WOMEN IN FINANCE

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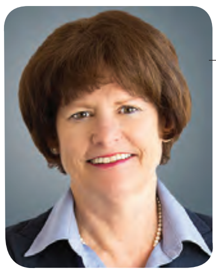
WOMEN IN FINANCE

Accounting

withum ADVISORY TAX AUDIT



MARGOT ANDREWS

WITHUM

Margot Andrews is an experienced partner with more than forty years of public accounting experience. Her expertise lies in business and individual tax planning, complex compliance and consulting issues related to the not-for-profit industry. Additionally, she works in tax preparation, consulting and planning across a variety of industries, including consumer products, financial services, manufacturing, distribution and logistics, education, real estate and agriculture. Andrews' expertise in compliance allows her to navigate IRS audits for her clients successfully. She is a close, trusted advisor to many of her long-standing clients, consulting on various business matters, exceeding expectations by giving each client the dedicated time they require to address their specific needs. Andrews is a key player in mentoring the young professionals in Withum's Irvine office. Her wealth of experience helps her guide young professionals through coaching, mentoring and being a resource for any client questions and needs. Before joining Withum, Andrews was a partner at KSJG CPAs, which joined Withum in January of 2020.

Andrews is a Certified Public Accountant (CPA) in California. She received her MBA in Taxation from Golden Gate University and her bachelor's degree from Chapman University. Andrews is a member of the American Institute of Certified Public Accountants (AICPA) and the California Society of Certified Public Accountants (CalCPA).

Banking

UnionBank A member of MUFG, a global financial group

JULIE BLOOMFIELD-BECKLEY

UNION BANK

Julie Bloomfield-Beckley is a highly talented director / senior vice president, business development manager in the Orange County Commercial Banking group at Union Bank®. She is currently responsible for the new business development of commercial credit relationships, targeting companies with sales in the range of $30 million to $2 billion whose credit needs generally range from $5 million up to several hundred million.

Beckley's primary mission is to identify and thoroughly understand clients' and prospects' short- and long-term corporate strategies and work closely with her team to provide guidance to help meet their objectives and deliver the value-added service our commercial clients expect of Union Bank. Beckley has held multiple positions in her 31-year career at Union Bank, including over 20 years with the Orange County Commercial Banking group, with eight years in relationship management. Beckley provides an insightful understanding of both the opportunities and risks involved in the credit products she sells and services, ranging widely from lines of credit, term loans, asset-based loans, commercial real estate and investment banking.

An active member of the Association for Corporate Growth, Financial Executives International, Forum for Corporate Directors, and other associations, Beckley thrives on helping prospects and clients achieve their strategic goals while also bringing them together with other local professional trusted advisors, such as lawyers and accountants, whose reputations she knows and values. A few of her favorite "meeting spots" are seats at Los Angeles Angels' baseball games and Anaheim Ducks hockey games.

Accounting

squarmilner

KIMBERLY CHEW

SQUAR MILNER LLP

Kimberly Chew is the director of marketing for Squar Milner LLP, a top 40 accounting firm in the US and one of the top firms in the West. She has been with Squar Milner for 16 years where she has helped scale and develop the firm's presence as they have grown to eight locations across California.

Chew oversees all marketing functions including the development of growth strategies, public relations and communications ensuring consistent branding and messaging across platforms. She works with her team on the development and implementation of digital marketing strategies that connect website, email campaigns, video, SEO, and social media. She coordinates firm-wide internal and external events, including the annual firm trip for over 350 attendees. Chew has built out several processes, including customization of the firm's current proposal software system, and managed the firm's campus recruiting process for 10 years.

In 2019, Chew developed a firm-wide Community Involvement Program, which has brought measurable change to the firm and its surrounding communities by creating employee volunteer days and company-wide drives for communities and organizations in need.

To create a strengthened presence in the market, Chew implemented a complete rebrand for Squar Milner including logo, all digital and print resources, website, and brand standards, further enhancing the identity of the firm.

Prior to joining Squar Milner, she acquired significant experience at a large circuit board manufacturer as their marketing coordinator. She earned her Bachelor of Science in Communications, Public Relations from California State Polytechnic University, Pomona.

