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Innovative Ways to Achieve an Exit

by Parker A. Schweich

A successful exit is a goal that many innovative companies have in common. There are occasions, however, when a traditional mergers and acquisitions, or M&A, transaction is unavailable no matter how innovative the company may be. In these circumstances, if a company is willing to consider less traditional alternatives, a successful exit can still be achievable.

1 + 1 = 3

If management is aware of another company in its industry with which it could combine, the synergies may increase the value of the combined company beyond the sum of its parts and make it a more attractive candidate for being acquired in a traditional M&A transaction. Private equity firms do this quite often, buying two or more similar companies, combining those portfolio companies and selling off the combined company for an even higher valuation. Innovative companies don't necessarily have to wait for a private equity firm to come knocking on their door; they could follow the same structure themselves. Often times, larger companies (and sometimes private equity firms) are divesting business units or assets, or spinning off companies, and this could be another source of opportunity for executing on this strategy. In many cases, this structure can be achieved in an all-stock deal in which the owners of each company receive stock in the new combined company. In instances, however, where one of the parties wants cash from the transaction, then achieving this structure will require finding a financing source. Companies that have had trouble raising capital in the past may be surprised to learn that financing may be more readily available for a combined business.

Option Deals

Sometimes an innovative company has what it takes to attract the attention of potential buyers, but isn't yet acquisition ready in the eyes of those suitors. In this case, the potential buyer may be willing to pay an option fee in return for an exclusive right to acquire the innovative company in the future for a fixed price during an option period on pre-negotiated terms and conditions. The upfront option fee can be a welcome infusion of cash without dilution that the innovative company may need to build its business to the point where it will be an attractive acquisition for the buyer. The structure also may include the parties entering into a joint development agreement to help the innovative company further develop its products, technologies or services which in turn may further enhance the innovative company's value proposition to the buyer. The strategic insight and assistance that a potential buyer can provide throughout the option period can be priceless.

ESOPs and MBOs

For a founder of a company that has positive cash flow but is, for whatever reason, an unattractive M&A candidate, an employee stock ownership plan, or ESOP, and/or a management buyout, or MBO, transaction may provide the founder with his or her desired liquidity while preserving a future for the company. In an ESOP transaction, the company creates an ESOP to which the founder sells his or her shares of the company at fair market value in exchange for cash (if outside financing is available from an ESOP sponsor) or for an interest-bearing seller promissory note. The ESOP provides ownership opportunities to the company's employees and, depending on the structure, the ESOP transaction can provide certain tax benefits to the selling owner. In an MBO transaction, certain key members of management

buy the company from the founder either with their own cash or by borrowing the purchase price from an outside source or from the founder through an interest-bearing seller promissory note. While ESOPs and MBOs are not appropriate for every company, they sometimes may be the only available exit strategy if the company cannot attract a third party buyer.

Bridging Valuation Gaps

Sometimes parties reach the stage of negotiating a letter of intent for a traditional M&A transaction, but can't quite agree on terms because the buyer isn't willing or is unable to pay the purchase price that the seller wants. In these situations, creative negotiations can help bridge this valuation gap between the parties to move the deal across the finish line. Properly negotiated earnout structures that are realistically achievable can provide the seller with the total consideration it is seeking while providing the buyer with an incentive tool to keep the seller's team motivated to grow the business post-acquisition. Similarly, a properly negotiated equity rollover structure, where the seller continues to have a stake in the future value of the sold business through retaining some modest amount of equity ownership post-acquisition, can have the same impact and may ultimately represent an even higher value for the seller in a future sale of the business than in the first.

Licensing Arrangements

While not considered a true exit, entering into certain kinds of licensing arrangements could provide cash to an innovative company while being structured in such a way that the innovative company would not have to play an active role in bringing the products to market or in other aspects of the venture. In a way, these arrangements sit somewhere between an M&A transaction and actively operating a business. In certain license arrangements, the cash consideration could take the form of a royalty stream equal to a percentage of net sales of the products that the other party develops using the innovative company's intellectual property. These royalty streams in turn could be valuable enough that the innovative company may be able to sell the future royalty stream itself to a royalty monetization firm.

Seek Advice

If a traditional M&A transaction is not an option, there are still a number of different ways to achieve a successful exit if one is willing to take a creative approach. Not every deal structure is right for every company, and less traditional deal structures often can be quite complex. It is imperative that any company embarking on such a path seeks out experienced counsel and other advisors to guide them appropriately.

Parker Schweich is a shareholder in Stradling's Corporate and Securities practice group and is a member of the firm's Mergers & Acquisitions, Public Company and Emerging Growth practice groups. Parker helps clients raise capital, invest in or acquire businesses, achieve successful exits and navigate the complexities of corporate and securities laws.





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The AI Revolution: How Tech Companies Can Use AI to Scale Up

By David Yasukochi, Octavio Dossi Neto, and Aftab Jamil, global leaders of BDO's Technology practice

Tech industry leaders find themselves in the precarious position of managing financial and operational risks while investing in innovation for the business to succeed long-term. Atop the list of technologies anticipated to cause the greatest industry disruption in the near future sits artificial intelligence (AI), with 35 percent of tech CFOs surveyed in BDO's 2019 Technology Outlook Survey looking to this emerging technology to help scale their business.

But while AI is anticipated to become as commonplace as the Internet and email, before jumping into emerging opportunities, you will need to determine exactly how you would incorporate it into your business strategy and operations, and whether it makes sense for you to do so now, or later.

Scale Up: Now—or Never?

According to our Technology Outlook Survey, scaling the business is the top priority among tech CFOs. Scaling means anticipating opportunities and leveraging them to expand the potential of your organization. To that end, AI offers a great deal of opportunity for pushing the bounds of operational excellence—especially so for tech companies who are already on the cusp of innovation, reimagining the ways the world connects and engages with their customers. Other top technology leaders cite growing concerns around product or service innovation, data privacy, digital transformation and regulatory compliance—all issues that could be potentially better managed through a robust AI program.

From data creation and management, to cyber and fraud threats, to employee recruitment and retention, it behooves technology leaders to identify where and how to augment internal capabilities with AI—or risk losing your relevance.

Here are a few AI use cases that have real potential to impact the bottom line:

Managing Big Data

The right system will be able to take large quantities of data and scale it to your business to make it manageable—and meaningful. Tasks such as collecting communications data from calls and emails and redistributing them to usable records, responding to customer concerns with natural language processing, identifying gaps in information or flagging issues in the supply chain to determine actionable endeavors are just a few functions AI could serve.

Detecting and Thwarting Cyberattacks

Through the monitoring of vast amounts of data, AI can be applied to prevent fraud and mitigate cybersecurity threats. By analyzing revenues or simple expense claims, AI technology can flag cases that are suspected of being inconsistent (or fraudulent). In the case of a ride-sharing company, AI facial recognition tech has been applied and scaled to its drivers to prevent fraud in its ride-hailing services. On the downside, AI can aid cyberattackers by providing automated hacks that learn more about their target's vulnerabilities over time. Bloomberg reported earlier this year that Microsoft, Google and Amazon had incorporated machine learning algorithms to engage with ever-expanding and adapting hacker capabilities and successfully thwarted attempts to break into their systems.

Employee Recruitment

Most tech companies expect to increase their number of employees this year, and the Bureau of Labor Statistics (BLS) projects a 13 percent increase in computer and information technology jobs from 2016 to 2026—that will add an additional 557,100 new positions. AI can streamline the recruitment process for HR teams by automatically screening resumes, locating desirable candidates, scheduling interview appointments and automating the onboarding process through chatbot services.

Barriers to Adoption

Robots are Tools, Not Friends

A common concern of AI is that it will replace human employees. While it is

true that robotic process automation (RPA) does reduce time-intensive work tasks, it does *not* mean that robots will replace human workers. Instead, RPA provides an opportunity to reserve employees' time for "higher-value" tasks such as projects that require critical thinking, rather than routine or tedious tasks that can be automated through AI.

Scale Your Scaling

The prevalence of legacy systems runs a real risk of undermining the full potential of AI implementation. A valuable first step on the path to full AI implementation then may be to upgrade an old system with cloud computing, which would assist with managing large quantities of data, while adding transparency to digital decision-making.

Before going full-bore on a large-scale AI initiative, consider a pilot project first. That way, the risks are lower if you do not have an ideal first-run; lessons can be learned and strategy tweaked on the next try. Don't forget to plan for a trial run of the AI system before scaling your whole business with it. A scalable initiative, alongside the right guidance, is crucial for successful implementation.

Transcending IT

Making AI work for your company involves creating a data-driven culture company-wide, not just in the IT department. This means team cohesion will be of utmost importance in the successful implementation of AI. You need support from leadership, a strong partnership with AI experts, human resources to be aware of AI capabilities and recruit accordingly, and an investment in training for augmentation. A robust data governance program that directs how data is collected and managed within an organization is also key to AI implementation. **Check Yourself Before You AI Yourself**

It's clear that AI has the potential to help organizations scale up. Here are some questions to explore before starting down the road to AI implementation:

1. What is the scope of the problem I am trying to solve?
2. How vulnerable is my company's data?
3. Are our legacy systems slowing us down?
4. Can I scale a trial run?
5. Do I have the other executives on board?
6. Will this system augment my team's abilities?
7. Do I need to adjust legal overview for data and privacy compliance?

BDO's 2019 Middle Market Digital Transformation Survey found that 39 percent of companies are currently deploying AI technology, while another 45 percent are considering following suit. Now is the time to begin the hard work of guiding your business to take the next step in its digital transformation.

For more information contact us at (714) 957-3200 or email dyasukochi@bdo.com and odossineto@bdo.com.

About The Technology Practice at BDO USA, LLP

BDO has been a valued business advisor to technology companies for over 100 years. The firm works with a wide variety of technology clients, ranging from multinational Fortune 500 corporations to more entrepreneurial businesses, on myriad accounting, tax and other financial issues. For more information, visit: www.bdo.com/technology

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Kristen McCarthy, Assurance Managing Partner
714-668-7338 / kmccarthy@bdo.com

Tammy Hannan, Tax Managing Partner
714-668-7341 / thannan@bdo.com

BDO, 600 Anton Boulevard, Suite 500, Costa Mesa, CA 92626

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Making the Online Mortgage Application Process Simpler

In today's world where moving fast is the norm, you may think that finding the time to apply for a home loan is about as likely as finding the time to catch up on emails or clean out your jam-packed storage room.

The good news is the online mortgage application process can be a lot simpler and less time-consuming than you think.

Back in the day, when interest rates were 15-plus percent (before online banking was even a thing), getting a mortgage loan required a trip to the bank for a conversation with your lender and a long slog to gather copies of paystubs, tax documents and bank statements.

All that documentation was for good reason and is still needed – it shows you have the ability to repay your loan and are assuming a financial obligation you can manage. But mortgage companies are innovating to find much easier ways for consumers to apply and provide the needed information.

"Consumers today expect that most anything can be accomplished with a few taps on their mobile devices," says Perry Hilzendeger, head of Wells Fargo's Home Lending Retail division. "We're aligning our online mortgage application experience to that expectation."

Imagine this: you're perusing real estate sites and find a property you like. You call the real estate agent and get an appointment to see it tomorrow, but it's a competitive market so you want to be ready with your loan so you can make an offer. You pull out your phone and select a mortgage lender, such as Wells Fargo.

Wells Fargo has an online mortgage application, and because you're already an online banking customer, you can log in and be presented your profile information, checking, savings and brokerage account balances and other account information you have with the bank to help you move quickly through the application process. Your application is quickly in, and you're ready to house hunt! There were no paper documents to track down and you never left your kitchen table.



It's important to note that even as financial institutions innovate and tap into digital options that makes the lending process more efficient for consumers, that doesn't mean consumers only have digital options. They still have options for how they interact with their mortgage company and access to great guidance.

Companies like Wells Fargo are working to provide consumers all the options – if you want to go into a banking branch, talk face-to-face with your home mortgage consultant and fill out an application right there, that's an option. If you'd rather do it all on the phone, you can. If you have a lot of questions and need guidance around the different products and services that might work for your situation, you can get that, too.

As you pick a lender, here's how to ensure your homebuying experience can be smooth and easy:

- Make sure your lender has a robust online mortgage application that allows you to easily apply and provide information.
- Just because you can do it all online, doesn't mean you want to. Shop around for a full-service provider who can offer guidance throughout the application process.
- Be sure you can apply for the loan when, where and how you want. Your mortgage company should meet you where you are. If you want a face-to-face conversation with a mortgage consultant, your mortgage company should provide that.

If you want to do it all online, you should have that choice, too.

- Know that not all homebuying situations are alike, and complicated financial situations may require a little more legwork. Work with a trusted lender who will take the time to guide you through the application process.
- Look for a lender who has a breadth of products and services and can offer the right options for your situation, as well as the convenience of digital tools.

"Mortgage lending has come a long way from the days of fax machines and pushing paper," says Hilzendeger. "Take time to find a lender who is accessible in the way you want, committed to simplifying the online mortgage application experience and can guide you down the right home financing path for you."

Keith Kobata, Orange County Region President, Wells Fargo

Keith Kobata is the Orange County Region President, managing 79 Wells Fargo branches with over 1,200 team members and \$14B in deposits. His team is responsible for building relationships with existing and perspective customers by leveraging and optimizing Wells Fargo's products and services to help our customers succeed financially.

A 23-year banking veteran, Kobata was most recently the Area President for the Greater Orange County division where he was responsible for overseeing Wells Fargo's Community Banking throughout North Orange




He currently resides in Irvine, Calif.

County and Long Beach. Prior to his role as Area President, Kobata held various roles such as banker, branch manager and district manager.

Kobata is actively involved in community events and nonprofits and serves on the board of directors for the United Way Orange County and the Orange County Business Council.

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How to Manage the New Demand of Landing a Large Contract

By City National Bank

Your small business is running smoothly, fulfilling customer orders, collecting accounts receivable and paying suppliers and employees with little or no hassle. And now you're in the running for a major contract that could mark a milestone in your company's development.

Landing that major contract may sound like the moment you've been waiting for, but before you seal the deal, you need to ask some important questions:

- Are you and your business ready?
- Do you have the production capacity and workforce to handle the demand, and adequate funds to invest in whatever resources you may need?
- Is your factory or office big enough to support this major increase in demand?

"New growth opportunities are not usually thought of as something that can hurt a business, but if a leadership team does not know how to handle the new contract, it can leave them worse off than they were before the new business," said Jason Burt, business coach and owner of Michigan-based Evolve Holdings Inc.

Make Sure It Fits your Company

Managing the new demand from a significant contract takes planning, and likely depends on your industry and specific business. The best time to assess your ability to handle the job, and to prepare for it, is before you win the big contract.

"Evaluate whether the contract makes sense for the business. Many small businesses get so excited about the financial possibilities of a large contract, they forget to ask the question of whether they should accept it or not," Burt said.

"Bringing on a contract that doesn't fit your core competency or is not part of planned growth can actually hurt your business more than it helps. Businesses must have a clear strategy and vision for their company," he said. That doesn't mean a company will never shift direction, he added, "but make sure you are doing it with the impact understood."

