven vision. Founding the company more than fifteen years ago, he has refined his brand of work in creative marketing roles across film, television, radio and theatre and his passion for innovation, creative strategy, design thinking, media and business building. Since 2005, Deutschman and his team have worked at the convergence of marketing, storytelling and connected technology. Under his leadership The Buddy Group has shaped the trajectory of creative work across industries while shaping the terrain of Storydriven consulting. The diversity of his experience and expertise is reflected in The Buddy Group’s client list, past and present including: Airbnb, AARP, A3C, Arm, AT&T, BlackRock, Vertafore, Goodwill, Wedbush, National University, McDonald’s HappyMeal.com, Esperian, Bain Capital, Michaels Stores, Virgin Voyages and Takeya. Along the way, it has executed 200 product and program launches; deployed across mobile, web and connected television.
Jeff Motske is the author of The Couple’s Guide to Financial Planning in Denver, Colorado, as well as his Life/Health/Disability Medicare Planning in Corona Del Mar. Zandbergen holds his CFP designation from the College of Financial Planning in Orange County and the Life/Health and Insurance licenses. Additionally, Berbaum expertise has been featured by Forbes Business Council. The Zandbergen Group, Laguna Beach

Bart Zandbergen is an esteemed certified financial planner and the founder and CEO of The Zandbergen Group. An OC native and long-time Laguna Beach resident, Zandbergen couldn’t think of a better city for his statewide office to call home. As a nationally recognized authority in financial planning and investment advising, Zandbergen has devoted his career to guiding clients to a life full of purpose and financial freedom through personalized financial planning. Zandbergen holds his CFP designation from the College of Financial Planning as well as his LifeHealthDisability Medicare Planning in Orange County. The key differentiator is that the Van Speed Shop creates custom conversions in eight-nine weeks compared to the industry standard which is six-nines months. University of California, Irvine (UCI) Esports, Irvine

Mark Deppe, Director, UCI Esports

An accomplished higher-education entrepreneur with 20+ years of experience, Mark Deppe is the leader and director of UCI Irvine's esports program, the first of its kind at a public university. Deppe is responsible for the strategic planning, implementation and development of UCI Irvine's highly coveted esports program, which he founded in 2016. Prior to working at UCI, Deppe held a position as UCLAs Event Manager, where he managed logistics, budgeting and execution of prominent guest events, including UCLAs esports, which was the top 5000 list of the fastest growing companies in America as well as recognized by the Orange County Business Journal multiple times as the top 100 Fastest Growing Private Companies. Van Speed Shop, Westminster

Duran Morley, CEO

Duran Morley (son of Blue C’s, Eric Morley) started the Van Speed Shop (custom Mercedes Benz Conversions) and the Van Mart which is the online Mercedes Benz conversion parts store in 2019 from the garage of his parents house after a near-death motorcycle accident. He quickly grew to a 1,500 square foot warehouse in Fountain Valley. Then to a 4,000 square foot warehouse in Costa Mesa and now to a 28,000 square foot facility and 20 employees in Westminster. At 21 years old, Morley and his team have built a growing business providing van conversions to business owners, celebrities, action sports athletes to the outdoor adventurous public. Each Mercedes Benz custom van conversion is handcrafted entirely in Westminster, California. The Van Speed Shop includes fabrication, welding, engineering, carpentry, and upholstery operational departments. The key differentiator is that the Van Speed Shop creates custom conversions in eight-nine weeks compared to the industry standard which is six-nines months. Vibrato Medical, Irvine

Juliana Elstad, CEO

Juliana Elstad is a CEO, entrepreneur, and advisor with over 20 years of experience identifying opportunities for growth and delivering success in small startup to multi-billion-dollar environments. She has a proven track record of creating, growing, and leading medical technology organizations with a focus on building dynamic cultures and mentoring high potential leaders. Elstad has expanded Vibrato in America as well as recognized by the Orange County Business Journal multiple times as the top 100 Fastest Growing Private Companies.

US Alliance Group, Rancho Santa Margarita

Fadi Cheikha

Fadi Cheikha was raised in Lebanon by his Lebanese Father and Greek mother. He finished college with two degrees: Business Management and Economics, and at the age of 20 left Lebanon for the United States. Cheikha speaks, reads, and writes fluently in English, French, and Arabic, but strives to remember his Greek. US Alliance Group, Inc, doing business as Electronic Cash Systems and Alternative Payments International, has had the honor of being ranked on the Inc. 5005000 list of the fastest growing companies in America as well as recognized by the Orange County Business Journal multiple times as the top 100 Fastest Growing Private Companies.

