

WOMEN

IN FINANCE



WOMEN IN FINANCE

Banking

**JULIE BECKLEY**

UNION BANK

Julie 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 \$40 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 32-year career at Union Bank, including over 21 years with the Orange County Commercial Banking group, with nine 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, specialized lending, 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. Beckley is an avid sports fan, and you can often see her enjoying all the many sporting events that southern California has to offer.

Banking

**ANGELSEA BELLI**

BANC OF CALIFORNIA

Angelsea Belli, in her role as head of operations, commercial and real estate banking at Banc of California, focuses on creating a superior experience for clients and team members while managing operational risk. She leverages more than 15 years of experience in the financial services industry with expertise in commercial lending, deposit and treasury services. Belli has long since found inspiration within the entrepreneurial spirit that clients exhibit. That inspiration drives her success with process enhancements and creative solutions to challenges. She has a demonstrated record of managing through changing regulatory and industry norms while achieving and exceeding growth goals.

Having experienced the benefit of mentorship at a young age, she is passionate about providing similar experiences for the next generation of business owners and leaders. She works closely with the Banc of California Charitable Foundation to identify mentorship, board and volunteer opportunities.

Banking

**RACHEL CARRILLO**

BANC OF CALIFORNIA

Rachel Carrillo has served in the financial services industry since 1991. During the beginning of her career, Carrillo was employed by a small credit union where she served in a multitude of capacities and quickly rose through the ranks. In 1998, she was promoted to VP of branch operations and became a crucial member of the management leadership team that helped facilitate the transition from a credit union to a thrift charter that would later become Banc of California.

In her current role as senior vice president of branch administration at Banc of California, Carrillo is responsible for the efficient operation, compliance and administration of all branches. Ms. Carrillo manages a team of regional operations managers with an emphasis on operations, quality control and risk management. Throughout her career, Ms. Carrillo has helped lead several strategic initiatives, including mergers and acquisitions, opening new branch locations, and company-wide process improvement initiatives.

One of her most rewarding moments of 2020 during the pandemic was when she was part of the Paycheck Protection Program team that worked around the clock to get loans to small businesses impacted by the coronavirus. She also takes great pride in being a mentor and always supporting the growth of other employees by sharing her knowledge and skills to advance careers and develop lasting relationships. The four cornerstones of Ms. Carrillo's success have been her integrity, ability to adapt to change, stick-to-it-iveness and commitment to excellence.

Accounting

**LISA CLARK**

DELOITTE & TOUCHE LLP

Lisa Clark is an Audit & Assurance partner in Deloitte's Orange County office, bringing more than 18 years of external audit experience to her role. Clark assists her clients with offerings that include equity securities, acquisition transactions and spin-offs, and supports them in accounting for items such as purchase accounting, financing transactions, revenue recognition and internal controls.

Clark has devoted her career to cultivating close relationships with her clients and helping them navigate opportunities and challenges throughout their company's business life cycle. She works across industries, including life sciences, healthcare and real estate, and serves both public and private companies through all stages of development, including IPOs.

Clark has a passion for teaming, professional development, inclusion and the well-being of Deloitte's people, and leverages this in her role as the Orange County Audit Talent & Development Leader. She has a broad range of experiences building and supporting teams across multiple industries, working in different offices, holding national office roles and managing life at home with her husband and two children.

Outside of work, Clark has served on the board of directors of WHW (formerly known as Women Helping Women) and the Amercian Red Cross. She earned her a bachelor's degree in business administration with a concentration in accounting at California State University – Fullerton.

Learn more about Deloitte at www.deloitte.com and contact Clark directly at lisaclark@deloitte.com.

Accounting

**ERIKA CONIGLIO**

RSM US LLP

As a director with RSM for the past 13 years, Erika Coniglio is passionate about accelerating the growth of Southern California businesses, with an emphasis on C-level relationship management and client satisfaction. She exemplifies the firm's brand promise, "the power of being understood," and five key characteristics, "caring, curious, collaborative, courageous, critical thinkers," by dedicating herself to client advocacy to ensure customer needs are met with a customized tailored approach of the firm's comprehensive tax, audit and consulting capabilities.

Coniglio focuses on Orange County and Inland Empire area businesses, primarily in the technology, life sciences and consumer products industries. A key part of her role is leveraging the firm's vast talent, resources and locations to deliver the best team to every single client engagement. As the largest middle-market professional services firm, RSM has a national presence and global reach, and approximately 80% of Coniglio's clients have an international presence.