Karen Kiang, a City National Bank credit manager, suggests that business owners review details and logistics before accepting any new contracts to make sure they truly will be beneficial.

Will the contract generate extra profit — or will you be scrambling just to keep up with demand? Will it boost economies of scale — or require you to source more working capital and secure new equipment?

"Businesses need to really identify whether or not this is going to improve their profit margins, or actually contract them," said Kiang.

It's also important to consider exactly how big you want your business to become and how much capital you will need to get there.

"You don't want to take on too much when you know you don't have the capacity," said Kiang. "The worst thing a business can do is overestimate and then not achieve what they intended to with the first order," ruining the customer relationship.

Sean Steichen, a business banking relationship manager at City National Bank, recommends that a business look at its resources, assessing its headcount and capacity, and then determine what it needs to do to meet a big new demand. That could mean hiring more employees, adding new equipment to automate processes, and/or purchasing inventory and raw materials.

Small businesses sometimes get into trouble when they jump into enticing contracts too quickly, then find themselves scrambling to make them work, said Steichen, who noted that such missteps can be avoided with expert advice and support from a team of professionals, including an attorney, a CPA and a banker.

"A lot of times you'll see businesses are very ambitious when they get new projects," said Steichen. "It's important for businesses to manage their growth and have sustainable growth," rather than expanding too fast.

Plan In Advance

Allen Ilano, senior vice president and regional manager for business banking at City National Bank, noted that bankers should be consulted up front, so they can help business owners anticipate that increased demand in advance. Unfortunately, that doesn't always happen.

For example, an engineering firm might need a short-term loan to start a new development project, but often, "we get these requests after the fact, where they're scrambling for capital," he noted.

If the new contract makes sense, Burt suggests that you create a plan — and it might not include handling all the new demand by yourself.

"Not all new business has to be brought internally 100 percent for success. If you are thinking long term, this contract should only be a stepping stone for potential future business," Burt said. "I often talk to companies about minimizing the risk — and yes, margin — by partnering with other companies to help meet the new contract needs."

Burt also urges business owners not to jump in right away.

"I tend to be a risk-taker, but I always caution my clients about the amount of risk to take on during fast-growth periods. Spending lots of money on new equipment for capacity, or hiring lots of new employees, may seem like the only way to accomplish the goals in front of you, but there are other options," he said.

"Overtime is not fun, but it can be a good short-term countermeasure to handle a capacity constraint. Outsource some activities where it makes sense. Using other companies to open up capacity internally is another great way to meet the needs long term. Think of how your company will look after the contract has come through your organization," Burt said. "You don't want to burden your company with extra expenses if things move back to normal."

While submitting a bid or negotiating with a potential client, you might want to touch base with suppliers and staffing agencies to make sure you'll be able to have materials and people in place to ramp up production if you secure the contract.

		
Allen Ilano Senior Vice President Regional Business Banking City National Bank (949) 223-4552 Allen.Ilano@cnb.com	Karen Kiang Senior Vice President Credit Manager City National Bank (949) 862-7030 Karen.Kiang@cnb.com	Sean Steichen Vice President Business Banking City National Bank (714) 228-7718 Sean.Steichen@cnb.com

The UPS Store and Inc. cite several areas to evaluate when pursuing major clients, suggesting you consider and solve any potential problems first. Besides fulfillment, they recommended that you look at your accounting procedures, HR operations, customer service and training, among other areas.

Once a business calculates what it needs to do to fulfill a new contract, the owner can explore the company's options, including managing any capital needs.

Your company's specific requirements will determine what type of financing to seek. A medical or technology company might decide to lease equipment, while a wholesale distributor would likely look at a term loan to expand inventory, according to City National Bank's Steichen. A business owner might benefit from an equipment loan.

Banks prefer to see business owners seek a line of credit before they might need it, rather than waiting until they're "in the hole," said Ilano. "Even if you don't have to use it today, it's good to have it in place for tomorrow."

Perform Well

Once you've landed the contract, it's important to "execute at the highest level," Burt said.

"You just won this great opportunity. Make sure the new client is happy at all costs. If this is a big opportunity for your organization, and this is a part of the long-term growth of the company, then treat it that way," he said.

"Obviously all companies must worry about profitability, but if this is about long-term growth, don't be so focused on short-term cost and margin that it forces you to perform poorly," Burt said. "Always meet the customer's expectations first, then worry about how to increase your profitability."

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improved diagnostic techniques that allow physicians to detect problems sooner.

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Innovation in Philanthropy: Orange County United Way and Salesforce Team Up to Revolutionize Workplace Giving

Are you ready to take your workplace giving to a new level?

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By leveraging the most innovative Salesforce technology and the expertise of United Way, the leader in workplace giving and community impact, Philanthropy Cloud gives every employee access to the best opportunities to help transform their communities. This is a new digital marketplace where employees and causes can engage with each other—featuring volunteer opportunities, fundraising events, corporate workplace giving campaigns and more.

Making an Impact Matters to Your Employees

Today's employees are socially conscious, and more engaged than ever with their local communities and the world at large. New generations of the workforce expect the companies they work for to prioritize giving back and be engaged in meaningful corporate social responsibility campaigns. The 2018 Charitable Giving Statistics from Nonprofit Source found that 88% of millennials find their job more fulfilling when they have opportunities to make a positive impact on society and the environment, and employees who did engage in corporate giving programs have 75% longer tenures with the company.

Two Worlds Unite: Technology and Philanthropy

Philanthropy Cloud provides an end-to-end solution that makes managing your workplace giving and employee volunteering engagement easier than ever—it's the best in technology being harnessed for good.

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- Grant management
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- Real-time, automated impact reporting
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- Mapping of individual philanthropy goals against friends, teams and corporate goals
- Personalized donor profiles complete with tailored giving recommendations
- Tools for assessing total personal, community and company impact
- Artificial intelligence software delivers personal, relevant content per user

With Philanthropy Cloud, corporate partners can build deeper connections with their employees and gain a holistic view of their impact right here in Orange County.

The innovative platform is driven by mission—making communities better and brighter for all. Global corporate leaders like Deloitte and Kellogg have already signed on.



A personalized donor profile gives employees a sense of ownership by enabling them to lead and drive their desired activities and contributions to the philanthropic causes they support. Plus the desktop and mobile access makes it easy for them to donate or volunteer at any time.



The Philanthropy Cloud solution brings real-time impact reporting at the individual and corporate level. Make a donation or log volunteer hours and watch your impact grow.

Personalized User Experience

The generational shift in today's workforce demands a digital platform for giving and volunteerism that includes both a desktop and mobile platform option. Philanthropy Cloud combines Salesforce's technology with an enhanced and personalized user experience, matching skills and interest with a network of credible and impactful nonprofits. It's an easy-to-use platform that, using artificial intelligence, is tailored to the individual employee. All content presented on the platform's homepage is customized to fit the message and causes of importance to the user—keeping them engaged and building an energized culture of giving. Making giving even easier for employees, Philanthropy Cloud provides easy donation via payroll deductions, cash/check, stock, or credit card.

Philanthropy Cloud Enhances Employee Engagement

By making employee engagement dramatically easier, more efficient and more effective, Philanthropy Cloud provides an unmatched solution for your team to drive real social change. Here's a look at how Philanthropy Cloud will revolutionize your employee engagement:

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- It leverages the latest in technology to simplify and personalize their experience.
- It enriches their knowledge through a recommendation engine, powered by Einstein, a Salesforce embedded and proprietary AI technology.
- It provides a personalized homepage listing their causes of interest.
- It shows an activity dashboard detailing their donation and volunteering history.

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Philanthropy Cloud inspires, connects and empowers social change.

For more information or to get a demonstration of this new, impactful giving platform, contact Orange County United Way today at Cloud@UnitedWayOC.org.



INTRODUCING

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+



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Culture of Innovation

By Dawn S. Reese, Chief Executive Officer, The Wooden Floor



When The Wooden Floor began exploring potential growth opportunities in 2015, I would ask various CEOs what they were most concerned about as they scaled their organizations. The number one answer - always keep a watch on your culture to ensure that it scales with your organization's growth plans, too. This quote from MaRS Discovery District resonated with me:

"A **culture of innovation** is an environment that supports creative thinking and advances efforts to extract economic and social value from knowledge, and, in doing so, generates new or improved products, services or processes. A healthy culture of innovation has a shared set of values and mutually reinforcing beliefs about the importance of innovation as well as an integrated pattern of behavior that supports research and innovation. A thriving culture of innovation can leverage the existing strengths of a given research and innovation ecosystem."

A culture of innovation should be at the center of each growing business, including nonprofit organizations like The Wooden Floor, through a commitment to the following:

Design-Thinking: While it is regular practice in the technology sector, nonprofits can implement the same design-thinking approach in order to develop high-impact solutions to solve some of the greatest issues related to poverty such as homelessness, hunger and the education gap. At The Wooden Floor, we regularly follow a design-thinking process which includes three steps:

1. **Empathy** - providing opportunities to listen and learn from the students and families we serve in order to create results-driven programs.
2. **Ideation** - providing an affordable way for us to generate new thoughts on programs and/or process improvements, which we can implement either incrementally, or at a larger scale.
3. **Experimentation** - what we like to call "piloting" of new projects. This provides our team with an opportunity to try something new, without the high investment of organizational resources, and at the same time creates an opportunity for learning.

Values-Based Organization: As part of a culture of innovation, in any sector, leaders need to create a codified vision, mission and values which are aligned through strategies, goals and objectives, then reviewed regularly to ensure they serve as a "north star" to your mission. Once codified, it is imperative that these are communicated throughout your entire organization. At The Wooden Floor, we took our values of: *Respect, Excellence, Community and Stewardship* to the next level. The Board of Directors and staff have evolved our values into our Guiding Principles which help us to navigate our discussions and decisions as well as define how we *carry out* our mission, in order to remain innovative. We believe our *Guiding Principles* are our differentiator, as is the way we live them out every day.

Strategic Vision: With a changing socioeconomic landscape, strategic plans are often outdated as soon as they are created. Therefore, there has been dialogue recently about the need for a formal strategic planning process. At The Wooden Floor, we believe it is crucial to set a long-term Strategic Vision, which serves as an aspirational guidepost in order to focus and innovate programs to move both our organization and our students forward. Our inspiration for a 10-year vision strategy is knowing that on day one of our students' journey with us, they make a 10-year mental commitment to complete their journeys to higher education, and we must be prepared to make a 10-year financial commitment to them. As we approach the culmination of our Strategic Vision 2010-2020---which has led to scaling our high-impact model both locally and nationally and incredible results including 15 consecutive years of 100% college enrollment for our graduates---we have already set our next Strategic Vision 2021-2031.

High Trust: *The Speed of Trust* by Stephen Covey is a must read by all leaders. At the root of the culture of innovation, high trust is integral to the design-thinking process, which is human-centered. For design-thinking to have high impact, there should be confidence among team members to be transparent, collaborative and communicative about all learnings in order for those to be fed back into the design-thinking process. The goal is to learn quickly in order to adapt and change course if needed with limited impact to internal resources. As Covey knows: *A team with high trust, leads to high performance.*

We believe when dance is used as a means of social change, innovation flourishes into courageous life-changing outcomes for the children we serve, and moves The Wooden Floor's exciting mission forward, which helps move our community forward.



Dawn S. Reese is the Chief Executive Officer of The Wooden Floor, which has received numerous awards including 2018 New York Life Foundation AIM High Afterschool Award for Middle School Programming, and featured in the Stanford Social Innovation Magazine, summer 2017. During her tenure, The Wooden Floor opened its second location in Santa Ana with a third planned, and licensed its model in Washington, DC. Reese received the 2019

Women Breaking Barriers Award from **Connected Women of Influence**, 2018 Founders Award from the **Institute for Community Impact**, the 2016 Center for Leadership Award for Innovation from **California State University Fullerton** and the 2015 Difference Makers Award for Small Nonprofit Person of the Year from the **Santa Ana Chamber of Commerce**. Dawn serves on the Board of Directors for **OneOC** where she is also the Chairperson for the Nonprofit Advisory Council (2017-2020), **Orange County Music and Dance**, and the **Santa Ana Chamber of Commerce**. She also serves on the Board of Advisors for the **Center for Leadership - Mihaylo College of Business and Economics at California State University, Fullerton**; **Institute for Community Impact**; and the **Orange County Business Council's Latino Education Attainment Committee**.

TheWoodenFloor.org

DawnSReese @DawnSReese



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THEIR NEIGHBORHOODS, OUR COMMUNITY – **AND OUR WORLD.**

JOIN US

The Wooden Floor has been forced to turn away approximately 80 percent of the children who line up to enroll in our organization due to high retention and space constraints. **We are called to pursue collaborative growth to do more for the children who need us.**

Thanks to the vision of Orange County leaders, we are on our way toward reaching our goal for the *Lift* Campaign: to raise \$27.2 million by 2020. The remarkable success of this campaign has fulfilled Phase I of our campus expansion goals to open a second location. This has provided the momentum and opportunity to change even more lives, by now raising funds for a third location of The Wooden Floor.

THIS VISION WILL BE REALIZED WITH COMMUNITY SUPPORT.

Lift

IT'S YOUR MOVE

Will you help us *lift* students out of poverty to their full potential?
Learn more at LiftCampaign.org.

Every generous gift to The Wooden Floor supports our *Lift* Campaign goals to expand our campus, grow to serve more youth, and deepen our services. Join us and other community supporters as we **answer the call together to transform the lives of young people** in low-income communities through the power of dance and access to higher education.

Founded in 1983, The Wooden Floor is one of the foremost creative youth development nonprofit organizations in the country. We transform the lives of young people in low-income communities through the power of dance and access to higher education. In Orange County and through national licensed partners, we use a long-term approach grounded in exploratory dance education to foster the confidence and gifts within each child to innovate, communicate, and collaborate – skills necessary for success in school and in life. 100 percent of students who graduate from The Wooden Floor immediately enroll in higher education. **Our students become change agents and beacons of hope within their own families, their neighborhoods, our community, and our world.**

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Attorney's Fees in "Exceptional Case" Determinations Based On Non-Litigated Issues

The U.S. Court of Appeals for the Federal Circuit recently affirmed a district court's exceptionality determination under 35 U.S.C. § 285 based on plaintiff's inadequate pre-suit investigation of infringement although infringement was never adjudicated. *ThermoLife Int'l LLC v. GNC Corp.*, Case Nos. 18-1657, 18-1666 (Fed. Cir. May 1, 2019).

ThermoLife, the exclusive licensee of four patents owned by Stanford, brought a total of 81 infringement suits. During the litigation, the parties agreed to "phased discovery" that was initially limited to issues concerning standing, claim construction, patent invalidity and/or unenforceability with issues unique to each Defendant to proceed, only if necessary (namely, infringement and damages).