Banking

PACIFIC PREMIER BANK®

KRISTINE CHUNG

PACIFIC PREMIER BANK

Kristine Chung is a senior vice president and director of Commercial Banking at Pacific Premier Bank, headquartered in Irvine, California. Since joining Pacific Premier in 2016, Chung has worked with business owners to achieve their goals and has led a team of dedicated relationship managers, guiding them in their professional development and growth. Chung believes in the importance of being a lifelong learner and encourages fellow banking professionals to never stop looking for opportunities to learn and grow.

With over 34 years of experience in banking, Chung specializes in commercial banking and international trade. After three years working for Comerica Bank, she joined City National Bank in 1992 to commence the Small Business and Government Lending Division, then went on to manage the Orange County Commercial Banking Center. In 2005, she became a founding executive of Security Bank of California.

Chung's expertise in commercial banking is evidenced by the numerous successful businesses she has partnered with throughout her tenure at Pacific Premier. Founded in 1983, Pacific Premier is a strong-performing commercial bank that offers a full array of financial services for businesses and individuals. Pacific Premier works with small, middle-market, and large businesses to provide products/services such as lines of credit, loans, treasury management, merchant and payroll services, and real estate financing.

Her love for banking is demonstrated through collaboration with business owners to grow their operations and achieve their goals. She enjoys learning the intricacies of how each company got its start and hearing about the passion owners have for their companies. Chung expertly leads her commercial banking team in developing customized, short- and long-term solutions for their clients—whether businesses need working capital to manage cash flow, obtain depository services, purchase equipment or inventory, or refinance existing debt. The team recognizes that every client is unique and requires a different set of products and services to reach their objectives.

Chung's passion for small businesses also extends outside of the workplace. She currently serves on the board of the CDC Small Business Finance and Loan Committee, and previously served as a board member of both Pacific Coast Regional (which provides state-guaranteed loans) and California Integrated Waste Management. She earned a Bachelor of Science degree in Business Administration, Accounting, at California State University, Los Angeles.
Pacific Premier Bank, Member FDIC.

Banking

BANC OF CALIFORNIA

DEBBIE DAHL-AMUNDSON

BANC OF CALIFORNIA

Debbie Amundson is executive vice president & chief internal audit officer for Banc of California, leading the Internal Audit, SOX Compliance, and Credit Review groups, which are responsible for the bank's independent internal assessment of the adequacy and effectiveness of governance, risk management, internal controls, asset quality, portfolio management, as well as the quality of performance in carrying out assigned responsibilities to achieve the organization's goals and objectives.

With over 35 years of financial services leadership experience directing and building effective internal audit and credit review functions, she has obtained Certified Internal Auditor, Certified Information Systems Auditor, and Internal Quality Assurance Assessment/Validation certifications; is a member of the Institute of Internal Auditors (IIA) and the Risk Management Association (RMA); and has been a panel speaker at the RMA Annual Risk Management Conference and guest speaker for the IIA.

Passionate about community and vocational service, she spends time each year volunteering for Habitat for Humanity, Rotary International, Junior Achievement, and United Way Women's Leadership. She and her husband, Steve, enjoy international travel and time with family and friends.

Amundson received her BS degree in finance and business administration, minoring in economics and mass communications, from Minnesota State University Moorhead; graduated from Pacific Coast Banking School at the University of Washington; and completed the RMA/Wharton Advanced Risk Management Program at Wharton School, University of Pennsylvania.

POWERFUL LEADERS.
EMPOWERING CALIFORNIA.

DEBBIE DAHL-AMUNDSON
EVP, Chief Internal Audit Officer

SAMANTHA HAUGH
SVP, Marketing

LYNN M. HOPKINS
EVP, Chief Financial Officer

CHRISTINE MARTIN
EVP, Treasury Management,
Bank Operations and Systems

LYNN SULLIVAN
EVP, Chief Risk and BSA Officer

NICOLE L. WELLS
SVP, Business Management Executive,
Private & Specialty Banking Division

These standout professionals are changing the landscape of banking in California.

We are proud to have these six women from our leadership team recognized in this inaugural ***Profiles of Women in Finance***. Their experience and expertise have helped to make Banc of California one of the most respected business banks in the country.

