

Excellence in **ENTREPRENEURSHIP** Awards

AWARD CEREMONY AT IRVINE MARRIOTT | MAY 26, 2022

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

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Business Keeps Booming for Top Entrepreneurs



Last May, the Business Journal honored five local executives shaping Orange County's business economy at the 20th annual Excellence in Entrepreneurship Awards.

The industries varied—the winners ranged from a clean en-

ergy enthusiast to fitness franchiser 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; bios for nominees for the upcoming event begin on page 44.

Anthony Geisler: Chasing Xponential's Full Potential

By KAITLIN AQUINO

Since **Xponential Fitness Inc.** (NYSE: XPOF) CEO **Anthony Geisler** received his **Excellence in Entrepreneurship Award** last May, his company has seen growth on multiple fronts.

Revenue for the Irvine-based fitness brand curator, which calls itself the largest global franchiser of boutique fitness brands, totaled \$155 million in 2021, up 45% from the year prior. It expects total revenue for this year to range between \$201 million to \$211 million.

"The operational accomplishments that drove our record financial performance in 2021 further provide us great momentum into 2022," Geisler told analysts in a conference call last month.

Xponential went public via an initial public offering last July, at \$12 a share. Shares for the company have since more than doubled to \$25 as of late last week, giving Xponential a more than \$1 billion market cap.

After the company reported its fourth-quarter

earnings last month, analyst firm **Raymond James** maintained its strong "buy" rating.

Xponential closed out 2021—a "milestone year" for the company—with over 2,100 studios globally, up from roughly 1,600 toward the end of 2020. The company expects to open 500 studios this year and has over 1,800 licenses contractually obligated to open in North America.

"The key to our ongoing success is our ability to proactively manage the health of our franchise system," Geisler said in last month's conference call.

Three months after its July IPO, the company welcomed a new brand to its portfolio: Australia-based fitness franchiser **Body Fit Training**. Xponential acquired the brand for \$44



Anthony Geisler
CEO
Xponential Fitness

million in a combination of cash on the balance sheet and debt from its existing senior secured loan facility, company officials said.

The company also inked a deal with the parent company of **LA Fitness** last November, in which it will offer 350 franchise licenses within LA Fitness and **City Sports Club** locations over the next five years. The first few studios already opened earlier this year, regulatory filings indicate.

Last month, Xponential launched a new monthly subscription program called **XPASS**, which gives subscribers access to all of its brands, some of which include **Club Pilates**, **Pure Barre**, **Cyclebar** and **Yogasix**.

Xponential Fitness Inc.

- **FOUNDED:** 2017
- **CEO:** Anthony Geisler
- **HEADQUARTERS:** Irvine
- **BUSINESS:** multi-brand fitness franchiser
- **2021 REVENUE:** \$155M (up 45%)
- **OC/COMPANYWIDE EMPLOYEES:** 238/322
- **NOTABLE:** portfolio of brands include Club Pilates, Pure Barre, CycleBar, StretchLab, YogaSix, Row House, AKT, STRIDE, Rumble and BFT

XPASS is a "great funnel for new customers, with more than 15% of account holders having never interacted with one of our brands prior to joining and nearing 60% of account holders being previously lapsed from an Xponential brand or deemed inactive by studio sales staff," Geisler told investors. ■

Deepak Garg: Expanding SEW's Global Reach

By KEVIN COSTELLOE

Deepak Garg sometimes sounds more like an activist for water and electricity resources instead of a veteran 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 power is a "fundamental human right," Garg said. His firm, also known

as SEW, is rapidly expanding globally to realize that goal, with a growing client base in Europe, the Middle East, Asia, Australia and New Zealand.

The company will add another 400-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% year-to-year right now" 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



Deepak Garg
Founder, CEO
Smart Energy Water

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.**,

Smart Energy Water

- **FOUNDED:** 2012
- **FOUNDER/CEO:** Deepak Garg
- **BUSINESS:** software technology provider in the energy and utility sector
- **EMPLOYEES:** 1,200+ now, adding over 400 this year
- **NOTABLE:** more than 50% annual growth

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, dispatch field crews and perform other resource-saving services better. ■

Scott Shreeve: 'Best Year Ever' for Crossover Health

By AUDREY KEMP

Dr. **Scott Shreeve's** **Excellence in Entrepreneurship Award** wasn't his only win in 2021.

Last year was also **Crossover Health's** "best year ever," growing from serving 400,000 employees to nearly 430,000, according to Shreeve. This means Crossover is poised to reach its "million-member-march" by 2024.

It's also on its way to grow its 43 health centers to 50 by the end of this year.

The San Clemente-based medical group provides primary healthcare—meaning urgent, in-person and online care—to self-insured employers nationwide.

"We take care of the whole person, from healing their sore throat, to addressing their mental health or their chronic disease," Shreeve told the Business Journal.

Other services include mental health, Crossover's fastest-growing service line "given the nature of the pandemic."

Its team of primary care doctors, physical therapists and other specialists is "available for

members ... through every season, any weather, and all conditions."

Some of the largest employers in the country make up Crossover's members, including **Apple**, **Facebook**, **Microsoft** and **Amazon**.

Shreeve estimates its services save their clients about 15%.

Team Player

Shreeve saw the importance of care teams first as a college athlete and then as an emergency care physician.

"As a football player, a gym coach, a nutritionist, and a life counselor surrounded me to help me perform my best," he said.

"ICU patients have an occupational health therapist, a social worker, and a clinical care specialist. I thought, 'Why isn't this done in



Scott Shreeve
CEO
Crossover Health

other settings?"

The care team concept became the foundation for Crossover Health, which Shreeve founded in 2010.

Medical Metaverse

Shreeve is expecting the "same growth trajectory" as last year in 2022.

That goal is "embedded in the business," because the pandemic prompted a shift from the office, "into the metaverse."

This is "a huge win" for Crossover, Shreeve said, because it permits the company to deploy its virtual health service to hundreds of thousands of employees.

Last September, Crossover launched **Be Well**, a digital health content library catered to younger employees. Each of its podcasts, webinars and videos is created by its providers.

Crossover Health

- **FOUNDED:** 2010
- **HEADQUARTERS:** San Clemente
- **CEO:** Scott Shreeve
- **BUSINESS:** primary healthcare services for employers
- **COMPANYWIDE EMPLOYEES:** 1,500
- **NOTABLE:** opening more health centers; on track to reach 1M users by 2024

In January, the company hired Bay Area native **Sandra Cavanah** as chief financial officer.

She "sets [the company] up for even more growth" given her "extensive experience in finance, digital health and purchasing cycles," he said.

"Things start small, and as we grow and continue to serve these national clients, we will have a lot of opportunities for continued growth." ■



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Michl Binderbauer: Energy Exec Goes to Washington

■ By KEVIN COSTELLOE

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 farther in 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**.



Michl Binderbauer
CEO
TAE Technologies

"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."

Holy Grail

In simplest terms, fusion involves the use of the same energy process that powers the sun and the stars, a daunting achievement many have called the "Holy Grail" of energy research.

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.

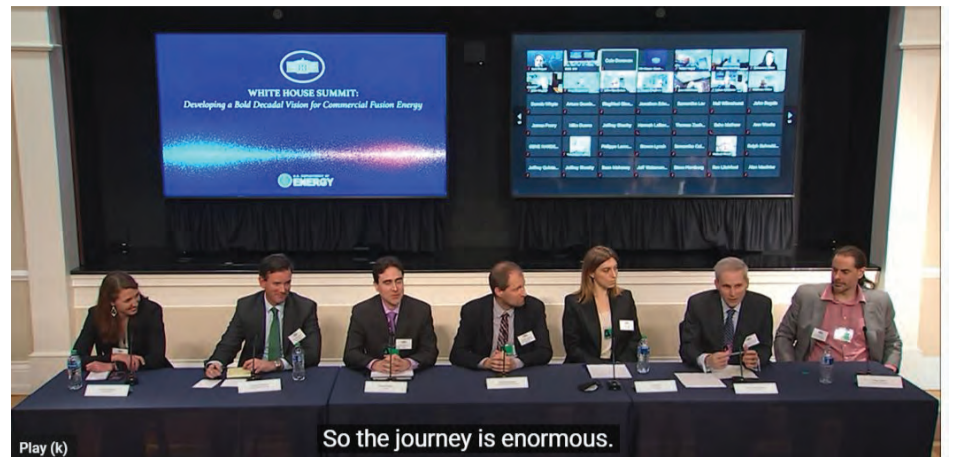
During the **Fusion Industry Vision** panel, Binderbauer noted the "20 years of just a bear of making technological components work."