Mandy H. Kim

The district court bifurcated the proceedings and held all asserted claims invalid after a bench trial on invalidity. Thereafter, Hi-Tech and Vital moved for attorney's fees under Section 285 making two main arguments for exceptionality: (1) plaintiffs did not conduct an adequate pre-suit investigation into infringement; and (2) plaintiffs filed many suits without adequate investigation, simply trying to extract nuisance-value settlements. The district court agreed and awarded attorney's fees. ThermoLife and Stanford appealed the exceptional case determination.

The Federal Circuit affirmed, holding that the district court did not abuse its discretion in finding the case exceptional although the basis for alleging infringement was not fully adjudicated or litigated before judgment on the merits. Noting that this is an unusual case for fees but not a legally impermissible one, the Court emphasized "the wide latitude district courts have to refuse to add to the burdens of litigation by opening up issues that have not been litigated but are asserted as bases for a fee award." The Court also held that early notice by a party seeking fees in an exceptional case determination is not rigidly required, particularly in circumstances where discovery as to party-specific issues are postponed.

This decision shows that a lack of diligent pre-suit investigation may be sufficient to result in an award of attorney's fees even if infringement is not adjudicated, particularly where non-infringement may easily be determined.

For more information contact Mandy H. Kim, Partner, at mhkim@mwe.com or (949) 757-6061.

OC Philanthropy



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August 21

Published annually, OC Philanthropy features trends in giving, news within the local nonprofit community, as well as the Corporate and Private Foundation Lists.

OC Philanthropy is distributed to 20,000 wealthy, philanthropic executives with an average household income of \$748,000. These leaders actively support multiple nonprofits in our community with their time and money.

- Your ad includes an article.
- OC Philanthropy is a stand-alone special edition, polybagged with the September 2 weekly paper for increased visibility.
- OC Philanthropy will be the official publication of AFP's National Philanthropy Day Luncheon with bonus distribution to all Luncheon attendees on November 14.

For more information, contact Amy Sfreddo at 949-664-5058 or sfreddo@ocbj.com.



Final Call

Nomination Deadline: August 21, 2019



The Orange County Business Journal is accepting nominations for the 10th annual General Counsel Awards. The program is designed to recognize the significant role in-house counsel play in the success of businesses within our community. Awards are presented in the following categories:

- General Counsel of a Public Company
- General Counsel of a Privately Held Company
- Specialty Counsel (*attorney members with a specified focus within an organization*)
- Rising Star Award (*senior-level in-house counsel and recently appointed GC's*)
- In-House Legal Team (*made of two or more members*)

DINNER GALA & AWARDS PROGRAM

HOTEL IRVINE

November 13, 2019 from 6:30 - 8:30 p.m.
*Tickets: \$275 Table for 10: \$2600

NOMINATION INFORMATION

Visit www.ocbj.com/bizevents or contact
Melanie Collins, Signature Events Manager
at collins@ocbj.com or 949.664.5065



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Matt Parlow, Dean
CHAPMAN UNIVERSITY
Dale E. Fowler School of Law



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

Innovation as a Value Driver

As an investment banker with 25 years of experience advising clients on unlocking brand value in major capital transactions, I've come to learn of the critical importance of consistent innovation of products in the core representation of a brand's message to the end consumer.

The very best brands are relentless about maintaining and constantly improving their products and their market position by continually re-evaluating goals, objectives, position and relevance to their customers, and quickly and appropriately innovating to provide the best possible product and experience those customers are looking for.

Constant transformation and evolution, whether it be in product design or function, the experience with the brand, the way its communicated to the market or the channel that represents the brand; all are essential elements to product and brand innovation.

How to Measure Innovation - According to the 2019 Bloomberg Innovation Index, it's interesting to note that while South Korea spends the most on R&D spending as a percent of GDP, and Denmark ranks at the top in researcher concentration, the United States has the greatest density of public high-tech companies and remains the most prolific issuer of patents; strong evidence of an enviable culture of innovation.

But, it's not just the quantitative drivers that push innovation - in evaluating ways companies maintain and build a culture of innovation, the following behaviors can be seen as important adherents to success.

Pursue a Higher Calling - Be a purposeful brand. Recent research shows top consumer-facing brands are associating themselves with initiatives relating to environmental sustainability, education, or focused giving to drive deeper customer engagement because their customers want to be a part of higher-purpose initiatives.

Test and Learn - Apply lessons learned continually and confidently. Test products in the field by engaging with your target audience. For example, conducting brand-festival experiences, which, used appropriately, will drive strong emotional connections to your brand and products. Provide limited runs or special products to influencers or core customers to sample receptivity, and pivot as you learn. Studies firmly conclude: companies that deliver an outstanding customer experience rely extensively on customer feedback loops. Innovative brands have long realized that their customers control the longevity and success of their brand.

Digital Dexterity - Authentically engage with your target market across social media. Demonstrate the value proposition of your brand through customer example. Humanize your brand by sharing behind the scenes content, which can be easily curated, making you more approachable. Relatable brands are winning.

Co-Creation - A process where brands and consumers work together to create and develop better, more engaging products and experiences. A great

example of this is LEGO, who established an online community where members can create, submit and discover unique creations that compete and may ultimately be adopted and put into production, and credit and reward is shared with the creator.

Customer Experience - In the next couple of years, experience is expected to overtake price and product as the key brand differentiator customers are making decisions on. Innovative companies have highly developed customer engagement strategies, or risk being left behind. A recent visit to Comic Con and being immersed in the palpable energy of the experience certainly bears this out.

Creative Packaging - Presenting products in unique and special ways. By creating a remarkable "unboxing" experience, brands can drive an immediate and positive emotional experience between their products and their customers. Local companies such as Voluspa and Too Faced Cosmetics have been quite successful in connecting customers in this way.

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 has acquired YUCATAN Guacamole BUY-SIDE ADVISOR	 has received an investment from VIRGO FINANCIAL ADVISOR	 has been acquired by TRIGO a portfolio company of ARDIAN SELL-SIDE ADVISOR	 has received a growth equity investment from CLOVIS POINT CAPITAL FINANCIAL ADVISOR

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2019 INNOVATOR OF THE YEAR AWARD NOMINEES

Acorns, Irvine*Noah Kerner, CEO*

Noah Kerner got involved with Acorns two months after their launch as an adviser, investor, board director and eventually CEO. Under his leadership, the company has gone from seed to Series E funding and was recently valued at \$860 million. Kerner has spearheaded the development of Acorns Later and Acorns Spend and continues to employ his drive and creativity to push the company forward. Kerner has also managed a number of strategic partnerships, including a recent content deal with Comcast and NBC Universal. Acorns is the country's fastest-growing financial wellness system with more than five million accounts. Its easy-to-use, mobile-first technology makes it simple for anyone to set aside and invest life's spare money. Acorns allows customers to automatically invest in a low-cost, diversified portfolio of exchange-traded funds offered by some of the world's top asset managers. Customers grow their wealth in one of five portfolios constructed with help from Nobel laureate economist Dr. Harry Markowitz. Acorns' smart portfolio algorithms automatically work in the background of life, helping users build wealth naturally, pennies at a time.

**AG Tools Inc., Irvine***Martha Montoya, CEO*

Martha Montoya is the founder and CEO of AG Tools, Inc., a provider of a web-based solution that improves the decision-making process of farmers and all stakeholders in the food supply chain. Montoya is also part of the UCI Beall Applied Innovation Wayfinder incubator program. With 25-plus years of experience shipping fruits and vegetables to major retailers across the U.S. and worldwide, Montoya has keen insights into the challenges faced by farmers and retailers. At the crossroad of high technology and agriculture, AG Tools reduces food waste, increases profits and fills in communication gaps between farmers and food retailers by providing succinct, timely and valuable information regarding distribution, production, and pricing, to all stakeholders involved in the food chain supply. Under the leadership of Montoya, AG Tools has won awards and received recognition from Microsoft, IBM and the University of California, Davis, for innovation, machine learning and artificial intelligence.

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

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

**Alignment Healthcare, Orange***John Kao, CEO/President*

Alignment Healthcare is a population health services company that offers Medicare Advantage plan options through Alignment Health Plan and partners with select health plans in other markets to help deliver better benefits at lower costs. Backed by two large private equity firms – General Atlantic and Warburg Pincus – Alignment has grown at a 42% annual rate over five years, now serving more than 60,000 Medicare members across 20-plus markets. By combining high-touch care coordination with AVA®, Alignment's proprietary technology that helps doctors predict care often before it's even needed, Alignment was able to turn a 3-star Medicare Advantage plan to an overall 4.5-star rating in 2018. The Centers for Medicare & Medicaid Services rates plans every year on a 5-star system, with five stars being the best. In 2019, the company introduced its ACCESS On-Demand Concierge, which not only provides 24/7 concierge-level member services at no additional cost to the member but also an exclusive "black card" that can be used as a debit card to buy eligible over-the-counter items at more than 50,000 retailers nationwide.

**Allied Universal, Santa Ana***Mark Mullison, CIO*

As chief information officer (CIO) for Allied Universal®, Mark Mullison is responsible for both internal and client-facing technology innovation. He is an innovative and dynamic leader who enjoys working with people to build, apply and operate technology that creates value by offering strategic solutions. With more than 20 years of extensive experience in product development, information technology, and global operations, Mullison has a proven track



record of integrating people, processes, and technology into world-class products and operating environments that deliver measurable ROI. Prior to joining Allied Universal, Mullison was executive vice president & CIO for Education Corporation of America (ECA), where he was responsible for providing strategy and thought leadership to the company's systems integration, automation and learning technology efforts. Throughout his career, he has successfully managed over \$300 million in technology solutions—from concept to operation—in over 65 countries around the world for companies including Sprint, Alcatel, Orange Business Services, Level 3 Communications and U.S. Security Associates.

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

Amnion Life is a pre-revenue start-up company started by Amir Fassihi, along with 18 friends and family investors. Amnion Life has raised \$1,160,000 through bootstrapping by Fassihi and an additional \$281,000 was raised via 185 investors on a crowdfunding campaign in early 2019. Amnion Life has developed the AmnioBed™ – a novel, patent-protected, neonatal incubator system intended to decrease critical and long-term complications common in preterm birth (PTB) infants by recreating core conditions of an in-womb environment. The Company is seeking capital to complete pre-clinical studies and clinical trials, to achieve FDA (US) approval and CE Marking (European Economic Area) approval, and to build the necessary infrastructure for commercialization and market launch. Dr. Fassihi is a full-time radiologist working as a teleradiologist for Virtual Radiologic and he plans to continue his full-time work as a radiologist during the upstart stage of Amnion Life.

**AONDevices Inc., Irvine***Mouna El Khatib, CEO/Board Member*

Mouna El Khatib is the co-founder and CEO of Southern California based AONdevices, Inc. The company developed a neural network technology that can reliably recognize human speech and audio commands in very noisy environments. The technology can be implemented in a small footprint SoC for always-on battery powered applications such as smartphones and wireless headsets. Additionally, El Khatib is paving the way for AONdevices to build specialized deep learning Hardware IPs and chips for voice and audio processing and expand the framework to other applications in adjacent markets. The company's services combine deep learning with advanced DSP and also provide low power chip design techniques approach to create market-leading intelligent devices, enabling clients to enhance the user experience without compromising system power. El Khatib has 18 years of experience in voice, audio, Digital Signal Processors (DSPs), Systems-on-Chip (SOC), system architecture, chip development and leadership. She is a former Qualcomm principal engineer, earning five Excellent Execution and Leadership Qualstar Awards during her tenure. El Khatib also served as the engineering director at Brainchip and Conexant.

**Avatar Partners Inc., Huntington Beach***Marlo Brooke, CEO/Founder*

Marlo Brooke founded AVATAR Partners in 2003 with the mission of protecting the democratic rights that are embodied in the vision of America and its Allied Countries, and those the world over who urgently seek and need such rights. As founder and CEO of AVATAR Partners, Brooke is a recognized thought leader in warfighter readiness and innovative, advanced training systems, job aids and software systems. Brooke provides vision, leadership and oversight of all programs and customer relationships that support the Department of Defense and Commercial Industry. Under her leadership for 16 years, AVATAR Partners continues to invent disruptive, high-quality enterprise solutions. Her latest innovations have transformed the Augmented Reality (AR) Ecosystem by helping to eliminate three showstoppers for global AR adoption: drift, jitter, and the inability ability to lock 100% on target. In doing so, AVATAR has achieved a 4800% accuracy for Augmented Reality above industry average, surging AVATAR 3-5 years ahead of its competitors.

**Axonics Modulation Technologies Inc., Irvine***Raymond Cohen, CEO*

Raymond Cohen is an accredited public company director with over 35 years of experience in leading medical device companies and serving as a board member at a number of private and publicly traded life science companies. Axonics Modulation Technologies, Inc. is a medical device company committed to becoming the global leader in Sacral Neuromodulation by providing customer-centric solutions to treat urinary and bowel dysfunction and improve the quality of life for patients and their families. The Axonics System features a miniaturized long-lived rechargeable neurostimulator, designed to provide therapy for at least 15 years. It is the only full-body MRI conditionally safe sacral neuromodulation system that features a user-friendly patient Remote Control and advanced tools to optimize lead placement and therapy programming for an improved patient and clinical experience. The Axonics System brings to the market a long-term solution in symptom relief for the millions of people suffering from overactive bladder, bowel incontinence and urinary retention. The Axonics System is approved for sale in Canada, Europe and Australia, and currently pending FDA approval for commercial launch in the US in the second half of 2019.





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2019 INNOVATOR OF THE YEAR AWARD NOMINEES

BANKCODE, Laguna Beach*Cheri Tree, Founder/CEO*

BANKCODE has successfully developed a game-changing technology and methodology called B.A.N.K. is designed to increase sales up to 300 percent by predicting the buying behavior of the customer in less than 90 seconds and then delivering the custom formula to ultimately close the sale and engage the client. B.A.N.K. is reverse-engineered personality science based in BUYology, the science of buying behavior. Cheri Tree, founder and CEO, published her book about this revolutionary methodology called *Why They Buy*. Tree is the leading expert in the world on selling using the power of personality science and has spoken at Harvard University and UC Berkeley and recently had a white paper published by San Francisco State University. As a tool for sales, B.A.N.K. has been used successfully for more than 20 years. The four "buying personalities" used to type people have consistently increased sales success for users in the marketplace.

**Behr Paint Company, Santa Ana***Scott Richards, General Manager*

Founded in 1947, Behr Paint Company is one of the largest manufacturers of paints, primers, decorative finishes, stains and surface preparation products to do-it-yourselfers and professionals in the United States, Canada and Mexico. The Santa Ana, Calif.-based company and maker of the BEHR® and KILZ® brands is dedicated to meeting the coating and color needs of DIYers, professionals, architects, and designers with an unwavering commitment to quality, innovation and value. Behr started in a garage in Pasadena California over 70 years ago and has grown to be an international brand known for its quality and innovation. Scott Richards is responsible for growing the DIY and PRO Paint business at The Home Depot in the US and Canada with accountability for Strategy, Sales, and Product and Channel Marketing. Prior to his position as general manager for the past five years, he served as senior vice president of marketing for 11 years.

