



A LAYERED APPROACH

Relativity Space's 3-D Printing And Its CEO Tim Ellis Are Revolutionizing Aerospace

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THE 2024 CFO AWARDS HONOREES AND FINALISTS

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Dear Reader:

In the 2024 C-Suite Magazine, we present an exclusive look into the talented CEO of Relativity Space, a revolutionary new company headquartered in Long Beach, known for manufacturing rockets using 3-D printing technology with the aim of reaching Mars in the future. The behind-the-scenes look into Tim Ellis and this proprietary technology demonstrates the influx of innovation that further establishes the SoCal market as a hub for a burgeoning aerospace industry.

This edition also delves into the realms of organizational focus underlining the shift towards expansion and sustainability with a notable emphasis on investing in advanced technologies, particularly artificial intelligence. Nevertheless, recruiting skilled professionals and ensuring a maximum return on investment remain key priorities for the remainder of 2024.

Additionally, you will find a curated list highlighting the leading accounting and business consulting firms operating in Los Angeles and Orange Counties. Discover the establishments that have secured a position on these prestigious lists!

Nominated by their peers and colleagues, the visionary Chief Executive Officers of 2024 featured in this publication span a wide array of sectors. Despite the diversity, they all exhibit common attributes, such as resolute leadership, intuitive decision-making and unwavering perseverance, which warrant distinctive commendation.

Lastly, this edition encapsulates the essence of the CFO Forum & Leadership Awards. Explore the enlightening discussions held during the session themed "Prioritizing Tech Innovation & Talent Retention" and delve into the profiles of the noteworthy honorees, finalists and nominees who have been recognized for their outstanding contributions to both their organizations and the local community.

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Best regards,

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Relativity Space's CEO Tim Ellis started a career in aerospace at 25 – now, he's one of the difference makers in Southern California's most advanced economy. (Cover photo by Varon Panganiban.) Inset: Relativity's Terran 1 ready for launch in Cape Canaveral, Florida. (Photo by Michael Baylor for Relativity Space)

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Inspiring Change in Banking with a People-Over-Profits Vision

When Ash Patel joined Commercial Bank of California in 2013, he had a vision to create a bank that didn't yet exist. One that was driven by a dedication to a people-over-profits vision that prioritized not only the success of clients, but the team. This vision has enabled hundreds of business owners across Southern California to grow and achieve their dreams.

Last month, Commercial Bank of California announced the acquisition of Oakland-based Community Bank of the Bay, and launched the opportunity for Ash to take this same vision to support entrepreneurs in the Bay Area.



Congratulations Ash Patel for all you've achieved
and for being recognized as a 2024 Visionary CEO
by L.A. Times B2B Publishing



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7 Ways Employers Can Enhance Their Competitive Edge for Drawing Talent

New research examines employers' workforce management priorities, business practices and benefit offerings.

Amost seven in 10 employers (69%) either currently use or plan to use robotics or artificial intelligence to augment their human workforce, according to a new survey by nonprofit Transamerica Institute and its Transamerica Center for Retirement Studies (TCRS).

“Robotics and artificial intelligence may be revolutionizing the business world, but human workers are still critically needed. Many employers are feeling the pain of the prolonged labor crunch. Those with innovative and robust benefit offerings have an edge in the competition for talent,” said Catherine Collinson, president and CEO of Transamerica Institute and TCRS.

In fact, 37% of employers say labor shortages are negatively impacting their overall business and day-to-day operations, and almost half of employers (49%) indicate employee recruitment and retention are a top workforce management-related priority.

The new report, “Workplace Transformations: Employer Business Practices and Benefit Offerings,” provides an in-depth view of employers' overarching business concerns, workforce management priorities, flexibility and alternative work arrangements and health, welfare and retirement benefit offerings. It also provides recommendations for employers and policymakers. The report is based on a survey of more than 1,800 for-profit U.S. employers, and it offers comparisons by company size.

Employers' Top Workforce Management Priorities

Employers are juggling a variety of workforce management priorities. Top priorities include: employee health, well-being and safety (60%); compensation and benefits (55%); employee recruitment and retention (49%); flexible work arrangements (48%); talent development (39%); diversity, equity and inclusion (DE&I) (37%); and employee community involvement (31%). Only 23% of employers cite return-to-office policies as a top priority.

Seven Ways Employers Can Enhance Their Business Practices and Employee Benefit Offerings

“Employers feel responsible for their employees' health and well-being and they recognize the importance of a strong benefits package to attract and retain talent. Many have implemented offerings, but there is still ample room for expanding benefits in today's highly competitive, rapidly evolving environment,” said Collinson.

The survey findings identify these seven ways employers can enhance their offerings:

1. Facilitate professional development.

The workplace is transforming in large part due to new technologies like artificial intelligence. Accordingly, employers must help their workers keep their job skills up to date and relevant. Just 44% of employers offer job training and 35% have professional development programs.

2. Expand alternative work arrangements.

The pandemic ushered in a new era of flexibility. Workers are not interested in returning to old ways, because they have proven alternative arrangements can be successful. Many employers offer some form of alternative work arrangements, but they could be even more accommodating. The most commonly offered arrangements include flexible work schedules (59%), ability to adjust hours as needed (54%), ability to take unpaid leave of absence (44%), hybrid work (43%), ability to work somewhere on-site (38%), ability to work exclusively remote (37%) and ability to switch from full-time to part-time and vice versa (36%).

3. Support caregivers in the workplace.

Amid population aging and the skyrocketing cost of long-term care, many workers are called upon to care for an aging parent or loved one. Yet employer support toward

caregivers is limited. The most prevalent forms of support are an unpaid leave of absence (39%), paid leave of absence (35%), online resources and/or tools (25%), a benefit that offers referrals to backup care (23%) and training for employees on how to handle caregiving situations (23%).

4. Offer phased or flexible retirement.

The massive Baby Boomer generation is retiring, and the oldest Generation Xers are close behind. They are envisioning a gradual transition into retirement versus an immediate stop to work. Only 35% of employers have a formal phased retirement program with specific provisions and requirements, and 28% plan to implement one in the future. Moreover, many employers offer informal ways to transition.

5. Foster an age-friendly work environment.

The multi-generational workforce includes four generations spanning more than seven decades of life experience. It brings unprecedented diversity of perspectives, skills and expertise. Almost nine in 10 employers consider themselves to be age friendly (87%), but the survey findings suggest otherwise. Only 44% have adopted a formal diversity, equity and inclusion policy statement specifically referencing age among other commonly included demographic characteristics.

6. Provide more health, welfare and retirement benefits.

Many employers provide some benefits to their employees, but they could offer even more. Health insurance (64%) is the most commonly offered benefit, followed by a 401(k) or similar plan (59%), life

insurance (46%), an employee assistance program (35%), a workplace wellness program (35%) and disability insurance (34%).

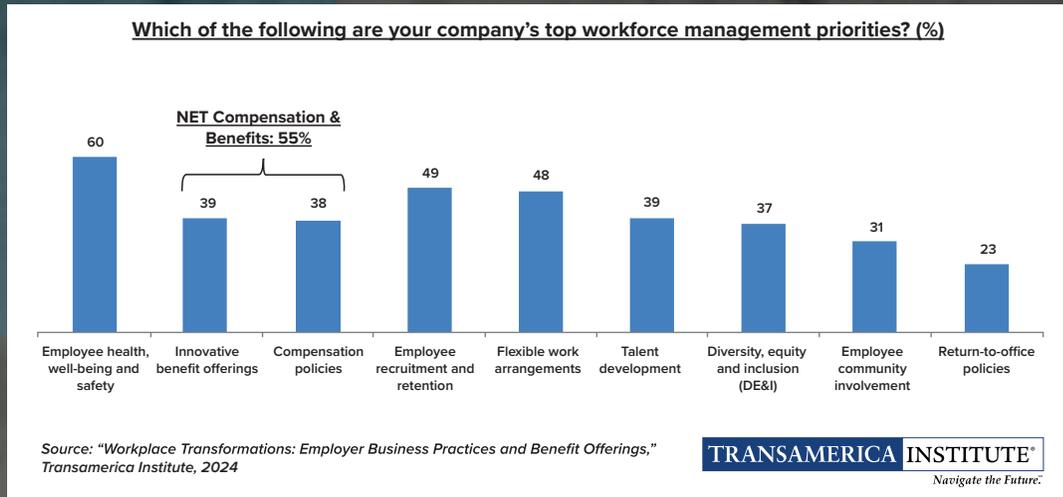
7. Enhance retirement benefits to help workers better prepare for retirement.

The SECURE 2.0 Act of 2022 makes it easier and more affordable for employers not offering retirement benefits to adopt a plan. It also has a myriad of provisions for current 401(k) plan sponsors to enhance their plans and help workers build their savings. Only 32% of 401(k) plan sponsors are “very” familiar with the new law, while just 2% of employers not offering retirement benefits are “very” familiar with it.

“An employer’s ability to pursue business opportunities, implement new technologies and ultimately compete in the future of work requires a vibrant workplace. Employers

that provide flexibility, an array of supportive business practices and innovative employee benefit offerings will prevail in the intense competition for human talent – now and in the future,” said Collinson.

Workplace Transformations: Employer Business Practices and Benefit Offerings is based on a survey of 1,873 employers of for-profit companies. It provides analysis by small, medium and large companies and contextual comparisons with Transamerica Institute’s most recent survey of workers.

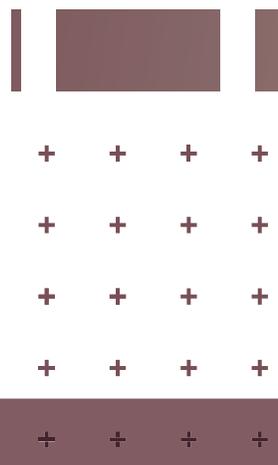



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CFOs Increase Focus on Tech and M&A



inflation will affect costs to the same degree in 2024 as it did in 2023, and half of CFOs expect their companies to raise prices for a substantial portion of their products/services to offset it.

Regarding capital, 67% of surveyed CFOs indicate they will allocate or reallocate capital to new business investments. This is particularly interesting, considering 62% of CFOs believe now is not a good time to take on greater risks.

More than three-quarters (76%) of surveyed CFOs expect cybersecurity to be a top priority for the audit committee over the next 12 months, beyond financial reporting and internal controls, and indicate enterprise risk management (43%) and finance and internal audit (40%) as the next top priorities for the audit committee in 2024.

Sixty-five percent of surveyed CFOs said they expect their companies to offer a hybrid work arrangement in 2024. For some, that could be a silver lining or a looming cloud depending on where an organization and their talent stand on the topic.

2024 M&A Strategy

Of the surveyed CFOs planning to pursue M&A and joint venture opportunities (JV), 57% say increasing competitive positioning and/or capturing sector and market leadership best describe their companies' top M&A strategy.

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Nearly half of CFOs will also explore new North American markets but are wary of inflation-driven cost increases.

Each quarter, Deloitte's CFO Signals study tracks the thinking and actions of leading CFOs representing North America's largest and most influential companies. This year's results reveal a distinct focus on technology and M&As among CFOs.

Concerning company strategy, more than three-quarters (76%) of CFOs expect digital transformation and technologies to play a greater role in 2024. In fact, 80% of CFOs expect their organizations to embed more automation/digital technologies into their operations in the coming year.

Nearly half (48%) plan to increase their focus on new markets inside North America versus the 30% who indicated their focus will be on new markets outside the region. Slightly more than one-quarter (26%) of CFOs say



Strengthening a core business or raising capital follow, cited by 34% of CFOs.

Slightly more than one-third (34%) of CFOs expect their companies to increase the average number of deals they close over the next 12 months, while just 13% expect a decline over the same period. Almost half (46%) do not expect any change, with 7% indicating "don't know/not sure."

Looking further out, more than half (51%) of surveyed CFOs project M&A to account for 1% to 10% of their companies' growth in the next three years, and 19% of CFOs expect between 11% and 50% of their companies' growth to derive from M&A in that period.

Almost half (49%) of surveyed CFOs indicate they will likely use all cash to finance their deals in the next year, while 30% expect to use alternate structures such as JVs and strategic partnerships.

Nearly three-quarters (71%) of surveyed CFOs say that the valuation of assets/widening bid-ask spreads is among their companies' top-three challenges to M&A or deal success. Integration/divestiture (36%) and the status of debt markets (30%) round out the top three most-often cited responses.

"At the cusp of 2024, CFOs expressed a far more conservative outlook than in the previous quarter's CFO Signals survey, likely due to the continued impact of high interest rates, inflation and tensions caused by geopolitical conflict," said Steve Gallucci, national managing partner, U.S. CFO Program, Deloitte LLP, and global leader, Deloitte Touche Tohmatsu Limited. "However, their concerns are contrasted by signals that the new year will bring greater M&A activity as well as investments in digital technologies, both for strategic and operational purposes, indicating there may be a light at the end of the tunnel."

"Surveyed CFOs are looking to deploy capital via M&A as a growth lever in 2024," said Adam Reilly, national managing partner, Mergers, Acquisitions and Restructuring Services, Deloitte & Touche LLP. "This finding aligns with the

results of our recent '2024 M&A Trend Survey: Mind the Gap.' Should the Federal Reserve come through on expectations for reduced interest rates, that, coupled with some strategic pivots, could potentially spur more deal-making."

Since 2010, Deloitte's survey has provided key insights into the business environment, company priorities and expectations, finance priorities and CFOs' priorities. Participating CFOs represent diversified, large companies, with 81% of respondents reporting revenue in excess of \$1 billion. Nearly one-quarter (24%) of CFOs are from companies with greater than \$10 billion in annual revenue. ■



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CISOs' Evolving Cybersecurity Approach

Chief information security officers (CISOs) who elevate response and recovery to equal status with prevention are generating more value than those who adhere to outdated “zero tolerance for failure” mindsets, according to a new Gartner survey.

“Each new cybersecurity disruption exposes the fact that CISOs manage more through adrenaline than intention, which is unsustainable,” said Dennis Xu, VP analyst at Gartner. “CISOs need to be resilient through intention, rather than adrenaline, if they want to thrive.”

“The industry has made incredible strides on the prevention side of things, but response and recovery remain under-developed muscles because of the industry’s zero tolerance for failure mindset,” said Christopher Mixer, VP analyst at Gartner. “In an era where successful cyberattacks are increasing in volume and impact despite preventative cyber investments, organizations must augment their approach to elevate response and recovery to equal status with prevention.”