"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



Binderbauer, second from right, addresses a White House Summit on fusion energy

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

Still, many scientists and experts caution that commercialized fusion energy may still be a long way off.

\$900M

TAE has received nearly \$900 million in funding to date, with support from companies including **Google**, **Kuwait Investment Fund**, **Goldman Sachs** and one of the world's largest venture capital firms, **NEA** of suburban Washington.

With one of the company's power plants, Binderbauer has said, "you could make copious amounts of power at economic rates with no detriment to the environment. That is, in a nutshell, why it's so important and why people are willing to invest gobs of money. It's the Holy Grail of energy."

Binderbauer has a Ph.D. in physics from the **University of California, Irvine**. His firm counts about 250 employees in Orange County with more to be hired this year, and about 100 employees overseas.

The company uses a machine, dubbed **Norman**, which is about the size of two double-decker buses and operates at approximately 70 million degrees. The work is still in the experi-

mental stage.

TAE Technologies has been scouting for a site in the Irvine area to accommodate growth, specifically a new machine called **Copernicus**, which is expected to be ready within a few years, Binderbauer told the Business Journal in a Feb. 25 profile.

The company would ideally like 175,000 square feet of space for its "next-generation reactor" as well as lab, office and warehouse space.

TAE currently leases about 140,000 square feet across three buildings in its hometown.

"We're at an incredible point where the science and the technology is starting to meet up with the challenge," Binderbauer told the White House panel. "The journey is enormous." ■



TAE employees working on key components of 'Norman,' a fifth-generation fusion device

TAE Technologies Inc.

- **FOUNDED:** 1998
- **CEO:** Michl Binderbauer
- **HEADQUARTERS:** Foothill Ranch
- **BUSINESS:** nuclear fusion, related fields
- **EMPLOYEES:** about 250 in OC, with about 100 overseas (as of March)
- **NOTABLE:** CEO Binderbauer took part in White House Summit on fusion energy

Emile Haddad: Big Picture Focus Amid Changes

■ By KATIE MURAR

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 the **FivePoint** 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



Emile Haddad
Founder, Chairman Emeritus
FivePoint

Lebanese Civil War, starting over in America, plotting homebuilder **Lennar Corp.**'s expansion into California and now serving as chairman emeritus and adviser to FivePoint, 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

FivePoint'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, FivePoint officials have said.

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.

"With 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. ■

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:** \$182.2M
- **MARKET CAP:** \$900M
- **NOTABLE:** Haddad to deliver keynote address at 21st annual Excellence in Entrepreneurship awards



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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 largest expenses typically incurred for early-stage and development-stage companies are costs associated with research and development (R&D) activities. Opportunities may exist when developing new products and ideas to reduce payroll 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. Your accounting team will need ample time to produce these statements. You'll also want to ensure you have the correct quality controls in place to adhere to the strict accounting and financial reporting rules and regulations of a public company.

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 core 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 a 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.



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

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.
- Initiatives such as financial donations and drives for underprivileged groups, resume workshops and interview training at high schools benefit the local community and create harmonious relationships that generate support and potential investment for a business.
- Identifying and addressing governance risks and opportunities will allow a company to avoid costly governance-related scandals. Key factors to consider when investigating your company's governance structure include the role and makeup of the board of directors, executive oversight and compensation and overall corporate performance measurement strategies.

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.

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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 Lefteris, 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.

Trained emergency and internal medicine, DispatchHealth teams are fully equipped to treat common to complex injuries and illnesses. These conditions include:

- Bronchitis
- Croup
- Diarrhea, nausea or vomiting
- Flu
- Headache or migraine
- Respiratory infections
- Pneumonia
- Shortness of breath with chronic obstructive pulmonary disease (COPD)
- Strains, sprains and minor fractures
- Urinary tract infections

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 ucihealth.org/inhomecare to learn more.

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Learn more at ucihealth.org/irvinehospital

UCI Health





Secret Sauce

By Ivo A. Tjan, CEO
CommerceWest Bank

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 credits. 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.

CommerceWest Bank services our clients by providing them advanced and convenient banking tools to free up their time. Our goal is to promote a partnership where we cater to our clients' needs by providing exceptional service, whether it be in person, via phone, zoom, email, online or through mobile banking. We take pride in knowing that our team can and has accomplished this while providing a tailored and personalized experience for each client, without them physically coming into an office. It is clear this is the future of Banking.

"We will create a complete banking experience for each client, catering to businesses and their specific banking needs, while accommodating our clients and providing them high-quality, low-stress, and personally tailored banking and financial services."



BlueprintCFO

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

By Jim Downes, Founder of Blueprint CFO

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.



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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 marquis-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!

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DIAMONDS





Solar Energy Offers More Than a Green Value

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

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.

Deductions are Nice, What About Income?

Utilities have Purchase Power Agreements (PPA) with producers. These contracts typically have a 20 to 25-year term, providing income for the project the moment energy production begins. The cash flow to the investor is generally 4% to 6% of the annual return. After accounting for the investment at risk following

the tax benefits, the return on investment (ROI) jumps to over 10%. By leveraging the purchase with qualifying debt, the ROI is even greater. (These are estimates and each solar transaction is subject to independent review.)

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.



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

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Business Loan Interest Rates: Fixed vs. Variable

Written by Live Oak Bank

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



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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 charge 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 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 you or your team.

Most businesses use many different, disjointed 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 about 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 invoicing, 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
- Create estimates you can easily convert to an invoice
- Customize a professional-looking invoice with your business logo and colors

Accept Payments Quickly and Avoid High Fees

- Accepting payments directly inside online banking
- Streamlining the process of accepting credit cards and avoid a lockup 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.





Irvine Valley College (IVC) Entrepreneurship Program Builds In-Demand Skills and Launches Innovative Partnerships

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 also 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.

Create Your Own Future

With IVC's Entrepreneurship Program

To learn more about the IVC entrepreneurship program, open classes, potential partnerships, or the Idea Pitch Competition visit link.ivc.edu/entrepreneurship

Annual Idea Pitch Competition for Prizes and Mentorship

Exciting Entrepreneurship Certificates of Proficiency

IVC's Program Has Grown Exponentially Since Its Inception

Small Business Startups Have Surged Since 2019!

IRVINE VALLEY COLLEGE

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. Divorces, by their nature, pit 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 *Dragnet* 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.

Invariably, 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.



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High Stakes Divorce Lawyers

2022 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

1105 Media, Irvine*Rajeev Kapur, CEO*

Rajeev Kapur is a seasoned high-tech executive who's an expert at leading and driving innovation at entrepreneurial start-ups, \$20-\$100 million-plus midsize companies, and Fortune 500 companies, such as Dell, where he built winning teams globally, including in China and India. Currently, Kapur is CEO of 1105 Media, Inc. a leading provider of B2B marketing, where he oversees a diverse portfolio of five companies.

**ADYA and Spice Girl Sauces, Anaheim***Shachi Mehra, Co-Owner & Executive Chef*

Chef/Partner Shachi Mehra has led ADYA to tremendous success in its first five years of business. She is responsible for bringing a new Indian experience to Orange County at ADYA, an authentic Indian restaurant that is a reflection of modern India. The menu revolves around fresh, sustainable ingredients and focuses on contemporary interpretations of Indian street foods, tandoori specialties and rich curries. With a thriving location in Anaheim and a flourishing catering business, Chef Mehra has gained local and national attention for her accomplishments, including becoming a winner on Food Network's Chopped; earning the title of Rising Star Chef in the Golden Foodie Awards; and being tapped to serve as Guest Chef with Celebrity Cruises. In 2021, Chef Mehra launched her own line of sauces for retail sale, Spice Girl Sauces, which are now available nationwide. Chef Mehra is driven by giving back, as she is dedicated to supporting many local and regional charities through her businesses.

**Alignment Healthcare, Orange***John Kao, Founder & CEO*

John Kao is the founder and CEO of Alignment Healthcare, Inc. (NASDAQ: ALHC), a consumer-centric platform delivering customized health care in the United States to seniors and those who need it most, the chronically ill and frail, through its Medicare Advantage plans. The company now stands among the top 20 most valuable public companies based in Orange County, California. Kao has had a long career in the health care industry and has served in executive roles at CareMore Medical Enterprises, The TriZetto Group, PacificCare Health Systems, Secure Horizons USA, and FHP International. He believes strongly in the tenets of servant leadership and serves on various boards of nonprofit organizations.