**BIOLASE Inc., Irvine***Todd Norbe, President/CEO*

Todd Norbe was named president and CEO of BIOLASE, Inc. in August 2018. Just prior to becoming CEO, Norbe joined the BIOLASE Board of Directors in June 2018. Biolase Inc. is a medical device company and global market leader in the manufacturing and marketing of proprietary dental laser systems that enable dentists and dental specialists to perform a broad range of minimally invasive dental procedures, including cosmetic, restorative, and surgical applications. Biolase's laser systems are designed to provide clinically superior, patient-friendly results for many types of common dental procedures compared to those achieved with traditional instruments. Biolase has sold over 36,200 laser systems to date in over 90 countries around the world. Throughout the years, Biolase has been recognized for innovation, product design and marketing. Biolase has numerous highly respected industry peer awards for clinically relevant, high-quality products.

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

Patrick Johnson is a seasoned executive with P&L leadership in turnarounds, startups, emerging companies, as well as companies challenged with mature product life cycles. With a history of repeatedly growing sales and gross margins at double-digit growth rates, he has provided leadership in strategic planning, sales, marketing, corporate branding, product positioning, and operations. Johnson is a senior executive with 25 years of experience leading manufacturing companies in diverse industries including medical, dental, aerospace and motorsports. He has been at BioPhotas for seven years and has helped obtain FDA approval and patents on products. BioPhotas manufactures and sells the Celluma Series of Light Therapy devices for treating skin, muscle and joint conditions. Since first receiving FDA clearance in 2013, the award-winning Celluma PRO has become the market-leading product in the Light Therapy product category, with sales doubling nearly every year.

**BirchStreet Systems Inc., Newport Beach***Steve Markle, CEO*

Steve Markle is the CEO at BirchStreet. Markle brings over 20 years of technology and business leadership. His responsibilities include direct responsibility for leading and managing BirchStreet's customer success operational units including project management, technical service, customer support, training, account management as well as product management. BirchStreet Systems is the global leader in providing multi-facility enterprises a complete procure-to-pay (P2P) automation solution using cloud-based technology. BirchStreet software focuses on streamlining and improving high -cost business processes with its modules that automate eProcurement, AP Processing, Inventory Control, Recipe Management, Executive Dashboards, and Capital Projects for customers in its focus industries of; hospitality, casino, restaurant, country club, airports, education, food manufacturing, and healthcare. Thousands of businesses contracted in over 130 countries, currently subscribe to BirchStreet to connect and do business with a network of more than 400,000 transacting Marketplace Suppliers. Established in 2002, BirchStreet is privately held and is headquartered in Newport Beach, California with offices in Denver, China, Singapore, Mexico City, London, and India.

**CalAMP, Irvine***Michael Burdick, President/CEO*

As president and CEO of CalAmp, Michael Burdick is helping his customers reinvent their businesses for the connected economy and improve lives around the globe with technology solutions that streamline complex mobile IoT deployments and brings intelligence to the edge. CalAmp's software and subscription-based services, scalable cloud platform and intelligent devices collect and assess business-critical data from mobile assets and their contents. The company is headquartered in Irvine, California and has been publicly traded since 1983. Through an acquisition in 2016, LoJack® is a brand of CalAmp and a leader in stolen vehicle recovery and innovative automotive services. In 2019, CalAmp acquired Tracker and Car Track (branded LoJack Mexico) to expand its global portfolio for connected vehicle and asset tracking solutions into the United Kingdom and Mexico (respectively) as well as other geographies. Most recently CalAmp acquired Synovia Solutions, a leading provider of fleet tracking solutions for commercial and government markets, delivering cutting-edge solutions for cities, counties as well as public and private education transportation providers.

**CathWorks, Aliso Viejo***Jim Corbett, CEO*

James "Jim" Corbett has more than 30 years of leadership experience in the medical device field. Currently, he is chief executive officer CathWorks Ltd, Kfar Saba, Israel. Over the course of his career, Corbett has held the positions of chief executive officer, Alphatec Spine, Vertos Medical, ev3 Inc, chairman and CEO Microtherapeutics, Home Diagnostics Inc.; president, Boston Scientific International; and general manager Baxter, Japan, as well as a number of executive roles in his 11 years at Baxter Healthcare. CathWorks is a medical technology company focused on applying its advanced computational science platform to optimize the treatment of coronary artery disease (CAD). Under Corbett's leadership as CEO, CathWorks has achieved, in a short timeline, significant milestones, including successful completion of US pivotal trial, US FDA approval and US launch of FFRangio technology. The FFRangio system is poised to disrupt the FFR market and revolutionize the treatment of CAD. Corbett's vision is to launch FFRangio globally in all major regions by the end of 2020.

**CB Technologies Inc., Orange***Kelly Ireland, CEO/Founder*

Kelly Ireland founded CB Technologies in 2001 as a value-added reseller (VAR) with a focus on unparalleled client service. However, having a keen eye for technology trends, she assessed the impending changes in the IT industry early on and saw a need for drastic change. Thus, in 2015 Ireland began augmenting her engineering team, building up the internal expertise and external partnerships necessary to revolutionize the company's offerings and make the difficult transition from VAR to Systems Integrator. Since that time, CB Technologies has evolved into an award-winning IT Solutions Provider with a roster of Fortune 50 clients. Ireland's leadership and vision has led to multiple award-winning engineered IT solutions, including the 2015 HP PartnerOne Solution Provider of the Year Award for Cloud, CRN's prestigious Triple Crown Award in 2016, eight consecutive Boeing Performance Excellence Awards, and CRN's IoT Innovators award in 2017. Ireland has also achieved numerous personal awards, including CRN's 2018 Power 30 Solution Providers (an elite subset of their annual Women of the Channel award list).

**ChromaDex, Irvine***Frank Jaksch, Co-Founder/Executive Chairman*

Frank L. Jaksch Jr. is a co-founder of ChromaDex and has served as a member of Board since February 2000. Jaksch served as chairman of the board from May 2010 to October 2011 and was its co-chairman from February 2000 to May 2010. In June of 2018, Jaksch transitioned from chief executive officer to executive chairman of the Board. Jaksch oversees research, strategy and operations for the company with a focus on scientific and novel products for pharmaceutical and nutraceutical markets. ChromaDex Corp. is an integrated, global nutraceutical company devoted to improving the way people age. ChromaDex is an innovative natural products company that discovers, acquires, develops and commercializes proprietary-based ingredient technologies through its unique business model that utilizes its wholly-owned synergistic business units, including ingredient technologies, natural product fine chemicals (known as "phytochemicals"), chemistry and analytical testing services, and product regulatory and safety consulting (as Spherix Consulting).

**Concierge Key Health, Newport Beach***Jennifer Anderson, CEO*

Jennifer Anderson has more than 12 years of senior leadership experience in Health Science, Bio-Pharmaceutical and Technology markets, with extensive experience leading world-class companies and brands like ALPHAEON, Allergan, CheckedUp, Finess and Sermo, and most recently helped launched ShoutMD, rapidly establishing it as a social media platform with approximately 20,000 members worldwide. Anderson's appointment as CEO coincides with the launch of Concierge Key Health's newest platform offering, AccessElite. This new membership program aims to help people achieve total wellbeing with a simplified process for connecting with top specialists,





Thank you for leading the way to better

Your vision and commitment to step up and lead the way is an inspiration to all. We salute the time and talent you bring to making our community a better place to live, work, and prosper.

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Together we'll go far



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same-day appointments with the click-of-a-button and the ability to message your specialist directly with follow-up questions. For a low monthly cost, members are surrounded with the specialists, insights and support they need to reach their health and wellness goals — all with the support of an exceptional member services team ready to serve. Currently available in regions across Orange County, San Diego and Dallas, AccessElite plans to expand its elevated services into numerous additional U.S. markets in 2019.

Cryo Innovations, Newport Beach
Keith Scheinberg, Founder/CEO

Keith Scheinberg, CEO of Cryo Innovations LLC, has a B.S. in Biology and was heavily involved in research and development projects for Johnson & Johnson and the US Military. He also founded a safety software and app development company with expert knowledge of cryogenic safety protocols. In 2015, Scheinberg launched Cryo Innovations, LLC, quickly becoming the industry standard in cryotherapy, providing the safest, most technologically advanced “cryo saunas” on the market. The revolutionary Made-in-the-USA XR Cryo Chamber runs on a cloud-based Android tablet with a built-in Point of Sale, dual-fingerprint authorizations, and a web-based portal that can accommodate up to 1,000 storefronts. Each chamber is self-regulated by over eight safety features. Cryo Innovations is the only cryo manufacturer to have secured a GSA contract from the U.S. Government to provide cryo saunas to all military branches and veterans. Spotlit on The Ellen Show, Cryo Innovations is the nation’s leading supplier of cryo saunas to gyms, salons, chiropractors, and other facilities. The company has single-handedly shifted the industry from an elitist market sector of celebrities and pro-sports figures to the general public.


CureDuchenne, Newport Beach
Debra Miller, Founder/CEO

After her son, Hawkin, was diagnosed with Duchenne, a progressive muscle-wasting disease, Debra Miller left her job in Silicon Valley to launch CureDuchenne and raise funds to help find a cure. Since 2006, she has raised \$30 million and invested over \$15 million in scientific research. Miller’s efforts have resulted in the first drug approved by the FDA for the treatment of Duchenne. Additionally, 12 research projects CureDuchenne has funded have advanced to human clinical trials. She is also responsible for developing the first Duchenne-specific physical therapy program and PT certification. Today, Miller is highly focused on strategic partnerships that allow CureDuchenne to serve the Duchenne community through every stage, from early diagnosis to clinical trials to adulthood. Through her leadership, CureDuchenne has garnered international attention for its efforts to raise funds and awareness for Duchenne muscular dystrophy through venture philanthropy.


Dastmalchi, Newport Beach
Alex Dastmalchi, CEO

Alex Dastmalchi is the founder of Dastmalchi LLC, a global company with a thriving dossier in beauty, fitness, and lifestyle. Dastmalchi believes in infusing the world with positive intent, and all the products and services provided by his various ventures align with that personal mission. The company’s unique 360-degree view on self-care is the true transformative ingredient in his growing beauty portfolio which houses Vanity Planet, Hudson & Mane, and upcoming trailblazers Oliglo and MyHare. Dastmalchi believes that looking and feeling one’s best should remain inclusive, accessible, and manifest from within is what keeps his prolific attaché of brands expanding and revered internationally for unsurpassed value. Dastmalchi himself serves as a mentor to start-ups and as a board member of Corazon de Vida, a supportive organization for displaced, orphaned and abandoned children in Baja, Mexico.


Dendron Pharmaceuticals LLC, Seal Beach
Jim Caggiano, Chief Executive Officer

A seasoned and dynamic leader, Jim Caggiano has a proven track record of creating significant value in turnaround situations. Under Caggiano’s leadership, Dendreon has been transformed into a thriving company that is making the fight against cancer personal by harnessing the power of the body’s immune system to fight back. In 2010 Dendreon’s flagship product, PROVENGE® (sipuleucel-T), was the first immunotherapy made from a patient’s own immune cells ever approved by the FDA and remains the only cellular therapy for prostate cancer to this day. The groundbreaking treatment has been prescribed to more than 30,000 men with advanced prostate cancer to date and is currently being studied in a large-scale clinical trial called ProVent, which is evaluating the effectiveness of PROVENGE® in men with early-stage prostate cancer in hopes of curing more men of the disease. Through his business leadership, commitment to patients, and ability to clearly articulate and execute his vision, Caggiano is at the helm of what is today an exciting and growing enterprise that closed the 2018 financial year with earnings before interest and taxes (EBIT) of \$108 million.


DIMER UVC Innovations, Los Alamitos
Elliot “Mo” Kreitenberg, President/Co-Founder

On a trip home from business school, Mo Kreitenberg found his dad tinkering with a prototype to disinfect airplanes using UV light. Kreitenberg felt the project worthy of market research. He found that 96% of respondents said airplanes should be

disinfected and they would pay a fee for that. The machine is the GermFalcon. Kreitenberg put Wall Street opportunities aside, raised a seed round and pitched Virgin America. They loved it and helped with R&D until they were acquired. In a classic start-up pivot, Kreitenberg helped create the UVHammer to compete with cumbersome devices used in healthcare. The UVHammer is more effective, faster and was wildly praised when debuted at an infection control meeting in Philadelphia in June 2019. Production has begun in OC. Kreitenberg won a 2018 NASA iTech innovation competition with the GermRover, a 3D Roomba-like drone that navigates inside spacecraft while emitting UV light and killing germs. NASA estimates it could save millions of dollars per year in crew time and launch costs with the GermRover.


Docbot, Irvine
Andrew Ninh, CEO

Andrew Ninh is the CEO of Docbot. When he was 18 years old, he decided to build an artificial intelligence deep learning software system that efficiently captures data in real-time. Ninh collaborated with Dr. Karnes, a gastroenterologist from UCI, to create Docbot. The company develops real-time artificial intelligence software aimed towards helping colonoscopists find more lesions during colonoscopy and classifying lesions by malignancy. Colorectal cancer is the second leading cause of cancer-related deaths in the US and it is the third most common cancer in men and in women. AI colonoscopy can identify up to 20 percent more abnormalities than a traditional test. To determine if a polyp is precancerous, the traditional process normally takes about two weeks, whereas Docbot’s system optically detects it in fractions of seconds. Docbot graduated from the UCI Wayfinder incubator and recently, after completing the program at the Y Combinator accelerator, received \$2.045 million in seed funding. Docbot also received a \$225,000 NSF grant that will support a clinical trial focused on a serious complication of gastroesophageal reflux disease.


Dreams for Schools, Irvine
Nithin Jilla, Executive Director

Nithin Jilla is a passionate educator, social entrepreneur and philanthropist who champions building models and systems of social change that are sustainable and empower the next generation. In his current role as executive director of Dreams for Schools (DFS), an organization he started during his time in undergrad at UC Irvine, he has helped grow the organization from two school partnerships to over 50 annually, providing innovative technology & engineering experiences across Orange County & Riverside. Dreams for Schools was named Non-Profit of the Year in 2018 in the OC by Forge54. The mission of DFS is to make STEM approachable and accessible to all. By providing the right tools and experiences, DFS helps improve students’ STEM literacy and empowers them to become the critical thinkers, creative leaders and technologists of tomorrow. Dreams for Schools has helped expose youth to the workforce & business leaders with many local business organizations – from Wells Fargo to Kingston Technology to Mitsubishi Electric. DFS has provided over 1,800 youth with hands-on opportunities to make STEM learning personal, creative and fun.