To begin the journey toward augmented cybersecurity, Gartner’s label for a cybersecurity function that has elevated response and recovery to equal status with prevention, CISOs should prioritize three areas of activity: building cyber fault tolerance in the business, streamlining to a minimum effective cyber toolset and building a resilient cyber workforce.

Build Cyber Fault Tolerance in the Business

Gartner recommends that CISOs work to build cyber fault tolerance into their business by focusing first on two areas of business activity where preventative cybersecurity measures are very visibly underperforming – generative AI (GenAI) and the use of third parties.

For a rapidly evolving technology like GenAI, it is impossible to prevent all attacks at all times. The ability to adapt to, respond and recover from inevitable issues is critical for organizations to explore GenAI successfully. Therefore, effective CISOs are complementing their prevention-oriented

guidance for GenAI with effective response and recovery playbooks.

Regarding third-party cybersecurity risk management, no matter the cybersecurity function’s best efforts, organizations will continue to work with risky third parties. Cybersecurity’s real impact lies not in asking more due diligence questions but in ensuring the business has documented and tested third-party specific business continuity plans in place.

“CISOs should be guiding the sponsors of third-party partners to create a formal third-party contingency plan, including things like an exit strategy, alternative suppliers list and incident response playbooks,” said Mixer. “CISOs tabletop everything else. It’s time to bring tabletop exercises to third-party cyber risk management.”

Minimum Effective Toolset

One of the places that the zero tolerance for failure mindset is most embedded is in cybersecurity’s approach to technology.

“CISOs keep old gear past its sell-by date while also rushing to add new tools without fully understanding the added cost and management complexity they bring,” said Xu. “CISOs must break the cycle of gear acquisition syndrome that inhibits their ability to thrive by embracing an ethos of adopting the fewest number of tools required to observe, defend and respond to exploitations of the organization’s exposures.”

To achieve this, CISOs should:

- **Identify redundancies** and gaps by mapping their toolset to their controls framework.
- **Build technology proofs** of concept around deployment risks, not just feature functionality.

- **Aggressively pursue GenAI** augmentations to existing tools.

Build a Resilient Cyber Workforce

“CISOs and their teams often have a heroism mindset,” said Mixer. “They feel they must avoid bad outcomes at all costs, even at the expense of their health. They need innovation, experimentation and engagement from their people more than ever, but the way they ask their people to operate often has the opposite effect.”

To create a resilient cyber workforce, CISOs must treat resilience as a true competency and build it in their people in the same way they build technical and other competencies:

- **Make it easy for employees to get the support they need:** This includes building self-care into employee workflows, like counseling and decompression exercises during active incidents.
- **Share failure and learning stories:** CISOs should set an example and be the first to share examples of times they fell short of their objectives and what they learned from those experiences.
- **Reengineer work to reduce burnout:** Engage employees to understand where they experience friction in their work, reduce bottlenecks and leverage automation to free people up to focus their energy on activities that truly demand it. ■



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How to Maximize the ROI on Your Latest Tech Investment

Investing in new technology for your business often involves much more than just the financial cost. There are so many factors that must come together in the right place at the right time to see a return on such a substantial investment. One of the most important but often overlooked assets for implementing new technology is having the right people to bring it to life. Without the right talent in place, your business will never be able to meaningfully apply new advancements – making even a satisfactory ROI nearly unachievable.

What do I mean by “the right people?” Technical qualifications aren’t enough. There’s a myriad of hard and soft skills that effective implementers must possess to ensure the firm adopting this new technology sees a return on its investment. One of the most important and perhaps surprising skills your tech team should have is communication. You need employees that are going to appropriately and effectively communicate the technology’s targeted impact on both short- and long-term business objectives and the overall enterprise value. This team will need people that can take complex systems, ideas and processes and boil them down to familiar, digestible terms to illustrate the benefits of adoption through specific use cases. For this reason, hiring people who have experience on the user-side has historically proven to be a bonus – it ensures that they are able to articulate the problem they are aiming to solve since they’ve been in the users’ shoes before.



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Because of the time and money that goes into them, tech investments come with a lot of pressure to yield results. That’s why the right tech team will also be comprised of data-driven decision-makers. These days, there is no shortage of information available to us. The challenge, though, is knowing what exactly to do with it. It’s crucial that the tech team implementing your new systems and programs is adept at filtering information to identify what is most relevant to their objectives. They’ll also understand how the role of data can evolve throughout the process – it’s not just used to measure outcomes at the project’s conclusion. It can be leveraged to assess risk levels, identify gaps in efficiencies and much more throughout the entire process. The best tech employees will align upfront with senior leadership on defining what successful ROI looks like and have the communication skills needed to advocate for this point of view. Good employees know how to measure results – great employees know *what* results are worth measuring.

Now that you know what you’re looking for in a team, how do you get them through the door? While it sounds like I may have just described a needle in a haystack, it’s much simpler than you might think. There is no magic combination of benefits that will appeal equally to every technology professional. However, there are some common themes my colleagues and I have identified within the field over time.

For starters, remote flexibility is essential. The pandemic years have proven that certain roles can be easily performed remotely or partially remotely. As a result, technology candidates are increasingly reluctant to commit to onsite roles. Companies that don’t offer remote options will find it very difficult to attract candidates. The desire for more flexible working arrangements is impacting salaries, as some candidates are willing to accept lower pay for the option to work remotely. One particularly effective model is to offer flexible hours to employees. Combined with two to three remote days

a week, this can be a very attractive proposition.

Compensation is naturally a major factor, too. Professionals that possess both the hard and soft skills required to excel in a role involving tech implementation know that their proficiencies are rare and adjust their salary expectations accordingly. When trying to attract top-tier talent, it is important to understand an individual’s motivations as well as their personal circumstances, as it can inform how you reward them.

As is true for nearly every industry, a strong company is one that fosters teamwork, a sense of community and inclusion – leading to more employee happiness, satisfaction and engagement that also benefits growth and revenue for businesses. Candidates are typically looking for more inclusive work cultures, so promoting the steps your company has taken to improve and enhance the overall employee experience will leave a lasting impression on candidates throughout the interview process.

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Countdown to Launch



**For SoCal Aerospace Company
Relativity Space and CEO Tim Ellis,
The Future is Rocketing Skyward.**



Relativity Space's Terran R two-stage rocket is set to launch in 2026. (Photo by Michael Baylor for Relativity Space)

For Relativity Space Co-Founder and CEO Tim Ellis, the secret to making a really good rocket is to speed up the time from designing the hardware to getting real test data that is used to improve and iterate. The company is building rockets that leverage 3-D printing in Long Beach that are a combination of high-tech manufacturing and a Silicon Valley startup culture.

"It's definitely one of the most complex and challenging products, but that's where the 3-D printing technology is big. We're iterating so fast and that's the key to go quickly," he said.

Traditional rocket manufacturing follows stringent production processes that require a design to be locked from the onset, so that the part can be procured from a vendor. With 3-D printing, Relativity can print a part and start testing within a matter of days. Based on test data, tweaks can be easily made before needing to lock on a design. This is critical to reducing cost and timeframe, but also building the best performing product.

The idea for Relativity Space was borne from Ellis' experimentation with 3-D printed parts and a vision to 3-D print an entire rocket. That vision combined his creative mindset with technical skills that he learned at the University of Southern California. Ellis, now 35, was born and raised in Texas as the oldest of three siblings. His first job was as a youth soccer referee. When he applied to USC for college, the original goal was to come to Los Angeles to become a screenwriter.

He even completed a scholarship application where he said that his dream job was to become a fiction writer or a CEO.

Upon arrival, however, his writing dreams were dashed in a moment of self-doubt, and he decided to focus on aerospace engineering after thumbing through the course catalog. He pursued undergraduate and master's degrees in aerospace engineering at USC and found a passion for space as a member of USC's Rocket Propulsion Lab, a student group that designed, built and launched rockets. This group is where he met future Relativity Space co-founder Jordan Noone. During his freshman year, the group built and tested a rocket motor in the Mojave Desert. Notably, it later became the first student group to successfully launch a rocket above the Karman Line, which is recognized as the boundary separating Earth's atmosphere and outer space.

"I wasn't even into rockets or space growing up so I wasn't sure what was going to happen. The engine test was about seven seconds, and it was the most intense thing that I've ever experienced in my life," said Ellis. "It was unbelievably powerful. The air gets thick and soupy. It made me realize that engineering can be creativity with physics."

During college, Ellis worked at Jeff Bezos' Blue Origin as a summer intern, where he was the youngest person at the company. There were about 150 employees at the time and the propulsion team was small – about 20 employees. That meant that Ellis had access to the top engineers at the company. He completed three internships there and joined the company when he graduated from USC. He worked as a propulsion development engineer and started the company's metal 3-D printing division. Several companies had started to 3-D print components, and he convinced the company to bring 3-D printing in-house.

Meanwhile, Ellis' future Relativity Space co-founder Noone started working as an engineer at SpaceX. Just two years later, the duo decided to quit their jobs to establish Relativity Space. The vision was to leverage 3-D printing to re-define the traditional aerospace manufacturing process and eventually use the technology to build an industrial base on Mars.

They cold-contacted investors and received an offer from Mark Cuban for \$500,000 in seed funding to launch the company. Shortly thereafter, Relativity was accepted into the famed Silicon Valley incubator Y Combinator. They had a great idea, but they were young and without clients or investors. Ellis had \$100,000 in student loan debt when he

launched the company. He said that the entrepreneurship journey is about taking what seemed like crazy risks or naïve risks, but it's also about hustle and grit.

"At 25, I decided to start a 3-D printing rocket company. I just didn't know what I was getting into. In hindsight, we figured it out and I've had to learn a lot in the process, but that was unbelievably hard," said Ellis. "Ultimately, the most expensive way for investors to fail and kind of the saddest way to fail is if we built the rocket and then nobody wants it. You have to prove product market fit early. Even in Y Combinator, I was cold-calling customers," he said.

The founders' long-term vision is to help establish an industrial base for humanity on Mars. It's fundamental to the company's mission and represented in the company's logo, which envisions co-existence on two planets.

Since its founding, the company has raised \$1.33 billion across six funding rounds, most recently at a valuation of \$4.2 billion. The company has grown to 1,200 employees and has a test site at NASA's historic Stennis Space Center in Mississippi and a launch pad at Cape Canaveral in Florida. Investors include well-known institutional funds and individuals. Some investors provide advice and wisdom for the myriad of challenges that startups face. Ellis said that Mark Cuban has invested in every round and mentioned that Walt Disney Co. chief executive Bob Iger and entertainment executive Michael Ovitz have both personally invested in the company and provided guidance. Noone served as Relativity's chief technology officer but departed the company in 2020 and co-founded Embedded Ventures,

“[Relativity Space] were the first to make that leap to say that they aren't just going to 3-D print an engine or component but the whole system and launch vehicle. That was a grand vision.”

- Dr. Leon Alkalai, Mandala Space Ventures



(above) Relativity Space's manufacturing floor. (below) The company's HQ in Long Beach.





Aeon R engine component testing at NASA's Stennis Space Center in Mississippi.

an early-stage venture fund focused on space operations, engineering and manufacturing.

As of June, Relativity Space had sold over \$2 billion in launch service agreements to more than 10 clients. It will launch from its own dedicated orbital launch site at Cape Canaveral, where it became the fourth company to have a dedicated pad. The others are United Launch Alliance, a joint venture of Boeing and Lockheed Martin; SpaceX and Blue Origin. Relativity's contracts include a partnership with Redondo Beach-based Impulse Space Inc. to deliver the first commercial payload to Mars. The partnership calls for Relativity to launch Impulse's Mars Cruise vehicle and Mars Lander, which Ellis stated is on the launch calendar for 2026 or 2028.

Relativity initially planned to fly a small rocket dubbed Terran 1. However, it pivoted from Terran 1 after just one flight to the larger Terran R, which can haul over 20 metric tons to low Earth orbit. Terran R is a 270-foot tall, 18-foot wide, two-stage reusable rocket powered by Relativity's Aeon R engine that is designed to compete in the market currently dominated by the SpaceX Falcon 9. Terran R will prioritize first-stage reusability, meaning that part of the rocket will have capability for use in multiple launches.

"The world is actually facing a supply crisis in launch because the demand for satellite launches is bigger than the supply of rockets. The world is literally sold out of commercial launches through the end of 2028. Right now, you cannot buy a rocket at

any price from most of the major suppliers. Companies like Amazon are building their own satellite networks," said Ellis.

Finding the right facility in Southern California was key to the company's rapid expansion and future commercial success. It draws from a large talent pool of engineers and other aerospace professionals and has plentiful access to materials due to a robust supply chain infrastructure. Relativity signed a lease in 2021 for its Long Beach headquarters in a one-million-square-foot warehouse at the Goodman Logistics Center adjacent to Long Beach Airport. The massive building on a 93-acre site was a former Boeing C-17 Globemaster manufacturing plant and has capacity for more than 2,000 employees along with the necessary equipment that includes the company's proprietary metal 3-D printers. The company moved in last year and has room to grow. Nearby, Relativity proposed building a 200-foot tall tower and pad for static rocket testing but has yet to receive approvals.

"There's really not a lot of buildings like this one in the United States. You could build one, but you're going to build it way out in the middle of nowhere and then getting talent there is very difficult," said Ellis.

Southern California is the largest space engineering hub in the country, if not the world, according to Dr. Leon Alkalai, a retired technical fellow and 32-year veteran of NASA's Jet Propulsion Lab (JPL) and the California Institute of Technology. He held numerous leadership

positions and was responsible for the capture leadership of both the GRAIL mission to the moon (2007) and the INSIGHT lander on Mars (2012). He received Distinguished Individual Achievement medals from NASA in 2011 and 2019 for his contributions to those missions.

He launched Pasadena-based Mandala Space Ventures three years ago after retiring from JPL. The company is a combination of an incubator and an accelerator that advises on investments, provides mentorship and technical due diligence while striving to create a community for the local space tech industry. It also has a venture fund that makes direct investments.

"There are a few space engineering hubs around the country but not anything compared to what we have in broader Los Angeles," said Dr. Alkalai. "It's the center of a space-industrial revolution. We're moving from Earth to lower orbit and then the moon. There's more and more need to put things into space. It used to be prestige and science, but now it's the economy," he said.