TOGETHER **WE WIN**™

BANC OF CALIFORNIA

bancofcal.com

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WOMEN IN FINANCE

Accounting

DEBORAH DICKSON

SMITH DICKSON

Deborah Dickson, CPA, CFF, MAFF founded Smith Dickson, Certified Public Accountants, LLP, 30 years ago and continues to serve as the managing partner. Her experience includes forensic accounting and expert testimony, tax, and consulting.

Ms. Dickson provides forensic accounting, litigation support services and expert witness testimony with an emphasis on business disputes including fraud and embezzlement, intellectual property, real estate, trust and estate, employment, and personal injury. She works as a forensic expert witness in Federal, State, Probate, and Family Law Courts; in arbitrations; and as a court appointed referee - providing asset and fraudulent expense tracing; economic damage analysis; lost profits and unjust enrichment calculations; forensic accounting; business valuations; financial/tax records analysis; and expert testimony.

Ms. Dickson personally handles the tax and accounting matters for high net worth clients and business owners– advising on strategic business planning, tax planning and compliance, bank financing negotiations, and financial statement presentation. She is frequently involved with due diligence and structuring of business buy/sell deals. She is a popular speaker on subjects such as tax planning and buying/selling businesses.

Ms. Dickson began her career as an auditor for Deloitte (formerly Touche Ross) and subsequently accepted an offer to run the Entrepreneurial Services Division at PricewaterhouseCoopers (formerly Coopers & Lybrand).

Contact Ms. Dickson at (949) 553-1010x12, www.smithdickson.com.

Finance

SUANNE FRADETTE

PRICEWATERHOUSECOOPERS LLP

Suzanne Fradette is an audit partner in PwC's Orange County office, with 32 years of experience serving clients in the retail, consumer products, industrial manufacturing, oil and gas, hospitality, food and beverage, transportation, and technology industries. Prior to joining PwC's Orange County office in September 2007, she worked in PwC's Beijing, Paris, Honolulu, San Francisco, and Orlando offices, and her clients have ranged in size from growth-oriented start-ups to multi-billion-dollar multinationals. She has assisted public companies in navigating though the rigorous requirements of SEC reporting, and has many years of experience in working with closely held, entrepreneurial and private equity-owned companies. She has extensive experience working with companies being poised for an IPO or other major equity event, and has taken companies public on U.S., Asian and European stock exchanges.

Fradette is a national PwC Diversity and Inclusion leader, and is a nationally-recognized speaker regarding diversity and corporate responsibility issues. She serves on the boards of several charitable organizations, including the Orange County United Way and the American Red Cross, is a Fellow of the National Association of Corporate Directors and a member of Women Corporate Directors. She serves on the Dean's Advisory Board of UCI's Paul Merage School of Business, and has taught at the university level. Fradette was honored with a nomination for the OCBJ Women in Business Award. She is a licensed C.P.A. in California, Florida, Hawaii, and Guam, and is a member of the American Institute of Certified Public Accountants. She and her husband Steve live in Irvine.

Finance

KAAREN HALL

UDIRECT IRA SERVICES

Despite being in the midst of a recession and mortgage market collapse, Kaaren Hall founded and made a resounding success of uDirect IRA Services. She discovered a strategic way to put her 20+ years in mortgage banking, real estate and property management to use. The solution was an untapped market for both her skills and for investors – self-directed IRAs. Through uDirect IRA, she has guided tens of thousands of Americans through the process of diversifying their investments using self-directed IRAs.

She says, "Financial literacy is not taught in schools, but our future depends on understanding it. Only about 4% of U.S. investors have a self-directed IRA. Why? Because most investors and many advisors simply aren't aware of it."

For those raising capital, Self-Directed IRAs represent a way to tap into $30 Trillion in retirement savings. "Alternative assets" is fast-growing asset class and asset sponsors all over the country are utilizing the SDIRA for their capital needs.

Because Self-Directed IRAs can have a dramatic impact on retirees' quality of life, Hall brings her full passion to educating Americans about the little-known investment vehicle. Hall's company, "uDirect" was founded in 2009 and has $500MM+ Under Management with account holders in every state in the U.S.