**American Lending Center & Sunstone Management, Irvine***John Shen, CEO*

John Shen founded American Lending Center, LLC in June 2009. As a passionate small business advocate, Shen spearheaded the effort of the organization to build a successful lending practice primarily based on the SBA 504 program. American Lending Center, LLC, one of the most successful U.S. non-bank lenders specializing in government-sponsored loan programs designed for small businesses. His expertise includes commercial lending, structural financing, private equity, and venture capital fund management. He is currently an economic development commissioner of the city of Irvine. A winner of the "2017 Coleman SBA 504 Lender of the Year Award" by distinguished media outlet, the Coleman Report, Shen's unique expertise and experience also make him an invaluable asset as founding partner of Sunstone Management. Shen's in-depth understanding of U.S. capital market demand and his unique ability to develop client trust have been essential to laying the foundation for Sunstone and continuing to drive operations to greater success. Both companies have received numerous achievements and awards, including being listed on the Financial Times, Inc. 5000, and countless other fastest growing private company ranks.

**AO, Orange***Jack Selman, Founding Partner*

Jack Selman's talent and passion for design began at an early age. His course was set during high school mechanical and architectural drawing classes. It was cemented when a neighborhood friend—recognizing Selman's interest in architecture—took him to a Frank Lloyd Wright exhibit in Los Angeles. That friend went on to found LPA, Inc. where Selman worked to hone his craft, and in 1974 he started Architects Orange (AO). Fifty years later, and since founding AO, Selman's excitement for design remains intact and has evolved to include a passion for the business of architecture, from building client relationships to merging business goals with design excellence. In his role, Selman guides the firm's 15 studios and offers client and team counsel on everything from design direction to continuity in the process. He has enjoyed immense pride overseeing the evolution of AO's world-class design teams and projects living out the motto to always, Under Promise. Over Deliver.

**Apex Golf Carts, Laguna Hills***Caius Griu, CEO*

Apex Golf Carts was founded in 2012 by Caius Griu. Over the past 10 years, Apex has completed over 25,000 jobs and achieved over \$30 million in revenue. The success of Apex Golf Carts is a direct result of the core set of values that Griu instilled in the company and is modeled after; respect, determination, integrity and teamwork. Griu 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 hitting the mark. His passion is embracing the philosophy of continuous improvement and what comes from it. One way he is revolutionizing his fleet is by installing lithium battery 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, Griu is an active member in the community and makes his philanthropic work a top priority. In addition to his own personal efforts; Apex Golf Carts also participates in giving back by holding an annual fund raiser where 100% of the proceeds are donated to an annual charity.

**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 proudly certified as a Great Place to Work. Ponce de Leon started her business at age 23, fascinated by the concept of community-based health care. The company was founded to support the most vulnerable seniors and to provide jobs to Filipino immigrant women and nurses. 17 years later, Apex Home Health & Hospice Care takes pride in having a 97% woman workforce, and being 1 out 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 rewrote 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 service them properly, let alone have conversations to know their personal financial needs or goals. With a new mission 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***Emylee Thai, CEO*

Emylee 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 Improvement Amendments (CLIA) certified, College of American Pathologists (CAP) accredited, high-complexity clinical diagnostic laboratory that provides cutting-edge laboratory services, with emphasis on genetics, that promote precision medicine. Thai's goal is to make genetic testing inclusive rather than exclusive and to bring affordable, innovative actionable healthcare solutions to everyone. In 2022, her plan is to expand this focus even further to key markets within 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*

With over 35 years of experience Ron Viggiano has become the area's premier clothier by asking the right questions and understanding the client's wants and needs to help guide them into creating distinctive and personalized wardrobes. 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 successful business leaders and athletes in Orange County 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*

Shannon 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***Marla Hemmel, President*

Marla Brower 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 Association 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.



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BioPhotas Inc., Anaheim*Patrick Johnson, President & CEO*

Patrick Johnson is the CEO & president of BioPhotas Inc., and the inventor of the award-winning Celluma SERIES of light therapy devices. With an extensive background in the medical device industry, Johnson saw the potential for bringing the significant therapeutic benefits of Low-Level Light Therapy affordably to the masses, leading to the founding of BioPhotas and the development 14 different Celluma devices so far. Johnson's innovation is responsible for more patents, more awards and more medical indications-for-use than any other low-level light therapy device in the world. Prior to BioPhotas, his leadership experience includes 10 years with Pro-Dex, Inc., a publicly held medical device manufacturer, serving in the roles of chief business development officer, CEO and president, and board member. Johnson has guest lectured at both Chapman University and University of California Irvine on Entrepreneurship and Strategic Architecture. Johnson now speaks internationally and writes extensively on the science and benefits of Low-Level Light Therapy.

**Blue C, Costa Mesa***Eric Morley, Co-Founder & Chief Operating Officer*

Since co-founding the company in 1998, Eric Morley has established Blue C as Orange County's leading brand strategy and marketing communications agency. Morley has supported over 12,000 marketing projects for clients across the world, including more than 500 rebrands and 1,000 brand launches. This past year, Blue C added six new clients to its roster. To compensate for this growth, Morley launched two new divisions: Blue C United, which specializes in content development, and Blue C Electric, which focuses on the electric transportation and sustainability industry. Under Morley's strategic leadership, Blue C proceeded to grow its BrandPwr process which leads companies into complete brand strategy clarity and builds a marketing roadmap for progressive brands. An active community member, Morley continued Blue C's mentorship program which promotes education and careers in branding and marketing to high schools and universities like Chapman University. Morley is also a co-founder of the California Love Drop, a non-profit organization that has served more than 300 "love drops" and delivered over 30,000 meals to front line responders during the pandemic.

**Branded Group, Anaheim***Michael Kurland, CEO*

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 "BeBetter 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 multiple published articles on Forbes.com, Inc.com, Thrive Global, and Huffington Post. Kurland has recently been selected as a member of the Forbes Business Council. As a result of Kurland's and his team's commitment to BeBetter, Branded Group has received multiple industry and humanitarian awards including Great Place to Work® certification and ranking on the Inc. 5000 year after year.

**Brevvie, Huntington Beach***Kristine Everly, COO*

Kristine Everly and Timothy Murphy are the co-founders of Brevvie, a leading provider of consumer product rental management solutions for multi-family communities, commercial office buildings, city and state beaches, retailers and universities throughout North America. Brevvie's mission is to reduce waste and free up storage space for consumers who value sustainable living. Brevvie combines renting consumer goods, electronic lockers and mobile applications to create a seamless customer experience, while increasing available amenities and property revenue for each retailer/location. Brevvie was founded in 2017 and is a graduate of the UCI Beall Applied Innovation Wayfinder Incubator. As professionals in the real estate industry Everly and Murphy understood the habits of people who lived in apartments and multifamily housing communities and were able to capitalize in the growth of the circular economy to create a system that offers many benefits, including use without ownership, convenience, and the slowing of overconsumption.

**Butcher's House, Costa Mesa***Jeffrey Offer, Chef-Owner*

Chef Jeffrey Offer opened his first restaurant Butcher's House at Costa Mesa's 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. Born and raised 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 storied culinary career spans over a decade across three continents, his most recent role was executive chef of Moulin restaurants for nearly six years. As a classically trained French chef, Offer brings more than 12 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.

**CAIN Group, Newport Beach***John Cain, Founder & Principal*

John Cain, founder and principal of CAIN Group and Broker Associate at Pacific Sotheby's International Realty in Newport Beach, California, launched his storied career in real estate in 2004 and has since become one of Southern California's most successful real estate agents. He has received top real estate industry accolades including being named "Top Real Estate Agent" by Orange Coast Magazine, "Agent of the Month" by Executive Agent Magazine, and recognition on Realtor Magazine's prestigious "30 Under 30" list in 2010. Additionally, Cain has been named to Real Trends 1,000 list of top real estate producers in the country, each year from 2014 to present, and has appeared on several television shows on Bravo and HGTV. Trusted by discerning clients, ranging from celebrities and professional athletes to premier homebuilders and captains of industry, Cain is renowned as the agent of choice in the luxury real estate market throughout coastal Orange County. CAIN Group is the #1 small team in OC and #9 in the nation for 2021, per The Wall Street Journal and Real Trends. CAIN Group proudly touts over \$2.1 billion in collective team sales.