Dr. Alkalai is not an investor in Relativity Space, but he did briefly interact with it on a consulting assignment for a venture capital firm about six years ago. He performed a technical due diligence and saw its first 3-D printing machine in El Segundo. The company didn't have significant financing or other facilities.

"They were the first to make that leap to say that they aren't just going to 3-D print an engine or component but the whole system and launch vehicle. That was a grand vision. In hindsight, it was a challenge to see the growth to where they are now," said Dr. Alkalai.

California Institute of Technology and the Jet Propulsion Lab (JPL) in Pasadena anchor the ecosystem, but there's a range of companies from Santa Barbara to San Diego that include the entire spectrum of startups to legacy aerospace giants that benefit from access to the region's talent pool and infrastructure. A strong university system helps educate the next generation of engineers and high-tech workers.

Relativity Space is part of a group of companies focused on launch vehicles and propulsion systems. Hawthorne-based SpaceX is by far the largest and most advanced in the sector. SpaceX employs about 7,000 people in Hawthorne, according to the city's latest annual financial report. It has successfully launched rockets 362 times as of June 30, which includes 326 total landings and 295 reflights of those spacecrafts. Industry estimates pegged SpaceX revenue at nearly \$9 billion in 2023, and it is projected to generate

\$15 billion this year, based on the scheduled launch capacity combined with revenue from the company's Starlink satellite internet network. SpaceX was rumored to be raising funds at a valuation of \$210 billion recently.

Companies such as Northrop Grumman, Boeing and Raytheon have all utilized 3-D printing for some components and have space tech initiatives. Other well-established companies that comprise the space tech ecosystem include Rocket Lab in Long Beach and Costa Mesa-based defense contractor Anduril. Additionally, there are dozens of startups focused on rockets, satellite networks, space tourism and in-space manufacturing, such as El Segundo-based Slingshot Aerospace.

“The engine test was about seven seconds, and it was the most intense thing that I’ve ever experienced in my life. It was unbelievably powerful. The air gets thick and soupy. It made me realize that engineering can be creativity with physics.”

- Tim Ellis, Relativity Space co-founder and CEO

“There’s a whole lake of demand to go into space. Companies want to launch satellite constellations for climate change monitoring, disaster and weather monitoring, agriculture and large-scale data centers in space,” said Dr. Alkalai. He noted that national security and defense is a huge industry and there are applications for manufacturing as well. The U.S. leads the way, but there are launch vehicles being developed in Europe, Singapore, India and China.

According to LeoLabs, a Menlo Park-based company that utilizes a global network of ground-based radars to track objects in space, there are currently more than 20,000 objects in lower earth orbit. NASA defines lower earth orbit as the area with an altitude of 1,200 miles or less. This distance is considered near enough for transportation, communication, observation and resupply. It’s the area where

the International Space Station currently sits and where many future platforms will be located.

Moon Mission

Of course, NASA has plans to go beyond low Earth orbit. The various missions to the moon and Mars have spawned space technology with commercial applications at home. Earl Cole founded Los Angeles-based The SMART Tire Company four years ago as part of a NASA-sponsored program. The program was originally organized in Cleveland but opened to a national competition when it went virtual during the pandemic. Cole, who lives in Los Angeles, developed a business plan for how to commercialize NASA’s airless tire technology and won the exclusive rights to commercialize it. Although his company is small and still in the development phase, he sees vast potential for the industry.

“It’s a trillion-dollar market unfolding before our eyes,” said Cole, referring to the commercial value of technology unlocked by the space program. “We already have 15,000 people on a waiting list for an airless tire. We are doing space work with NASA’s Lunar Terrain Vehicle program for the next version of the moon buggy,” he said.

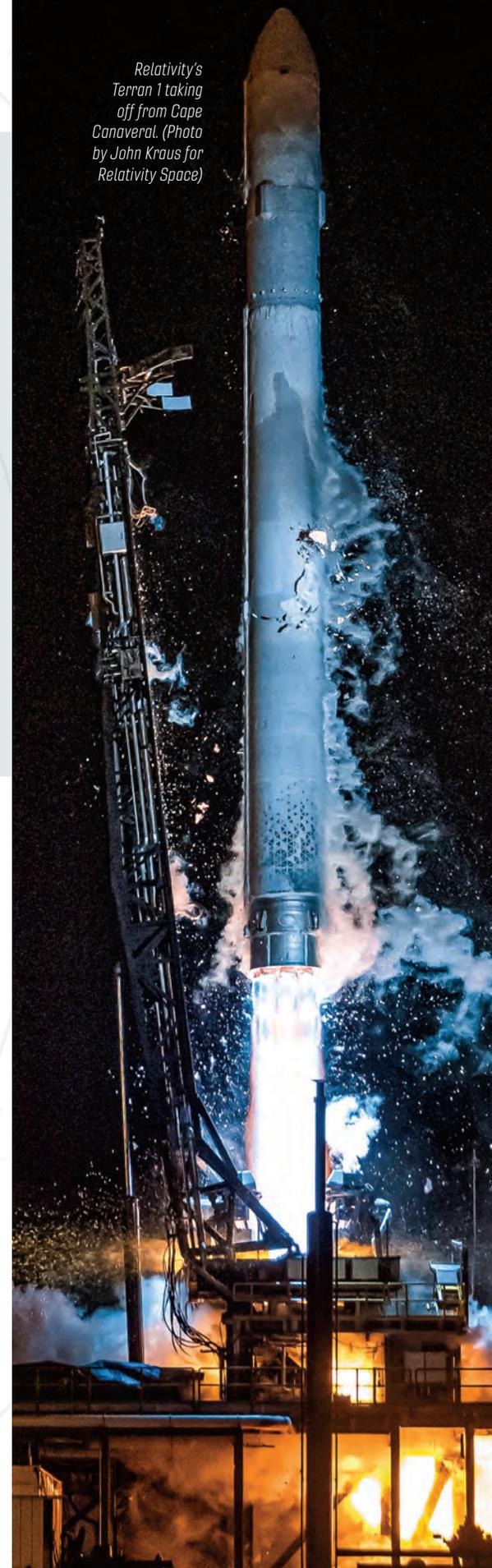
Cole used a combination of crowdfunding and self-funding to launch the company. He may engage with venture capital when the product is ready to scale. It uses a metal called Nitinol that is most commonly used in heart valve replacements.

Both startups and legacy companies see the potential for tremendous economic growth, even as some companies have failed in the highly competitive space tech sector. Competition is only growing stiffer as more companies and capital flow into the industry. Demand from governments and private companies that utilize low Earth orbit for satellites and other technology is very strong right now, and SpaceX is currently the only company with the launch capacity to support the industry. Notably, Sir Richard Branson’s Virgin Orbit shuttered last year after a launch failure. Nevertheless, the hope is that startups such as Relativity Space will create a diverse and robust space economy.

“Tim Ellis has yet to write his full story of success. It’s still being written and there’s a way to go,” said Dr. Alkalai. “The journey is not over. This industry is very tough. If the young don’t learn from the past, then they will repeat the mistakes.” ■

- David Nusbaum

Relativity's Terran 1 taking off from Cape Canaveral. (Photo by John Kraus for Relativity Space)



HOW CEOs VIEW SUSTAINABILITY

A commitment to ESG is a priority in C-Suite decision making, despite recent economic conditions.

Sixty-nine percent of CEOs view sustainability as a leading business growth opportunity in 2024, according to a recent survey of CEOs and senior executives by Gartner, Inc.

“As CEOs reset their long-term strategies, environmental sustainability remains one of the leading factors that will frame competition,” said Kristin Moyer, distinguished VP analyst at Gartner. “Despite much corporate greenwash, recent economic conditions could have triggered a reversion to environmental, social and governance (ESG) cynicism and a refocus on profit at all costs. However, the overall commitment of CEOs appears unwavering.”

The 2024 Gartner CEO and Senior Business Executive Survey was conducted from July to December 2023 among over 400 CEOs and other senior business executives in North America, Europe, Asia/Pacific, Latin America, the Middle East and South Africa, across different industries, revenue and company sizes.

“Sustainability consistently remains a top 10 business priority, surpassing even productivity and efficiency this year,” said Moyer. “Leaders and investors know environmentally cavalier corporate behavior is a mid- to long-term risk to business results with a big price to be paid when environmental factors are ignored as externalities. However, smart CEOs realize big sustainability challenges create new areas of business opportunity.”

Achieving Sustainable Business Growth

According to Gartner’s annual survey, the leading ways CEOs are using sustainability to drive business growth are through sustainable products and services (33%), sustainable business practices (18%), stakeholder engagement (18%) and decarbonization (18%). Digital investment and innovation is ranked ninth at 8%.

[Continued on page 40]

Focusing on Growth and AI to Round Out 2024

Sixty-two percent of CEOs selected “growth” as their top business priority in 2024.

According to a new survey by Gartner, Inc, heads of companies are focused on growing their businesses. This is the highest level since 2014, and an increase from last year’s survey where 49% of CEOs said their top business priority was growth.

“Along with the increased focus on growth, the survey showed a relatively weak position for cost management, suggesting that most CEOs and senior business executives believe the most challenging economic times are past,” said David Furlonger, distinguished VP analyst and Gartner fellow. “We have entered a phase of rising business leader confidence and business strategy re-launches.”

The 2024 Gartner CEO and Senior Business Executive Survey was conducted among 416 CEOs and other senior business executives in North America, Europe, Asia/Pacific, Latin America, the Middle East and South Africa, across different industries, revenue and company sizes. The survey found that CEOs are entertaining a growth mindset in their current environment.

AI is Captivating CEOs

When asked about digital transformation, 34% of CEOs identified AI as the top theme of the next business transformation after digital, followed by operations efficiency at 9%.

“AI’ is displacing ‘digital’ as the keyword CEOs mention the most, due in no small part to

generative AI (GenAI),” said Don Scheibenreif, distinguished VP analyst at Gartner. “The majority of CEOs surveyed believe that the AI breakthroughs of 2023 justified the tech sector hype. They are relying on CIOs, CTOs or CDOs to unlock the value of GenAI, showing that this is a team effort when approaching these projects and not just a top-down experience.”

CEOs Approach AI with Caution

CEOs are not deterred by any negative prospects around AI, as 87% of CEOs agreed that the benefits of AI to their business outweigh its risks. Another 90% of CEOs agreed the idea that AI is an existential threat to humanity is hype and exaggeration.

However, CEOs are not approaching AI with an entirely positive outlook. Fifty-six percent of CEOs said disinformation, misinformation and deep fakes will create operating problems. Twenty-nine percent see constrained electricity supply and 53% see general supply chain issues as a problem, in large part due to GenAI and the demand the technology creates.

“CEOs should tolerate low-cost GenAI projects,” said Scheibenreif. “But they should avoid the temptation to try and control GenAI’s use from the center. The excitement and energy will be almost impossible to handle.

“CEOs must let the hype cycle do its work for them. The trough of disillusionment in GenAI will arrive soon enough – probably before the end of 2024. CEOs should clamp down only on experiments that they believe are dangerous for the company’s reputation and allow the herd to police itself this time.” ■

@Gorodenkoff / AdobeStock

The C-Suite Trends Toward Outsourcing

Company leaders are increasingly looking outside of their businesses for critical functions and solutions.

Marcum LLP, in collaboration with Hofstra University, has released the findings from its latest CEO Survey, offering insights into the business environment, outlook and trends among middle-market CEOs.

A significant takeaway from the survey indicates a rising tendency toward outsourcing critical business functions. The survey reveals that 29.1% of CEOs reported increased outsourcing activities compared to their historical approaches. Cybersecurity emerged as the most outsourced function with 17.9% of companies primarily relying on external expertise to secure their data and information systems. Conversely, human resources remained the least outsourced function, with only 4.8% of CEOs opting for external services.

Furthermore, over half (50.2%) of the CEOs identified the primary motivation behind the outsourcing trend as access to superior expertise and talent. Cost savings (27.9%) and improved efficiencies (20.3%) were other significant motivators contributing to the decision to outsource various corporate functions.

“With talent in short supply and margins growing ever tighter, the advantages of outsourcing are becoming clearer than ever. Every day, more businesses are waking up to the reality that the specialized expertise of outside partners can relieve some of the day-to-day burden and enable organizations to concentrate their efforts where they’re most effective, which helps to drive growth and innovation,” said Jeffrey Weiner, chairman and CEO of Marcum LLP. “Recognizing this need, Marcum began offering a comprehensive suite of outsourced

services, from HR to IT to accounting and beyond. Each of our outsourcing teams is dedicated to enabling businesses to remain focused on delivering their unique services and solutions while our experienced, qualified teams safeguard their operational capabilities.”

The Marcum LLP-Hofstra University CEO Survey also presents a nuanced view of the current business climate. Here are the key findings from this CEO survey:

Business Environment

- There has been a notable rise in the percentage of CEOs expressing the highest level of optimism (“10”) about the current business climate (13.9%, up from 8.6%).
- The majority of CEOs (88.7%) maintain a rating of “5” or higher regarding their outlook with the weighted average remaining steady at 6.9.
- Industry-specific optimism varies with technology remaining relatively high (56%), construction experiencing a decline (33%) and retailing witnessing the most significant drop in optimism to 18%.

Influences on Business Planning

- Economic concerns continue to dominate with 54.2% of CEOs indicating it as a top-three influence on planning efforts, up from 49.2% in the previous survey.

- The availability of talent (38.2%) has overtaken rising material and operational costs (35.1%), the second most prominent concern for CEOs.

External Issues of Concern

- CEOs indicate that an economic slowdown (45%), interest rates and the cost of capital (42.7%) and political uncertainty (35.8%) are the primary external issues of concern.
- Other notable worries include supply chain challenges, rising energy costs, labor shortages and increasing customer expectations.

The survey was developed, conducted and analyzed by Zarb School MBA students, led by associate professor of international business and marketing Dr. Andrew Forman, in partnership with Marcum.

“In our increasingly interconnected world, the ability to adapt and respond to the ever-evolving market conditions is essential for business sustainability,” said Forman. “The insights from our joint CEO Survey with Marcum LLP underscore the value of outsourcing as a critical tool for CEOs looking to harness external expertise while maintaining internal focus and agility.”

“Understanding the changing tides of the business landscape is key to preparing tomorrow’s leaders,” said Janet Lenaghan, dean of the Hofstra University Zarb School of Business. “Through our partnership with Marcum LLP, we provide our MBA students with real-world learning opportunities that shape their perspective on strategic decision-making, such as the significant trend towards outsourcing identified in our latest CEO Survey.” ■



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Accounting Firms Utilize New Technology for Growth

Traditional financial service providers have expanded beyond the realm of standard tax and audit roles.