ENP Institute, Irvine
Scott Hamilton, CEO

Scott Hamilton is a well-known thought leader, advisor & keynote speaker in the field of strategy & innovation for Global 500 through mid-market companies. Hamilton is CEO of the Executive Next Practices Institute (ENP), an enterprise-level research & forum organization that is based at UCI Beall Applied Innovation. ENP provides strategic support, educational forums and connections to small to large market enterprises in Southern California and other national markets. They assist these organizations in how to grow and scale via internal innovation and external alliances. Since 2008, Hamilton and his Nextworks Strategy team have grown the ENP Institute to a national entity delivering innovation forums and training to the C-suite leaders of both small and large market enterprises. Hamilton expanded the concept of “next practices” that allows firms to create strategies that are unique to their business model for new growth, innovation and ROI. He has helped hundreds of enterprises maximize their leadership effectiveness, accelerate digital integration and explore new markets via his Nextworks Strategy advisory practice.


Ephesoft, Irvine
Ike Kavas, Founder/CEO

Ike Kavas is the founder and CEO at Ephesoft, with 20 years of document capture, document management, workflow and systems engineer experience. His focus is to guide, innovate and expand the company’s mission of making meaning out of unstructured content. Kavas holds a patent on supervised machine learning for document classification and extraction, disrupting a stagnant industry with modern, cloud-first architecture for Ephesoft’s leading content capture and data discovery technology. Ephesoft introduced the industry’s first cloud, Capture-as-a-Service and hybrid solutions, making it simple for any sized organization to increase efficiency and streamline business processes. Kavas has grown the company to global force with over 250 strategic technology, OEM, alliance and channel partners and customers in over 53 countries. His visionary intuition has propelled the capture market forward, earning both Ephesoft



“ I’m looking
for answers ”

“ We’re changing
the world ”

“ What am I going to
do next? ”

“ We will be the first
people in the world
to answer ”

“ I want to see this
research translate
into something on
the market... ”

“ How can we take
that to the next
level? ”

IT'S NOT HARD TO SPOT INNOVATORS

In Recognition of Our 2019 Innovator
of the Year Awards Nominees

Congratulations and Thank You!

Andrew Ninh	Docbot
Mark Bachman	Integra Devices
Martha Montoya	AG Tools
Michl Binderbauer	TAE Technologies
Nasam Chokr	NOWA Innovations
Neel Grover	Indi
Quinn Taber	Immerse

UCI Beall
Applied Innovation

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UCI Beall Applied Innovation is a dynamic platform that brings campus-based discoveries together with Southern California's vibrant business community to support job creation and economic growth. To make this happen, UCI Beall Applied Innovation facilitates connections between UCI and entrepreneurs, startups, inventors, the business community and investors.

2019 INNOVATOR OF THE YEAR AWARD NOMINEES

and himself recognition and awards. Recently, he launched the capture industry's first hybrid cloud solution to help customers easily transition the most resource-intensive processes into the cloud for peak performance and scalability while still being able to use their on-premises solution.

EPIC Ceramic & Stone/Famosa Inc./The Slab Studio/Kannabis Works, Santa Ana
Josiah Lilly, Creative Energy Officer

Josiah Lilly is an entrepreneur who started his first company at age 17 and has successfully launched three other companies since then. His distinctive perspective, eye for beauty and innovative approach has allowed him to differentiate his companies and deliver unique client experiences. He has brought technology to the tile and stone industry which historically has had a very traditional mentality. EPIC Ceramic & Stone utilizes cutting edge technology such as robots for cutting and water jetting the stone slabs, and overhead cranes to streamline the fabrication process and create an engaging experience for clients. Famosa Inc. is a design studio and showroom focused on helping clients envision and create beautiful environments in their homes. The Slab Studio is a high-end design showroom that was made from what was originally a warehouse. The showroom experience features music, carpet, and lighting to allow clients to see the product as they would in their home, instead of the typical dusty lot or warehouse. Kannabis Works is a medical cannabis company that helps people deal with medical conditions more effectively. As one of only 18 legal dispensaries in Santa Ana, Kannabis Works partners with doctors and hospitals to provide medically-driven solutions for patients.



Evolus Inc., Newport Beach
David Moatazedi, President/CEO

David Moatazedi joined Evolus as president and chief executive officer in May 2018. Moatazedi led Evolus through the launch of the company, as well as the launch of its inaugural product, Jeuveau™ (prabotulinumtoxinA-xvfs). Jeuveau™ is the first neurotoxin in the United States developed for aesthetic use only and is the first FDA-approved neurotoxin to enter the U.S. market in nearly a decade. Moatazedi has more than 20 years of sales and marketing experience primarily building market-leading aesthetic brands. Prior to joining Evolus, he served a tenure of more than 14 years at Allergan. Beginning in 2005, as part of the global marketing team, Moatazedi held roles of increasing seniority and ultimately held the title of SVP, U.S. Medical Aesthetics where he led Allergan's aesthetic portfolio and several multibillion-dollar acquisitions. Before joining Allergan, Moatazedi served for six years as a district manager at Novartis Pharmaceuticals for the dermatology division.



Hoag Memorial Hospital Presbyterian/Hoag Family Cancer Institute, Newport Beach
Burton Eisenberg, M.D., Executive Medical Director, Hoag Family Cancer Institute & Grace E. Hoag Executive Medical Director Endowed Chair

Dr. Burton Eisenberg was co-recruited by Hoag and USC Norris Comprehensive Cancer Center in 2013 as the executive medical director over Hoag Family Cancer Institute. Dr. Eisenberg is responsible for the strategic planning for Hoag Family Cancer Institute, continuing the development of a world-class cancer program for our community extending throughout Orange County. Dr. Eisenberg joined Hoag from Norris Cotton Cancer Center at Dartmouth-Hitchcock Medical Center, an NCI Designated Cancer Center on the east coast. In addition to bringing innovative cancer strategies, he also joined Hoag's medical staff as a highly experienced surgeon, specializing in melanoma and sarcoma surgery. Dr. Eisenberg completed his residency at M.D. Anderson Hospital in Texas and a fellowship at Memorial Sloan-Kettering Cancer Center in New York. This diverse background from nationally acclaimed cancer centers has bridged the patient care continuum between academic cancer centers and community-based cancer programs and allowed for Dr. Eisenberg to build on the important vision of Hoag Family Cancer Institute – treating patients with both effective and compassionate care.



Immerse, Irvine
Quinn Taber, Chief Executive Officer

Quinn Taber started his first company at age 15 offering micro-enterprise loans to small business owners in North Africa and the Middle East. He graduated from Pepperdine University early to move to the Middle East where he helped manage a large charitable foundation while simultaneously volunteering in the direct refugee camps. By 23, he had traveled to nearly 50 countries and become fluent in Arabic through his immersive method. His insights into linguistics inspired him to found immerse, the first and only virtual reality language teaching platform. In 2017, Taber and the Immerse team took residence at UCI Beall Applied Innovation where they utilize the collaborative workspace. They joined the department's Wayfinder Incubator program designed to provide support and resources for startup companies, such as access to a broad network of investors, funding channels and advisors that have helped shape the company's growth and development. Taber is working with Oculus VR, a wireless VR gaming company that specializes in virtual reality hardware and software products. Taber's company has been recognized as the first company to connect teacher and students in virtual reality and the first to build a pedagogy around VR language acquisition.



INBRACE, Irvine
Dr. John Pham, CEO/Co-Founder

John Pham DDS, MS is a researcher, three-time entrepreneur, team builder, former aerospace engineer and practicing orthodontist. His research is featured in numerous cover articles in the American Journal of Orthodontics and the Journal of Clinical Orthodontics, and he frequently speaks on cutting edge technology topics at industry association meetings, orthodontic conferences and residency programs. As CEO and co-founder of INBRACE, Dr. Pham is leveraging his years of research and orthodontic practice experience to transform the industry with an invisible, healthy, patient-friendly solution for a great smile. With his mentor, research partner and INBRACE inventor Dr. Hongsheng Tong, the two founded INBRACE in 2012 and incorporated in 2014. By 2018, the company had secured \$26 million in venture funding, moved to a new office location in Irvine, tripled manufacturing capacity and grew to more than 80 employees. Today, Dr. Pham and INBRACE are focused on product refinement and infrastructure buildout in preparation for sustainable, long-term growth. Employee headcount has surpassed 90 as INBRACE expands customer acquisition, training, customer support and marketing resources.



Indi, Newport Beach
Neel Grover, Co-Founder/Chief Executive Officer

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. Indi Engagement Cloud is a SaaS video/photo platform that helps brands engage their customers and associates directly on the brands' digital properties by creating shoppable, commissionable reviews and engagement challenges to drive community, brand awareness and performance-based online sales from social media. Key outcomes include a highly engaged customer base, dramatically extended social media reach and robust social and sales data along with new revenue, income and reward opportunities. Because the engagement is initiated directly on the brand's website or in their app (as compared to social media), brands own all the content and receive email addresses, remarketing rights, and robust social media and sales data associated with all submissions. The company has received two rounds of funding and is currently raising a Series A round. Microsoft is one of the investors who has committed to participate in this next round.



Informative Research, Garden Grove
Scott Horn, Chief Operating Officer

With almost 20 years of experience in computer science, software development, and project management, Scott Horn has always displayed endless dedication, innovation, and perseverance in every role that he's taken on, which is proven by his extraordinary track record. To date, he is the fastest promoted employee in Informative Research's 70-plus year history, going from a Software Architect in the IT Department in 2007 to chief operating officer within 10 years. This accelerated path is also evident at the start of his career. Once hired as a Software Architect in 2007 and shortly promoted thereafter to VP of IT, Horn's initial contributions at Informative Research include - but are not limited to - developing IR's principal software, maintaining compliance requirements for the IS and QA departments, spearheading system upgrades and redesigns, and ensuring maximum uptime and stability in computer networks.



Integra Devices, Irvine
Mark Bachman, Chief Technology Officer

Dr. Mark Bachman is a pioneer in the development of engineering and manufacturing for ultra-miniaturized devices (smaller than ants). Four years ago, Dr. Bachman left his faculty position at UCI to co-found Integra Devices, a vibrant, venture-funded startup based on the intellectual property he developed while at the university. Based in Irvine, California, Integra Devices employs 10 engineers (5 Ph.D.'s), and has top tier customers in medicine, biotech and industry. Integra Devices was recognized as a technology leader by Frost & Sullivan, receiving the "2018 North American Technology Innovation Award" for the 3D micro-sensors and devices industry. Integra Devices has developed several exciting products, including a microswitch that switches microwaves in a cell tower; a micro-implantable sensor that monitors glaucoma in the eye; a microfluidic sensor that ensures the safe delivery of drugs in wearable drug-delivery units; micro-power energy harvesters that continuously charges batteries; and novel nanomaterials to prevent next-generation computer chips from overheating.

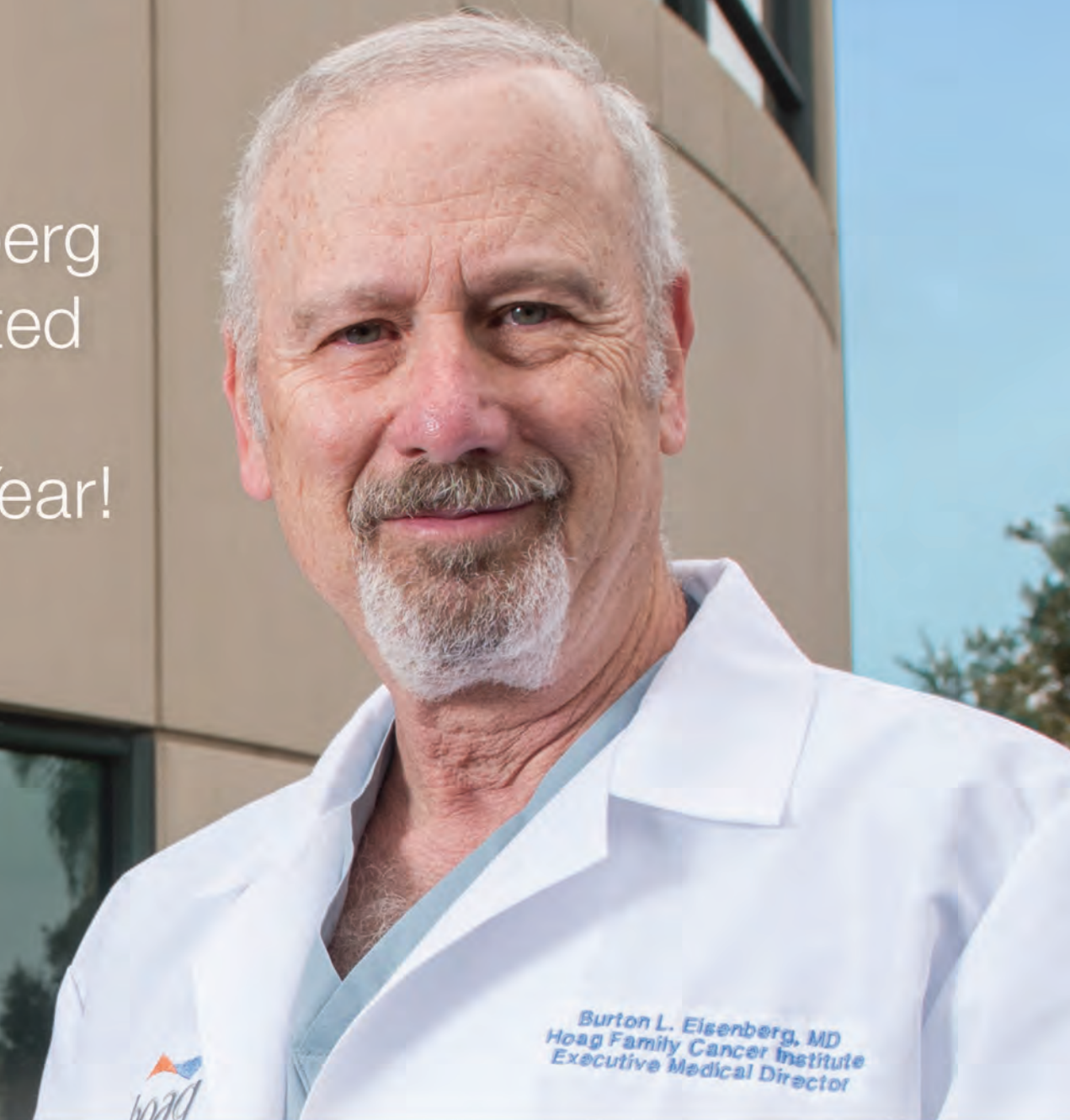


Kareo Inc., Irvine
Dan Rodrigues, Founder/CEO

Dan Rodrigues, founder and CEO of Kareo, began his entrepreneurial success as the co-founder of Scour, a very popular search engine for finding music and video files online used by more than 10 million consumers. With Scour, Rodrigues raised \$12.5 million in venture capital financing from Michael Ovitz, Ron Burkle, and Ron Conway, lead a 70-person organization, designed the Scour Exchange peer-to-peer software downloaded by more than seven million registered users, developed other patented technologies and sold the company in 2000. Rodrigues started creating technology for the healthcare industry in 2001 as a co-founder and managing partner of Skematix, a software consulting firm



Congratulations,
Dr. Burton Eisenberg
on being nominated
for OCBJ's 2019
Innovator of the Year!