The Saffire Group, Corona Del Mar

Bernadette A. Peterson oversees the strategic direction and overall operations of The Saffire Group. She works on behalf of clients and business owners to create solutions that help them to plan for retirement, create wealth and protect assets. The Saffire Group is the leader in the global auto and trucking industry for financial advisory solutions. Through years of strategic planning, implementation and development, The Saffire Group has had the unique opportunity to work with some of the world’s most successful enterprises to provide strategic advisory services. The Saffire Group has been recognized with several awards and accolades over the past 20 years, but perhaps the most rewarding is the knowledge that our clients are happy with the service we provide. Through the years, The Saffire Group has been able to build a strong reputation by providing unparalleled service and expertise to our clients. The Saffire Group is proud to have worked with some of the world’s most successful enterprises, and we look forward to continuing to provide strategic advisory services in the future.

Lenham, the company he founded. It is a diversified holding company with interests in numerous fields, including manufacturing, wholesale distribution, retail, real estate, technology, biotech/healthcare, and specialized services. Prior to forming Lenham, he spent several years with a leading insurance company as well as with a Salt Lake City, UT-based management and financial services business. During that time, he was selected nationally to serve on the Beta Alpha Psi’s Board of Directors.

The Zandbergen Group, Laguna Beach

Bart Zandbergen is an esteemed certified financial planner and the founder and CEO of The Zandbergen Group. An OC native and long-time Laguna Beach resident, Zandbergen couldn’t think of a better city for his statewide office to call home. As a nationally recognized authority in financial planning and investment advising, Zandbergen has devoted his career to guiding clients to a life full of purpose and financial freedom through personalized financial planning. Zandbergen holds his CFP designation from the College of Financial Planning as well as his LifeHealthDisability Medicare Planning in Orange County. The key differentiator is that the Van Speed Shop creates custom conversions in eight-nine weeks compared to the industry standard which is six-nines months. University of California, Irvine (UCI) Esports, Irvine

Mark Deppe, Director, UCI Esports

An accomplished higher-education entrepreneur with 20+ years of experience, Mark Deppe is the leader and director of UCI Irvine’s esports program, the first of its kind at a public university. Deppe is responsible for the strategic planning, implementation and development of UCI Irvine’s highly coveted esports program, which he founded in 2016. Prior to working at UCI, Deppe held a position as UCLAs Event Manager, where he managed logistics, budgeting and execution of prominent guest events, including UCLAs esports, which was the top 5000 list of the fastest growing companies in America as well as recognized by the Orange County Business Journal multiple times as the top 100 Fastest Growing Private Companies. Van Speed Shop, Westminster

Duran Morley, CEO

Duran Morley (son of Blue C’s, Eric Morley) started the Van Speed Shop (custom Mercedes Benz Conversions) and the Van Mart which is the online Mercedes Benz conversion parts store in 2019 from the garage of his parents house after a near-death motorcycle accident. He quickly grew to a 1,500 square foot warehouse in Fountain Valley. Then to a 4,000 square foot warehouse in Costa Mesa and now to a 28,000 square foot facility and 20 employees in Westminster. At 21 years old, Morley and his team have built a growing business providing van conversions to business owners, celebrities, action sports athletes to the outdoor adventurous public. Each Mercedes Benz custom van conversion is handcrafted entirely in Westminster, California. The Van Speed Shop includes fabrication, welding, engineering, carpentry, and upholstery operational departments. The key differentiator is that the Van Speed Shop creates custom conversions in eight-nine weeks compared to the industry standard which is six-nines months. Vibrato Medical, Irvine

Juliana Elstad, CEO

Juliana Elstad is a CEO, entrepreneur, and advisor with over 20 years of experience identifying opportunities for growth and delivering success in small startup to multi-billion-dollar environments. She has a proven track record of creating, growing, and leading medical technology organizations with a focus on building dynamic cultures and mentoring high potential leaders. Elstad has expanded Vibrato in America as well as recognized by the Orange County Business Journal multiple times as the top 100 Fastest Growing Private Companies.