Removed from the stereotypical imagery of “bean counters,” today’s large accounting firms, and the CPAs who comprise their workforce, are finding that mission statements and roles are rapidly shifting to meet the needs of 21st century industries and their styles of working. Companies are evolving with new technology, and the changing nature of work requires advisors to understand a variety of business issues for both multi-national corporations and small businesses alike.

Those issues include new tax regulations that are being debated, technological advancements such as artificial intelligence (AI) that were implemented before being fully developed and supporting people in a hybrid work environment.

Many of these challenges are common in the diverse Southern California market where there is not one specific industry that dominates the region. Entertainment is a major sector, but there are also significant employers in aerospace, manufacturing, technology and life sciences.

“We have an important role as business advisors on a variety of issues in addition to their traditional tax and audit services,” said Ryan Smith, office managing partner for PwC in Irvine. “It’s about understanding how to position a client for their next phase of growth,” he said.

On the tax side, Smith cited Pillar Two compliance as a major issue for which companies are planning, even as the regulations are still being developed and implemented. Pillar Two is a set of regulations that impact the tax requirements for large international businesses and require advanced data tracking, calculations and reporting.

“Regulation is slow, but the speed of business is fast. Companies need to know how to plan appropriately,” said Smith.

Another issue is uncertainty created during an election year where there can be impacts to local,

state and federal policies. It can be hard for large organizations to respond to sudden changes that are beyond their control. Nevertheless, despite ebbs and flows to the economy, the Southern California region benefits from a strong middle-market environment to buoy the downswings while supporting opportunities for growth.

Technological Advancement

One area of rapid change is the implementation of AI and large language models. There are applications for companies on both the front end and the back end to support a wide range of applications. At PwC, there is a firmwide goal to upskill current employees to utilize the new technology. It has invested in OpenAI software at a firmwide level and trained staff on how to use it.

In May, PwC announced a partnership with OpenAI that provided licenses on an enterprise level to 100,000 PwC employees in the United States and United Kingdom, making it the largest corporate partnership for OpenAI’s ChatGPT technology. PwC also became the first reseller for ChatGPT Enterprise. That deal built upon a \$1 billion, three-year commitment that the firm made in 2023 to implement the technology. It now claims that it has actively engaged ChatGPT with 950 of its top 1,000 consulting clients.

Other “Big 4” firms have responded. In June, KPMG announced plans to add capabilities to its internal, proprietary AI tool with help from Microsoft using Microsoft’s OpenAI Service and Azure AI Search. Currently, more than 15,000 KPMG advisory employees can access the technology, and the firm expects to scale it to a broader swath of the company this summer. The internal tool works to complement the broader Advisory GPT tool and Microsoft 365 Copilot this summer. It will also utilize Microsoft Copilot for all of its U.S. partners and professionals this year.

Ernst & Young has also invested in AI technology for employees and customers. It plans to

implement Microsoft Dynamics 365 Sales and Copilot for Sales to approximately 100,000 employees by January 2025.

“There are new skill sets that can be utilized. You could be doing technology type roles or engineering type roles. It’s much broader than it was 20 years ago,” said Smith.

Future-Facing Accounting Roles

Smith has seen the evolution of the workforce firsthand. He was named office managing partner on July 1, 2024 after working for the company for the past 22 years in Orange County, aside from a rotation at an international office. His roots in Southern California are strong. Smith was born and raised in Orange County and attended Cal State Fullerton before joining PwC in Irvine after college. His personal experience is with clients in several industries that include technology, automotive, life sciences, consumer products and aerospace and defense.

“I’m looking forward to the role,” said Smith of his office management duties. “We have just over 500 people in Orange County. My focus is on how we interact with the community around us. That includes nonprofits, schools and executing on our client obligations. We will expand our overall footprint.”

He was elevated to the role at a time when the workplace underwent a major transformation due to the hybrid nature of many companies. PwC has adopted a hybrid environment in the office and tries to be deliberate about making connections when workers are together in the office. In an industry such as accounting, there’s a benefit for less tenured workers to gain experience from senior leadership, and many of the younger employees understand the benefit of those relationships built working side-by-side with their peers and mentors.

“We are educating today’s college students about the industry. As a young person, you can get a vast amount of experience in a short time. You get the breadth of the firm of our size but executed at a smaller level, which is the best of both worlds,” Smith said.

- David Nusbaum



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TOP ACCOUNTING AND BUSINESS ADVISORY FIRMS IN LOS ANGELES COUNTY

Ranked by Number of CPAs

L.A. Times B2B Publishing presents the 30 largest accounting and business advisory firms ranked by the number of CPAs in Los Angeles County offices. Overall, the 30 largest firms employ 3,267 CPAs in Los Angeles County and have more than 12,600 total staff.

Ernst & Young LLP is the largest accounting firm in Los Angeles County with 634 CPAs. The firm employs more than 2,100 accounting professionals locally and employs more than 2,300 people, including support staff.

Many of the largest firms are global. Among the top 10 firms listed, West Los Angeles-based HCVT is the only firm with local headquarters. HCVT has 211 CPAs in Los

Angeles County and more than 500 local employees. The firm has 12 offices, with nine located in Southern California as well as offices in Arizona, Texas and Utah.

Many of the firms listed have expanded over the past year by opening new offices and adding additional services. For example, CohnReznick, which has offices in Downtown Los Angeles and Woodland Hills, announced that it opened three new offices in South Florida over the past year and an office in Denver. The firm generated more than \$1 billion in revenue in 2023, up 14% over the prior year.

To view these lists online, visit latimes.com/b2b/top-accounting-firms.

Ernst & Young LLP

1

725 S. Figueroa St., Los Angeles

Top Local Executive	CPAs	634
Andy Park	Accounting Professionals	2147
	Year Established	1989



ey.com

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Manufacturing, Real Estate, Retail, Tech	Advisory, Audit, Internal Audit, M&A, Tax

PwC LLP

2

601 S. Figueroa St., Suite 900, Los Angeles
840 Apollo St., Suite 217, El Segundo

Top Local Executive	CPAs	516
Andy Sofield	Accounting Professionals	1103
	Year Established	1854



pwc.com

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

Deloitte LLP and subsidiaries

3

555 W. Fifth St., Suite 2700, Los Angeles

Top Local Executive	CPAs	421
Terry Feit	Accounting Professionals	2305
	Year Established	1895



deloitte.com

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Manufacturing, Real Estate, Retail, Tech	Advisory, Audit, Internal Audit, M&A, Tax

HCVT

4

11444 W. Olympic Blvd., 11th Floor, Los Angeles

Top Local Executive	CPAs	211
Vicken Haleblan	Accounting Professionals	423
	Year Established	1991



hcvt.com

Industries Served	Accounting Services
Entertainment, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, M&A, Tax

KPMG LLP

5

550 S. Hope St., Suite 1500, Los Angeles

Top Local Executive	CPAs	195
Michelle Wroan	Accounting Professionals	1143
	Year Established	1897



kpmg.com

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Internal Audit, M&A, Tax

Grant Thornton LLP

6

444 S. Flower St., Suite 3100, Los Angeles

Top Local Executive	CPAs	137
Cathy Hyodo	Accounting Professionals	260
	Year Established	1924



grantthornton.com

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

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TOP ACCOUNTING AND BUSINESS ADVISORY FIRMS IN LOS ANGELES COUNTY

Ranked by Number of CPAs

7

BDO USA

515 S. Flower St., 47th Floor, Los Angeles

Top Local Executive	CPAs	97
Kory Stoehr	Accounting Professionals	308
	Year Established	1910

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

bdo.com

8

RSM US LLP

515 S. Flower St., 17th Floor, Los Angeles

Top Local Executive	CPAs	93
Leslie Stackpole	Accounting Professionals	292
	Year Established	1926

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

rsmus.com

9

Armanino LLP

11766 Wilshire Blvd., Ninth Floor, Los Angeles
21650 W. Oxnard St., Suite 2400, Woodland Hills

Top Local Executive	CPAs	89
Ken Coelho	Accounting Professionals	439
	Year Established	1969

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, M&A, Tax

armanino.com

10

CohnReznick LLP

707 Wilshire Blvd., Suite 4950, Los Angeles
21600 Oxnard St., Suite 700, Woodland Hills

Top Local Executive	CPAs	87
Kash Hussain	Accounting Professionals	197
	Year Established	1919

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

cohnreznick.com

11

GHJ

700 S. Flower St., Suite 3300, Los Angeles

Top Local Executive	CPAs	87
Tom Barry	Accounting Professionals	186
	Year Established	1953

Industries Served	Accounting Services
Entertainment, Manufacturing, Nonprofit, Real Estate	Advisory, Audit, M&A, Tax

ghjadvisors.com

12

Moss Adams

21700 Oxnard St., Suite 300, Woodland Hills
222 N. Pacific Coast Highway, Suite 1400, El Segundo

Top Local Executive	CPAs	68
Carol Suruki-Carmay	Accounting Professionals	175
	Year Established	1913

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Manufacturing, Nonprofit, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax

mossadams.com

13

Baker Tilly

11150 Santa Monica Blvd., Los Angeles

Top Local Executive	CPAs	68
Greg Zelenay	Accounting Professionals	192
	Year Established	1931

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Manufacturing, Real Estate, Tech	Advisory, Audit, Tax

bakertilly.com

14

Gursey | Schneider LLP

2121 Avenue of the Stars, Suite 1300, Los Angeles

Top Local Executive	CPAs	56
Stephan Wasserman	Accounting Professionals	128
	Year Established	1979

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax

gursey.com

15

BPM LLP

1723 Cloverfield Blvd., Santa Monica
5000 E. Spring St., Suite 200, Long Beach

Top Local Executive	CPAs	52
Rick Parent	Accounting Professionals	103
	Year Established	1986

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

bpm.com

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Weaver and Tidwell LLP

21800 Oxnard St., Suite 700, Woodland Hills
100 W. Walnut St., Seventh Floor, Pasadena

Top Local Executive	CPAs	51
Sindhu Rajesh	Accounting Professionals	98
	Year Established	1950

Industries Served	Accounting Services
Financial, Healthcare, Manufacturing, Real Estate, Tech	Advisory, Audit, M&A, Tax

weaver.com

17

Windes

3780 Kilroy Airport Way, Suite 600, Long Beach

Top Local Executive	CPAs	45
Sean McFerson	Accounting Professionals	85
	Year Established	1926

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

windes.com

18

CNM LLP

6320 Canoga Ave., Suite 150, Woodland Hills

Top Local Executive	CPAs	42
Nathan Matthews	Accounting Professionals	67
	Year Established	2003

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Real Estate, Retail, Tech	Advisory, Audit, Internal Audit, M&A

cnmlp.com

19

Lucas Horsfall

299 N. Euclid Ave., Second Floor, Pasadena
16501 Ventura Blvd., Suite 501, Encino

Top Local Executive	CPAs	40
Michael P. Amerio	Accounting Professionals	105
	Year Established	1957

Industries Served	Accounting Services
Healthcare, Manufacturing, Real Estate, Tech	Advisory, Audit, Business Management, M&A, Tax

lhmp.com

20

CBIZ & MHM

10474 Santa Monica Blvd., Suite 200, Los Angeles

Top Local Executive	CPAs	40
James Parks	Accounting Professionals	85
	Year Established	1978

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax

cbiz.com

21

Marcum LLP

777 S. Figueroa St., Suite 2900, Los Angeles

Top Local Executive	CPAs	30
Rob Babek	Accounting Professionals	53
	Year Established	1951

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

marcumllp.com

22

Fineman West & Company

801 S. Figueroa St., Suite 1000, Los Angeles
14140 Ventura Blvd., Suite 207, Sherman Oaks

Top Local Executive	CPAs	30
Wendy On	Accounting Professionals	45
	Year Established	1979

Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

fwllp.com

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TOP ACCOUNTING AND BUSINESS ADVISORY FIRMS IN LOS ANGELES COUNTY

Ranked by Number of CPAs

23

Fishman, Block and Diamond LLP

16830 Ventura Blvd., Suite 400, Encino

Top Local Executive	CPAs	30
Steven J. Fishman	Accounting Professionals	30
	Year Established	1980



Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail	Advisory, Audit, Business Management, Estate Planning, Tax

fbc.com

24

Macias Gini & O'Connell LLP

2121 Avenue of the Stars, Suite 2200, Los Angeles
700 S. Flower St., Suite 800, Los Angeles

Top Local Executive	CPAs	29
Jerome Vermeulen	Accounting Professionals	64
	Year Established	1987



Industries Served	Accounting Services
Entertainment, Manufacturing, Nonprofit, Real Estate, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

mgocpa.com

25

Gerber & Co LLP

1880 Century Park E., Suite 200, Los Angeles

Top Local Executive	CPAs	24
Selwyn H. Gerber	Accounting Professionals	27
	Year Established	1986



Industries Served	Accounting Services
Entertainment, Financial, Legal, Nonprofit, Real Estate	Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax

gerberco.com

26

H&B (Hutchinson and Bloodgood LLP)

550 N. Brand Blvd., 14th Floor, Glendale

Top Local Executive	CPAs	20
Luba Kvitcho	Accounting Professionals	30
	Year Established	1922



Industries Served	Accounting Services
Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate	Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax

hb.cpa

27

Withum

16830 Ventura Blvd., Suite 501, Encino

Top Local Executive	CPAs	20
Christopher L. Passmore	Accounting Professionals	40
	Year Established	1974



Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

withum.com

28

Duffy Kruspodin LLP

21600 W. Oxnard St., Suite 2000, Woodland Hills
9171 Wilshire Blvd., Suite 555, Beverly Hills

Top Local Executive	CPAs	19
Mark Kruspodin	Accounting Professionals	37
	Year Established	1990



Industries Served	Accounting Services
Entertainment, Healthcare, Hospitality, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax

dk.cpa

29

Hedman Partners LLP

27441 Tourney Road, Suite 200, Valencia

Top Local Executive	CPAs	18
Calvin D. Hedman	Accounting Professionals	25
	Year Established	1994



Industries Served	Accounting Services
Entertainment, Financial, Manufacturing, Real Estate, Tech	Advisory, Audit, Estate Planning, M&A, Tax

hedmanpartners.com

30

Prager Metis

2381 E. Rosecrans Ave., Suite 350, El Segundo
12100 Wilshire Blvd., Suite 1420, Los Angeles

Top Local Executive	CPAs	18
Walt Brasch	Accounting Professionals	35
	Year Established	1920



Industries Served	Accounting Services
Entertainment, Financial, Healthcare, Hospitality, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, M&A, Tax

pragermetis.com

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TOP ACCOUNTING AND BUSINESS ADVISORY FIRMS IN ORANGE COUNTY

Ranked by Number of CPAs

L.A. Times B2B Publishing presents the 20 largest accounting and business advisory firms ranked by the number of CPAs in Orange County offices. Overall, the 20 largest firms employ 1,340 CPAs in Orange County and have more than 4,700 total staff.