Coniglio is actively involved with local organizations, such as Octane, which aims to create 55,000+ jobs in Southern California's tech and health tech space by 2020. RSM has been a platinum sponsor of Octane for the last five years. Coniglio is a member of Octane's High Tech Awards committee, which interviews and selects program finalists. Additionally, she sits on the advisory board of Cal State Fullerton's Center for Family Business, and represents RSM as a sponsor member of the Orange County Chapter of Financial Executives International. You can reach Coniglio at erika.coniglio@rsmus.com or (949) 255-6521.

Accounting

**KAREN F. CONNAIR**

MARCUM LLP

Karen F. Connair is a partner in the Costa Mesa office of Marcum LLP, a top-ranked national accounting and advisory services firm. A member of the Costa Mesa Tax Department and the Firm's national Corporate Tax Compliance and Planning Group, she has more than 25 years of experience working in both public accounting and private industry. Connair's expertise includes tax consulting and reporting for large and middle-market closely held companies, partnerships, their owners and other high net worth individuals. She also assists foreign companies entering the US market.

Connair is also a member of Marcum's national and regional Diversity, Equity & Inclusion Committees as well as the Firm's Women's Initiative. Prior to joining Marcum, she was distinguished as the first female partner at an Orange County accounting firm. Her experience also includes 17 years at a "Big Four" firm where Connair was responsible for providing all tax services (U.S., state, local and international) to her clients. She also worked on internal tax quality peer reviews throughout the Americas and has led numerous internal technical educational training sessions at both local and regional levels. Before reentering the public accounting field, Connair was the tax director for a commercial real estate developer.

Connair is an active member of the California Society of Certified Public Accountants (CalCPA), where she served as the 2014-2015 president for the Orange County/Long Beach chapter. At the state level, she was a chapter council representative and member of the Membership Committee and a previous committee representative for the Women's Leadership Forum Planning Committee. Connair be reached at (949) 236-5655 or karen.connair@marcumllp.com.

A woman's work is unstoppable

CEOs, inventors, entrepreneurs, artists, teachers, doctors, bankers, innovators and trailblazers. Women have proven themselves in all of these and countless other roles. As we continue to lift barriers that can hold women back, there's no stopping what they can do in the workplace and beyond.



FIFTH THIRD BANK

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Accounting

**DEBORAH DICKSON**

SMITH DICKSON

Deborah Dickson 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.

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.

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.

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 Dickson at (949) 553-1020, www.smithdickson.com.

Accounting

**EMILY EGKAN**

WITHUM

Emily Egkan is a senior manager in Withum's Tax Services Group and based in Orange County, CA. As a licensed CPA in the state of California, she has over 12 years of comprehensive experience

consulting with closely-held businesses and their owners in tax compliance and advisory services. Egkan has a diverse background with expertise in construction, healthcare, manufacturing distribution and logistics, mortgage banking and professional services. She specializes in optimizing tax strategies for Subchapter C, S-Corporations, Partnerships and individuals and has worked extensively with clients conducting multi-state filings and consolidated filings. Additionally, Egkan works closely with company owners, their management teams and their legal advisors to support their financial goals, plan for tax impact of company transactions and assist in succession planning.

Egkan received a Bachelor of Science degree in Business from Cal Poly San Luis Obispo. After earning her Bachelor of Science, she continued her education at Cal Poly San Luis Obispo and received a Master of Taxation. She is a member of the American Institute of Certified Public Accountants (AICPA) and the California Society of Certified Public Accountants (CalCPA).

Egkan and her family enjoy spending quality time outdoors—at the beach, lake and mountains. She and her husband are both former collegiate athletes and continue to compete in adult soccer and volleyball leagues, respectively, in their free time. When she is not working or competing, Egkan also coaches her children in their recreational sporting leagues.

For more information, please visit our website at www.withum.com.

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 \$35 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 \$500 million+ under management with account holders in every state in the U.S.

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

Accounting

**AMANDA HONG**

WITHUM

Amanda Hong is a partner in Withum's Tax Services Group with over 23 years of experience. She provides federal and multi-state tax planning, consulting and compliance services to privately and publicly held

companies. 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, professional services, technology, and emerging growth.

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. 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 Master 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). For more information, please contact Amanda Hong at ahong@withum.com.