Learn more about Hall and her thriving company at uDirectIRA.com

WOMEN IN FINANCE

Banking BANC OF CALIFORNIA

SAMANTHA HAUGH

BANC OF CALIFORNIA

With an extensive and impactful career in the finance industry, Samantha Haugh, senior vice president of Marketing at Banc of California, has demonstrated a talent for achieving goals and moving the needle throughout her career. Haugh joined the bank's executive leadership team in 2015 to lead the corporate marketing and branding strategies during a period of tremendous growth.

At Banc of California, Haugh has built a best-in-class marketing team and established the bank's reputation as the premier relationship-focused business bank in Southern California. Throughout her more than 20-year career, Haugh has supported several national financial leaders, such as Citi Corp (Orange), AIG (L.A.) and Experian (Costa Mesa) by driving revenue, expanding market share and building brands, but she is most proud of the last five years at Banc of California.

Haugh is passionate about community service and led the formation and launch of the Banc of California Foundation, which supports 75 California-based nonprofits. In addition to serving on the Foundation's board, she volunteers her time and resources supporting the bank's nonprofit community-based partners. For the last two years, Haugh has served as a board member for JVS-SoCal, a workforce development organization serving 50,000 people annually through training programs to prepare LMI individuals for careers in rapidly growing industries.

Haugh received her Bachelor of Arts in Marketing Communications from California State University, Fullerton, and Internet Marketing certification from the University of California, Irvine.

Accounting withum ADVISORY TAX AUDIT

AMANDA HONG

WITHUM

Amanda Hong is an experienced partner in Withum's Tax Services Group. She has served the Southern California business community over the past 22 years, providing federal and multistate tax planning, consulting and compliance services to both privately and publicly held companies and various business entities. Hong specializes in international taxation, mergers and acquisitions, tax controversy matters, and high net-worth families and individuals. Her experience crosses several industries, including consumer products, manufacturing, distribution and logistics, real estate, technology and emerging growth and construction.

Hong works closely with her clients to gain a deeper understanding of their business operations and challenges. Her philosophy is not only to provide tax support for her clients but to become a long-term trusted advisor, sharing best industry practices to help their companies grow and achieve their financial goals.

Hong is fluent in Mandarin and Taiwanese with speaking, reading and writing capabilities. She has a deep understanding of the unique needs of multi-national and multi-generation families and their business organizations. Her extensive professional services experience and language abilities perfectly position her to assist in-bound and out-bound companies, as well as high net-worth families, in transitioning and preserving family wealth and business continuity.

Hong is a Certified Public Accountant in California. She received her Masters in Taxation and Bachelor's degree from California State University, Fullerton. Hong is a member of the American Institute of Certified Public Accountants (AICPA) and the California Society of Certified Public Accountants (CalCPA).

Banking BANC OF CALIFORNIA

LYNN M. HOPKINS

BANC OF CALIFORNIA

Lynn M. Hopkins is the chief financial officer of Banc of California and a member of their Executive Asset Liability Management, Credit and Enterprise Risk Management Committees. As a successful banking executive with more than three decades of experience, she's gained deep mastery in finance and risk management, which has led to an impressive track record with growth-oriented community banks. Prior to joining Banc of California in 2019, Hopkins gained extensive mergers and acquisitions experience, having executed and championed financial due diligence, contract review and the integration of more than 40 bank mergers over 22 years. A strategic-minded leader and thinker, she is recognized as a Sarbanes-Oxley, regulatory and SEC expert.

Hopkins was previously chief financial officer/EVP at First Choice Bancorp in Cerritos (Orange County), as well as executive vice president of PacWest Bancorp, where she had also served as chief accounting officer, chief financial officer (of subsidiary Pacific Western Bank) and corporate secretary, where she oversaw all aspects of accounting, finance, and treasury risk management. During her 15 year tenure at PacWest, she played a key role in strategic enterprise risk management and corporate governance development while the company grew from $1 billion to more than $20 billion in assets.

Hopkins is an advocate for women in business through her involvement in the WCD's BoardNext LA/OC chapter. She graduated from the University of California-Los Angeles with a BA in Economics/Business. She began her career as a CPA for KPMG LLP, working in their London and Los Angeles offices.

WOMEN IN FINANCE

Accounting

BPM

SCHARRELL JACKSON

BPM LLP

Scharrell Jackson joined BPM in early 2020 with over 35 years of operations, accounting and finance experience, which she utilizes to support BPM as the Firm's principal and chief operating officer.