Deloitte is the largest accounting firm in Orange County with 238 CPAs and more than 1,000 total staff in the area. Ernst & Young LLP ranked No. 2 with 179 CPAs in Orange County and Moss Adams ranked No. 3 with 128 CPAs.

The largest local firm is independent Haskell & White LLP. The Irvine-based firm has 50 CPAs in its local office and a total local staff of 88 employees. The firm has a second office located in San Diego.

To view these lists online, visit latimes.com/b2b/top-accounting-firms.



Deloitte LLP and subsidiaries

1

695 Town Center Drive, Suite 1000, Costa Mesa

Top Local Executive	CPAs	238
Marshall Solomon	Accounting Professionals	943
	Year Established	1895
	Industries Served	Accounting Services
	Entertainment, Financial, Healthcare, Manufacturing, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Internal Audit, M&A, Tax

deloitte.com

Ernst & Young LLP

2

18101 Von Karman Ave., Suite 1700, Irvine

Top Local Executive	CPAs	179
Mary Garrett	Accounting Professionals	389
	Year Established	1989
	Industries Served	Accounting Services
	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax	

ey.com

Moss Adams

3

2040 Main St., Suite 900, Irvine

Top Local Executive	CPAs	128
Shannan Gardner	Accounting Professionals	257
	Year Established	1913
	Industries Served	Accounting Services
	Financial, Healthcare, Hospitality, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

mossadams.com

PwC LLP

4

2020 Main St., Suite 400, Irvine

Top Local Executive	CPAs	118
Ryan Smith	Accounting Professionals	325
	Year Established	1854
	Industries Served	Accounting Services
	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

pwc.com

KPMG LLP

5

20 Pacifica, Suite 700, Irvine

Top Local Executive	CPAs	84
Mark Clemens	Accounting Professionals	409
	Year Established	1897
	Industries Served	Accounting Services
	Entertainment, Financial, Healthcare, Hospitality, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Internal Audit, M&A, Tax

kpmg.com

HCVT

6

18565 Jamboree Road, Fourth Floor, Irvine

Top Local Executive	CPAs	77
Scott Stephenson	Accounting Professionals	170
	Year Established	1991
	Industries Served	Accounting Services
	Entertainment, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, M&A, Tax

hcv.com

BDO USA

7

600 Anton Blvd., Suite 500, Costa Mesa

Top Local Executive	CPAs	69
Kristen McCarthy	Accounting Professionals	148
	Year Established	1910
	Industries Served	Accounting Services
	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

bdo.com

Armanino LLP

8

18101 Von Karman Ave., Suite 1400, Irvine

Top Local Executive	CPAs	68
Julissa Quirk	Accounting Professionals	116
	Year Established	1969
	Industries Served	Accounting Services
	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, M&A, Tax

armanino.com

RSM US LLP

9

17400 Laguna Canyon Road, Suite 200, Irvine

Top Local Executive	CPAs	67
Paul Short	Accounting Professionals	271
	Year Established	1926
	Industries Served	Accounting Services
	Entertainment, Financial, Healthcare, Legal, Manufacturing, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

rsmus.com

Baker Tilly

10

18500 Von Karman Ave., 10th Floor, Irvine

Top Local Executive	CPAs	51
Thomas Bennett	Accounting Professionals	192
	Year Established	1931
	Industries Served	Accounting Services
	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Internal Audit, Tax

bakertilly.com

Haskell & White LLP

11

300 Spectrum Center Drive, Suite 300, Irvine

Top Local Executive	CPAs	50
Wayne R. Pinnell	Accounting Professionals	76
	Year Established	1988
	Industries Served	Accounting Services
	Healthcare, Hospitality, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, M&A, Tax

hwcpa.com

Windes

12

2050 Main St., Suite 1300, Irvine

Top Local Executive	CPAs	47
Sean McFerson	Accounting Professionals	90
	Year Established	1926
	Industries Served	Accounting Services
	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax

windes.com

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TOP ACCOUNTING AND BUSINESS ADVISORY FIRMS IN ORANGE COUNTY

Ranked by Number of CPAs

<p>Marcum LLP 13</p> <p>600 Anton Blvd., Suite 1600, Costa Mesa</p> <table border="1"> <tr> <td>Top Local Executive</td> <td>CPAs</td> <td>40</td> </tr> <tr> <td>Philip Wilson</td> <td>Accounting Professionals</td> <td>79</td> </tr> <tr> <td></td> <td>Year Established</td> <td>1951</td> </tr> </table>  <table border="1"> <tr> <td>Industries Served</td> <td>Accounting Services</td> </tr> <tr> <td>Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech</td> <td>Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax</td> </tr> </table> <p>marcumllp.com</p>	Top Local Executive	CPAs	40	Philip Wilson	Accounting Professionals	79		Year Established	1951	Industries Served	Accounting Services	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax	<p>Withum 14</p> <p>100 Spectrum Center Drive, Suite 1000, Irvine</p> <table border="1"> <tr> <td>Top Local Executive</td> <td>CPAs</td> <td>30</td> </tr> <tr> <td>Kenneth L. Johnson</td> <td>Accounting Professionals</td> <td>79</td> </tr> <tr> <td></td> <td>Year Established</td> <td>1974</td> </tr> </table>  <table border="1"> <tr> <td>Industries Served</td> <td>Accounting Services</td> </tr> <tr> <td>Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech</td> <td>Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax</td> </tr> </table> <p>withum.com</p>	Top Local Executive	CPAs	30	Kenneth L. Johnson	Accounting Professionals	79		Year Established	1974	Industries Served	Accounting Services	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax	<p>RJI CPAs 15</p> <p>18012 Sky Park Circle, Irvine</p> <table border="1"> <tr> <td>Top Local Executive</td> <td>CPAs</td> <td>25</td> </tr> <tr> <td>Manuel J. Ramirez</td> <td>Accounting Professionals</td> <td>81</td> </tr> <tr> <td></td> <td>Year Established</td> <td>1980</td> </tr> </table>  <table border="1"> <tr> <td>Industries Served</td> <td>Accounting Services</td> </tr> <tr> <td>Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech</td> <td>Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax</td> </tr> </table> <p>rjicpas.com</p>	Top Local Executive	CPAs	25	Manuel J. Ramirez	Accounting Professionals	81		Year Established	1980	Industries Served	Accounting Services	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax	<p>BPM LLP 16</p> <p>36 Technology Drive, Irvine</p> <table border="1"> <tr> <td>Top Local Executive</td> <td>CPAs</td> <td>17</td> </tr> <tr> <td>David Jorgensen</td> <td>Accounting Professionals</td> <td>34</td> </tr> <tr> <td></td> <td>Year Established</td> <td>1986</td> </tr> </table>  <table border="1"> <tr> <td>Industries Served</td> <td>Accounting Services</td> </tr> <tr> <td>Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech</td> <td>Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax</td> </tr> </table> <p>bpm.com</p>	Top Local Executive	CPAs	17	David Jorgensen	Accounting Professionals	34		Year Established	1986	Industries Served	Accounting Services	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, M&A, Tax
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<p>CBIZ & MHM 17</p> <p>2010 Main St., Suite 250, Irvine</p> <table border="1"> <tr> <td>Top Local Executive</td> <td>CPAs</td> <td>15</td> </tr> <tr> <td>Paul Nation</td> <td>Accounting Professionals</td> <td>53</td> </tr> <tr> <td></td> <td>Year Established</td> <td>1978</td> </tr> </table>  <table border="1"> <tr> <td>Industries Served</td> <td>Accounting Services</td> </tr> <tr> <td>Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech</td> <td>Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax</td> </tr> </table> <p>cbiz.com</p>	Top Local Executive	CPAs	15	Paul Nation	Accounting Professionals	53		Year Established	1978	Industries Served	Accounting Services	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax	<p>CNM LLP 18</p> <p>15635 Alton Parkway, Suite 450, Irvine</p> <table border="1"> <tr> <td>Top Local Executive</td> <td>CPAs</td> <td>15</td> </tr> <tr> <td>Jeremy Wheeler</td> <td>Accounting Professionals</td> <td>22</td> </tr> <tr> <td></td> <td>Year Established</td> <td>2003</td> </tr> </table>  <table border="1"> <tr> <td>Industries Served</td> <td>Accounting Services</td> </tr> <tr> <td>Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Real Estate, Retail, Tech</td> <td>Advisory, Audit, Internal Audit, M&A</td> </tr> </table> <p>cnmlp.com</p>	Top Local Executive	CPAs	15	Jeremy Wheeler	Accounting Professionals	22		Year Established	2003	Industries Served	Accounting Services	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Real Estate, Retail, Tech	Advisory, Audit, Internal Audit, M&A	<p>Gursey Schneider LLP 19</p> <p>2211 Michelson Drive, Suite 650, Irvine</p> <table border="1"> <tr> <td>Top Local Executive</td> <td>CPAs</td> <td>14</td> </tr> <tr> <td>Robert Watts</td> <td>Accounting Professionals</td> <td>22</td> </tr> <tr> <td></td> <td>Year Established</td> <td>1979</td> </tr> </table>  <table border="1"> <tr> <td>Industries Served</td> <td>Accounting Services</td> </tr> <tr> <td>Entertainment, Financial, Hospitality, Legal, Nonprofit, Real Estate, Retail, Tech</td> <td>Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax</td> </tr> </table> <p>gursey.com</p>	Top Local Executive	CPAs	14	Robert Watts	Accounting Professionals	22		Year Established	1979	Industries Served	Accounting Services	Entertainment, Financial, Hospitality, Legal, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Estate Planning, Internal Audit, Tax	<p>The Pun Group LLP 20</p> <p>200 E. Sandpointe Ave., Suite 600, Santa Ana</p> <table border="1"> <tr> <td>Top Local Executive</td> <td>CPAs</td> <td>8</td> </tr> <tr> <td>Kenneth H. Pun</td> <td>Accounting Professionals</td> <td>25</td> </tr> <tr> <td></td> <td>Year Established</td> <td>2012</td> </tr> </table>  <table border="1"> <tr> <td>Industries Served</td> <td>Accounting Services</td> </tr> <tr> <td>Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech</td> <td>Advisory, Audit, Business Management, Internal Audit, M&A, Tax</td> </tr> </table> <p>pungroup.cpa</p>	Top Local Executive	CPAs	8	Kenneth H. Pun	Accounting Professionals	25		Year Established	2012	Industries Served	Accounting Services	Entertainment, Financial, Healthcare, Hospitality, Legal, Manufacturing, Nonprofit, Real Estate, Retail, Tech	Advisory, Audit, Business Management, Internal Audit, M&A, Tax
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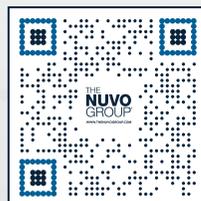
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CFO

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The fourth annual CFO Forum & Leadership Awards took place on June 13, 2024, and it drew hundreds of distinguished Southern California professionals to The Beverly Hilton to honor some of the area's top chief financial officers.

The evening opened with a networking reception in the courtyard, followed by an informative and fascinating panel discussion that featured industry experts sharing their insights on "Prioritizing Tech Innovation & Talent Retention."

After a multi-course dinner, attendees sat back and eagerly awaited the announcement of the names of each honoree. The awards presentation, comprised of six award categories, recognized CFOs for their successes and accomplishments over the past 24 months as well as for their exemplary leadership within their organizations and contributions to the community.

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Talia Stern, Ahmer Inam, Sasha Schuster



Sal Sarabosing, Michael Zemetra, Marc Blythe



Michael Swartzburg



Greg Gregorian, Armen Vartanian, Sarkis Mazmanian, Ani Petrosyan, Elizabeth Zardaryan



Matthew Roethle, Hans Getty



Barbara and David Santrella



Lauren Robinson, Mary Miller, Anna Brown



Catherine Rhebergen, Anubha Goel, Lorenzo Moran, Stella Chen



Avo Avetisyan, Christine Duque, Lilit Davtyan, Anna Magzanyan



Brian Hegarty, Clarissa Avendano



Stacy Nikzad, Jenna Pass, Tyler Mally, Michael Cornforth, Dario Sarmiento, Karrie Saydah



Christopher Vandeweyer, Dylan Pany, Giles Van Poucke, Thomas Dhondt



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Prioritizing Tech Innovation & Talent Retention

MODERATOR



Brian Hegarty

*Principal, L.A. Market Leader,
Employee Health & Benefits
Marsh McLennan Agency*

Brian Hegarty is the managing director of the Los Angeles office for Marsh McLennan Agency (MMA). In addition to overseeing the firm's rapid growth in the Los Angeles market, he specializes in employee benefits programs for mid-size to large companies. Since joining the firm in 2008, Hegarty has worked closely with many leading Los Angeles industries, such as technology, entertainment, apparel and hospitality, among others. Focusing on enhancing the experience for both employers and employees, he is very proficient at helping organizations that are expanding operations nationally and internationally. He is a thought leader who was instrumental in the development of the company's technology trust, Benefits Tech Trust.



Ahmer Inam

*Chief Data and Artificial
Intelligence Officer
Relanto*

Ahmer Inam holds the position of chief data and artificial intelligence officer at Relanto, a global firm specializing in business process transformation and enterprise resiliency. With over two decades of experience, he has a proven track record of driving organizational transformation through the implementation of intelligent digital solutions. He has held leadership positions at renowned firms such as Nike, PwC and Wells Fargo.

Inam's expertise extends beyond his professional roles. He serves as a member of brain trusts at XPRIZE, a position that recognizes his contributions to advancing AI-centric healthcare innovations. He also acts as a data & AI expert with the International Institute for Analytics, contributing his knowledge and insights to the field. Notably, he plays an active role in shaping responsible AI practices as a member of the Responsible AI Institute, which influences policies and frameworks for the responsible and ethical implementation of AI solutions.