Banking

**LYNN HOPKINS**

BANC OF CALIFORNIA

Lynn Hopkins is a highly successful banking executive with more than three decades of experience. Over that span, she's gained a deep mastery in finance and risk management while compiling an impressive record with growth-oriented community banks. Since 2019, she's been chief financial officer of Banc of California and a member of the executive asset liability management, credit, and enterprise risk-management committees.

Hopkins is the model of commitment and leadership at Banc of California, demonstrated through several milestones, including a successful subordinated debt raise and most recently the announced acquisition of Pacific Mercantile Bank. Prior to joining Banc of California in 2019, she managed over 30 bank mergers over a 25-year-career span, executing financial due diligence and business integrations. Hopkins is considered a Sarbanes-Oxley, regulatory and SEC expert in the industry.

Hopkins was previously EVP/CFO at First Choice Bancorp in Cerritos, California. She also served as executive vice president of PacWest Bancorp for 15 years, including leadership as chief accounting officer, chief financial officer (for their bank subsidiary) and corporate secretary.

She is an advocate for helping women in business through her involvement in the L.A./O.C. chapter of Women Corporate Directors and their BoardNext initiative for successful leaders. As the mother of a child with a rare disease, Hopkins strives to raise awareness of the topic in our communities. In December 2020, she published a TEDx Talk entitled "Curing Rare Disease Is Possible." Hopkins also serves on the board of directors of the National MPS Society.

Accounting

**SHAWN KATO**

BAKER TILLY

Shawn Kato is a tax partner with Baker Tilly US, LLP, serving clients throughout Southern California. Based in Irvine, Kato has 27 years of tax and accounting experience, working with public and private entities across many industries, including technology, manufacturing and consumer products. She specializes in corporate tax, particularly income tax provisions, net operating loss limitations, stock-based compensation and business combinations. She has mentored many women in her career and is dedicated to the advancement of women within public accounting. Kato is an active member of the American Institute of Certified Public Accountants (AICPA) and the California Society of Certified Public Accountants (CalCPA).

In addition to her role at Baker Tilly, Kato is a lecturer in the Master of Professional Accountancy program at the UCI Paul Merage School of Business. She teaches Advanced Topics in Taxation, where she works with students to practically apply tax laws to real world scenarios. Shawn was raised in Orange County, and earned her Bachelor of Arts degree in business economics from the University of California, Los Angeles. She has three children and spends time volunteering with their activities and sports teams, and in her free time she enjoys traveling.

Kato can be reached at shawn.kato@bakertilly.com or (949) 222 2999.



POWERFUL LEADERS. EMPOWERING CALIFORNIA.



LYNN M. HOPKINS
EVP, Chief Financial Officer



SUPRIYA SHAH
SVP, Internal Audit Director



OLIVIA LINDSAY
SVP, Deputy Chief Risk & BSA Officer



ZOILA PRICE
EVP, Managing Director
Warehouse Lending



RACHEL CARRILLO
SVP, Branch Administration



ANGELSEA BELLI
SVP, Head of Operations, Commercial
& Real Estate Banking

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](https://www.bancofcal.com)

WOMEN IN FINANCE

Banking



MARY KING

FIFTH THIRD BANK

Mary King serves as a senior vice president and senior relationship manager for Fifth Third Bank in Orange County, California. She joined the Bank in 2018 as a middle market lender to lead Fifth Third's expansion in the state. She is responsible for delivering solutions that best meet the financial needs and goals of Southern California companies with annual revenues of \$20 million to \$500 million. King understands her clients' business and is a fierce advocate for them.

Before joining Fifth Third, King's 23-year career in commercial banking included roles in foreign exchange trading, developing and leading a credit training program for new hires and experienced lenders, formulating credit policy for commercial and real estate lending, and relationship management. She started her career at Lloyds Bank California, predecessor to Bank of the West.

King's roots in Southern California are deep. After earning her bachelor's degree in business economics from the University of California, Santa Barbara, she has lived in Orange County for 25 years and been continually involved in the community. She has served as PTA president and school site council member and spent countless hours with the National Charity League and United Way.

Accounting



GINA LARA

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, 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 joined the team at Smith Dickson, CPAs—a firm that she knew and respected from having collaborated with 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 both the tax and the forensic accounting department at Smith Dickson. Lara's tax role at the firm includes planning and compliance for individuals, business owners, and trusts. On the forensic accounting side, Lara specializes in financial analysis and litigation consulting services for trust and estate matters.