Jackson has a background that results in operational efficiency, human capital development, technological innovation, business growth and scalability. Her extensive experience leading organizations through business combinations continues to drive BPM's commitment to expanding further into Southern California and other West Coast markets.

Jackson's passion for motivating established and aspiring leaders does not end when she leaves the office. In addition to her many roles at BPM, Jackson is a dynamic speaker outside of work and owns a women's speaker series, Leadership in Heels, where she continues to support the professional growth of women. She is a sought-after speaker and passionate about mentoring leaders and underserved youth to obtain upward mobility, personally and professionally.

Jackson received the Los Angeles African American Vanguard Award and Farmers & Merchant Bank's Woman of Courage Award, and she was named the Orange County Business Women of the Year. She has been recognized for countless achievements and continues to serve the community and hosts a weekly bible study in her home. Learn more about Scharrell and BPM at www.bpmcpa.com.

Accounting

SMITH DICKSON CERTIFIED PUBLIC ACCOUNTANTS, LLP

GINA LARA, MBA, CFP®, EA

SMITH DICKSON

Gina Lara has been counseling clients in tax and financial planning matters for more than fifteen years. She began her career in the financial industry working at an independent wealth management firm that catered to business owners, professional athletes, and other high net worth clientele. During her tenure, Lara became versed in all aspects of financial planning, from investment management to tax and estate planning. As she completed her MBA from Pepperdine University and obtained her license as a Certified Financial Planner (CFP®), Lara achieved corresponding success within the wealth management firm, rising to a director position.

Several years ago, Lara was asked to join the team at Smith Dickson, CPAs—a firm that she knew and respected from having collaborated with them on behalf of her wealth management clients. At Smith Dickson, Lara continued to develop her skills and qualifications, most recently earning the designation of enrolled agent (EA)—the highest credential granted by the Internal Revenue Service for federally licensed practitioners who specialize in taxation.

Lara's distinctive background provides her clients an unparalleled scope of knowledge that is utilized in her dual roles working in the Tax and the Forensic Accounting Departments at Smith Dickson. As tax manager, Lara's responsibilities include planning and compliance for individuals, business owners, and trusts. As forensic accounting manager, she provides financial analysis and litigation consulting services for trust and estate, and family law matters.

Contact Lara at Smith Dickson, Certified Public Accountants, LLP, (949) 553-1010x21, www.smithdickson.com.

Accounting

SingerLewak Accountants & Consultants

KATHY LAWSON

SINGERLEWAK LLP

Kathy Lawson is a partner in SingerLewak LLP Assurance and Advisory practice based in our Irvine office. Lawson is a Certified Public Accountant with more than eighteen years of experience in public accounting. Lawson primarily serves private companies from start up to a billion dollars in revenue in a variety of industries that include technology, professional services, manufacturing and distribution, healthcare and nonprofit organizations. Lawson has transaction experience with corporate restructurings, mergers and acquisitions and previously worked significantly with public initial offerings.

Lawson started her career with SingerLewak in 2002. Prior to that, she earned her B.A. in Business Administration with an Accounting concentration from California State University, Fullerton. Lawson is a member of the AICPA and CALCPA. As part of the Firm's in-house training program, Lawson has conducted numerous seminars on accounting, auditing, and related subjects. She serves on various committees within the Firm and heads up the Firm's Irvine recruiting efforts.

For the past 60 years, SingerLewak has been at the forefront of helping businesses succeed and scale. Our professionals work and consult with businesses in diverse sectors on efficient solutions such as tax compliance and advisory, IPOs, assurance and management consulting. We are proud of our proactive track record in helping businesses succeed efficiently. Whatever your needs are, we have a solution. Visit us at www.singerlewak.com

WOMEN IN FINANCE

Accounting

KRISTAN LIVINGSTON

RSM

Kristan Livingston is a senior audit manager at RSM and has 18 years of Big 4 audit and accounting experience providing financial statement and compliance audits to health care, nonprofit, government and higher education clients. Livingston is knowledgeable of GASB and FASB literature, Uniform Guidance (A-133), and AICPA agreed upon and debt consent procedures. Livingston has experience working with nonprofit hospitals, helping them implement the new nonprofit reporting model, grants standard and revenue recognition standard. Livingston spent several years auditing the largest municipal utility in the U.S. helping them to navigate the pension, OPEB and asset retirement obligations standards, as well as helping them to improve their process for managing federal funds. During Livingston's career, she had the pleasure of providing financial statement and uniform guidance audits to over 20 nonprofit organizations in the Orange County and Los Angeles communities, which include community foundations, college auxiliary organizations, religious organizations, art organizations, food banks and children's homes. Finally, Livingston has experience auditing private universities, as well as both of California's largest public college systems.