**California State University, Fullerton - Center for Entrepreneurship, Newport Beach***John Jackson, Director*

John Bradley Jackson is director of the Center for Entrepreneurship at California State University, Fullerton. At CSUF Jackson is a professor with expertise in New Venture Creation and New Venture Launch. Known affectionately as "Professor JJ", Jackson brings startup experience along with practical marketing and sales knowledge to the classroom from both Silicon Valley and Wall Street. He is founder of the CSUF Startup Incubator which has helped launch over 80 startups. At CSUF Jackson was awarded two grants from the National Science Foundation. In 2016 Jackson also founded Titan Angels, LLC, which is an investment fund that focuses on scalable ventures in the southern California region. Jackson serves as fund manager.

**CathWorks, Irvine***Ramin Mousavi, President & CEO*

Ramin Mousavi is a dynamic executive with an outstanding history of building high-performing teams and achieving exceptional results in the medical device and high-tech industries - from developing to launching and commercializing breakthrough and transformational products. He is currently the president & chief executive officer (CEO) of CathWorks, an innovative global medical device company focused on transforming the diagnosis and treatment of coronary artery diseases. CathWorks is dedicated to improving the care of patients suffering from coronary artery disease by providing clinicians the most comprehensive and objective data through CathWorks digital health platform, a combination of advanced algorithms, artificial intelligence, machine learning and cutting-edge user interface. A rising star of the medical device industry, Mousavi has executive leadership and operational experience in general management, marketing, strategy, product development, and commercialization across multiple market segments.

**CBT, Orange***Kelly Ireland, Founder, CEO & CTO*

Kelly Ireland founded CBT in 2001 as a Value-Added Reseller (VAR) focused on unparalleled client service. However, having a keen eye for technology trends and always taking the time and opportunity to listen to industry experts, she assessed the impending changes in the industry early on. She built up CBT's engineering expertise, data science practice, and partnerships to revolutionize the company's offerings and make the difficult transition from VAR to Domain Expert Integrator in 2015. CBT is now in rarefied air, bridging the gap between operational technologies (OT) and information technologies (IT) with groundbreaking projects like the Refinery of the Future (RotF) at Texmark Chemicals. Ireland's leadership and vision has led the company to earn many accolades, including five consecutive CRN IoT Innovator awards, 2021 PTC Partner Network for Best Ecosystem Project Award (beating out Accenture and L&T Technologies, both multi-billion-dollar System Integrators), three CRN Triple Crown awards, two consecutive WPO 50 Fastest-Growing Companies awards, and nine consecutive Boeing Performance Excellence awards. This has spurred explosive new-logo growth for CBT.

**Channel Bakers, Anaheim***Joshua Kreitzer, CEO*

Founded as one of the first agencies purely focused on Amazon Advertising in 2015 by CEO Joshua Kreitzer, Channel Bakers is a full-service, global agency founded upon a core tenet to help brands find the right audience at the right time to tell their story and drive sales. The agency utilizes its decades of experience leveraging data and analytics to grow revenue within specific retailers and verticals. With this strategy Channel Bakers has helped clients become top brands on Amazon. Channel Bakers is one of the selected partners featured in Amazon Advertising's find-a-partner directory.

**Check Capital Management, Costa Mesa***Steven Check, Founder, President & Chief Investment Officer*

Steven Check is the founder, president, and chief investment officer for Check Capital an independent investment management firm based in Costa Mesa. Forming the company in 1987 with a dedication to Warren Buffet's steadfast investment and client relations principals, Check has steadily grown Check Capital to more than \$1.6 billion in assets under management and most recently placed 4th on CNBC's FA100 and Barron's Top 100 Independent Advisors lists - one of only two investment managers in the nation to appear on both lists in 2021. Never forgetting that the firm handles other people's money - as well as



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some of its own - Check Capital has a culture of avoiding losses. Therefore, its investment philosophy centers around the acquisition of stocks from exceptional businesses, run by first-class management teams, when those firms are selling at bargain prices.

Codebreaker Technologies, Laguna Beach

Cheri Tree, CEO

Cheri Tree is a best-selling author, professional keynote speaker, and world-renowned entrepreneur. She is the founder, chairman, and CEO of Codebreaker Technologies, LLC., with clients in more than 100 countries worldwide. She is the creator of the revolutionary B.A.N.K. methodology and Codebreaker's Personality Coding Technology, designed to help business owners close more sales in less time and improve their communication skills and personal relationships. Tree has spoken to hundreds of thousands of entrepreneurs and professionals globally at some of the top business conferences in the world. She has also been invited to speak at Harvard University, the University of California, Google, and the United Nations. In addition, Tree has been featured in numerous international publications including Forbes.com and Entrepreneur.com, and has been nominated as innovator of the year and entrepreneur of the year because of the breakthroughs created from her Personality Coding Technology, including Codebreaker AI, the world's first Artificial Intelligence powered by B.A.N.K.

**David Meltzer Enterprises, Ladera Ranch**

David Meltzer, Founder

As our world continues to evolve, David Meltzer prepares each day to meet those 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 1 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 "2 Minute Drill" and the first late-night entrepreneurial show "Office Hours". He's filmed four seasons since the start of the pandemic, with another season of "Office Hours" set to record in March 2022. 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. In addition to recording locations at the Blue Wire studio in the Wynn Las Vegas and at SoFi Stadium, home of the NFL's Los Angeles Rams and Chargers, David Meltzer Studios just launched its third location in Orange County.

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

Sabrina Phillips, Interior Designer

As an artist with a business and marketing background Sabrina Phillips craved a creative outlet so she began an interior design firm in 1991 in her small hometown just 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 started her business all over again not knowing a soul. By 2020, she had established herself and company within the south Orange County communities as a talented designer who listens to what her clients want and need for their home and works diligently at exceeding their expectations. This approach inspired her to create the new tagline: Your Home. Your Life. Your Style. Phillips is currently working on becoming a general contractor and has a core desire to support other women in business. She and three other females work together to create high quality experiences for their clients and she is looking to grow her company this year by adding other female designers and project managers in 2022.

**Ephesoft, Irvine**

Ike Kavvas, Founder & CEO

Ike Kavvas is the founder and CEO of Ephesoft, a leader in intelligent document processing focused on accelerating productivity with automation. He helps customers in 50 countries with his global team in the Americas, Europe and Asia. Kavvas' entrepreneurial drive fuels him as a passionate technology innovator, AI and machine learning advocate, speaker and customer-obsessed trailblazer. His mission is to leave a legacy by helping the next generation achieve their goals through entrepreneurship and being good citizens of the world. He came to the United States with nothing and built a business through hard work and grit - proof that the American Dream is alive. Kavvas holds a patent on supervised machine learning for document classification and extraction. He is a serial entrepreneur with three ventures and successful exits, exemplifying both technical and business acumen.

**e-PlanSoft™, Irvine**

Michael Chegini, CEO

Michael Chegini is a visionary whose drive to innovate and commitment to improve how public agencies and the AEC industry perform plan and document reviews led to the foundation of e-PlanSoft. His vision drives the company to continuously advance technology and leading-edge products that provide a vital tool for plan/document reviews and document management. Dr. Chegini has over 40 years in architectural and engineering design, design management, program and project management, and construction of buildings and supporting facilities for public transportation, educational, and municipal agencies, public works agencies and the private sector. His deep experience in compliance management equips him with the unique insight to develop and provide software that best serves the industry. Under his charge, e-PlanSoft has created advanced tools that allow agencies to improve their productivity, collaborate across departments from anywhere, whether in the office or not, and maintain business operations even through the pandemic. Under his leadership, the company has been awarded a total of 14 patents, with more under consideration, each representing advancements in the way plan reviews are conducted.

**Fable & Spirit, Dublin 4 Gastropub, & Wineworks For Everyone, Newport Beach**

Darren & Jean Coyle, Owners

Darren and 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 operates all three restaurants with their daughter, Ali, who serves as director of Wines & Sommelier, and son, Drew, who serves as the director of Spirits. The Coyles warmth and hospitality is the reason that all three restaurants are so well supported by the community. Within months of opening Fable & Spirit in 2019, the restaurant established itself as a neighborhood favorite and earned titles such as "Dish 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. Diversity of audience, technology and media is evolving from a volume minority into a growth majority. In order to stay in lockstep with the U.S. market's transformation, they evolved from a mindset of "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 within the U.S. Growing his roster of clients from Fortune 500 companies to start-ups. Clients include, Comcast, got milk?, Cacique, Chick-fil-A, California Department of Public Health, and Travelpro, to name a few.