His involvement with prestigious institutions extends further. Inam is a founding member of the Decentralized Society Lab at MIT Media Labs, where he contributes to exploring the societal impacts of emerging technologies. Additionally, he serves as a mentor and advisor to the MIT

AI Venture Studio, lending his expertise to foster innovation in AI-powered entrepreneurship. His contributions to the technology industry have earned him a position as a member of the Forbes Technology Council, where he actively participates in shaping technology-related conversations. Inam's passion for AI startups also drives him to provide guidance and advisory services to promising ventures in the field.



Dylan Pany

*Managing Director –
Head of Los Angeles &
West Coast Region
Phaidon International*

Dylan Pany is the managing director of the global talent partner, Phaidon International. Recognized for cultivating high-performing teams, he launched his career in New York, specializing in sourcing business-critical talent in sales and trading for Phaidon's financial services brand, Selby Jennings. Motivated by educating and nurturing internal graduates, Pany made a strategic move to Los Angeles where he successfully established the West Coast business. Now overseeing a 100-plus workforce, he thrives on training and developing his teams to become subject matter experts, delivering exceptionally high-level of service to Fortune 500 clients and niche professionals.



Sasha Strauss

*CEO & Founder
Innovation Protocol*

Sasha Strauss speaks from 25 years in brand strategy, having defined brands for leading corporations, philanthropies, faiths and academic institutions. His distinct and direct approach to how brands and leadership must communicate is the foundation for his brand strategy consultancy, Innovation Protocol (IP). Their ability to inspire while they inform is why brands like Nestlé, PayPal, LEGO, Google, Disney and Korn Ferry have called on their consulting and thought leadership since 2006.

While running IP as CEO, Strauss has been a professor for 17 years, concurrently teaching brand strategy at UCLA, USC and UCI business schools. That coursework, coupled with IP's client work for innovators, directly impacts his impassioned keynote speeches at the world's largest conferences.



Shared Insights from the Event

On the best practices for being collaborative in a hybrid or remote work environment:

Dylan Pany: If you have individuals that are working in different time zones, in different offices, etc., communication may not be as much as you'd like or where you want it to be. So, communication should be top-down: making sure that it's perfectly aligned with business objectives and perfectly aligned with the mission of the company.

Ahmer Inam: What we have seen successfully implemented in driving collaboration in a hybrid and remote work environment is first and foremost connecting on mission and purpose. It's not so much what we do, which is very task-oriented, it's more around why we do what we do, which is very purpose-driven.

Sasha Strauss: We try to orient our clients around the idea that it's very hard to negotiate time zones and figure out what zone someone's in. If you look at your calendar technology, there's a really easy default setting where you can show two or three time zones simultaneously. Game-changer. That way, when you're on a call with someone, you don't have to calculate anything: "It's three hours later where you are. Let's talk at this time." What that does most importantly is show grace and consideration for the person on the other end of the Zoom.

On allocating resources to tech solutions while maintaining fiscal responsibility:

Pany: Discipline is important in all areas of business. I have to always revert back to strong financial governance, strong diligence or discipline. When it comes to these decisions and ensuring that whatever the intent of the product

is, can you very confidently say it is going to achieve the result that you want?

On the best emerging technologies to pursue:

Inam: What's happening with AI, blockchain and newer and newer technologies coming every day creates a lot of confusion, especially for decision-makers. We essentially identify and prioritize particular problems to go after and then what technologies are needed to ensure that we are not solving this problem for yesterday or today, but building it as a core capability of differentiation for tomorrow. At that point, whether it's AI or blockchain or whichever technology makes sense to drive that future-centric approach to solutioning, that's when it comes into play.

Strauss: There's really no point in thinking about innovation and investing in innovation if you're not thinking about the workforce that has to use it. The failures I've seen have really been about the neglect of talent – every time innovation shows up in the enterprise, people's jobs change. If you want them to be engaged and using the technology, you have to help them career up a little bit as well.

On attracting and retaining top talent:

Strauss: Talent today of all ages wants feedback. They don't want to wait till the annual review. They don't want to see you scribbling and then coming back to them a year later. They want feedback as it's happening right now. For me as an owner, operator and employer, I had to change the way that I thought about feedback and created this micro-gesturing effort. It's not like a thing you should consider doing. It's something you must do, so we give

this active feedback experience because everyone accepts that this is how talent wants to work now.

Inam: People want to work for companies that align with their mission. Last year, I made a statement here that we will not be replaced by AI. We will be replaced by people who know AI. That's the fear that a lot of people have in the companies that are not investing in upskilling and training their employees with AI – they're going to lose out extensively over the next few years. Continuous learning is an element as part of retention strategy.

On AI as a factor of how companies will hire in the future:

Pany: Being a part of talent acquisition, I think of how that process looks: Are you using an agency? Are you speaking directly with the person? Do you have a giant CRM that has an AI underlying function that presents the best candidates and brings them to your attention before you even need to pick up the phone and make a call? I also think certain roles are going to be more imminently affected and certain positions are going to be more imminently required to become a part of this AI movement, and others still have a little bit more time to adapt. Either way, it's coming, and you need to get on board.



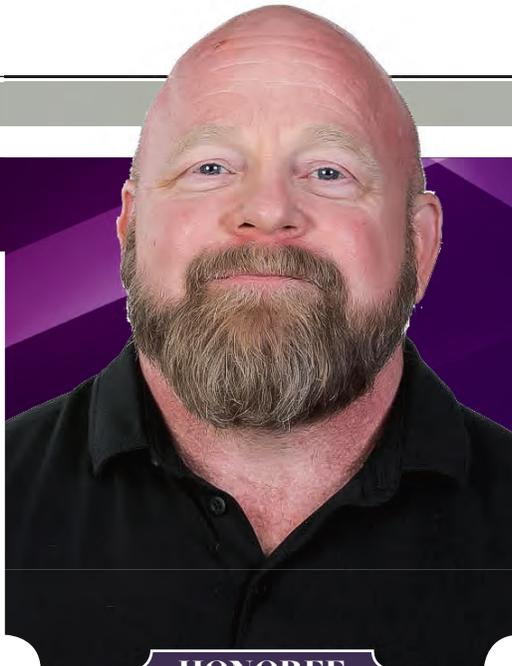
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CFO LEADERSHIP AWARDS

Education/Non-Profit

Lyle Honig Mojica

Chief Financial Officer
AIDS Healthcare Foundation



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Lyle Honig Mojica grew up in a small town in Kansas and attended Kansas State University, earning his bachelor's degree in business with a concentration in accounting in 1992. Working in Kansas at the beginning of his career, he visited Los Angeles, where his sister lived, and decided to make the move to have the California dream.

With a fresh start in California, Mojica started working for the AIDS Healthcare Foundation as an accountant when the company was transitioning from a hospice care facility to a preventative healthcare center model. Working on the accounting aspects of the transition, he was at the forefront when it came to working for marginalized individuals in society who had very little social and political support. After the transition, Mojica decided to branch out to the private sector to obtain his CPA with a reputable firm working as a senior business consultant at Arthur Anderson in Los Angeles. Once he obtained his CPA, he worked with

major clients like Hyperion Solutions, Montgomery Watson Harza and the Los Angeles Unified School District. After making his mark working for a top accounting firm, he decided to go back to work for the AIDS Healthcare Foundation to continue his passion for working for those in need.

Mojica worked his way up the ranks through the years and eventually became the assistant CFO.

During his tutelage as assistant CFO, he learned how to manage and direct others in a mutually inclusive and respectful way. It was during that time that Mojica eventually became the CFO of the AIDS Healthcare Foundation, serving millions of people around the world.

He currently has 10 vice presidents and directors under him who serve day-to-day operations, which include revenue cycle, procurement, compliance, analysis, accounts payable, payroll and accounting.

AIDS Healthcare Foundation recently reached a milestone, treating 1.9 million patients and counting worldwide. Under Mojica's leadership, many patients can be seen at little to no cost out of pocket. There has been an enhanced revenue stream year to year due to the analysis and hard work of the finance department at the AIDS Healthcare Foundation.

Education/Non-Profit: Finalists



Howard
Goldman

Chief Financial Officer
Didi Hirsch Mental Health
Services

As the chief financial officer of Didi Hirsch Mental Health Services, Howard Goldman goes beyond typical financial leadership in the nonprofit sector. Amidst limited resources and overwhelming needs, he stands out for his innovative financial strategies, steadfast dedication to the organization's mission and exceptional leadership qualities. Under his guidance, Didi Hirsch has expanded its reach through strategic partnerships and innovative service delivery, addressing critical mental health needs in the community. Goldman's commitment to financial health and sustainability is evident in his success in securing funding for essential programs, such as youth suicide prevention initiatives. With his holistic approach, he integrates the organization's mission into every financial decision he conducts. Goldman's forward-thinking strategies ensure that financial decisions align with the organization's goals.



James O.
Phillips

Chief Financial Officer
Los Angeles Mission

James O. Phillips, CFO of Los Angeles Mission, brings over 36 years of experience in nonprofit financial leadership. Originally from Lagos, Nigeria, he has dedicated his career to advancing charitable causes. His early roles included managing a \$300-million portfolio as director of accounting for Cook County Economic Development Association and helping build 160 homes as CFO of Peoria Community Action Agency. At Christ-Centered Ministries, Phillips grew revenue from \$600K to \$23 million. Since joining Los Angeles Mission in 2021, he has forged partnerships with AT&T, Target, CVS and the Ahmanson Foundation, securing the organization's first million-dollar public grants. He is committed to mentoring young men of color and serves on the Christian Family Center Church board.

Emilee Tello, Chief Financial Officer of Orange County United Way since 2018, played a pivotal role in the acquisition of 2-I-I Orange County (2IIOC), a key service connecting residents with vital resources. Leading the due diligence and integration processes, she ensured a seamless financial and operational merger, doubling the organization's staff size. Beyond her financial duties, Tello oversees IT and facilities, ensuring the integration of 2IIOC's employees into United Way's systems and the effective management of workplace operations. Additionally, she contributes to the 'Journey to 100 campaign,' celebrating the organization's centennial. With a background as a CPA and experience in major companies, Tello is celebrated for her leadership and commitment to community service, including volunteer work and health and wellness initiatives.



Emilee
Tello

Chief Financial Officer
Orange County United Way

William Van Noll, CFO of Palo Verde Hospital, has been instrumental in securing financial stability for the hospital amidst the challenges faced by community hospitals, especially post-COVID-19. He successfully secured an \$8.5-million loan from California's Distressed Hospital Loan Program, ensuring the hospital's operations could continue. Van Noll introduced the innovative Rural Centricity strategy, aimed at reversing the outmigration of residents seeking medical services far from Blythe. This approach enhances local accessibility to healthcare, addressing the needs of 20,000 residents. His efforts have laid the groundwork for improved medical services and the potential for a new, state-of-the-art hospital, significantly benefiting the community. Van Noll's educational background includes a bachelor's degree and an M.B.A. from USC, and he is also a Certified Public Accountant (CPA).



William Van
Noll

Chief Financial Officer
Palo Verde Hospital

Private Company—Small

CFO LEADERSHIP AWARDS

Clarissa Avendano

Clarissa Avendano currently serves as the CFO for Gen.G Esports, which has a global presence across key markets in Seoul, Shanghai and Los Angeles. Since she joined in early 2020, the company has tripled in size, and she led the financial due diligence for the company's latest major round of fundraising. She carries over 20 years of experience across several industries, starting her career at Deloitte navigating corporate clientele (Northrop Grumman and Dole Food Company) through complex accounting transactions, steering the Sarbanes-Oxley international accounting and SEC reporting at Korn/Ferry International, and driving profitability across a variety of consumer product manufacturing corporations (Merle Norman Cosmetics/Topson Downs).

Experienced in multiple industries, including esports, apparel/fashion/cosmetics, manufacturing and professional services, Avendano can deftly navigate concepts and business events at a high level while also understanding how to dig into detailed transactions. Able to man-



Chief Financial Officer
Gen.G Esports

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age a variety of vendor relationships, contract negotiations, banking and treasury functions, she specializes in analytical skills, training and process development, internal controls, systems implementation and integration and accounting. She has provided and executed critical financial and operational recommendations that have resulted in multi-million dollars of impact on the companies she has served.

Under Avendano's fiscal stewardship, Gen.G Esports has become a leading operator of an esports organization intended to create and guide esports teams into champions on the international stage. The company offers a wide range of professional services, such as premier esports coaching and training, lifestyle management and business acumen development to build a large roster of teams that can participate in multiple official esports competitions, enabling esports enthusiasts to develop and grow their career.

Avendano graduated from UCLA with a B.A. in business/economics and an accounting minor and holds an M.B.A. from the UCLA Anderson School of Management with an Advanced International Management Certification. She is also an active CPA in California. Avendano continues her involvement at UCLA Anderson, mentoring student teams through their master's theses and has been an alumni judge in evaluating M.B.A. business plans since 2013.

Private Company—Small: Finalists



Malindi Davies

Interim CFO
FinditParts

Malindi Davies, the interim CFO of FinditParts, is known for her expertise in corporate strategy, operations and finance. With over 15 years of senior operating experience across public and private sectors, she has a track record of fostering growth and revenue, having raised over \$60 million in venture capital and spearheaded team expansions from 18 to 70-plus. Davies specializes in e-commerce, luxury fashion and consumer media, collaborating closely with CEOs and boards to shape business strategy and optimize infrastructures. Her expertise spans finance, luxury fashion, art, e-commerce and media, underpinned by graduate degrees in finance/accounting and organizational psychology. As the previous COO of Tamara Mellon Brand, Davies orchestrated a \$50 million Series C raise; while as general manager of Saatchi Art, she drove 40% top-line growth and 30% EBITDA improvement.

Phil Oseas, chief accounting officer at GeoLinks, has over 30 years of financial expertise across various industries. Since joining GeoLinks, he has driven strategic initiatives, leading to significant milestones. In 2023, he secured a minority ownership transaction with JLC Infrastructure, accelerating nationwide expansion. Oseas met CAF year-4 deployment goals and refinanced the company's line of credit, boosting revenue by 11% to \$40.9 million. He also spearheaded the adoption of ASC 842 Leasing. His efforts were crucial in securing an \$84-million RDOF award from the FCC for network build-out, significantly enhancing GeoLinks' growth and market presence.