US Alliance Group, Rancho Santa Margarita

Fadi Cheikha

Fadi Cheikha was raised in Lebanon by his Lebanese Father and Greek mother. He finished college with two degrees: Business Management and Economics, and at the age of 20 left Lebanon for the United States. Cheikha speaks, reads, and writes fluently in English, French, and Arabic, but strives to remember his Greek. US Alliance Group, Inc, doing business as Electronic Cash Systems and Alternative Payments International, has had the honor of being ranked on the Inc. 5005000 list of the fastest growing companies in America as well as recognized by the Orange County Business Journal multiple times as the top 100 Fastest Growing Private Companies. Van Speed Shop, Westminster

Duran Morley, CEO

Duran Morley (son of Blue C’s, Eric Morley) started the Van Speed Shop (custom Mercedes Benz Conversions) and the Van Mart which is the online Mercedes Benz conversion parts store in 2019 from the garage of his parents house after a near-death motorcycle accident. He quickly grew to a 1,500 square foot warehouse in Fountain Valley. Then to a 4,000 square foot warehouse in Costa Mesa and now to a 28,000 square foot facility and 20 employees in Westminster. At 21 years old, Morley and his team have built a growing business providing van conversions to business owners, celebrities, action sports athletes to the outdoor adventurous public. Each Mercedes Benz custom van conversion is handcrafted entirely in Westminster, California. The Van Speed Shop includes fabrication, welding, engineering, carpentry, and upholstery operational departments. The key differentiator is that the Van Speed Shop creates custom conversions in eight-nine weeks compared to the industry standard which is six-nines months. Vibrato Medical, Irvine

Juliana Elstad, CEO

Juliana Elstad is a CEO, entrepreneur, and advisor with over 20 years of experience identifying opportunities for growth and delivering success in small startup to multi-billion-dollar environments. She has a proven track record of creating, growing, and leading medical technology organizations with a focus on building dynamic cultures and mentoring high potential leaders. Elstad has expanded Vibrato in America as well as recognized by the Orange County Business Journal multiple times as the top 100 Fastest Growing Private Companies.


**Vincit, Irvine**

Ville Houttu is the founder and CEO of Vincit USA. Previously, he helped Finland to rank 350 employees and make it public on Nasdaq First North marketplace. After the IPO, Houttu moved to California to start Vincit’s local subsidiary. During the first five years of Vincit USA’s operations he has built a team of over 50 developers and designers, and acquired three digital agencies: XTOPOLY, Devise Interactive and Vuria LLC. In addition to Vincit USA’s fast growth, from zero to over $10 million in five years, the company has been highly profitable every year of its existence. Houttu and the company have been recognized by several notable institutions. In 2021, Vincit USA was named to the Inc. 5000 Fastest-Growing Companies in America List. In 2020, Houttu led the company to rank top-50 on the FAST Company’s Best Workplaces for Innovators list. In 2019, Inc. Magazine listed Vincit USA among Best Workplaces, and in 2018 Ville was named the Entrepreneur of the Year by the Newport Irvine Chamber of Commerce.

**Vivonic Pharmaceuticals, Newport Beach**

Paul Edalat, Chairman of the Board & CEO

As a founding partner, CEO, and chairman of Vivonic Pharmaceuticals, Paul Edalat is a visionary industry disruptor driven by his desire to transform the pharmaceuticals industry to better serve patients and consumers. Edalat’s mission is to usher in an outdated industry to improve the lives and wellbeing of all Americans: regardless of race, socioeconomic, or any other social determinant of health. He is a true believer in the power of future-focused medicine to ensure equitable health opportunities for all. Working with Viva’s team of scientists, doctors, and advisors, the company is leading the way with innovative new technologies such as its patented ZICOH, a drug delivery device, and the patented TABMELT, a sublingual drug delivery system. Together with the team, Edalat leads a whole-patient approach to treatment, focusing on the synergistic roles mental and physical health have together. With the company’s expansion into medical technologies and neurosciences, Edalat wants to bring a fresh new perspective to just how patient care can be achieved.