Livingston continues to grow RSM's health care and public sector practices in both the Orange County and Los Angeles markets.

About RSM US LLP
RSM's purpose is to deliver the power of being understood to our clients, colleagues and communities through world-class audit, tax and consulting services focused on middle market businesses. Learn more at rsmus.com. Please contact Livingston at (949) 255-6652 or Kristan.Livingston@rsmus.com.

Banking

CHRISTINE MARTIN

BANC OF CALIFORNIA

Christine Martin is executive vice president, treasury management, bank operations and systems at Banc of California. In this capacity, she is responsible for Information Technology and Security Operations, bank-wide deposit and loan operations, all treasury management product and sales functions and the Project Management Office.

Martin has a deep history in banking, with a focus on treasury management and operations, where she led product management and new product launches, new system integrations and bank merger activity. Prior to joining Banc of California, Martin spent nine years at MUFG Union Bank in progressive roles, ending as managing director in transaction banking focused on Liquidity and Revenue Management. She has also worked at Washington Mutual, Home Savings of America, and started her career in banking at First Interstate Bank.

Martin has lived in Orange County for 21 years and is involved with the community through her own interests and her children. She is a board member for Creative Kids Playhouse Children's Theatre of Orange County, volunteers with BBBS Workplace Mentoring, and completed the 2018 AIDS Lifecycle, a 545-mile bicycle ride from San Francisco to Los Angeles in support of AIDS services in Los Angeles and San Francisco.

Martin received her Bachelor of Arts in Journalism from the University of Southern California and MBA from UCLA's Anderson School of Management. She also attended Pacific Coast Banking School, where she graduated with honors and was a library paper entrant for "Basel III Liquidity Coverage Ratio and the Impact on Commercial Banking Funding Strategies."

Accounting

TASHA OTSUJI

WITHUM

Tasha Otsuji is a partner in Withum's Tax Services Group based in Orange County, CA. As a licensed CPA in the state of California, she has over fifteen years of comprehensive experience consulting with closely-held businesses and their owners in tax and management advisory services. Otsuji has a diverse background with expertise in manufacturing and distribution, not-for-profit entities, wealth management, and individual and business tax compliance and planning. She specializes in developing cutting-edge tax strategies for Subchapter C, S-Corporations, Partnerships and individuals and has worked extensively with clients conducting multi-state filings and consolidated filings. Additionally, Otsuji works closely with multiple not-for-profit management teams and boards of directors advising on compliance, accounting and governance issues. Tasha thrives when researching and analyzing complex tax matters to provide unique solutions.

Otsuji received a Masters of Taxation in high honors from Golden Gate University and a Bachelor of Science degree in Accounting from Azusa Pacific University. She is a member of the American Institute of Certified Public Accountants (AICPA) and the California Society of Certified Public Accountants (CalCPA).

Otsuji and her family enjoy traveling and serving internationally in several countries throughout Africa, South East Asia, and Eastern Europe. Throughout the year, they also serve at Camp Oakhurst, a camp for children, situated just outside of Yosemite National Park.

WOMEN IN FINANCE

Accounting SMITH DICKSON

KAREN REED, CPA

SMITH DICKSON

Karen Reed has been with Smith Dickson for over 25 years. She currently manages many of the firm's financial statement engagements including audits, reviews and compilations. She also performs tax compliance work and supervises substantial tax controversy work, including negotiations with the Internal Revenue Service, Franchise Tax Board, California Department of Tax and Fee Administration, and the Employment Development Department regarding audits, notices, liens, levies and payroll tax issues. Additionally, she coordinates with clients' controllers/chief financial officers and interacts with their bankers and attorneys.