Phil Oseas

Chief Accounting Officer
GeoLinks



Jim Mancuso

CFO & COO
Chosen Foods, LLC

Jim Mancuso, currently serving as CFO and COO of Chosen Foods, has a career in the fast-moving consumer goods sector, specializing in mid-tier entrepreneurial organizations backed by PE and VC firms. He has been instrumental in doubling business revenue and adjusted EBITDA. Mancuso implemented technologies, such as AP automation and cash flow AI manual tasks. Under his leadership, Chosen Foods acquired and integrated a competitive brand and successfully completed a dividend recapitalization. His prior roles include CFO of MyMochi, leading its rise in the frozen novelty market, and CFO of SmartyPants Vitamins, culminating in a sale to Unilever. Mancuso has also held significant positions at Beanfields Snacks, GT's Living Foods, KORRES North America, Revlon, TEMPTU and Weleda North America & AG.

Juyuan Wei, chief financial officer at Westwood Financial, joined the firm in 2018 and quickly rose through the ranks due to his exceptional financial acumen and strategic insight. Initially hired as finance director of strategic planning and analysis, he transformed financial and operational reporting, leading to his promotion to vice president of finance within six months. During the COVID-19 pandemic, Wei's leadership ensured the company outperformed its public peer REIT group and maintained investor dividends. Promoted to senior vice president of finance and accounting in 2020, he oversaw all financial functions, including debt strategy and board deliverables. As CFO since February 2023, Wei has developed a five-year debt strategy, earned significant interest income through strategic investments, managed complex reverse exchanges and ensured cash protection post-SVB collapse.



Juyuan Wei

Chief Financial Officer
Westwood Financial

CFO LEADERSHIP AWARDS

Private Company—Midsize

Timothy Weerasiri

Chief Financial Officer
Ninety.io

Tim Weerasiri is the CFO of Ninety.io and has been CFO, COO and head of data analytics for multiple companies in the technology, media and telecommunications space. Over an 18-year career, he has driven \$2 billion of revenue growth and secured six business exits totaling \$10 billion in value. Weerasiri has scaled startups ranging from 50 to 2,000 employees, including CornerStone OnDemand, Riot Games, Victorious, TeleSign and Revolution Prep, and enjoys identifying new and disruptive ways to optimize the outcome.

The consistency that can be seen throughout Weerasiri's career is that he can be found running toward the fire. He began his career at KPMG where he spent eight years specializing in software tech companies. Towards the end of his tenure, there was a number of new pronouncements around revenue recognition that were causing confusion. During a rotation in San Jose, Weerasiri was part of a small team that developed national training materials to educate professionals and customers on software revenue recognition that



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helped many companies with their filings across the country.

Over a career in Los Angeles-based tech startups, Weerasiri has seen some notable highlights, including more than \$1 billion of revenue growth in an 18-month period across 36 countries at Riot Games while supervising a \$2-million payment gateway buildout that covered 89 payment

processors in those same 36 countries. He was instrumental in raising the capital needed to drive \$200 million of revenue growth in one year from TeleSign's strategic pivot. Additionally, the growth and sale of Revolution Prep for \$200 million, a Santa Monica EdTech company that is the largest non-franchise private tutoring business in the U.S., was significant during the pandemic given the market upheaval.

Consistent with the theme of running toward fires, Weerasiri joined Cornerstone OnDemand during a time when it was staring down the barrel of several material weaknesses due to a quick IPO process. Through the application of key principles, CSOD was able to file its first IOK without issue.

Weerasiri is a strong believer that people do not quit jobs — they quit managers. He has worked his career to provide thoughtful leadership in this area that has translated into thought leadership contributions in his work at Ninety.

Private Company—Midsize: Finalists



Mike Hall

Chief Financial Officer
Resolution Economics

Mike Hall, CFO of Resolution Economics, is an experienced finance professional with a demonstrated history of working in the venture capital and private equity industries. He is skilled in many areas, including M&A diligence, financial modeling, valuation analysis, technical accounting with U.S. GAAP and IFRS, operational strategies and analysis, management, industry analysis and research and return analyses and considerations. Hall is a hardworking, dedicated individual offering an entrepreneurial perspective. In his role at Resolution Economics, he helps to provide sophisticated economic, statistical and financial analyses, forensic investigations, forensic technology, dispute advisory, expert testimony and specialized technology and analytic solutions to leading law firms, Fortune 500 companies and government agencies.



Ahmed Hassanein

Chief Financial Officer
Signature Estate & Investment
Advisors, LLC (SEIA)

Ahmed Hassanein, CPA, MBA, is the chief financial officer of Signature Estate & Investment Advisors, LLC (SEIA). With nearly three decades of experience, he oversees SEIA's financial operations, guiding the firm's growth and diversification. Headquartered in Los Angeles with 16 offices nationwide, SEIA offers bespoke investment management and financial planning services to affluent clients. Hassanein's career includes pivotal roles at startups and established organizations, such as chief accounting officer at private equity-backed wealth management startups, and senior positions at Advisor Group, Cetera Financial Group, Deloitte, FBR Capital Markets and Lincoln Avenue Capital. He also served as CFO and COO of the alternative asset manager Steben & Company, where he oversaw operations, accounting and investor relations for over \$1 billion in assets under management.

Biruta Pachucka is the chief financial officer of BALL Construction, a leading site utilities contractor in Southern California. As the company's first female executive in 35 years, she champions collaboration, creativity and innovation. With 13 years in the A/E/C industry, Pachucka excels in financial leadership, job-cost accounting, project forecasting, corporate budgeting and strategic planning. She is known for her effective communication, flexible management style and strong service mentality. A strategist and problem-solver, Pachucka anticipates and mitigates challenges within the complex construction environment and builds high-performing teams. Additionally, she empowers women in business through mentorship and advocacy initiatives and offers consulting services to A/E/C firms. Pachucka is also a dedicated real estate investor.



Biruta Pachucka

Chief Financial Officer
BALL Construction, Inc.

Jake Howard Schreiber, chief financial officer at Johnson-Peltier, has been with the company for over a decade, becoming only the second CFO in its 67-year history. Starting his career as an IBEW electrician, he transitioned through roles such as estimator, project manager, safety director and operations manager. Schreiber's intimate knowledge of the company and construction processes has driven operational improvements and enhanced efficiency. As CFO, he has significantly improved cash flow management, enabling the pursuit of larger projects. He has also negotiated and maintained multi-year master service agreements with key customers, securing future work worth several hundred million dollars. Under Schreiber's leadership, Johnson-Peltier has won 20 NECA Electrical Excellence Awards since 2017.



Jake Howard Schreiber

Chief Financial Officer
Johnson-Peltier

Private Company—Large

CFO LEADERSHIP AWARDS

Muhammad Shahzad


Chief Financial Officer
Relativity Space

As chief financial officer and president of Relativity Space, Muhammad “Mo” Shahzad is responsible for corporate strategy and growth, leading all commercial, financial, people, and legal and risk efforts at the company. His responsibilities include but are not limited to sales and business development, brand and communications, financial planning and strategy, fundraising, capital allocation, accounting, treasury and tax, human resources, talent acquisition, legal, government affairs, safety and security. Under Shahzad’s leadership, Relativity Space has raised over \$1.3 billion and grown more than 10 times in headcount.

He has over 20 years of finance and capital markets experience with an extensive background in financial planning, operations, management and strategy as well as deep technical knowledge. Before joining Relativity, Shahzad served as CFO of The Honest Company, where he led several financing rounds and scaled the business profitably. Previously, he was VP in technology, media & telecom investment banking at Goldman, Sachs & Co., where he advised on over \$30 billion in financ-

ing and merger and acquisition transactions and served as West Coast business unit manager for the investment banking division.

Shahzad and his team have implemented innovative cash flow management strategies that balance scope, schedule and risk to drive Relativity Space’s Terran R program, which is a multi-billion-dollar, multi-year program. He has also implemented a capital allocation program that allowed Relativity

to hit technical milestones on time and on target while spending smartly.

Under Shahzad’s stewardship, Relativity Space introduced financial modeling improvements that enhanced forecasting accuracy, leading to more effective budget allocation and reduced overall risk. He and his team also increased the company’s contract value backlog to \$1.8 billion while enhancing the company’s enterprise risk management framework, safeguarding its people and physical assets, including a total overhaul of its insurance philosophy, approach and partnerships.

Other accomplishments include establishing a culture empowering informed decisions aligned with the company’s risk appetite; streamlining financial processes through the adoption of intelligence and forecasting tools; dramatically improving efficiency and transparency in financial reporting; and instituting rigorous internal controls that ensure regulatory compliance and best practices that significantly reduced audit times and compliance costs.

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Private Company—Large: Finalists


Eric Chin
Chief Financial Officer
Akido

Eric Chin serves as the CFO for Akido, overseeing all finance and accounting operations, including fundraiser participation and investor relations. In addition to his role as CFO, he held a number of financial and operational leadership positions at ApolloMed and its subsidiaries, including interim co-chief operating officer and corporate secretary. Over the past year, Chin led the financial efforts to finalize the acquisition of Rhode Island Primary Care Physicians Corp (RIPCPO) into the Akido organization, expanding the medical network to the East Coast and doubling the patient base to nearly half a million. He now serves on the RIPCPO Board of Directors. Chin is a dedicated member of the Los Angeles community, serving as a member of the board of directors for the Chinese Chamber of Commerce of Los Angeles, a council member of the EY Alumni Council and a supporter of Covenant House.


Thomas Dhondt
Chief Financial Officer
Telesign

Thomas Dhondt is a seasoned financial executive renowned for his strategic acumen and commitment to driving growth and innovation. With over a decade of experience across international markets, he has consistently demonstrated exceptional leadership and a dedication to excellence. As Chief Financial Officer at Telesign, Dhondt played a pivotal role in expanding the company’s business by 70% over three years through strategic investments and global market expansion, establishing it as a leading digital identity solution provider. He spearheaded a complex merger with competitor Route Mobile, solidifying Telesign’s position as a top-three industry leader and projecting combined revenues to exceed \$1 billion, with anticipated synergies surpassing \$100 million annually. Dhondt is also actively involved in fostering international collaboration and investment on the West Coast through his membership in Belwest.

Razzak Jallow, CFO of FloQast, has a distinguished career in technology and finance. Early in his career, he implemented financial infrastructure at Synopsys, aiding its growth to a \$500-million enterprise. At Adobe, Jallow managed the transition to a subscription model. His career includes key roles at Apple, LendingClub and Looker before joining FloQast. At FloQast, he has driven the company to \$100 million in annual recurring revenue, enhancing transparency and cross-functional collaboration. As CFO, Jallow has a strong hand in internal operations and direction. He led initiatives such as cloud-first operations and scalable success strategies. In addition, he serves on the board of Zone24x7 and the audit committee for Bellarmine College Preparatory School.


Razzak Jallow
Chief Financial Officer
FloQast

Mike Kovar, CFO and treasurer of Acra Lending, brings over 30 years of executive experience across finance, manufacturing, SaaS and real estate. As a change agent, he enhanced Acra’s financial infrastructure post-acquisition, upgrading teams, automating processes and consolidating insurance. His strategic initiatives, including a new treasury cash management program, generated \$3 million in revenue and de-risked \$150 million in cash. Kovar also implemented a top-down, bottom-up budgeting process for 17 centers, increasing accountability and transparency. He introduced Loan Vision, an advanced loan-level accounting system, automating reports and enabling data-driven decisions. Previously, Kovar held key roles at Lender Processing Services, Lending Tree Loans and Pacific Life.


Mike Kovar
CFO & Treasurer
Acra Lending

CFO LEADERSHIP AWARDS

Public Company—Midsize

Michael Swartzburg

Chief Financial Officer
Dermavant

With a background spanning over two decades in biotechnology and healthcare, Michael Swartzburg brings a wealth of experience and expertise to his current role as the chief financial officer of Dermavant Sciences. His key strengths lie in his ability to build and grow companies, resulting in significant value creation — most notably generating over \$2 billion worth of business mergers and integrations, IPOs and follow-on equity offerings in various leadership roles at prior companies and executing \$200 million of financing arrangements at Dermavant.

As Dermavant's CFO, Swartzburg has been integral in the launch of the company's first FDA-approved product — VTAMA (tapinarof) cream, 1% for adults with plaque psoriasis — growing Dermavant to approximately 300 employees and successfully positioning the company's financial assets to facilitate the distribution of its product into pharmacies and patients' hands just days after receiving FDA approval. He evolved and grew his local and global finance, accounting and technology



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teams to seamlessly transition Dermavant from a research and development stage company to a newly commercialized company.

Outside of his financial stewardship at Dermavant, Swartzburg is also deeply committed to giving back to the community and is particularly inspired by children's charities. As a seasoned leader, he recognizes the immense importance of supporting

the younger generation, because they represent the future. As part of his charitable involvement, Swartzburg actively donates to and engages with national and local organizations, such as St. Jude Children's Research Hospital and Cedars-Sinai Hospital Board of Governors Innovation Center. He also supports The Children's Hospital of Orange County Foundation.

While his community involvement primarily focuses on children's charities, Swartzburg and his wife Charisse are dedicated to making a positive impact that goes beyond a single cause, and they support their two daughters' Orange County schools and fundraising activities. He continuously seeks ways to contribute and make a difference in the lives of others, leveraging his expertise to support charitable endeavors across the Orange County community. Swartzburg is an active member of the California State University, Northridge Alumni Association and a donor to the CSUN Alumni Scholarships program.

Public Company—Midsize: Finalists

Timothy Richard
CruickshankChief Financial Officer
ImpediMed

Tim Cruickshank, a leader with over 15 years in life sciences, served as CFO of ImpediMed from 2020 to 2023. He led ImpediMed to a 275%+ share price increase, securing coverage for its technology with major U.S. health insurers and expanding its market to over \$2 billion. Cruickshank also developed the company's SaaS business model, achieving significant revenue growth. Recognized as CFO of the Year and a 40 Under 40 winner, he continues as a senior advisor at ImpediMed. He is active in the San Diego community, particularly with Big Brothers Big Sisters, raising over \$2 million through the annual Golf Marathon, and was named Volunteer of the Year in 2021 by the San Diego Business Journal.

Justin
ScarpullaChief Financial Officer
Identiv, Inc.