**Wahoos Fish Taco, Tableau Kitchen + Bar, Toast Kitchen + Bakery, Fill’s Bakeshop, Costa Mesa**

Ed Lee, Co-Founder and Managing Partner

Ed Lee is the co-founder and managing partner of Wahoos’ Fish Taco, responsible for the expansion and development of what has become one of the most iconic fast-casual restaurant brands in the nation. Founded in 1988 in Costa Mesa by Lee and his two brothers, Wahoos’ Fish Taco now has more than 55 locations nationwide and one in Tokyo, Japan. With more than 40 years of experience in the restaurant industry, Lee is also the founder of some of Costa Mesa’s favorite modern eateries, including Toast Kitchen + Bakery, Tableau Kitchen + Bar and Fill’s Bakeshop. A renowned restaurateur with a strong devotion to his community, Lee has dedicated much of his time and resources to giving back through fundraising programs at his restaurants, mentoring young chefs, and advising as a board member for entrepreneurship programs and non-profit organizations.

**Waterford Property Company, Newport Beach**

John Drachman & Sean Rawson, Co-Founders

Waterford Property Company was founded in 2019 by John Drachman and Sean Rawson through a merger of Stillwater Investment Group and The Waterford Group. Waterford has collectively acquired or managed over $2.8 billion in real estate projects throughout California. The firm was created to plan/build/reposition unique real estate projects that meet or exceed the needs and desires of stakeholders while achieving high risk-adjusted returns for investors. Proving its business plan, in 2021, Waterford focused on innovative disruption within the housing market. Waterford is now the most active sponsor in the California Statewide Community Development Authority’s middle income housing program. Waterford has converted 4,014 market rate apartment units across Southern California to affordable housing, a program that provides affordable housing to essential workers, many of whom struggle with the high cost of living in the communities where they work. For Waterford, being in the housing business is a noble profession. It provides an opportunity to create communities where people can thrive and work with community stakeholders to create consensus and develop projects that enhance communities.

---

**New Tax Savings – Do You Qualify?**

By Richard Warner, Partner, Smith Dickson CPAs, LLP

Recently, California Governor Newsom signed SB 113 into law, greatly expanding the benefits of the elective pass-through entity tax commonly referred to as the SALT workaround. Here is some background and highlights of the enhanced tax savings and reduced eligibility requirements.

**Under the Tax Cuts and Jobs Act of 2018, taxpayers could only deduct a yearly combined maximum of $10,000 of their state income taxes and property taxes on their federal tax return, which became known as the SALT limitation.**

**Last year, with the passing of AB 150, a workaround to the SALT deduction cap became available allowing pass-through entities (PTEs) to deduct their state tax payments as a business expense at the entity level, bypassing the $10,000 SALT deduction limit at the individual level. But there were still significant restrictions to the strategy.**

**With the signing of SB 113 in February 2022, the following restrictions were loosened:**

- **A qualified PTE now includes PTEs with partnership owners.**
- **Single-member limited liability companies that are pass-through owners are now eligible to claim the elective tax credit.**
- **The tentative minimum tax limitation on the elective tax credit is repealed for tax years beginning on or after January 1, 2021.**
- **Income taxed under the PTE election now includes guaranteed payments made to owners.**
- **PTE credit can now be used to offset tentative alternative minimum tax.**
- **Effective 2022, the PTE credit can be utilized against an individual’s California personal income tax liability after the credit for taxes paid to other states.**

Smith Dickson CPAs are available to guide businesses in evaluating eligibility for the California pass-through entity-level tax, application based on their current structure, and consideration of potential benefits and risks.

Richard Warner, CPA, Partner - Taxation, oversees tax strategy and compliance work for individuals, partnerships, and corporations. Contact Richard at (949)553-1020, or email richard.warner@smithdickson.com.
Congratulations 2022 Nominees