Your visionary leadership and commitment to delivering personalized, trusted cancer care to Orange County patients has allowed Hoag Family Cancer Institute to once again be recognized nationally in the top 10% of cancer centers by U.S. News & World Report.

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CANCER



Hoag Family
Cancer Institute

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based in Southern California. Among the various projects he led, Rodrigues designed and built a web-based medical billing software and healthcare information system for a national medical billing company. During his tenure at Skematix, Rodrigues also designed an online auction service for industrial equipment, a self-service Internet kiosk for airports, and an online music service. In 2004, Rodrigues founded Kareo. Under his leadership, Kareo has grown to 500-plus employees serving over 25,000 healthcare providers in the US. At the helm of Kareo, Rodrigues has raised over \$90 million in total capital.

Karma Automotive, Irvine
Dr. Lance Zhou, CEO

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


Kofax Inc., Irvine
Reynolds Bish, CEO

Reynolds Bish was named CEO of Kofax in 2007. In addition to creating a new vision for the company, he has driven substantial strategic change throughout the business leading to significant growth in revenues, operating income, and shareholder value creation. Prior to Kofax, he co-founded and was CEO of Captiva Software Corporation, a leading provider of input management software and services, and a NASDAQ listed company that was acquired by EMC Corporation in December 2005. Bish was previously CEO of Unibase Systems, Inc., a private company that revolutionized the data entry market by providing software and systems on industry-standard, open platforms. He was also a co-founder and CFO of Covalent Systems Corporation, served as CFO of Fafco, Inc. and was a CPA with Price Waterhouse. He's a recognized industry spokesperson, honored as an Entrepreneur of the Year by Ernst & Young in 2003, and named a Director of the Year by the Corporate Directors Forum in 2008. He holds a Bachelor of Science in Business Administration from the Pennsylvania State University.


loanDepot, Irvine
Billy Spears, Chief Information Security Officer

As the senior vice president and chief information security officer at loanDepot, Billy Spears has transformed their information security presence into a robust ecosystem for cybersecurity throughout the enterprise. He discovered the known environment tolerances by identifying and exposing critical risks. His notable innovation has led to the implementation of Artificial Intelligence and Machine Learning, improved network monitoring and log correlation capabilities, dramatically increasing the company's overall security posture. Most security professionals work in the background to provide the stable infrastructure needed for other departments to shine and earn credit for increasing sales revenue. Spears differentiated a traditional CIA model to include privacy, safety and reliability, ultimately making 3rd parties feel safer providing their confidential data. Building trust in an era of industry broken systems is the biggest problem Spears has been dedicated to solving, and at loanDepot, he successfully achieved his innovative architectural vision for revolutionizing technology, processes, and people- while simultaneously creating a market differentiator.


LOCATE Inventory, Laguna Hills
Nick Schiffelbein, Chief Technology Offer

Nick Schiffelbein is the chief technology officer for LOCATE Inventory in Orange County, California. LOCATE is a cloud-based inventory/order-management software platform that has proven to be invaluable for SMBs, particularly in the warehouse and e-Commerce space. The idea behind LOCATE was to give SMBs an option to remain in the QuickBooks ecosystem as their businesses continued to grow and prosper without having to convert over to a more costly and complicated ERP system. LOCATE launched in early 2017 and was named one of QuickBooks' Top 10 apps that same year. Now just in its third year in operation, Schiffelbein and the company's other top executives have LOCATE on a path toward success. And with Schiffelbein leading the charge, LOCATE is on the cusp of launching international versions of the platform that will be available to customers in a handful of foreign countries, including the UK, Canada, Australia and New Zealand.


MarginPoint, Laguna Hills
Vince Sheeran, Chief Executive Officer

With over thirty years of sales, marketing, and operations experience in the Enterprise Software and Business Services Industries, Vince Sheeran has aided numerous businesses to improve their organizational outcomes and create long-term shareholder value. Sheeran has earned a reputation for establishing and tapping into professional networks of business, technical, and entrepreneurial leaders to bring about breakthrough innovations and improve organizational success. Under Sheeran's leadership, MarginPoint has become a leading provider of mobile-enabled, collaborative field service and inventory management solutions for distributors and their service contractor customers. Plumbers, Electricians & HVAC technicians utilize the MarginPoint solution to manage their full inventory management workflow for all material regardless of who supplied it or where it is stored. With MarginPoint tracking each inventory transaction, demand signals are generated automatically based on the desired replenishment method for each stocking location. This reacquisition information is sent directly to the chosen distributors who fulfill the order in less time and with greater reliability. MarginPoint is considered a pioneer in the mobile inventory management for the service contractor market.


Mavenlink, Irvine
Ray Grainger, CEO/Founder

As founder and CEO, Ray Grainger started with an idea to reinvent the way businesses do work: Services organizations were difficult to operate in an ever-changing environment and the right technology was absent. With 25 years of experience in software and high technology, Grainger started Mavenlink. Grainger began his career at Accenture, where he spent 17 years honing his expertise in professional services management as global managing partner, consulting for both large enterprises as well as small and medium-sized businesses. During his time at Accenture, Grainger also invested in several technology companies through Accenture Technology Ventures, including enterprise knowledge management vendor InQuira. He later became executive vice president of Professional Services and Strategic Alliances at InQuira (acquired by Oracle in 2011), where he met his Mavenlink co-founders, Roger Neel and Sean Crafts. Today, Mavenlink provides enterprise-class Software as a Service (SaaS) that transforms the way businesses work in over 100 countries. Under Grainger's leadership, Mavenlink has experienced rapid growth and accolades, including being named Fastest-Growing Company, North America by Deloitte Technology Fast 500 and achieving 541 percent revenue growth year over year.


MeridianLink, Costa Mesa
Tim Nguyen, President

MeridianLink provides mission-critical software solutions to financial institutions. Developer of the industry's first multi-channel account opening and loan origination suite, the company's LoansPQ, LendingQB, and ACTion platforms allow banks and credit unions to process and accept consumer and mortgage loans as well as account opening applications and integrate seamlessly with all major core and data services providers. MeridianLink also offers Synergy, a highly customizable and configurable loan processing and decision-making workflow product, as well as MortgageCreditLink, the dominant provider of "tri-merge" integration functionality into credit bureaus and other third-party consumer and business databases. MeridianLink prides itself on being a learning organization for innovators and supports a culture of passion seekers who are relentless in pursuing excellence. Their learning and innovative orientation stretch beyond the company walls into both the local community and the entire financial industry.


NextVR, Newport Beach
David Cole, Co-Founder/CEO

David Cole co-founded NextVR in 2009 and has since propelled the company to the forefront of the immersive media industry by delivering fully-immersive live 3D virtual reality sports and entertainment experiences. As CEO, Cole has led NextVR to become the world's largest direct to consumer virtual reality content platform. Quickly recognized for partnering with the best in sports and entertainment such as the NBA, NHL, WWE, ICC and Oculus to name a few, the company now broadcasts several events per week via the NextVR app universally available on all VR platforms. Cole's enthusiasm for innovation continues to drive NextVR's abilities to remain at the front line of tech and enticing content. Cole has 27 years of experience in digital imaging, stereoscopic 3D research & development, business development and business execution. In addition, he has also co-authored 14 patents in virtual reality and stereoscopic technology and three patents in adaptive computer learning technology.


NOWA Innovations, Cypress
Nasam Chokr, CEO

Nasam Chokr is a biomedical engineer and chief executive officer at NOWA Innovations Inc., a startup company that is helping asthma and chronic obstructive pulmonary disease patients manage their diseases. Chokr developed adult-onset asthma in 2018 and noticed a problem with her asthma management. She



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decided to create a device that can help asthma patients like herself better manage their disease and prevent overdosing and underdosing of their medications. As an undergrad student at UCI, Chokr joined a UCI lab that for 20 years has researched pulmonary diseases and she co-invented two Asthma monitoring technologies. Soon before graduation, Chokr decided to become the CEO of NOWA and venture in the commercialization of these technologies. NOWA is currently developing its second prototype, is preparing to submit an SBIR application and will pilot its product, Unaresp™, at CHOC later this year. Congress invited Chokr to showcase NOWA in the House of Representatives last April. Additionally, she presented her work at the recent First Look SoCal Innovation showcase organized by the Alliance for SoCal Innovation.

Online Trading Academy, Irvine*Eyal Shahr, Founder/CEO*

Eyal Shahr is the founder of Online Trading Academy. His vision and passion have been the driving force behind the company's development and rapid expansion. Shahr's love for people and an innovative approach to business has helped Online Trading Academy transform lives worldwide through exceptional customer education and service. Shahr is a seasoned executive who started his first business importing diamonds in 1983. After developing the business to supply over 600 major wholesalers, the business was profitably sold in December 1990. Beginning in 1991, Shahr purchased 50% ownership in a struggling publishing house with a new vision (to publish guides for the Performing Arts). With marketing experience, creativity, and leadership, he opened eight offices throughout the country and within six years increased company revenues by eighteen times. Later he entered the securities business, forming Newport Exchange Holdings in 1997, the predecessor to Online Trading Academy.

**OPKIX Inc., Costa Mesa***Lawrence Greaves, CEO*

CEO and co-founder C. Lawrence Greaves has extensive experience and track record of successfully launching companies that have created tremendous shareholder and enterprise value. Following the love of his life home to the West Coast, LG arrived in Southern California during 2005 and worked his way up from a six-month internship into launching his own consultancy firm only three years later. Adept at augmenting revenue growth, marketing, capital formation, and fundraising, he started as one of the first three investors and assumed the role of CEO for OPKIX in 2016, raising a seed round of \$675,000 at a \$10 million valuation as well as a Series A of \$5.4 million at an \$88.5 million pre-



money valuation. His entrepreneurial spirit and passion to continue to pursue, foster and grow businesses is a key asset in leading the OPKIX Team as it drives forward from concept to commercialization to global growth. OPKIX is responsible for launching one of the world's smallest wearable cameras as well as a video editing app to edit and make creations.

Pacific Dental Services, Irvine*Mostafa Khairzada, Sr. Director, Clinical and Emerging Technology*

Over the course of his 18-year career in healthcare IT, Mostafa Khairzada has consistently demonstrated a passion for innovation. He combines his rich practical knowledge with an extensive education, putting both to work in the service of developing groundbreaking technology in the field of patient care. Today, Khairzada is spending his time understanding the use and applications of Artificial Intelligence and machine learning in healthcare to enhance the patient experience, and empower clinicians with real-time relevant data to increase patient trust, and clinician accuracy. Before stepping into senior technology leadership roles, he was a technical product and services implementer for large scale health systems like the City of Hope as well as Khairzada is an enthusiastic leader who strives to inspire while pushing the envelope of what's technologically possible in order to improve the patient experience, reduce costs, and improve overall outcomes within the ever-changing healthcare environment.

**Rallio, Irvine***Chuck Goetschel, CEO*

With a degree in computer science and his first website launched in the mid-90s, Chuck Goetschel had been closely observing the Internet evolution for a long time. He found that business owners and entrepreneurs needed to embrace its effect on their online branding, messaging, reputation and revenue. Through the Rallio SaaS for social media technology, Goetschel has been able to positively impact the social media and reputation management efforts of thousands of franchise locations around the country. With several investors and a growing team, Rallio is forecasted to triple in revenue in 2019 through its products and services for franchises, brands and multi-unit locations. Rallio was listed as a top supplier of choice in Entrepreneur magazine's 2018 list of Top Franchise Suppliers. Rallio solves the local social problem by providing hyper-local content and strategy to help individual franchisees grow their local businesses, supported by a proprietary technology to manage their entire online presence from one dashboard.



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Restaurant 365, Irvine*Tony Smith, Co-Founder/CEO*

Tony Smith is co-founder and CEO of Restaurant365, the world's only all-in-one, cloud-based, restaurant-specific accounting, back office and reporting solution. After earning his degree, Smith joined John Moody and Morgan Harris as director of Services at Dynamic Methods, a consulting company that assesses business issues, especially accounting needs that can be solved with a software as a service (SaaS). After dissecting the restaurant industry, Smith's work with Dynamic Methods led him to co-found Restaurant365 in partnership with Moody and Harris, where product direction and strategy has been his main focus. This never before created software was a rigorous task to perfect with years of troubleshooting and refining. Smith dove deep into the needs of restaurant managers by visiting their stores and helping count inventory, cash out servers and lock up to gain an understanding on turning several outdated systems into an efficient, cohesive software. With Restaurant365's rapid growth, Smith is constantly refining the software to be as cohesive and efficient as possible for restaurant managers. Now with three minority investments under their belt, Restaurant365 is growing and hitting their sales target each year.

**Site 1001, San Clemente***Dipak Shah, CEO*

An 18-time award-winning smart building company, Site 1001 is the first software platform to bring the power of AI to the largest industry on the planet - real estate. Winner of 2018's Most Outstanding Technology, 50 Hottest Technologies, Test Tech Startups, and more, Site 1001 originally spun out of a construction company and has since grown from just four employees to over 80 and from one office to three in just three years. Site 1001 is revolutionizing how buildings are run and combines core building information, live building systems, sensors and "people-generated" information like work requests and comments, with artificial intelligence and machine learning technologies to help make buildings smarter, more efficient and better places for the people who work, play and live in them. In just a few years, Site 1001 is already implemented in over five million square feet of buildings and has a loyal customer base.

**Smart Energy Water, Irvine***Deepak Garg, CEO/Chairman*

Deepak Garg, founder and CEO, stands at the forefront of the No. 1 Global Smart Energy and Water Cloud Platform, Smart Energy Water (SEW). He spent over 15 years evangelizing an industry-wide shift for the energy and utility industry which helped position SEW as a leader in the digital customer engagement and workforce engagement space. With deep tech industry knowledge, Garg has championed digital transformation for the energy and utility industry with SEW's cutting-edge platforms motivating utilities to embrace digital customer engagement solution to improve customer experience and customer service. He has built a reputation for developing business strategies, incubating new business models, and building out of the box solutions that have helped utilities embrace digital transformation. By embracing the core values of integrity, and innovation, he is working on a vision to achieve global sustainability around the world.

**SmartBug Media, Irvine***Ryan Malone, Founder/CEO*

Ryan Malone is the founder and CEO of SmartBug Media™, a leading Intelligent Inbound™ marketing agency with a unique 100% remote business model that employs 75 employees from 28 states. The company's remote model has proven to be wildly successful, enabling it to recruit people who are passionate about their job and committed to the zest of their lives, resulting in a low-retention business, free from politics and the negativity often seen in office-based environments. Based out of Irvine, SmartBug assists businesses in generating leads, increasing awareness, and building brand loyalty through inbound marketing, digital strategy, design, marketing automation, and public relations. In ten years it has been named twice to the Inc. 5000 list of fastest-growing companies, won hundreds of awards for workplace culture and client work, and is the highest-rated HubSpot partner in the world. Malone holds an MBA from UCI Paul Merage School of Business where he is also an industry fellow at the school's Center for Digital Transformation.