Contact Lara at Smith Dickson, Certified Public Accountants, LLP, (949) 553-1020, www.smithdickson.com.

Accounting



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 proudly 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. She started her career with SingerLewak in 2002. As part of the Firm's in-house training program, Lawson has conducted numerous seminars on accounting, auditing, and related subjects and serves on various committees within the Firm and heads up the Firm's Irvine recruiting and marketing efforts.

Lawson takes pride in consulting with her clients in diverse sectors on efficient solutions such as tax compliance and advisory, IPOs, assurance and growth advisory. She is an active member of ACG OC, FEI and other local organizations.

Lawson can be reached at klawson@singerlewak.com or at (949) 261-8600 or via LinkedIn @KathyLawson

Banking



OLIVIA LINDSAY

BANC OF CALIFORNIA

Olivia Lindsay, senior vice president, deputy chief risk officer at Banc of California, has over 20 years of experience in the financial services industry with a focus on the management and execution of operational and regulatory processes and controls. In this role, she leads the Operational Risk Management group, which is responsible for the administration of the Company's Operational Risk Management Program. She also serves as a member of the Bank's Enterprise Risk Management Committee. Lindsay has an impressive record of demonstrated success in the areas of risk and control framework development and operational process design and optimization. Her areas of expertise include business process re-engineering for BSA/AML operations, third-party risk management, credit life-cycle operations, issues management, exam management and governance oversight.

As a Lean Six Sigma certified expert, Lindsay encourages business leaders to continually reimagine their service delivery models in order to remain competitive, efficient, compliant and relevant. She has found that strong employee engagement is an essential component of organizational success, and she finds great satisfaction inspiring employees to chase their goals and maximize their full potential.

Before joining Banc of California in 2016, Lindsay served as managing director, head of the Performance Excellence Group at MUFG Union Bank. In her capacity as Performance Excellence Group head, she built the risk and control program for the Commercial Credit Services Division.

Accounting



KRISTEN MCCARTHY

BDO USA

Kristen McCarthy is the assurance managing partner for BDO USA, LLP's Orange County office. McCarthy has over 30 years of experience in public accounting and private industry. She focuses on technology, manufacturing and real estate clients. McCarthy is a member of the West Region's Technology Industry Group and leads the Orange County Real Estate Practice for BDO. Her experience includes serving public and privately held companies in the media, technology, manufacturing, real estate and service industries. She has worked with C-level executives and finance teams of both domestic and international companies to address their accounting, regulatory, and capital needs. Clients have come to rely on her ability to effectively evaluate and provide advice on the accounting ramifications of a number of complex matters, including revenue recognition, stock-based compensation, equity instruments, mergers and acquisitions, and complex financial instruments.

McCarthy is part of the Senior Leadership Team focused on Women's Inclusion and Diversity. She has also been active with BDO Flex, as a mentor to BDO's Leadership Institute and as part of the firm's quality control efforts.

McCarthy is active in BDO's philanthropic efforts through its BDO Counts Program and devotes time to CASA, Second Harvest Foodbank, The Leukemia & Lymphoma Society, and Operation Be Kind.

McCarthy is a CPA and earned a Bachelor of Science degree in Accounting from the University of Southern California. She is a member of the American Institute of Certified Public Accountants and California Society of CPAs. McCarthy can be reached at kmccarthy@bdo.com or (714) 668-7338.

Accounting



KATHERINE O'CONNOR

DELOITTE & TOUCHE LLP

Based in Orange County, Katherine (Katie) O'Connor is a partner with Deloitte & Touche LLP. She brings more than 16 years of experience to her role assisting clients primarily in the healthcare, life sciences, and consumer business industries. She serves as the client service partner for both public and private audit clients, and also leads Deloitte's local Accounting and Reporting Advisory services.

O'Connor is passionate about assisting companies transition from being privately held to publicly traded. She assists her clients in navigating the road to initial public offerings, whether via traditional path or through the acquisition of a special purpose acquisition company, and also advises newly public companies on Sarbanes-Oxley and SEC reporting compliance. Her clients have ranged in size from emerging growth start-ups to multi-billion-dollar global corporations.

O'Connor began her career at Deloitte after graduating from the University of Southern California's Marshall School of Business with a degree in accounting and international business. She is a licensed CPA in California and is a member of the American Institute of Certified Public Accountants.