Reed partners with a variety of small and mid-market companies and industries including but not limited to construction, technology, manufacturing, real estate, mortgage and escrow, medical, and professional services. She is particularly effective in consulting with clients on a one-to-one basis, advising them on implementation of accounting and internal control systems, payroll and Form 1099 regulations, cash flow management, and overall growth of their companies.

Reed has many loyal, long-term clients who depend on her frequent advice and communication with them. She works to provide the best possible hands-on experience with her clients.

Contact Reed at Smith Dickson, Certified Public Accountants, LLP, (949) 553-1010x17, www.smithdickson.com.

Banking BANC OF CALIFORNIA

LYNN (AHEARN) SULLIVAN

BANK OF CALIFORNIA

Lynn (Ahearn) Sullivan, executive vice president, chief risk and BSA officer of Banc of California, has over 20 years of experience in the financial services industry with a focus on the management of operation and regulatory processes and controls. In this role, she leads the Enterprise Risk Management organization which is responsible for developing and maintaining the Company's Enterprise Risk Management program; including the risk governance framework, developing and recommending its risk appetite, and oversight of the Bank's operational and regulatory risks.

Before joining the Banc of California, Ms. Sullivan served as the global head of Anti-Money Laundering Policies, Controls and Governance/Administration at Citigroup Inc., a multinational investment bank and financial services corporation. In her capacity as Global AML Policy and Controls Head, Ms. Sullivan oversaw global anti-money laundering program strategy, policy, training and control, anti-money laundering compliance testing and enterprise-wide anti-money laundering communications.

Prior to Citi, Ms. Sullivan served as the chief compliance officer at Rabobank, N.A. from 2012 to 2013 and worked at Union Bank, N.A., where she also served as the chief compliance officer.

Ms. Sullivan has a bachelor's degree in political science from the University of California, Santa Barbara. She has been recognized by the San Francisco Business Times as among The Bay Area's Most Influential Women and among The Bay Area's Forever Influential Women. In addition to banking, Ms. Sullivan is the founder and CEO of BE Fit | Modern Pilates, a boutique fitness business with locations in Orange and Los Angeles counties.

Wealth Management MIRACLE MILE ADVISORS

DANIELLE VOLOSHIN

MIRACLE MILE ADVISORS

Danielle Voloshin has worked in the financial services industry since 2011. As an Investment Advisor, she works closely with high-net-worth families and individuals to create comprehensive financial plans that serve to protect and grow multigenerational wealth. Voloshin specializes in implementing customized investment strategies, complex cash flow models and wealth transfer techniques for estate and business planning, philanthropic management, and family governance.

Prior to joining Miracle Mile Advisors, Voloshin worked at Green Street Advisors, consulting family offices and institutional clients on real estate investing. Previously, Voloshin worked at Morgan Stanley Private Wealth Management, where she developed strategic investment solutions for ultra-high-net-worth families with liquid assets in excess of $10 million.

Voloshin received her MBA with Dean's Honor List distinction from the University of Chicago Booth School of Business and her B.A. from Lake Forest College (Phi Beta Kappa). She holds the Financial Industry Regulatory Authority (FINRA) Series 66 securities license. Voloshin is involved in philanthropic organizations both locally and globally, serving as a Board Member of the Orange County Jewish Federation as well as an active member of AIPAC, United Way, and the Lisker Music Foundation.

WOMEN IN FINANCE

Wealth Management MIRACLE MILE ADVISORS

NELLA WEBSTER O'GRADY

MIRACLE MILE ADVISORS

Nella Webster has over thirty years of experience in providing investment management and financial planning services to clients throughout Southern California.

Prior to joining Miracle Mile Advisors, Webster ran Palo Capital's marketing and client service activities. Previously, she served in senior management roles at US Trust, Wilmington Trust, and First American Trust. During this time, she developed a deep understanding of the services clients and their family members need to build and maintain their financial security. Webster earned her Bachelor's degree in Economics and Business Administration from Chapman University and an M.B.A. in Marketing and Finance from California State University, Long Beach. She also holds the Certified Financial Planner® designation.

Webster has served on the board of directors of the Girl Scouts of Orange County, the Board of Counselors for Chapman University's Argyros School of Business, the Plasticos Foundation, and the Friends of the Girl Scouts Trust. Other leadership roles have included the board of Orange County United Way, the Women Helping Women advisory board, the Pacific Symphony 100, and the Anaheim Performing Arts Center. In 2015, Webster received the Philanthropist of the year award from the Orange County United Way, and in 2016, she received the Orange County Business Journal's Women in Business Award.