**Soft Health Technologies LLC, Laguna Beach***Thomas Berryman, Founder*

Thomas Berryman has extensive experience in bringing venture-funded medical technology companies from initial startup through product commercialization, revenue growth and exit. At Soft Health, Berryman resurrected a forgotten technology and secured rights to it from a Fortune 100 company. He assembled a team to re-create the manufacturing process, then drove production costs down and established new IP protection. Berryman pioneered applying a social media-based e-commerce strategy to a socially taboo condition that millions of women deal with, bringing them an entirely new method for preventing bladder leaks.

**SOLD.com, Irvine***Matt Woods, President*

Matt Woods is president of Irvine-based SOLD.com, the first-of-its-kind educational resource and proprietary recommendation engine for consumers researching and evaluating the many methods to sell and buy a home. After 20-plus years in the real estate/financial services industry, Woods is passionate about disruption capabilities that today's technology, when coupled with world-class operations, can have on traditional operating models. Utilizing complex data science, SOLD.com connects home sellers and buyers with the optimal path and partner for their unique situation. Following SOLD.com's launch in October 2018, they have consistently been building out their platform to provide a one-stop solution throughout the selling and/or buying journey. Earlier this year, the company began a partnership with HomeAdvisor to offer home improvement services directly to home sellers on their website. They also rolled out an offering for homebuyers in July 2019, and are soon to launch a mortgage solution. To date, more than 15,000 consumers have been matched by SOLD.com's proprietary recommendation.

**Sonendo Inc., Laguna Hills***Bjarne Bergheim, President/CEO*

Bjarne Bergheim brings more than 15 years of experience driving and leading disruptive innovation in life science companies. With breakthrough Multisonic Ultracleaning® technology, Sonendo® is elevating the level of clean throughout endodontics and dentistry. By introducing broad spectrum acoustic technology and reducing doctors' reliance on standard instrumentation, Sonendo is saving teeth, transforming dentistry and changing patients' lives. Prior to Sonendo®, Bergheim was a member of the Fjord Ventures, LLC team involved in the selection and due-diligence of portfolio companies. From 1998 to 2006, Bergheim was responsible for developing the first trans-apical valve procedure at 3F Therapeutics, Inc. Bergheim has been president and CEO of Sonendo, Inc. since 2008. He graduated Cum Laude with a Bachelor of Science degree in Mechanical Engineering from the University of California, Irvine in 1997 and earned a Master of Science degree from the California Institute of Technology in 1998.

**Sports 1 Marketing, Irvine***David Meltzer, CEO*

David Meltzer, alongside Hall of Fame quarterback Warren Moon, founded Sports 1 Marketing in 2010 and has further established himself as a top sports executive, highly touted keynote speaker recognized by both Forbes and Entrepreneur, philanthropist, and one of the world's top business coaches. The CEO of S1M, who was named Sports Humanitarian of the Year by Variety, has led the company as it earned honors such as one of the 20 Most Admired Companies to Watch 2018, Most Disruptive in Sports Marketing, a Best Place to Work, and its rapid growth landed it on the Inc. 5000 list for three straight years. In addition to successful projects like the Aggregated Marketing Platform, which was named "The Best App/Mobile Site in Sports" domestically and internationally, Meltzer has also seen continued success as the executive producer of Entrepreneur's record-setting digital business show, Elevator Pitch, and host of the Top 5 iTunes podcast, The Playbook.

**Swift Engineering Inc., San Clemente***Andrew Streett, Vice President of Technology/ Chief Scientist*

Andrew Streett is the vice president of technology and chief scientist for Swift Engineering. He is responsible for driving the creation of Swift-X products and technologies, developing roadmaps, forming strategic partnerships, leading spin-offs, and building and managing intellectual property portfolios for the organization. Under his leadership, Swift has developed solutions for multiple platforms and technologies within the underwater, marine surface, aerial, and space vehicle markets. In addition to his responsibilities as chief scientist, Streett leads many high functioning teams at Swift. He also serves as principal and chief engineer of X-blade Technology and Swift 020 Unmanned Aerial System ("UAS"), co-inventor and chief engineer of Solar Plastic Kiln, principal & director of NASA Humanoid Robotic Arm and Swift Telepresence Platform, and principal & chief engineer of NASA HALE UAS. Streett earned his Bachelor of Science in Mechanical Engineering and his Master of Science in Fluid-Structure Interaction of Piezoelectric Composite Caudal Fins from Rochester Institute of Technology. He also graduated with a degree in Innovation and Invention from Art Center College and Design and completed the Ecole Chocolate Program.

**Syntiant Corp., Irvine***Kurt Busch, CEO*

In 2017, Kurt Busch co-founded Syntiant Corp., an innovative manufacturer of ultra-low power machine learning semiconductors for battery-powered devices. Syntiant has moved very fast in the last 18 months, from closing its Series A round in October 2017, to sampling its first products in June 2018, to closing its Series B round in October 2018. The company has caught the attention of some of the world's leading tech companies who are now strategic investors, including Amazon, Applied Materials, Bosch, Intel Capital, and Microsoft and Motorola. In July 2019, Syntiant is shipping its first commercial chips for customer



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delivery. Custom built to run neural workloads, the Syntiant NDP100 and NDP101 processors consume less than 150 microwatts while continuously listening, providing 20x the throughput of the typical low-power MCU solution. Syntiant's ultra-low-power, high-performance, deep neural network processors are being designed into battery-powered devices, including earbuds, headsets, remote controls, laptops, and other voice-activated products, supporting entirely new form factors and usage models designed to wake up to speech rather than touch.

TAE Technologies, Foothill Ranch

Michl Binderbauer, CEO

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

**TAG, Newport Beach**

Anneke Stender, Executive Vice President

Over ten years ago, Anneke Stender saw a gap in the marketplace for back-office accounting and personal reporting services for the high-net-worth. She discovered that when CEOs sold their business or retired, they no longer had their corporate accountant to help with day-to-day financial tasks. The revelation sparked Stender to develop TAG Family CFO and TAG Bill Pay which brings a corporate accounting approach to families with a complex financial life. Stender manages TAG Bill Pay which is now a preferred bill pay vendor for several financial institutions and family offices. With her vision to build out this new service offering the company has tremendously increased revenue and employee size.



Stender started her career as the Controller of TAG in 2003. Back then TAG was known as "The Accounting Group", an outsourced accounting firm, with seven employees. Since then, under the guidance of Stender, who is now a co-owner of TAG, the company has grown to over 50 employees with four office locations and serving clients nationwide.

TAGNOS, Aliso Viejo

Neeraj Bhavani, Chief Executive Officer

Neeraj Bhavani founded TAGNOS and oversees the strategic vision for the company. TAGNOS helps hospital communities across the U.S. orchestrate their workflows to drive excellence across all care delivery paths. An energetic entrepreneur, Bhavani has many years of experience in healthcare informatics, wireless healthcare and workflow automation. He has raised \$5.5 million in Series A funding through two venture capital firms, and TAGNOS has three corporate investors: Cisco, Zebra and Honeywell.

TAGNOS also has a distribution relationship with Stryker and Siemens Healthineers. Bhavani holds multiple patents and has served in management consulting and IT leadership roles at Kaiser Permanente, IBM, Amgen, Blue Shield and THQ Wireless. Prior to TAGNOS, Bhavani was the vice president of Corporate Development for RoundWorld Solutions Big Data Security & Governance Solutions. He has also been a business development consultant for RNV Technologies Inc.

**TerraTech Corp/ Blüm, Irvine**

Amy Oppedisano, Co-Founder/ Marketing Director

Amy Oppedisano is co-founder of Terra Tech Corp., the first publicly traded cannabis company in the U.S., and serves as marketing manager of its subsidiary Blüm. She's been on the ground floor of the legal cannabis revolution, focusing her drive on education, brand development, retail identity and establishing a strong corporate ethos. Oppedisano served on the Board of Directors for Terra Tech Corp from 2012-2017 and is one of the first female founders of a publicly-traded cannabis company, globally. Her marketing focus has been driven by producing an ethically transparent product, responsible cannabis use and a respectful representation of the cannabis consumer. In 2018, Oppedisano began focusing on encouraging social responsibility and giving back to the community. She's organized activations that collected supplies for California wildfire victims, donated a portion of sales to the Las Vegas shooting victims, and passed out hundreds of pounds of food for local families in need. Under her leadership, Blüm has also been an active participant in local Pride events, art shows, street fairs, and the Women's March.



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Sonendo® has set the pace for endodontic innovation by developing disruptive technology that transcends the benchmarks set by standard root canal therapies. We are honored to be recognized for our work toward transforming the traditional endodontic armamentarium and thank Sonendo President and CEO Bjarne Bergheim for the far-sighted vision and steadfast leadership that drives us to innovate more than others think is possible, expect more than others think is practical and care more than others think is pragmatic.



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The Joseph Company, Irvine*Mitchell Joseph, Chairman/CEO*

Mitchell Joseph is the founder of the Joseph Company International and is the 4th generation of The Joseph Family, dating back to 1921 with the bottling and distribution of Dad's Old Fashion Root Beer & Squirt, to dedicate himself to the beverage business. Joseph has spent the last 25 years pioneering the Chill-Can® project. Joseph's expertise in sales, marketing, public relations, licensing, and finance have led to the Joseph Company International being recognized globally for the technological advancement that is the self-chilling beverage can. Residually, many non-self-chilling products and packaging solutions that exist in the market today came as a result of the research and development completed by Mr. Joseph and the team of engineers at The Joseph Company International.

**The Strength Co. LLC, Costa Mesa***Grant Broggi, Owner/ Founder*

Grant Broggi, United States Marine Corps Captain, is the owner of The Strength Co., LLC. Grant applies his military leadership to his strength training gym. Broggi was deployed to Afghanistan in 2014 where he began coaching Marines using the Starting Strength methodology. Broggi acquired his Starting Strength Coach credential in 2016, which brought many Orange County residents to his garage for training. Broggi opened The Strength Co. in Costa Mesa in August 2017. By December 2018, The Strength Co. opened a second location in Villa Park. Strength will improve endurance, increase confidence, and prevent injuries. Strength training has also been associated with longevity. At The Strength Co., Broggi uses his Marine experience to help his members achieve their health goals effectively. Each training session is a 90-minute group class designed to make the most of the member's time. The sessions are designed with working professionals and healthy organizations in mind.

**The Wooden Floor, Santa Ana***Dawn Reese, Chief Executive Officer*

Dawn S. Reese, CEO of The Wooden Floor, is a social innovator who leverages her unique blend of experience in business, technology, and the arts to propel young people forward. During Reese's ten-year tenure, the organization's budget has grown from \$2.1 million to \$3.5 million and has expanded both locally, and nationally. In April 2018, the organization opened its second location with a third location planned by 2022. The two campuses serve 500 children after school over a 10-year journey, and 100% of the graduates enroll in higher education. Under the Lift Campaign: Inspiring Young People. Building Our Community with a goal to raise \$27.2 million, which includes an innovative funding and growth strategy to pre-raise 10 years of program operating expense, not typically known in the nonprofit sector. Reese received the 2019 Women Breaking Barriers Award, 2018 Founders Award - Institute of Community Impact, and the 2016 Award for Executive Leadership for Innovation – CSUF Center for Leadership. Reese is on the Board of Directors of OneOC, OC Music and Dance and Santa Ana Chamber of Commerce.

**Titan Health & Security Technologies Inc., Newport Beach***Vic Merjanian, Founder/CEO*

Vic Merjanian, Esq. is the founder and CEO of Titan HST, a mobile and web-based tech company dedicated to connecting people during emergencies to decrease response time and increase safety. In 2018 alone, Titan HST was used over 200 million times. Titan HST's multi-patented and innovative technologies include Augmented Reality, allowing responders to find people in need through no visibility situations, dual-channel mesh networking, allowing people to communicate during network failures, real-time translation, bridging language barriers and the recent release of a line of hardware allowing people to in need to be found precisely and quickly in any situation. Merjanian is also the founder and managing partner of Kalfayan Merjanian, LLP's Newport Beach Office. The attorneys at his firm have achieved over \$1 billion in recoveries on behalf of their clients, spanning their Antitrust, Business Litigation, Civil Litigation and Personal Injury practices. Merjanian received the 2018 OCBJ Entrepreneur of the Year Award.

**United Sports Brands, Fountain Valley***Jay Turkbash, Sr. Vice President, Innovation*

Jay Turkbash joined United Sports Brands as vice president of sales and marketing in 2000, when the company only had the Shock Doctor brand in Minnesota. At that time, Shock Doctor had seven full-time employees, four mouthguard models and about \$5 million in annual revenue. Turkbash's leadership enabled Shock Doctor to grow into a leading sporting goods protective business, with a full line of mouthguards, cups, supports, compression and sports medicine products at top national retailers like Dick's Sporting Goods. This paved the way for Shock Doctor to acquire Cutters, McDavid and NATHAN, the current portfolio for United Sports Brands. Turkbash became vice president of Marketing and Product Development in 2008 and then senior vice president of Product Development in 2015, and just recently he became the company's first senior vice president of



Innovation. He remains actively committed to developing protective products that help athletes perform their best with the most confidence.

University of California, Irvine, Irvine*Michael Dennin, The Vice Provost for Teaching and Learning/ Dean of Undergraduate Education*

Michael Dennin has contributed significantly to many milestones at UCI, but most recognizably is his ability to popularize science and bring active learning environments to higher education. Last year he launched UCI's Office of the Vice Provost for Teaching and Learning (OVPTL). The division has sparked updated academic programs, exciting community partnerships and national outreach like never before, resulting in a number of recognitions for UCI embracing student diversity and college access. In the past year Dennin has created many opportunities for milestones including: building the Anteater Learning Pavilion, creating the Active Learning Institute, creating a new campus space called the Student Success Initiatives Center, and an initiative called First-generation Faculty which had so much success the first two years, that now all the University of California schools have adopted it. In addition, he helped expand the Campuswide Honors Program, the international student excellence program and fundraising opportunities.

**UST Global, Aliso Viejo***Adnan Masood, Chief Architect, AI and Machine Learning*

Dr. Adnan is a solopreneur and multifaceted technical professional with a diverse set of technical skills and expertise in Artificial Intelligence (AI) and Machine Learning (ML). He is known as one of the most prolific researchers in machine learning and AI, with his work helping incite the recent revolution in deep learning. He has been a notable speaker at the Microsoft Azure AI Connections Artificial Intelligence and Machine Learning Talks. He also co-manages, Tampa Data Science user group, and Irvine .NET Programmers Meetup. Dr. Masood and his team of data scientists and machine learning engineers are focused on machine learning life cycle implementation in the enterprise. He specifically looks at innovation areas for UST Global and leads the AI implementations, MLOPs, software architecture and development for various products in healthcare, retail, finance, and TMT verticals. Dr. Masood is responsible for conceptualizing and developing a set of next-generation AI solutions around analytics and automation that can be deployed across UST Global's customer in different industries.