Outside of her work at Deloitte, O'Connor gives back to the community, serving as an Audit Committee member of the YMCA of Orange County and Riverside. She is also active within the accounting school of her alma mater. O'Connor and her husband enjoy living in Huntington Beach with their two young children.

Learn more about Deloitte at www.deloitte.com and reach O'Connor directly at koconnor@deloitte.com.

WOMEN IN FINANCE

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 16 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 technology, manufacturing distribution and logistics, not-for-profit entities, wealth management, tax structuring for individuals and business tax compliance and planning. She specializes in developing cutting-edge tax strategies for Subchapter C, S-Corporations, Partnerships and individuals. She has worked extensively with clients conducting multi-state filings and consolidated filings and providing tax structuring support for mergers and acquisitions. Otsuji thrives when researching and analyzing complex tax matters to offer unique solutions. She is an active member of Withum's Women in Tech and Emerging Growth Services Team. She is also a regional leader of Women of Withum, the internal Team Member Resource Group that aims to motivate, elevate, and advocate for women at the Firm.

Otsuji received a Master 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. They also serve at Camp Oakhurst, a camp for children situated just outside of Yosemite National Park throughout the year.

For more information, please contact Otsuji at totsuji@withum.com.

Accounting



BINA PATEL

DELOITTE TAX LLP

Bina Patel is a managing director in the Private Wealth group of Deloitte Tax LLP's Costa Mesa office and serves as the Individual Income Tax National Competency Leader for the Deloitte Tax practice. She consults on

matters related to individual income taxation and has more than 26 years of experience advising wealthy individuals and their family offices in tax and accounting matters.

Patel primarily focuses on high-net-worth individuals, their closely-held investment and operating business entities and their respective family offices. Her clients have included large multi-generation families, entrepreneurs, executives, and complex trusts and estates. Patel also leads the private aircraft consulting practice for Deloitte Tax LLP, and she has specialized expertise in such industries as private equity fund structures, trust companies, and winery operations.

Born and raised in New Zealand, Patel began her career at Deloitte in the Auckland office. She is a licensed Certified Public Accountant in California as well as a licensed Chartered Accountant in New Zealand. She is also a member of the American Institute of Certified Public Accountants, California Society of CPAs and Chartered Accountants Australia & New Zealand. Patel holds a Bachelor of Commerce degree from the University of Auckland (NZ).

Patel serves as a founding board member of Chapman University's philanthropic planning advisory committee. She enjoys traveling and experiencing different cultures, along with adventures to far-flung places for hiking, including a summit of Mt. Kilimanjaro.

Learn more about Deloitte at www.deloitte.com and reach Patel directly at bpatel@deloitte.com.

Wealth Management



LAILA PENCE

PENCE WEALTH MANAGEMENT

Laila Pence, CFP® is the president of Pence Wealth Management ("PWM"), a Registered Investment Advisory firm, and one of Southern California's most prestigious private wealth management firms. With her

comprehensive approach to financial planning that takes into account her client's taxation, retirement planning, business structure, estate planning, and real estate, she focuses on making a positive difference in her clients' lives.

The cornerstone of her success centers on staying true to her values of helping people live their dreams. Pence has been covered by the mainstream media such as Bloomberg, Fox Business and quoted in leading publications such as Forbes and Barron's

Laila Pence is a registered representative with and securities and advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC. Financial planning offered through PWM.

PWM is a sophisticated financial services practice within LPL Financial, LLC ("LPL Financial") comprised of multiple financial professionals that provide a series of services including personal investment advisory, third party managed advisory and brokerage services. PWM an investment adviser registered with the State of California to provide financial planning services. The financial professionals affiliated with PWM are registered with and offer securities and investment advisory services through LPL Financial, member FINRA/SIPC and a registered investment adviser. As of 4/1/2021, the total assets serviced by PWM through LPL Financial consist of \$1.7 billion in advisory assets and \$300 million in brokerage assets. PWM and LPL Financial are separate entities.

To learn more, visit www.pencewealthmanagement.com.



empower others

Great leaders empower others knowing that success is not only measured by what you accomplish, but also by what you inspire in others. Withum's Amanda Hong, Tasha Otsuji and Emily Egkan make their imprint every day — influencing today's professionals to lead through action and passion — being a catalyst for the growth and success for their clients, colleagues and communities.