Banking BANC OF CALIFORNIA

NICOLE L. WELLS

BANC OF CALIFORNIA

Nicole L. Wells is senior vice president, business management executive for the Private & Specialty Banking Division. She is responsible for process oversight, monitoring and white glove service for the bank's most highly valued clients.

Wells has 25 years of financial service experience. She is proactive in her community and believes in local grassroots efforts to drive business. Wells is an active member of ASPA and former president for Phi Alpha Alpha Honor Society. She served as chair for Greater LA LEAD for Women 2010–2013 and later served as the Central Region Chair for Enterprise LEAD. Wells is a 2014, 2015 Global Diversity and Inclusion Award winner recipient for her leadership to champion gender intelligence strategies for executive leaders.

She is a champion for people and uses her influence to foster diversity and inclusion. She was elected the 20th president of Jack and Jill of America, Inc.-Inglewood and served 2014–2016. Wells is a member of The Links Inc. Angel City Chapter and currently serves as Treasurer. She is an active member of Alpha Kappa Alpha Sorority, Inc., and currently co-chairs her firm's inaugural Inclusion, Diversity, Engagement & Awareness (IDEA) Council. She believes in thriving communities through empowerment and regularly volunteers her time to give back by teaching financial literacy. Wells firmly believes we can all make a difference. She holds a Master's degree in Public Administration-Organizational Leadership with an emphasis in Public/Private Collaborations, and completed the Columbia University Graduate School of Business, Executive Education Program in May of 2011.

Accounting squarmilner

VIRGIE WOOLFOLK

SQUAR MILNER

Virgie Woolfolk has over 17 years of experience in operations and leadership training and currently serves as Squar Milner's firm administrator. As the leader of the administrative team for a firm of over 500 professionals, Woolfolk has focused extensively on operational efficiencies, problem solving, and leadership development. She has worked closely on major software implementations and process optimizations, and successfully executed due diligence, implementation and cultural integration for more than eight mergers.

When Woolfolk joined Squar Milner, she took over the front desk coordinator position for a firm with approximately 30 individuals. As the firm has grown to be one of the largest in California and Top 40 in the country, Woolfolk's continued dedication, hard work and commitment to the success of the company led to her professional advancement from managing the firm's billing department to the role she holds today. Woolfolk's true passion is being a good listener, allowing her to gain the necessary information to provide optimal solutions for operations and the firm.

Woolfolk graduated from Compton Community College with a degree in General Studies. Outside of work, she donates her time to nonprofit organizations and events, and she is an active Board Member and director of operations for the Krush Coalition, a community-based nonprofit dedicated to uplifting the health, education, social, and financial status of young people and families living in historically disenfranchised, traumatized, underfunded, and under-served communities.

Accounting squarmilner

LISA YAMAKAWA

SQUAR MILNER

Lisa Yamakawa is a tax partner in Squar Milner's Orange County office. She has over 15 years of experience offering tax compliance and consulting services, working extensively with high-net-worth individuals, family groups, and closely-held businesses. Yamakawa works with a number of industries, but demonstrates particular expertise in the real estate space, working with clients involved in residential, retail and commercial real estate ownership and development.

Yamakawa's professional background includes diverse experience in the areas of individual and flow-through taxation in order to help clients maximize their tax savings. Her work with family groups includes managing all of the individual family needs, as well as trusts, foundations, and family-owned business entities. Demonstrating a strong emphasis on "flow-through entity" structures, Yamakawa focuses on the interplay between the company and the individual.

Beyond her tax work, Yamakawa has shown consistent dedication to the growth of the firm. Since the inception of the firm's Summer Leadership Academy for campus recruits, Yamakawa has participated on panels and one-on-one interviews with the participating college students. She has also eagerly taken on mentorship roles for students, interns, and new tax associates, and helps extensively with interviewing and recruiting efforts.

Prior to beginning her career at Squar Milner, Yamakawa graduated from the University of California, Riverside with a Bachelor of Science degree in Business. Yamakawa holds her CPA license and is an active member of the American Institute of Certified Public Accountants.