**Gilson Daub, San Clemente**

Brent Daub, Senior Founding Partner

Brent Daub is a dynamic and successful entrepreneur and legal professional who recognized that traditional law firms needed to be radically different in order to improve employee retention and create a better work-life balance. So, he set out to make the practice of law dramatically better by founding Gilson Daub, a leading workers' compensation defense, subrogation, and general liability law firm based in San Clemente in 2011. He started out working by himself in a single basement office with no windows and only one client and 12 cases to manage. Today, under Daub's visionary leadership, Gilson Daub has grown significantly to comprise a fast-growing team of 90 talented employees across 19 offices located throughout eight states. Additionally, the firm handles nearly 15,000 cases for over 100 clients and currently represents 11 of the world's leading Fortune 500 companies. One of the key factors of Gilson Daub's success was Daub's desire to create a uniquely different law firm that offered an innovative culture and embraced a flexible working environment.

**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, sales management, 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 Florie, Founder & CEO

Dr. Brett Florie 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. Florie and the team of registered nurses at Hydration Room support patients' health with nutrient solutions customized for each individual's 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 Florie 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,

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branding and marketing industries. Hall founded Idea Hall in 2003 as a fusion agency bringing together branding, marketing and PR - a model that is gaining industry favor today. Throughout the years Hall has attracted world-class talent to Idea Hall, ensuring the spirit of entrepreneurialism fuels the agency and that its craft is continually advancing forward, innovating and redefining boundaries of possibility. Through an integrated marketing model, Hall and her team have been privileged to work with some of the most established commercial real estate businesses in OC, as well as healthcare and non-profit organizations taking on some of the county's biggest 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 Pham, Founder

Dr. John Pham started 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 teeth-straightening - giving the 500MM people who've opted out of orthodontics 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 tightenings - just a completely hidden wire that allows you to live your life normally while your teeth adjust. Brush, floss, eat and drink like you always do, and notice 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 business experiences helped him launch InBrace; a new kind of company that integrates advanced orthodontic methods, practice development, healthcare software systems, lean manufacturing, systems management and marketing and sales excellence to innovate purposefully and nimbly.

**Indi, Newport Beach**

Neel Grover, Founder & 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. with over 20 million products from 7,000 retailers 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 competing with Amazon on every product. Indi is a SaaS video platform that helps brands engage their customers directly in their digital properties rather than in social media as social media platforms are seizing control of customer engagement and data. Customers are incentivized to create: (i) video reviews to be displayed on the brand's website and apps; (ii) commissionable shoppable 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 drive brand awareness across all social media. Because the engagement is initiated directly on their website or in their app (as compared to in social media), brands own all the content, receive email addresses, remarketing rights and robust social media and sales data associated with all content submissions. Amazon just launched similar offerings to (i) and (ii) above for Amazon and Indi is providing it to all other retailers.

**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 commercial launch of over a dozen medical devices. With little fundraising experience and no background in ophthalmology, Van Meter's first major accomplishment for Ivantis was raising \$18 million in Series A funding within 90 days of leaving his stable career to make the nascent startup a go. He then made the strategic decision to invest in rigorous clinical data for Ivantis' Hydrus® Microstent, a minimally invasive glaucoma surgery (MIGS) device designed to lower eye pressure in patients with open-angle glaucoma. Under Van Meter's leadership, Hydrus has become one of the biggest medical device success stories in both clinical impact and valuation creation in over a decade. The company's success recently culminated in a \$475 million acquisition by Alcon. The acquisition will expand Ivantis' footprint from six countries to 140, bringing the sight-saving Hydrus technology to the millions of people with glaucoma worldwide.

**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 influential luxury REALTORS in Orange County. 2021 saw Jacqueline Thompson set several sales records for Coastal properties from Corona del Mar to Crystal Cove to Dana Point, where she sold the highest priced parcel of land in Ritz Cove (which was also a record for the County of Orange) that had never been built on. She began her career specializing in estates nestled within the coveted coastal enclaves, and she continues to excel in representing discerning buyers and sellers in Newport Coast, Newport Beach, Crystal Cove, Laguna Beach, and Shady Canyon. With over \$1.575 Billion in career transactions, Thompson entered 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 pilot and 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 management at Kraft Foods, where 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 and build awareness of the brand in just five years and was selected to the inaugural Forbes CMO Next list of 50 top marketers redefining the role of the CMO. After accumulating experience building household brands, Dickens partnered with some of his most talented colleagues to start Kadenwood in an effort to add traditional CPG expertise to the emerging CBD industry. Kadenwood's mission is to create the leading plant-based brands with high-quality products consumers can trust.

**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 collaborative leader specializing 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 Administrations both from the University of Southern California.

**Managed Direct Response, Irvine**

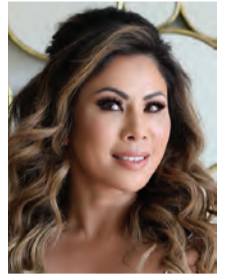
Pat Mercuri, President & Founder

Pat Mercuri is founder and president of Managed Direct Response which is based in Irvine, CA. Pat is a veteran of the direct marketing industry in Orange County with over 20 years of experience in the industry. Mercuri is recognized within the industry for his expertise in direct response having introduced a number of innovative marketing programs for the Mortgage, Solar, Automotive and Retail Services. Mercuri's desire to create a company that was different and better, combined with fulfilling broader social responsibilities, led to unprecedented growth. During his career he has mailed over 100 million lead generating marketing materials. Mercuri begins his working day at 3:00 am and doesn't stop until everything for the day is done, which make Managed Direct Response the fastest in turn around company for print and production. During the last 20 years Mercuri has grown his companies through three recessions and emerged as a leader in the industry. He understands that to grow you need to continually test, adapt and bring new marketing products to his companies.

**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, Beauty and the Bump, Goddess by Manna Kadar, Haute Dog Luxury Pet Products, Mason Man Skincare, and Manna Kadar Luxe Bath and Body.

**Mission Loans, Irvine**

Chad Smith, CEO

Chad Smith, AMP is chief executive officer at Orange County's Mission Loans which was founded in 2020. Smith's executive experience includes being an executive producer toon leader with secondary, operations, and credit risk experience. Smith's core competency is building and scaling call center sales and operations teams within a multi-branded sales floor handling inbound and outbound mortgage loan sales and operations. Smith has extensive experience and successes in transforming underperforming sales floors into high growth and Aquila levels units. Smith has served as a media spokesman providing expert commentary to top-tier media outlets such as Money Magazine, The Street, U.S. News and Market Report, MSNBC, CNN Money, Men's Health, and more.

**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 life-style brand headquartered in Irvine, California. With two locations currently open in Lake Forest and Irvine, and five more in plan for next 12 months, the brand is becoming a local favorite with its delicious, healthy and cravable 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 learning from the best entrepreneurs, 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 revive the restaurant industry and bring back the true meaning of restaurants as places for guests to "be refreshed, restored and made whole again" with uncompromising focus on quality, service and genuine care for people and our community.

**Mountain Mike's Pizza/Juice It Up!, Newport Beach**

Chris Britt & Ed St. Geme, Co-CEOs & Co-Owners

Visionary leaders, savvy entrepreneurs, and respected businessmen, Chris Britt and Ed St. Geme are the co-owners of two of the franchise industry's hottest restaurant chains. In 2017, Britt's private equity firm, Britt Private Capital, partnered with longtime friend and

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fellow Stanford graduate Ed St. Geme and his private investment firm, 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 80-unit Juice It Up!, one of the nation's leading handcrafted smoothie, raw juice, and superfruit bowl chains. Since being acquired, and with Britt and St. Geme 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. Britt and St. Geme previously partnered in owning 43 Burger King restaurants. Helming 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 clientele consists of the region's industry leaders, including Michelin-recognized restaurants. Most recently, two of Moxxe's clientele were recognized by Michelin - one with a Bib Gourmand, and the other with a Star rating, one of the most prestigious, globally recognized designations that a restaurant can receive. For nearly 18 years, Moxxe has built a name for itself by focusing on creativity, experience, compassion, authenticity and integrity.