Amanda Hong, CPA, Partner

Tasha Otsuji, CPA, Partner

Emily Egkan, CPA, MST, Senior Manager

Visit withum.com to learn more.

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WOMEN IN FINANCE

Banking

**MELISSA POLLARD**

FIFTH THIRD BANK

Melissa Pollard serves as senior vice president and senior relationship manager in Middle Market Banking for Fifth Third Bank. She is responsible for developing new business and managing existing commercial credit relationships in Southern California. She joined the Bank in 2018 after 20 years at Comerica Bank in Orange County.

Pollard brings 33 years of industry experience to delivering solutions that help business owners achieve their financial objectives. That includes complex senior financing such as traditional and asset-based credit lines, term facilities, equipment loans, commercial mortgages, acquisition financing and recapitalizations. She is highly skilled at working with her banking partners to keep the customer at the center of everything they do.

Pollard is a women's advocate who has been actively involved in establishing women's initiatives. She is a longtime member of the board of directors of Association for Corporate Growth of Orange County and their Women in Leadership committee, Girls Incorporated of Orange County and Influential Women of Orange County. Pollard graduated from the University of Richmond in Virginia. She lives in Aliso Viejo with her husband, and they enjoy spending time with their two adult children.

Banking

**ZOILA PRICE**

BANC OF CALIFORNIA

Zoila Price is EVP, managing director of warehouse lending at Banc of California. She is an entrepreneurial executive with over 25 years of exceptional mortgage banking, real estate and loss mitigation experience, which includes retail, wholesale, correspondent lending, bulk acquisitions and mortgage warehouse lending. She is an expert with proven accomplishments in the areas of negotiation, production, operations, strategic planning, problem-solving, and development of policies and procedures to minimize risk exposure in the mortgage and real estate arena. Ms. Price has also successfully created and restructured four warehouse lending platforms.

As head of Warehouse Lending, she oversees the warehouse lending platform of Banc of California by providing warehouse facilities for residential and commercial lenders nationwide. Since inception, the warehouse lending platform has funded over \$40 billion.

Prior to being at Banc of California, Ms. Price was president and CEO of Optal Companies, senior vice president of Lehman Warehouse Lending Division, president and CEO of Imperial Warehouse Finance, Inc., and senior vice president at Impac Warehouse Lending Group.

Accounting

**GINA PRIMEAUX**

DELOITTE & TOUCHE LLP

Based in Costa Mesa, Gina Primeaux is a principal with Deloitte & Touche LLP. She has more than 20 years of experience in the financial services industry.

Primeaux helps organizations transform their work, workforce and workplace amid an increasing convergence of industries, innovation and disruption. This includes advising organizations, boards and C-suite executives on issues related to strategic trends, governance, financial services reform, performance improvement, information technology and enterprise risk management.

Primeaux is a compassionate, values-driven leader who prides herself on helping clients strategize through areas of complexity and ambiguity that are ripe for innovation. She provides industry knowledge specialization with an emphasis on financial services, mortgage banking, default management and consumer regulatory remediation. She currently focuses on assessments of the financial service business and has led enterprise-wide risk management projects, process improvement and regulatory assessments.

In addition to serving clients, Primeaux holds a number of leadership roles within Deloitte. She is the Transformation Leader for Deloitte's Risk & Financial Advisory regulatory and legal group; the Advisory Fintech Industry - Mortgage Leader; and a Future of Work Leader within Deloitte's Talent group.

Outside of work, Primeaux is honored to support the Children's Bureau by serving as the Chairman of the Board of Trustees, Orange County. She graduated from the University of California – Riverside.

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WOMEN IN FINANCE

Accounting



CECILIA SANUDO
SINGERLEWAK LLP

Cecilia Sanudo is a director in SingerLewak LLP's Assurance and Advisory practice -based in our Irvine office. Sanudo is a Certified Public Accountant with more than thirteen years of experience in public accounting. Sanudo's clients are primarily private companies from start up to a billion dollars in revenue in a variety of industries that include manufacturing and distribution, professional services, technology, transportation and logistics and nonprofit organizations.

Sanudo also has transaction experience including corporate restructurings, mergers and acquisitions and previously worked significantly with public initial offerings. She started her career with SingerLewak in 2008 and is a member of the AICPA and CALCPA.

Aside from her daily client service responsibilities, Sanudo is an active member of the Firm's recruiting efforts, in-house training program and is a member of various professional organizations such as ACG OC.