**ViewSonic, Brea***Jeff Volpe, President, ViewSonic Americas*

As president of ViewSonic Americas, Jeff Volpe is responsible for strategic business planning, sales and marketing, operations, and logistics for the region (United States, Canada and Latin America). His expertise has helped establish the company as a global technology leader in display solutions for commercial as well as consumer applications. He has led ViewSonic Americas in a variety of capacities for 24 years. Additional roles have included: vice president of global brand and emerging technologies with responsibility for messaging development as well as pursuing new technology opportunities; vice president of marketing, where he was responsible for marketing strategy throughout the region; vice president of sales, managing the company's regional reseller, distribution, enterprise and retail operations; vice president of the business products division; and senior director for Canada. Prior to ViewSonic, Volpe served Citizen America Corporation as Canadian regional sales manager for computer printer products and as manager of indirect sales channels for Epson Canada Limited. He has received a Congressional Certificate of Special Recognition for his contributions to industry innovation and market leadership.

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

Ville Houttu is founder and CEO of Vincit California, Inc., a custom software development and design studio originally from Finland. Previously head of business development at Vincit Group, Houttu helped the Finnish company reach 350 employees and make it public on Nasdaq First North marketplace. He opened Vincit California in 2016, and has grown the US footprint to over 30 employees supporting local projects across multiple industries. Houttu also founded Vincit Dev Talks, a quarterly meetup which brings together members of the Orange County tech community for networking and innovative discussions. These events cover various topics provided by speakers across multiple industries and backgrounds. He also keeps Vincit involved in events that support local coding schools and programs through UCI. Houttu was recently awarded the 2018 Entrepreneur of the Year Award from Irvine Chamber of Commerce and has received increasing press coverage for his work in Orange County, growing the presence and clientele of Vincit.

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

Terry Mullin is an active innovator and business builder in Orange County. He has formed and lead teams in market-leading companies that have brought first in class

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software and hardware to the market. Within his latest venture, ViridiSTOR, Mullin has launched a new era in compact content management systems to deliver information to the over \$1 trillion event, conference, and tradeshow industry. His innovations not only make sense but reduce monetary costs and environmental costs. This is of critical importance as a renewed sense of urgency has focused on climate change and its associated issues. From the carbon pollution that is tied to paper production, to the fact that it takes 10 liters of water to make a single piece of paper, the ViridiSTOR eliminates these impacts. Moreover, it is unique in being a truly sustainable solution that actually reduces costs, increases profits for those who deploy it, and makes information more accessible and easier to use at events around the world. ViridiSTOR is engaging funding to take the company to the next level.

Ware Malcomb, Irvine
Lawrence Armstrong, CEO

Ware Malcomb CEO, Lawrence Armstrong, is both an accomplished architect and strong business leader. He is well known for his strategic, visionary approach to the company's management and growth, as well as his commitment to fiscal discipline to ensure the overall health of the firm. His strong design ability and focus on creativity and innovation greatly influence all aspects of the organization. His philosophy of embracing change and rewarding achievement and innovation has resulted in a highly successful, dynamic firm. Armstrong is a past winner of the Ernst & Young's Entrepreneur of the Year Award, Orange County/Desert Cities Region and was also a national finalist. Ware Malcomb was founded in 1972 in Irvine, California by Bill Ware and Bill Malcomb and focused on the design of office and industrial architecture. Since its founding, Ware Malcomb's philosophy of great design, excellent client service, and relationship-focused business has been a mainstay. The firm has a long history of leading design for commercial and corporate real estate.

Western Digital, Irvine
Robert Fairchild, Director Hardware Engineering, Content Solutions

Robert Fairchild joined Western Digital in 2010 as a mechanical engineer and has since been awarded nine patents and is now serving as the director of engineering. His most significant business accomplishment is the latest My Passport product architecture. By optimizing all of the design elements, the latest My Passport is the smallest, most cost-efficient to produce HDD mobile storage device on the market, all



of which should provide the company with a significant financial cost-benefit. Fairchild's second most significant accomplishment is the passive thermal management system developed for iBi which is a photo storage product. A special low cost thermally conductive but electrically non-conductive (iBi has internal WiFi so electrically insulated parts are required) plastic resin was developed so the internal structural parts of iBi could be manufactured by the low-cost injection molding process and provide the conductive thermal path needed to dissipate the heat. After the process was cost-optimized, the passive thermal management system resulted in little cost impact to iBi.

Western Digital, Irvine
Dean Jenkins, Technologist, Lead Systems Engineer

Dean Jenkins is a technologist and lead systems engineer in the Flash Products Group at Western Digital Corporation in Irvine. He assumed the role in 2017 after nearly a decade of progressive engineering leadership roles within the company. Throughout this time, Jenkins has been instrumental in the transformation of industry and customer requirements into marketable technologies and products. Jenkins previously held engineering positions with Aristos Logic, Paracel, Celera Genomics, Unisys in addition to Western Digital. His background also includes extensive experience in consulting and small business ownership. An accomplished inventor, Jenkins has been issued a total of 27 patents from the United States Patent and Trademark Office for applications including smart light bulbs, 3D printers, flash data retention sensors and communication interfaces. Several other patent applications are currently under review by the USPTO. Jenkins' current position as a technologist and systems engineering lead in the Flash Products Group sees him working with Western Digital's highest performance products – NVMe Solid State Drives (SSDs). In this role, he actively engages with customers, vendors and cross-functional teams to identify requirements, establish specifications, address capability gaps and drive issue resolution.

Western Digital, Irvine
Steven Peng, Sr. Industrial Design

Steven Peng is a lead industrial designer for many Western digital consumer products including WD My Passport, WD My Book, WD My Cloud, and many others. Through a holistic design approach, under Peng's design leadership, he helps them re-position and brand new WD Black gaming design. Peng created a



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2019 INNOVATOR OF THE YEAR AWARD NOMINEES

distinguishable industrial design, overcoming challenges along the way. One of the recent accomplishment was a new WD Black design. He crafted a cohesive point of view for Gamers in mind, industrial design language and packaging of WD Black. Peng has extensive experience in delivering innovation to market, including over 35 utility and design patents. He has managed internal and consultancy design teams, engaged in user research across three continents and executed with global engineering and manufacturing partners. Peng's multi-disciplinary background includes a BS in Product Design from Stanford University and an MFA in Industrial Design from Art Center College of Design.

Western Digital, Irvine

Wally Szeremeta, Sr. Technologist Hardware Engineering, Content Solutions

Wally Szeremeta has worked for Western Digital for over 26 years; including 13 years as a member of the Content Solutions team. Szeremeta has over 30 US patents covering a broad spectrum of technology topics including shock and vibration protection of data storage devices, thermal management of data storage devices, design of data storage testing apparatus, electromagnetic emission suppression, design of optical light guides and injection molding with controlled part flexing. He has been a key contributor to the development of many successful Western Digital products; including the My Book, My Passport, Portable HDD Rugged Case, My Cloud and My Cloud Pro. His latest achievements include the design and mechanical architecture of the smallest size Western Digital Portable Passport drive.

**Word & Brown General Agency, Orange**

Jessica Word, President

Jessica Word grew up in the insurance business. Her father, John M. Word III, and business partner, Edward J. "Rusty" Brown, Jr., established Word & Brown in 1985. Now at the forefront of Word & Brown, Word's experience and leadership have allowed her to grow through the ranks. She became the first woman to lead Word & Brown in 2013. Word is a recognized leader in developing and distributing comprehensive health benefit plan models and insurance solutions through licensed brokers. Prior to taking her current role in 2013, Word was executive vice president of Operations for the General Agency for seven years, managing small- and mid-sized Group Underwriting, Individual and Family Plan Underwriting, Broker Services, Customer Care, and Plan Maintenance, in addition to Program Management and collaborating with other organization leaders in strategizing new business initiatives for the General Agency. Word's broad experience working



across The Word & Brown Companies has given her great insight into different facets of the insurance industry – leading to the implementation of business process improvements to enhance the consumer and broker experience

Wurk Now LLC, Irvine

Sammy Singh, Chief Executive Officer

Founded in 2017 with the official product launch in early 2019, Wurk Now LLC is the brainchild of Sammy Singh and TJ Sehmi. Having over 25 years of experience in the staffing industry, it was Sammy's mission to bridge the gap between the temporary workforce and technology. Singh and Sehmi blended their expertise in staffing, technology, and compliance to design the new standard in the temporary workforce. In addition to being the only temporary workforce management platform built on the blockchain, Wurk Now is composed of four modules specifically for Staffing, Human Resource, Time & Labor, and Compliance. All of these modules use the best in technology to empower the temporary workforce with technological advancements such as a bilingual mobile-centric app, intelligent job matching, consolidated time cards, automated alerts, and a centralized database. Wurk Now LLC has received two rounds of seed funding and has 1,000 enrolled employees with a projected 12,000 enrollees in the next six months using the platform.

**Zadara Storage, Irvine**

Nelson Nahum, Co-Founder/CEO

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



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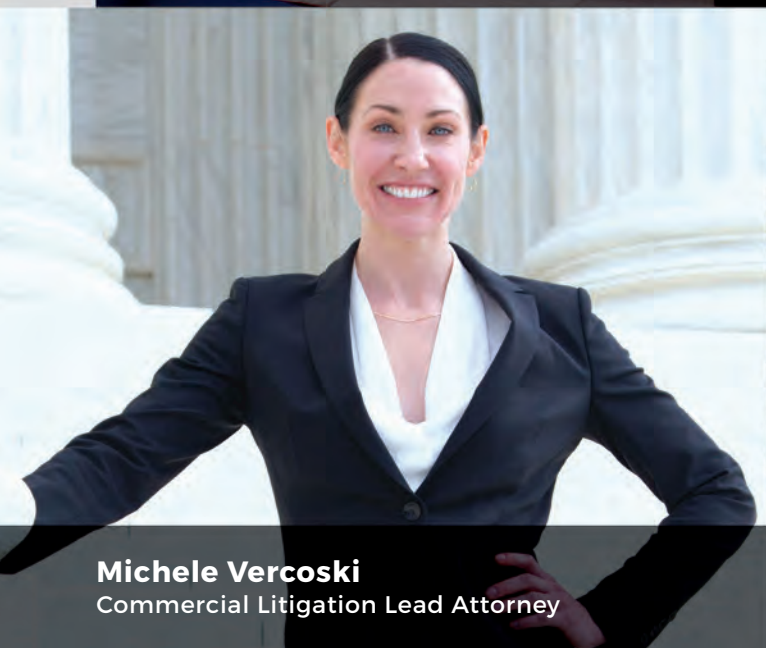


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INNOVATOR

of the YEAR AWARDS

Congratulations 2019 Nominees

Noah Kerner - *Acorns*
 Martha Montoya - *AG Tools Inc.*
 Hans Keirstead - *AIVITA Biomedical Inc.*
 John Kao - *Alignment Healthcare*
 Mark Mullison - *Allied Universal*
 Amir Fassihi - *Amnion Life LLC*
 Mouna El Khatib - *AONDevices Inc.*
 Marlo Brooke - *Avatar Partners Inc.*
 Raymond Cohen - *Axonics Modulation Technologies Inc.*
 Cheri Tree - *BANKCODE*
 Scott Richards - *Behr Paint Company*
 Todd Norbe - *BIOLASE Inc.*
 Patrick Johnson - *BioPhotas Inc.*
 Steve Markle - *BirchStreet Systems Inc.*
 Michael Burdick - *CalAmp*
 Jim Corbett - *CathWorks*
 Kelly Ireland - *CB Technologies Inc.*
 Frank Jaksch - *ChromaDex*
 Jennifer Anderson - *Concierge Key Health*
 Keith Scheinberg - *Cryo Innovations*
 Debra Miller - *CureDuchenne*
 Alex Dasmalchi - *Dasmalchi*
 Jim Caggiano - *Dendreon Pharmaceuticals LLC*
 Elliot "Mo" Kreitenberg - *DIMER UVC Innovations*
 Andrew Ninh - *Docbot*
 Nithin Jilla - *Dreams for Schools*
 Scott Hamilton - *ENP Institute*
 Ike Kavas - *Ephesoft Inc.*

Josiah Lilly - *EPIC Ceramic & Stone/Famosa Inc./
 The Slab Studio/Kannabis W Santa Ana*
 David Moatazedi - *Evolus Inc*
 Burton Eisenberg, M.D. - *Hoag Memorial Hospital Presbyterian/
 Hoag Family Cancer Institute*
 Quinn Taber - *Immerse*
 Dr. John Pham - *INBRACE*
 Neel Grover - *Indi*
 Scott Horn - *Informative Research*
 Mark Bachman - *Integra Devices*
 Dan Rodrigues - *Kareo Inc.*
 Dr. Lance Zhou - *Karma Automotive*
 Reynolds Bish - *Kofax Inc.*
 Billy Spears - *loanDepot*
 Nick Schifflbein - *LOCATE Inventory*
 Vince Sheeran - *MarginPoint*
 Ray Grainger - *Mavenlink*
 Tim Nguyen - *MeridianLink*
 David Cole - *NextVR*
 Nasam Chokr - *NOWA Innovations*
 Eyal Shahar - *Online Trading Academy*
 Lawrence Greaves - *OPKIX Inc.*
 Mostafa Khairzada - *Pacific Dental Services*
 Chuck Goetschel - *Rallio*
 Tony Smith - *Restaurant365*
 Dipak Shah - *Site 1001*
 Mr. Deepak Garg - *Smart Energy Water*
 Ryan Malone - *SmartBug Media*

Thomas Berryman - *Soft Health Technologies LLC*
 Matt Woods - *SOLD.com*
 Bjarne Bergheim - *Sonendo, Inc*
 David Meltzer - *Sports 1 Marketing*
 Andrew Streett - *Swift Engineering Inc.*
 Kurt Busch - *Syntiant Corp.*
 Michl Binderbauer - *TAE Technologies*
 Anneke Stender - *TAG*
 Neeraj Bhavani - *TAGNOS*
 Amy Oppedisano - *TerraTech Corp/ Blüm*
 Mitchell Joseph - *The Joseph Company*
 Grant Broggi - *The Strength Co. LLC*
 Dawn Reese - *The Wooden Floor*
 Vic Merjanian - *Titan Health & Security Technologies Inc.*
 Jay Turkbash - *United Sports Brands*
 Michael Dennin - *University of California, Irvine*
 Adnan Masood - *UST Global Inc.*
 Jeff Volpe - *ViewSonic Corporation*
 Ville Houttu - *Vincit*
 Terry Mullin - *ViridiSTOR LLC*
 Lawrence Armstrong - *Ware Malcomb*
 Robert Fairchild - *Western Digital*
 Dean Jenkins - *Western Digital*
 Steven Peng - *Western Digital*
 Wally Szeremeta - *Western Digital*
 Jessica Word - *Word & Brown General Agency*
 Sammy Singh - *Wurk Now LLC*
 Nelson Nahum - *Zadara Storage Inc.*

Luncheon & Awards Program

September 25, 2019
 12:00 p.m. - 2:00 p.m. at Hotel Irvine
 Tickets*: \$175 / Table of Ten \$1,650

Reservation Information

Please visit ocbj.com/bizevents or contact
 Melanie Collins, Signature Events Manager,
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