Excellence in Entrepreneurship Awards

1105 Media / Rajeev Kapur
ADTA and Spice Girl Sauces / Shachi Mehta
Alignment Healthcare / John Kaw
American Lending Center & Sunstone Management / John Shen
AO / Jack Salmon
Apex Golf Carts / Caius Gru
Apex Home Health & Hospice / Angela Ponce de Leon
Apriem Advisors / Harmon Kong
Artemis DNA / Emylee Thai
Austin Taylor Inc. / Ron Viggiano
Beacon Pointe Advisors / Shannon Eusey
BHE Management / Marla Hemmel
BioPhotos Inc. / Patrick Johnson
Blue C / Eric Morley
Brended Group / Michael Kurland
Bretrie / Kristine Everly & Tim Murphy
Butcher's House / Jeffrey Offer
CAIN Group / John Cain
Cal State University, Fullerton Center for Entrepreneurship / John Jackson
CathWorks / Ramin Mousavi
CBT / Kelly Ireland
Channel Bakers / Joshua Kreitzer
Cheek Capital Management / Steven Check
Codebreaker Technologies / Cheri Tree
David Metzler Enterprises / David Metzler
Designing Women of Orange County / Sabrina Phillips
Ephesos / Ike Kavas
e-Plan Inc. / Michael Chegini
fab Store & Spirit Dublin & GastroHub, Wineworks For Everyone / Darren & Jean Coyle
Galgos United / John Gallegos
Gilson Daub / Bent Daub
Global Memory Procurement Corp., d.b.a.
Memory.NET / Michael Johnson
Haven Laguna / Mara Samuels
Hydration Room / Dr. Brett Florie
Idea Hall / Rebecca Hall
InBrace / Dr. John Pham
Indi / Neil Groover
Ivanits Inc. / Dave Van Meter
Jacqueline Thompson Group / Jacqueline Thompson
Kadenwood Inc. / Erick Dickens
M&T Engineering / Gabrielle Segone
Managed Direct Response / Pat Mercuri
Manna Kadar Beauty Inc. / Manna Kadar
Mission Loans / Chad Smith
Mitrevi Restaurant Group LLC (Zesty Olive Mediterranean Grill) / Borislov Mitrev
Mountain Mike's Pizza & Juice It Up! / Chris Brill & Ed St. Germe
Maxxi PR Inc. / Mona Shah
Mutts / Alex & Meghan Murray
N2 Funding / Shabir Agha
Old Brea Chop House / Tony Fusco
Outshine Public Relations / Tolia Samuels
Pacific Dental Services / Stephen Thorne IV
Pence Wealth Management / Laila Pence
Relais & Chateaux / Jason Vogelsky
Plumes Sana Holdings, Inc. / Matthew Brownford
Port View Preparratory / Edward Miguel
Powerhouse Communications / Kristin Decher
Praia / Chuck Goetschel
Revel / Josh Dunham
Revive / Michael Alladani
Revive / Darip Jaggi
Revolve Law Group LLP / Kimberly Wright, Esq.
Revolve Law Group LLP / Sara Naheedy, Esq.
RiverRock Real Estate Group / John Combs
Saint Venita Hospice Care / Amparo Wang
Scarlet Kitchen & Lounge / Paola Rioran
SCG West Development / Brandon Lehman
SCS / James Schoeffler
Self-Schedule / Roy Deeter
Ship & Shore Environmental Inc. / Anochie Osikou
Smart Cups / Chris Kainik
Spinaker Investment Group / Joe Stapleton
Steinberg Sports and Entertainment / Leigh Steinberg
Sterling Public Relations / Paula Steurer
Super Rindor Farm / Harrison Ta
TALG | The Amin Law Group Ltd. / Ismail Amin
Tebra / Dan Rodrigues
The Buddy Group / Pete Deuschman
The Steadfast Group / Bernadette Peterson
The Zandbergen Group / Bart Zandbergen
Think Together / Randy Baruth
UCI & Bone-Rad Therapeutics, Inc. / Joyce Kayak
UCLI Sports / Mark Deppe
US Alliance Group / Fadi Chehika
Van Speed Shop / Duran Morley
Vibrico Medical / Juliana Escobar
Viewsonic Corporation / Jeff Volpe
Vinci / Ville Houttu
Vivera Pharmaceuticals / Paul Edelad
Vulcan / Shawn Dougherty
Wahoo's Fish Tacos / Tableau Kitchen & Bar, Toast Kitchen & Bakery, Fill's Bakeshop
Eld Lee
Waterford Property Company / John Drachman & Sean Rawson

Luncheon & Awards Program
May 26, 2022
12:00 p.m. - 2:00 p.m.
Tickets*: $175 / Table of Ten: $1650

Reservation Information
Visit: www.obcj.com/bizevents
or contact Melanie Collins,
Signature Events Manager,
at 949.664.5065 or
Melissa@obcj.com

Keynote Speaker
EMILE HADAD
Founder and Chairman
Emeritus, Firepoint Holdings, LLC

DIAMOND SPONSOR
withum

PLATINUM SPONSORS

SILVER SPONSOR

*Tickets are non-refundable. Ticket price includes a six-month subscription to the Orange County Business Journal ($15 allocated to the subscription). New subscribers only; current subscribers may gift the subscription to a colleague.