**Mutt's, Newport Beach**

Alex & Meghan Murray, Founders

Owned by husband-and-wife locals Alex and Meghan Murray, Mutt's in Newport Beach celebrates eclectic Americana while serving as a central gathering place for the community, serving breakfast, lunch, and dinner in a family-friendly, convivial atmosphere. Located in the Eastbluff Village Center, Mutt's exudes the same character and charm as its sister concept, Mutt Lynch's, but through a refined, family-friendly environment. 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 approachable American eclectic 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-qualified and qualified 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 You". The overarching taglines communicate the dedication to the broker community from each and every employee of N2 Funding. Asghar created N2 Funding as Asghar knows what brokers want and we pride ourselves on consistently delivering exceptional customer service, outstanding communication, and industry-leading turn-times with most loans closing in 30 days. Asghar built the N2 Funding leadership team with well over 100 years of combined experience in the mortgage industry with 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 for the community to gather for all of life's biggest celebrations.

**Outshine Public Relations, Newport Beach**

Talia 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 Talia Samuels in 2015, her agency represents an all-star roster that has included James Beard Award-winning and Michelin-starred chefs, AAA Five Diamond-awarded properties, and new-to-market culinary brands. With deep roots in the hospitality industry, she has a passion for supporting hoteliers, restaurateurs, chefs, and food and beverage brands through her creative storytelling verticals. Recognized for her poise, tenacity, and integrity, Samuels is a force 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, MHA, 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 opened 51 new supported 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 53,584 volunteer 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**

Laila Pence, President

Laila Pence, CFP®, is the president of Pence Wealth Management. An Egyptian immigrant, Ms. Pence came to the U.S. after her village was bombed 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, Ms. Pence headed west, attended UCLA and started a successful wealth management business, where she manages over \$2 billion in client assets.

**Petalfast, Irvine**

Jason Vegotsky, CEO

Petalfast 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 Vegotsky started and co-founded Petalfast during the peak of the pandemic, growing the business to \$8.5 million in a remote environment with a great company culture and team of 42 employees. His past experience includes president/CRO 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 Browndorf, CEO

Matthew Browndorf presented 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 \$1,000,000,000 including hardest-hit community auctions from 2012 through 2018. He successfully assisted a multibillion-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. Browndorf has also counseled clients on RMBS and CMBS, operating broker dealers, enforcement proceedings, and regulatory filings before the Securities and Exchange Commission, merger and acquisition consultancy, setting up reinsurance and insurance captives in the European and American markets, and was involved in setting precedent in the area of automobile franchises.

**Port View Preparatory, Tustin**

Edward Miguel, President & CEO

Edward Miguel, Ed. D., is the co-founder and president of Port View Preparatory® School. He opened Port 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. Port View Preparatory currently serves 171 students across 52 different school districts and four counties. Before opening Port View he was the chief operating 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. His responsibilities included the 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 Port 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**

Kristin Daher, President & Founder

Since founding Powerhouse Communications in 2015, Kristin Daher has made a name for the agency in the Orange County PR community and built Powerhouse's reputation as a premier 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 Daher's leadership, Powerhouse has earned a reputation among colleagues and clients like Mountain Mike's Pizza, WaBa 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 PROTOS Award in the Media Relations category for its impressive work launching fitness app Tone &



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Sculpt to U.S. media. Kristin's drive to succeed and make a name for Powerhouse Communications in the PR industry and beyond pushes the agency and its personnel to new heights every day.

Rallio, Irvine

Chuck Goetschel, CEO

Chuck Goetschel is the co-founder of Rallio. Rallio is a powerful SaaS platform combining cloud-based social media technology, artificial intelligence and employee advocacy. As the supplier of choice for franchise organizations and small businesses, Rallio enables multi-location brands and SMB operators to optimize their social media engagement, while managing their entire social media presence, online reputation, and online directory listings in one dashboard 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 Franchise 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 Dunham, CEO

Josh Dunham co-founded Reveel in 2006, and is responsible for creating and advancing the corporate strategy and vision of the business. He directly oversees the technology and operations departments. Under his guidance, Reveel successfully acquired a technology partner and is now the industry leader in machine learning technology. Prior to co-founding Reveel, Dunham served in several sales roles at DHL. He quickly became a top producer and remained in the top 1% of nationwide sales throughout his tenure. Dunham has a Bachelor of Science in International Business from Pepperdine University. Dunham serves on the board of Entrepreneurs Organization (EO) and serves as the Orange County President. Dunham finds passion in building. Whether it's Reveels' 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, Devise 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, Vincit. Jaggi is professionally driven by tech-centric solutions that are built for a purpose. Jaggi also has an interest in philanthropy which lead me to be the 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 the last 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, flipped, or invested 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, he saw tremendous value in leveraging his expertise to help homeowners maximize the value of their homes. Revive has innovated on 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, civility, curiosity, integrity, 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 real 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 convergence 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. Sought out by 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 shrewd respect for people's 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 real estate law. The firm and its partners specialize in building relationships through concierge support, where their world aims to literally and figuratively revolve around their clients. Revolve Law Group 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 song 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 in a row. Only 7% of recipients have achieved this distinction. Rhythm was 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 model. 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 services to the owner and the asset. Combs 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 with oversight of 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 United States. Her career started as medical record department director at Coast Plaza Hospital. She also owned a medical dictation 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 Hospice Care Corp, the business posted a revenue growth of 150% since the business acquisition in 2018.

**Scarlet Kitchen & Lounge, Rancho Mission Viejo**

Paige Riordan, Chef-Owner

As executive chef and owner of Scarlet Kitchen & Lounge in Rancho Mission Viejo, Paige Riordan 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 Riordan has cooked in some of New York's most prestigious restaurants including Reynard at The Wythe, widely recognized for bringing farm-to-table cuisine to New York City. 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, Riordan was a professional dancer and choreographer. For several years, she owned a dance company that performed all over New York called Scarlet Fever, which inspired the name of the restaurant. Today, Riordan takes to a new stage as Chef-Owner of Scarlet Kitchen & Lounge.

**SCGWest Development, Irvine**

Brandon Lehman, Co-Founder & Partner

Brandon Lehman, with his engineering background, passion for real estate and the building industry, co-founded SCGWest Development in 2012. Lehman's process implementation driven background has helped create the proven formula of synchronizing 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 builds and large scale interior renovations, to eventually entering the industry of commercial real estate development.

**SCS, Costa Mesa**

James Schiefer, Founder & CEO

Schiefer Media was founded in 1985 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 Schiefer Media to digital channels, helping many of those same initial clients like Mothers Polish and Edelbrock understand how to use new technologies and digital channels to drive new forms of marketing. From only three people and \$1.8M in revenue from those early days, James went on to merge the media 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



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technology innovation, scale, and growth to over \$70M in revenue and 105 employees by the end of 2021, making SCS Orange County's largest independent marketing agency not held by a holding company or brand. Through that transformation James has focused on organic growth, an acquisition strategy that has folded two other agencies (Fuel in Ottawa, Canada and Swarm in Atlanta), and has developed OTT and content platforms like Torque.tv (which went on to become Motor Trend platform for Discovery Networks) and The Life of Endless Summers. SCS today, headquartered in Orange County, with national accounts including Vans, Discovery Networks, Black+Decker, Remington, Aaron's, and Warner Bros. is poised to become a significant marketing services provider around the world.

SetSchedule, Irvine*Roy Dekel, CEO*

Roy Dekel is CEO and co-founder of SetSchedule. Dekel's accomplishments have been vast in both the real estate and technology industries. After the military, he moved to the United States to begin his sales career selling vacuums door-to-door, ultimately creating a team and becoming the #1 sales team of the company. From there, he began investing in real estate properties leading him to what would ultimately be the inception of SetSchedule. As the founding partner of SetSchedule, Dekel has grown the company from a team of three to a medium-size business of 200+ employees, from all around the world, and a user base of 35,000+ clients in five years. Under his leadership, SetSchedule has been recognized by Inc. Magazine as a fastest growing company since 2019, ranking 196th overall in the US. His vision is what has led the company to develop the highly successful SetSchedule 3.0 - For the Pro in You application recently launched. Thanks to Dekel's leadership, SetSchedule has surpassed \$3.5 billion of transactions between real estate agents and home owners and shoppers. His continuing mentorship has helped key figures of the SetSchedule team grow into executive leadership.

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

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 president and CEO, Anoosheh Oskouian directs the corporate strategy for engineering, product development, sales, and fabrication. She believes there is a balance between keeping the manufacturing industry alive and keeping the air and environment clean. As a leader in the industry, she is a 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, Oskouian is unique within the environmental sector. For over two decades leading her global corporation to new heights, Oskouian 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.