Outside work, Sanudo loves to spend time with family, traveling and mentoring first generation college students. Sanudo can be reached at csanudo@singerlewak.com or at (949) 261-8600 or via LinkedIn @CeciliaSanudo

Banking



SUPRIYA SHAH
BANC OF CALIFORNIA

Supriya Shah is the SVP, director internal audit for Banc of California. Shah brings 15 years of experience in the financial services industry, focusing on internal audit and risk management for the Bank. In her role, she is responsible for leading internal audit activities related to finance/accounting, credit risk, lending, and deposit operations. She supports the chief internal audit officer for internal audit governance and maintains an effective Quality Assurance Improvement Program. She strongly believes risk and audit functions can deliver objective assurance and insights that can help organizations achieve their strategic, operational, financial and compliance goals.

Prior to being at Banc of California, Shah served as a senior enterprise risk manager for four years at Commercial Bank of California and CTBC Bank, both premier business-centric community banks within the California footprint. She was instrumental in establishing an enterprise risk management program, with the board and senior management reporting, as well as third-party vendor risk management programs at these institutions.

Following graduation from California State University, Fullerton, Shah obtained her Certified Public Accountant (CPA) designation, and held expanding positions in public accounting and business advisory services at Deloitte, Grant Thornton, and Protiviti. During these years, she also held lead client-facing roles, serving strategic clients such as Bank of America, U.S. Bank and other banks and credit unions.

She attributes success to following her passion and committing to it. She upholds values such as integrity, accountability and respect, with a value-driven mindset in delivering results when working with a team. She spends her personal time on painting, arts, and traveling with family and friends.

Banking



MISSY STERN
FIFTH THIRD BANK

Missy Stern serves as senior vice president and senior relationship manager for Fifth Third Bank in Orange County, California. She brings the experience and expertise from her more than 35-year career to developing new business banking relationships with privately held and publicly traded companies with annual revenues of between \$20 million and \$500 million. These clients also benefit from Stern's long-term business relationships, extensive referral network and market knowledge.

Stern joined Fifth Third in 2018 as part of the Bank's expansion in the state. She previously served eight years as a senior relationship manager at Bank of the West and, before that, worked for First Bank and Comerica. She has been named to the Presidents Club several times in her career.

Stern earned her bachelor's degree from Arizona State University and her MBA from Pepperdine University. She has been active through her career in the Association for Corporate Growth, ProVisors, Business Forums International and the Orange County United Way. She also enjoys travelling with her family, skiing and generally being active.



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Banking

**KARA TREBS**

SUNWEST BANK

Kara Trebs is the EVP, chief human capital officer at Sunwest Bank. Ms. Trebs joined the bank in early 2016 and held positions as AVP, corporate recruiter and SVP, director of human capital. Over the past 15 years she has had a variety of HR roles within the retail and financial services industries for companies such as Nordstrom and Boot Barn. Ms. Trebs has had an instrumental hand in the exponential growth of Sunwest Bank. Her unique skillset allowed her to leverage her HR experience to build the bank's new competitive Health Savings Account platform SelfcareHSA.

Trebs progressive approach to leadership focuses on the empty chair philosophy, and believes management is more effective when engaging with their team within their own environment. Trebs serves as a mentor and coach to the executive team at Sunwest and finds this role her most gratifying.

Outside of her work with Sunwest Bank, Ms. Trebs has served on various boards and non-profits such as Tilly's Life Center, OC Rescue Mission, National Human Resources Association, and as a mentor for the California State University system. Trebs graduated from University of Phoenix with a Bachelor of Science in Business Administration and a Human Resources Management Certification and is currently enrolled in Pacific Coast Banking School.

Check out how Sunwest Bank, a \$2 billion western region business bank based in Irvine, CA, helps female entrepreneurs thrive at www.sunwestbank.com. You can also find her work on SelfcareHSA located here www.selfcare.com.

Banking

**LISA WESTHAFER**

FIFTH THIRD BANK

Lisa Westhafer is a senior vice president and senior relationship manager for Fifth Third Bank in Orange County. She is responsible for the development of new client relationships, focusing on companies in Southern California with revenues above \$20 million.