**Smart Cups, Mission Viejo***Chris Kanik, CEO & Founder*

Chris Kanik is the CEO and Founder of Smart Cups, a sustainability-driven technology company responsible for the World's First Printed Beverage. Born and raised in Union City, New Jersey, Kanik's creative and entrepreneurial spirit can be directly attributed to being the first generation born of immigrant parents. Having experienced first-hand the struggles and inequalities that exist among socio-economic classes, Kanik has always been drawn to disrupting the status quo and designing better solutions to systems. Kanik officially launched Smart Cups and The World's First Printed Beverage in December 2017 from their 23,000 sq. ft facility in Mission Viejo, California. Their first offering, Smart Cups Energy Drinks, was a proof of concept for Smart Cups Technology, which has never existed before.

**Spinnaker Investment Group, Newport Beach***Joe Stapleton, President*

Joe Stapleton is a co-founder for Spinnaker Investment Group. In this role, he assists businesses and individuals with customized investment management, life insurance, group benefits and executive compensation solutions. As an organization in the wealth management business, Spinnaker Investment Group has positioned itself uniquely among its peer group. Through its expansive team of experts and strategic alliances, Spinnaker helps provide highly objective and competent financial, estate, business and investment planning by providing a wide range of financial products and services from the vast universe of Fee Based Investment Services, Mutual Funds, Insurance Companies and Private Asset Managers. Over the past five years, the firm has launched a number of client service innovations while expanding its staff from three to 10 professionals, relocated to larger offices, and increased assets under management from \$100 million to more than \$500 million.

**Steinberg Sports and Entertainment, Newport Beach***Leigh Steinberg, Chairman*

Leigh Steinberg, premier sports agent, entrepreneur, best-selling author, and chairman of Leigh Steinberg Sports and Entertainment Holdings, is best known for his work building athletes into stand-alone brands. He is often credited as the real-life inspiration for the Oscar-winning film Jerry Maguire. Steinberg has represented many of the most successful athletes and coaches in football, basketball, baseball, hockey, boxing, and golf, including the number one overall pick in the NFL draft for an unprecedented eight times in conjunction with 64 total first round picks. With an unrivaled history of record-setting contracts, Steinberg has secured over \$4 billion for his 300+ pro athlete clients and directed more than \$800 million to various charities around the world. Over the course of his career, he has been featured on numerous national television programs, including 60 Minutes, Larry King Live, The Today Show, Lifestyles of the Rich and Famous, and many



more. He has been profiled in a host of magazines, including Business Week, Sports Illustrated, ESPN the Magazine, People, Forbes, Playboy, GQ, and FHM.

Sterling Public Relations, Corona Del Mar*Paula Steurer, Founder & President*

Celebrating the 14th anniversary of Sterling Public Relations, Paula Steurer founded the company as a Publicity, Branding, and Marketing hybrid in 2008. Steurer's innovative vision, strategic approach, and forward-thinking philosophy have played a vital role in propelling the brands her firm represents into the spotlight. With a passion for building brand identities and her innate ability to connect, engage, and drive brands to the next level, Steurer has become a trusted authority among entrepreneurs and executives. Her refreshing perspective on the world of PR, Marketing, and Branding has positioned her as a keynote speaker and workshop leader for nationally recognized brands such as Mindbody, Vizio, and Oracle. Through her leadership, Sterling Public Relations has become the in-demand firm for brands throughout California and North Texas who desire a competitive edge. The firm is designed for those who are ready to reimagine, reconnect, and reignite their brand strategy, messaging, and PR efforts.

**Super Renders Farm, Santa Ana***Harrison Ta, Founder & CEO*

Super Renders Farm was founded in 2017 in Orange County, California, to deliver solutions to businesses and organizations with the need to process their needs in IT works including 3D services, videos, IT projects and other softwares over the cloud. Founded just two years before the COVID pandemic but Super Renders Farm remain steadfast, strong and valuable to its customers, weathering through the challenges. Up to date, Super Renders 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 upgraded 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 process from 30 days to 1 hour, 2 days to 10 minutes and more. Super Renders Farm, 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 delivered, respectful business/workplace interactions, embracing business strategies to move upwardly, despite the pandemic.

**TALG - The Amin Law Group, Irvine***Ismail Amin, Founder & Partner*

Ismail Amin is a multi-jurisdictional practitioner 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 Fortune 500 companies and mid-sized privately held companies in diverse fields such as healthcare, biologics, biotechnology, 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. Committed to 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 operations, PatientPop provides technology to support practice growth. 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 Scour, 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 ago, it reflects his blend 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 countless firms 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; Vertafore, Goodwill, Wells Fargo, AARP, St. Joseph Health, GE, Washington Mutual, Pentel, American Express, Microsoft, King's Hawaiian Bread, Western Digital (WDTV), Google, YouTube, Epson, National University, McDonald's HappyMeal.com, Experian, 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.



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The Steadfast Group, Corona Del Mar*Bernadette Peterson, President & CEO*

Bernadette A. Peterson oversees the strategic direction and overall operations of The Steadfast Group. She works on behalf of individuals and both public and private companies that range from small start-ups to large, multi-national corporations. She provides accounting and consulting services including accounting support, process improvement/internal controls, budgeting/forecasting, Sarbanes-Oxley compliance, and outsourced Controller and CFO services. Peterson's expertise covers numerous industries, including manufacturing, wholesale distribution, retail, real estate, technology, biotech/healthcare, and specialized services. Prior to forming Steadfast, she spent several years with Ernst & Young in the Assurance and Advisory Business Services group. During that time, she was selected nationally to serve on the Beta Alpha Psi's Board of Directors.

**The Zandbergen Group, Laguna Beach***Letitia Berbaum, Partner & COO*

Letitia Berbaum is paving the way for future generations of female financial advisors. Through innovative strategies, Berbaum is able to help her clientele become financially fit so that they can thrive personally and professionally. As partner and COO of The Zandbergen Group, Berbaum specializes in wealth management, asset transfer strategies for high net worth individuals and multi-generational families, and full-service strategic planning for business owners - from those seeking an entrepreneurial framework to those exploring an exit plan. Berbaum has been recognized as an outstanding wealth manager in several publications and has been named as an Orange County Five-Star Wealth Manager for five consecutive years. She has earned the Accredited Investment Fiduciary® (AIF®) designation and holds a Series 66 securities registration, as well as Long Term Care Insurance, Life & Health, and Insurance licenses. Additionally, Berbaum expertise has been featured by Forbes Business Council.

**The Zandbergen Group, Laguna Beach***Bart Zandbergen, Founder & CEO*

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 namesake 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 in Denver, Colorado, as well as his Life/Health/Disability Insurance license and is a Certified Divorce Financial Analyst. Now in its fourth year of production, Zandbergen is also the podcast host behind The Zandbergen Report. His podcast show features commentary on the world of finance and investments as well as interviews with some of Orange County's hottest entrepreneurs, philanthropic leaders, and industry innovators.

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

Randy Barth founded Think Together in 1997 in Santa Ana, California, recognizing the need for a place that keeps kids safe and learning. He invested his family's personal funds and bootstrapped the organization to expand throughout Orange County and across the state. Since inception, Barth has led the scale-up of the organization to exceed \$100 million in annual revenue and employs more than 2,400 staff throughout the state. Bolstered by an investment of \$5 billion in Expanded Learning by the state of California, Think Together is preparing to hire 4,000 staff to grow to \$250 million in revenue and triple the number of students served annually to more than 500,000. Barth also recently acquired Orenda Education, an organization that for 25 years has provided systems change for schools and districts. In December of 2021, Orenda was awarded a \$4 million Education Innovation and Research (EIR) grant by the U.S. Department of Education to develop software tools to help scale their impact.

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

Jeff Motske is the author of The Couple's Guide to Financial Compatibility, an accomplished executive, radio personality and host of The Jeff Motske Show, and financial advisor. More importantly, he is a believer in the power of everyday Americans and is committed to helping them reach financial independence. He began his career in retirement planning out of college, and as he watched the landscape of financial services, Motske saw how disconnected most of his industry was from the real-life issues of Americans. In partnership with Kevin Mackintosh, he created Trilogy Financial in 1999 to bring together resources on financial, tax and estate planning for middle-class Americans. Motske started Trilogy with the vision of improving the industry, a vision that is still guiding him today. In 2016, he spearheaded the creation of Trilogy Capital, an RIA asset management firm that provides investment solutions for everyday Americans. He is also committed to creating the next generation of financial advisors, which can be seen in Trilogy's development of multi-generation.

**University of California Irvine and Bone-Rad Therapeutics Inc., Corona Del Mar***Joyce Keyak, Professor at UCI School of Medicine, Department of Radiological Sciences & Co-Inventor Bone-Rad*

Joyce Keyak, Ph.D., is a professor at the University of California, Irvine School of Medicine Department of Radiological Sciences and the co-inventor of Spine-Rad® Brachytherapy Bone Cement and co-founder of Bone-Rad Therapeutics Inc. With her co-inventors, Keyak was granted \$760,000 from the Department of Defense Breast Cancer Research Program to develop procedures and devices. With over 25 years of experience at UCI, Keyak is up to the job. She and her team recently completed an in vivo sheep study demonstrating safety of brachytherapy cement. Keyak



and her team strive to bring this treatment to patients whose cancer has spread to bone of the spine. Holding positions UCI's Departments of Radiological Sciences, Orthopedic Surgery, Biomedical Engineering and Mechanical and Aerospace Engineering, Keyak's expertise far exceeds one department or area of medicine. As a nominee for the 2021 UCI Innovator of the Year Award, 2017 Distinguished Investigator at the Academy for Radiology and Biomedical Imaging Research, named #10 in IMAGE magazine's 2009 "25 Most Influential in Radiology" and more, Dr. Keyak is an accomplished professional and innovator in numerous fields.

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 founder and director of UC Irvine's esports program, the first of its kind at a public university. Deppe is responsible for the strategic planning, implementation and development of UC Irvine's highly coveted esports program, which he founded in 2016. Prior to working at UCI, Deppe held a position as UCLA's Event Manager, where he managed logistics, budgeting and execution of prominent entertainment industry and UCLA events. He then joined UC Irvine as their Assistant Director of Student Government and Student Media. In this role, he expertly led multi-faceted teams, facilitated strategic communications for major UCI events and conducted contract negotiations for external and internal partners. A trailblazer within esports education, Deppe continues to champion student voices, be an advocate for diversity and inclusion within UCI's esports program and sits on the Board of Directors for the Riot Scholastic Association of America. Today, Deppe is working to expand esports programming across schools nationwide with the goal of establishing esports as a recognized program alongside other collegiate sport.

**US Alliance Group, Rancho Santa Margarita***Fadi Cheikha, CEO*

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 struggles 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 six times on the Inc. 500/5000 lists 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 custom conversion parts store in 2019 from the garage of his parent's house after a near-death motorcycle accident. He quickly grew into a 1,500 square foot warehouse in Fountain Valley. Then to a 4,000 square foot warehouse in Costa Mesa and now to a 26,000 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 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-nine 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 expertise in business development, financing, marketing, and clinical affairs in therapeutic, diagnostic, and monitoring medical devices. In 2021, as CEO of Vibrato Medical, noninvasive wearable medical device company for perfusion disorders, she has raised \$4 million Series A round, received two non-dilutive grants from National Institute of Health for \$1.8 million, recruited experienced and motivated management team, developed a prototype technology into a clinical product, and received regulatory approvals to use the technology in clinical trial setting.

**Viewsonic Americas, Brea***Jeff Volpe, President*

Jeff Volpe has had the pleasure of engaging, learning and managing in many business disciplines including executive management, customer and channel building, brand management, operations, public relations, and product marketing. He is also proud to be recognized as an industry expert on technology channels of distribution from reseller networks to retail. Hard work, vision and execution have formed the foundation for achieving success throughout his career. He truly enjoys the challenges and achievements associated with executive leadership, particularly in people development, driving change, process improvement and growth. Additional roles with ViewSonic have included vice president of marketing, Americas; vice president of sales Americas; vice president of the Business Products Division; and senior director for Canada. Volpe came to ViewSonic in January 1996 from Citizen America Corporation, where he was the Canadian regional sales manager responsible for the sales and customer management of computer printer products. Prior to that, he was manager of Indirect Sales Channels for Epson Canada Limited.



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Vincit, Irvine*Villie Houttu, CEO*

Villie Houttu is the founder and CEO of Vincit USA. Previously, he helped Vincit Finland to reach 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 Greater Irvine Chamber of Commerce.

**Vivera Pharmaceuticals, Newport Beach***Paul Edalat, Chairman of the Board & CEO*

As a founding partner, CEO, and chairman of Vivera 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 upend 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 Vivera'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, 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.

**Volonic, Newport Beach***Shawn Dougherty, Founder & CEO*

In today's fast moving world, the ability to identify a problem, formulate a solution and bring a product to market with explosive growth is what trailblazers are made of. Shawn Dougherty is a trailblazer. With her innovative talent and creativity she co-founded mophie, the #1 selling battery case manufacturer for mobile devices in North America. With Dougherty as COO and founder, mophie created the first juice pack battery case for the first generation iPhone in North America and built an exclusive partnership with Apple. Dougherty created a solid business structure at mophie, allowing the company to thrive and withstand rapid growth, both in the U.S. and



internationally. She is a master negotiator and raised millions of dollars in multiple rounds of capital and debt facilities. Under her guidance and strategic vision, the company grew from three employees in a barn in Michigan to a multimillion dollar business with 300+ employees in five facilities in California, Michigan, China, Hong Kong and Amsterdam. Today, Dougherty is Founder and CEO of Volonic, launched in 2019. Volonic is a consumer electronics brand redefining luxury lifestyle by fusing art and technology to create an experience that has never been seen before. Their flagship product, the Volonic Valet 3, is an elegant position-free wireless charging solution that can be completely customized to match your unique lifestyle using a variety of beautiful high-end materials.

Wahoo's 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 Wahoo's Fish Taco, responsible for the expansion and development of what has become one of the most iconic fast-casual restaurant brands in the nation. Founded in 1988 in Costa Mesa by Lee and his two brothers, Wahoo's 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 into workforce 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.

**Warner**

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



1105 Media / **Rajeev Kapur**
ADYA and Spice Girl Sauces /
Shachi Mehra
Alignment Healthcare / **John Kao**
American Lending Center & Sunstone
Management / **John Shen**
AO / **Jack Selman**
Apex Golf Carts / **Caius Griu**
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**
BioPhotas Inc. / **Patrick Johnson**
Blue C / **Eric Morley**
Branded Group / **Michael Kurland**
Brevie / **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**
Check Capital Management /
Steven Check
Codebreaker Technologies / **Cheri Tree**
David Meltzer Enterprises / **David Meltzer**
Designing Women of Orange County /
Sabrina Phillips
Ephesoft / **Ike Kavas**
e-Plan Inc. / **Michael Chegini**
Fable & Spirit, Dublin 4 Gastropub,
Wineworks For Everyone /
Darren & Jean Coyle
Gallegos United / **John Gallegos**
Gilson Daub / **Brent 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 / **Neel Grover**
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Jacqueline Thompson
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M&R Engineering / **Natalia Sephton**
Managed Direct Response / **Pat Mercuri**
Manna Kadar Beauty Inc. / **Manna Kadar**
Mission Loans / **Chad Smith**
Mitrevi Restaurant Group LLC (Zesty Olive
Mediterranean Grill) / **Borislav Mitrev**
Mountain Mike's Pizza & Juice It Up! /
Chris Britt & Ed St. Geme
Moxxe PR Inc. / **Mona Shah**
Mutt's / **Alex & Meghan Murray**
N2 Funding / **Shabi Asghar**
Old Brea Chop House / **Tony Fasulo**
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Rhythm / **Craig Cooke**
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SCGWest Development / **Brandon Lehman**
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Steinberg Sports and Entertainment /
Leigh Steinberg
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The Zandbergen Group / **Letitia Berbaum**
Think Together / **Randy Barth**
UCI & Bone-Rad Therapeutics, Inc. /
Joyce Keyak
UCI, Esports / **Mark Deppe**
US Alliance Group / **Fadi Cheikha**
Van Speed Shop / **Duran Morley**
Vibrato Medical / **Juliana Elstad**
Viewsonic Corporation / **Jeff Volpe**
Vincit / **Ville Houttu**
Vivera Pharmaceuticals / **Paul Edalat**
Volonic / **Shawn Dougherty**
Wahoo's Fish Taco, Tableau Kitchen + Bar,
Toast Kitchen + Bakery, Fill's Bakeshop /
Ed Lee
Waterford Property Company /
John Drachman & Sean Rawson

Luncheon & Awards Program

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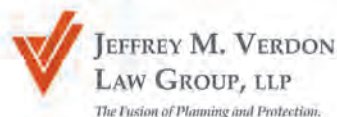
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