Westhafer brings a wealth of knowledge from her 25 years in the financial services industry serving middle market clients. She joined Fifth Third after serving five years as a senior business development officer with Bank of America's commercial bank and nine years leading the direct and private equity marketing efforts for PNC Bank in the region. She also has served in credit-oriented roles at both Capital Source and Fleet Capital. Before her banking career, she worked in the television and feature film division at the Walt Disney Co. and as a CPA in Arthur Andersen's downtown Los Angeles office.

Westhafer is a Southern California native who lives with her family in south Orange County. She earned her business degree at the University of Washington. She is a CPA (inactive) and is Series 7 and 24 licensed. While not working and spending time with her husband and son, Westhafer enjoys international travel, hiking and scuba diving, and she is an avid concertgoer.

Accounting

**KATIE ZINN**

DELOITTE TAX LLP

Catherine (Katie) Zinn is a Deloitte Tax LLP partner in the organization's Orange County practice, bringing more than 24 years of experience serving clients in the life sciences, technology and consumer industries.

She serves as the lead tax partner for various public and private clients in the Orange County area, managing the relationships for all of her clients and leading teams in transformational tax projects around the globe.

In addition to her client work, Zinn leads talent efforts for Deloitte's tax function in the west region of the United States and tax learning and development efforts for Deloitte's U.S. and U.S. India practices.

Outside of work, Zinn serves on the executive board of the Boy Scouts of America's Long Beach Area Council and as a board member of Rising Tides, a transitional housing program for young adults affiliated with Orangewood Children's Foundation. She is also actively involved as a volunteer at Mater Dei, where her son attends high school.

Zinn received a bachelor's degree from the University of California Los Angeles and a master's degree in taxation from the University of Southern California. She is a licensed CPA in California and is a member of the American Institute of Certified Public Accountants and the California Institute of Certified Public Accountants.

Zinn and her husband live in Long Beach with their teenage son.

Learn more about Deloitte at www.deloitte.com and reach Zinn directly at czinn@deloitte.com.

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Lori Wright is the executive vice president, deputy chief financial officer at Pacific Premier Bank, headquartered in Irvine, California. Since joining Pacific Premier in 2016, Wright's responsibilities have encompassed leading the Bank's overall accounting and financial reporting functions and serving as the company's principal accounting officer.

As deputy chief financial officer, Wright is tasked with developing strategy and overseeing policies, procedures, and execution of the Bank's financial reporting, corporate accounting, accounting and tax policy, loan and allowance accounting, and accounts payable functions, as well as Pacific Premier Trust's accounting function. Wright is recognized for building the accounting and financial reporting to meet the elevated proficiency and competency required of Pacific Premier's rapidly growing business. She has instilled a culture of outstanding customer service with the team to positively interact cross-departmentally to meet the needs of the Bank and its clients.

With more than 18 years of financial experience between bank finance, accounting, mergers and acquisitions, and external auditing, Wright is inspired by the complexity of the regulatory landscape and changing accounting principles present in the banking industry. Her education and career in finance/accounting has taken her across the Western United States. Prior to joining Pacific Premier, Wright served as Controller at both California Republic Bank and San Diego County Credit Union, as well as Chief Financial Officer of Solarity Credit Union. Wright is also a Certified Public Accountant (CPA) in California. She holds bachelor's degrees in Accounting and Actuarial Science from Central Washington University and a Master of Business Administration from Washington State University.



LORI WRIGHT, CPA

PACIFIC PREMIER BANK

Wright is constantly encouraged and inspired by Pacific Premier's corporate culture, which is driven by its clearly defined Success Attributes: Achieve, Communicate, Improve, Integrity, and Urgency. By following these attributes, employees are empowered to do their jobs with creativity, critical thinking, passion, and strategic drive. Wright enjoys that each day presents a new challenge and she views these challenges as an opportunity to work collaboratively with her team while growing the Bank and the individuals within it. "Great teammates are why I love my job," she says. "All of the teams within our organization work so hard to support each other and continuously rally toward our common goals, and the internal and external professionals we work with understand the Bank's high level of excellence and are great strategic partners."

Wright encourages young professionals and those early on in their careers to seek out leaders who devote time to mentorship, and emphasizes absorbing as much knowledge as possible while acknowledging the time and expertise shared. "Forge relationships that will contribute to enjoying your day job as well as enable learning from successful professionals," Wright says.

"I am fortunate to have an excellent leader as my boss, one who cares as much about my personal success as my professional success." In regard to choosing banking as her career, Wright says, "banking presents a constantly evolving educational opportunity in an industry brimming with highly competent professionals."

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