Justin Scarpulla, chief financial officer at Identiv, Inc., brings over 25 years of financial leadership to the global digital security and IoT leader. Under his financial stewardship, Identiv achieved record revenues of \$116.4 million in 2023, maintaining strong margins and a solid balance sheet. He led Identiv to end Q4 2023 with \$244 million in cash, cash equivalents and restricted cash and maintained a strong working capital position of \$487 million. Scarpulla's expertise in scalable financial systems and strategic growth has been instrumental in the company's success, including significant increases in federal billings and RFID unit shipments. Before Identiv, he held senior roles at SpaceX, Incipio Group and MaxLinear, where he drove financial strategy and operational excellence. Before that, Scarpulla's career originally began at Ernst & Young, providing a foundation in Big Four accounting.

Aaron Sullivan has been the chief financial officer of LiveOne, Inc. and PodcastOne Inc. since January 2024 after serving as interim CFO since December 2021. With extensive experience in financial management, mergers and acquisitions and operational leadership, he has played a crucial role in scaling organizations and enhancing financial reporting and internal controls. Sullivan has built and led financial organizations across multi-billion-dollar technology companies. Prior to his appointment as LiveOne's vice president and controller, he served as the controller-cloud of J2 Global, Inc. Prior to that position, he also worked at PricewaterhouseCoopers LLP, a global public accounting firm. Sullivan's educational background includes a B.A. in business and an economics degree from Trinity College Dublin in Ireland, and he is a Certified Public Accountant (CPA).

Aaron
SullivanChief Financial Officer
LiveOne

Michael L. Zemetra, EVP, CFO and treasurer at Veritone, has over 20 years of experience in senior financial roles within SaaS, technology and digital media companies. Since joining Veritone in October 2020, he has overseen finance, accounting, investor relations, HR, corporate development, tax and IT functions. Under his leadership, Veritone's revenue grew from \$57 million in 2020 to \$150 million in 2022, with a significant increase in employee count. Zemetra raised over \$250 million in financings and led a strategic turnaround, resulting in a 230% stock growth in 2024. He successfully negotiated debt recapitalizations, expanded global operations and improved internal controls, positioning Veritone for sustained growth and profitability. Zemetra's previous roles include CFO positions at LiveXLive Media, J2 Global, Global Eagle Entertainment and Demand Media.

Michael L.
ZemetraEVP, Chief Financial
Officer & Treasurer
Veritone



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JOE KAUDER
Chief Financial Officer

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Joe's experience and expertise have helped to make Banc of California
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CFO LEADERSHIP AWARDS

Public Company—Large

Evan Masyr

EVP & Chief Financial Officer
Salem Media Group, Inc.

Evan Masyr has been with Salem Media Group, Inc. for more than 24 years and has served as chief financial officer since July 2007. Over that period, he has been actively involved with transitioning the company from a pure-play radio operator to a multimedia corporation with approximately 30% of its revenue now coming from digital sources. Salem is America's leading media company specializing in Christian and conservative content with media properties, including radio, digital media and book and newsletter publishing.

During his time at Salem, Masyr has been involved with raising \$1.8 billion in capital (\$1.2 billion raised as CFO). He manages a team of approximately 50 professionals, encompassing accounts payable, payroll, staff accounting, SEC reporting, investor relations, finance, treasury, risk management, internal audit and radio traffic. Over the years, Masyr has instituted many operational efficiencies and cost-saving initiatives, such as reducing the monthly closing process by 16 days, completing various tax reorganizations, instituting a corpo-



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rate purchasing card program and significantly improving the company's cash management system. He also moved certain insurance lines to an offshore group captive insurance company, saving millions of dollars.

Over the past several years, Masyr has been able to guide his departments through the pandemic, seamlessly transitioning to a remote work envi-

ronment. During the pandemic, he was able to effectively refinance almost \$115 million of debt during those trying times. Also, Masyr played a key role in guiding the company through the process of obtaining \$11.2 million in PPP loans and then later getting the loans forgiven by the Small Business Administration. In 2021, the company sold almost \$26 million in real estate while still being able to broadcast its radio programming.

The media industry and the radio broadcast industry, in particular, have been challenged over the past few years. Time spent listening and advertising revenue has atrophied. During the majority of 2024, Salem was in default on some of its debt. Masyr worked tirelessly to resolve these issues. In particular, he managed to get two new debt facilities in place despite the growing leverage and financial struggles.

Public Company—Large: Finalists



Daniel Hart

Chief Financial Officer
Avid Bioservices

Daniel Hart, CFO of Avid Bioservices, has significantly contributed to the company's transformation into a leading biologics manufacturer. He joined Avid six years ago, bringing over 25 years of experience in various industries, and guided it through expansion and increased profitability. Hart's strategic initiatives boosted free cash flow over tenfold and raised \$35 million through equity and \$144 million in low-interest convertible debt. Additionally, he helped advance Avid's technological infrastructure by reducing the IT infrastructure footprint by decommissioning over 250 systems and overseeing upgrades to the enterprise resource planning (ERP) system, laboratory information management system (LIMS) and quality management system (QMS). Hart improved Avid's technological infrastructure, adding over 160 employees and growing revenue capacity from \$120 million to \$400 million.



Joseph Kauder

EVP & Chief
Financial Officer
Banc of California

Joseph Kauder joined Banc of California, Inc. (NYSE: BANC) as EVP and CFO in July 2024, based in Santa Ana, California. With over 30 years in finance and accounting, he has led complex finance organizations and advised boards and CEOs. Kauder played a pivotal role in Banc of California's merger with PacWest Bancorp, managing due diligence, negotiations and a \$400-million capital raise. He also restructured the merged company's balance sheet, executing significant asset sales and optimizing funding. Previously, Kauder spent over 15 years in executive finance roles at Wells Fargo, including as CFO for the wholesale banking group. He began his career at PwC and holds a B.S. from UNC Chapel Hill.

Ryan Lockwood, CarParts.com's CFO, blends financial expertise with dynamic leadership. His hedge fund background brings diverse insights, crucial in navigating today's business landscape amid challenges like COVID-19. In the past 24 months, he orchestrated pivotal projects, securing a \$60-million capital raise within six months and negotiating a favorable \$150-million line of credit. Notably, Lockwood modernized budgeting processes, fostering transparency and boosting adjusted EBITDA by 56% in 2022. He also oversaw the expansion of CarParts.com's real estate footprint, doubling its warehouse space from 615,000 sq. ft. to 1.25 million sq. ft. Beyond his corporate responsibilities, Lockwood is actively involved in serving the Greater Los Angeles community on behalf of CarParts.com and working with organizations such as Community's Child in Torrance and the Downtown Women's Center in Los Angeles.



Ryan Lockwood

Chief Financial Officer
CarParts.com

Trent Adem Revic, a seasoned finance professional, has been the chief financial officer of Unibail-Rodamco-Westfield in the U.S. since 2016. Originally from Australia, he now resides in Playa Vista, California, with his wife and two young daughters, Denali and Riva. Known for his extensive knowledge and commitment to sustainability, Revic has positioned the company as an industry leader. He is highly regarded for his open-door policy, engaging with employees at all levels and providing mentorship and motivation. Under his financial leadership, the company achieved record sales and outstanding employee satisfaction in 2023. Revic's strategic foresight and caring leadership style make him an invaluable asset to Unibail-Rodamco-Westfield.



Trent Adem Revic

Chief Financial Officer
Unibail-Rodamco-Westfield

CFO LEADERSHIP AWARDS NOMINEES

From healthcare to technology and from finance to education to numerous other industries, every company – whether public, private or nonprofit, whether large or small – requires the expertise and guidance of a savvy chief financial officer.

Submitted this year by their colleagues or peers, the standout nominees who are listed here in alphabetical order have demonstrated a penchant for navigating today's challenging business environment.

Please enjoy reading about their illustrious backgrounds and remarkable achievements as well as their contributions to their communities.



Private Company–Large

Steve Aleman

Chief Financial Officer
Prime Healthcare

Steve Aleman serves as Prime's chief financial officer and is a member of the senior executive team. He has more than 23 years of industry experience in healthcare, both on the payor and provider side. He has successfully developed and led large-scale, company-wide initiatives, including mergers and acquisitions and private equity transactions and drove growth in a private equity-backed integrated healthcare system. Aleman has been recognized over the years in the Los Angeles Business Journal among the top CFOs in Los Angeles and in 2023 was selected as CFO of the Year. Prior to Prime Healthcare, he served six years as CFO for Prospect Medical Holdings based in Los Angeles. Earlier in his career, Aleman, a CPA, worked as a director for Wellpoint/Anthem.

Jonathon Arrington has been with UCLA Health for nine years as the CFO of the faculty practice group. He oversees financial services, managed care, contract management, physician compensation, analytics and strategic initiatives. With a strong background in physician practice management, he has effectively led teams in revenue cycle management, financial reporting and business planning. Recently, Arrington integrated the largest sub-specialty into UCLA Health, streamlining operations and improving efficiency. He supports strategic planning initiatives, including Medicare Advantage growth and expanding patient access in Los Angeles County. He has also supported the UCLA Health Ambulatory Strategic Planning Committee which developed the five-year strategic plan. Furthermore, Arrington has been an executive sponsor for developing and implementing the integration of the DGSOM clinical operations into the health system.



Education/Nonprofit

Jonathon Duane Arrington

Chief Financial Officer
UCLA Faculty Practice Group



Private Company–Small

Connie Anne Yu Allen

Chief Financial Officer
Dusk to Dawn Urgent Care

Dr. Connie Anne Yu Allen is a family physician, educator and businesswoman from San Francisco, California. After graduating from UC Davis, she joined Teach for America, earning a master's in secondary education from Loyola Marymount University. Motivated to help underserved communities, Dr. Allen became a family physician, completing her residency at UCLA Harbor. As CFO of Dusk to Dawn Urgent Care, she promotes diversity and provides vital health services in Los Angeles and Orange County. Outside of her work at Dusk to Dawn Urgent Care, she is also a community advocate, supporting special needs children, breast cancer awareness and anti-Asian hate initiatives. Dr. Allen also serves on the board of the St. Vinson Eugene Allen Foundation, aiding families in need.

UCLA Health

UCLA Health celebrates honorees of the 2024 CFO Leadership Awards produced by L.A. Times B2B Publishing, including

Jonathon Arrington, Chief Financial Officer,
UCLA Faculty Practice Group
Nominee

With the addition of **UCLA West Valley Medical Center**, UCLA Health now operates five hospitals and more than 280 clinics, offering exceptional health care, close to home.



Scan to find exceptional care.

CFO LEADERSHIP AWARDS NOMINEES



Private Company—Large

**Michael
Cornforth**Chief Financial Officer
NKSFB, LLC

Mike Cornforth serves as the CFO of NKSFB, with a focus on the implementation of key technology solutions and team reconstruction. He began his career in 1990 with the assurance practice at Price-WaterhouseCoopers, focusing on health-care and insurance industries in their Los Angeles and Atlanta offices. Cornforth's extensive experience includes taking companies public on NASDAQ, public and private debt issuances, strategic mergers and acquisitions and corporate restructurings. As CFO of NKSFB during the COVID pandemic, he evaluated and restructured finance and accounting teams, implemented key technology solutions and embraced a digitized environment to improve efficiency. Cornforth led NKSFB's growth through acquisitions, integrating companies like CRM Management in New York City and Howard Capital Management Group.



Private Company—Small

**Sean
Cunningham**Chief Financial Officer
Integrated Capital
Management

Sean Cunningham is a seasoned CFO with over 30 years of experience in real estate investment, development and property management. As CFO of Integrated Capital Management, he oversees financial functions, fund accounting, investor reporting, compliance, insurance, audit, tax and corporate finance. Cunningham played a key role in launching the firm's debut private equity real estate fund, raising over \$30 million in equity commitments. He is currently involved in Integrated's fourth investment vehicle, targeting \$1.5 billion in total capitalization across various real estate assets. His collaborative leadership style emphasizes teamwork and strong stakeholder relationships. Outside of his position, he also serves as treasurer for the West End Group, a nonprofit supporting the West Los Angeles community.



Private Company—Large

**Mara
Garcia**Chief Financial Officer
Phonexa

Mara Garcia holds the role of chief financial officer at Phonexa, where she oversees the company's accounting, finance, human resources and legal/compliance functions, while also supporting Phonexa's Partnership Program. She joined Phonexa in 2020 as VP of finance & accounting, overseeing various financial practices and procedures. Garcia's leadership has been recognized through numerous accolades, including nominations for the CFO Leadership Awards by Los Angeles Times B2B Publishing and the Los Angeles Business Journal (LABJ), as well as being named a Top 100 Accountant by LABJ. Her involvement extends beyond Phonexa as she serves on the board of the CSUN Nazarian College Alumni Chapter and was previously vice president of the board of directors for CalCPA's LA Chapter.

Renee Dion joined Marquee Staffing in 1994 as the company controller. She has been instrumental in negotiating credit lines and banking relationships, is a seasoned risk manager credited with a very successful workers' compensation program and helped Marquee to enter TSL, a prestigious self-insured group. Under Dion's fiscal and operational stewardship, Marquee has become one of the leading professional staffing agencies in Orange County, San Diego and Los Angeles. Marquee specializes in connecting employers with skilled professionals and assisting job seekers in finding suitable positions and aims to streamline the hiring process for both parties. Dion is also an enrolled agent certified to practice before the IRS as well as a certified management accountant.



Private Company—Small

**Renee
Loignon Dion**Chief Financial & COO
Marquee Staffing

Private Company—Large

**Marc
Goldberg**Chief Financial Officer
Partner Engineering and
Science, Inc.

Marc E. Goldberg, Partner's chief financial officer, brings nearly two decades of expertise in finance and strategic management, starting from his tenure at Lehman Brothers as an investment banking analyst. Amidst recent challenges, his leadership steered Partner through turbulent times with scenario planning and transparency. Goldberg's strategic foresight and decisive actions helped mitigate the adverse impacts on the company's operations and personnel. Committed to community engagement, he supports Determined to Succeed, fostering educational opportunities for students. Furthermore, Goldberg's dedication to mentorship is evident in his support of Partner employees, notably mentoring Kelly Javier, who received acclaim for her achievements in business education.



Public Company—Large

**Nancy
Huang**Chief Financial Officer
CalOptima Health

As CFO of CalOptima Health, Nancy Huang has led the implementation of \$200 million in provider payments post-COVID-19 and supported the CalAIM program with \$94 million for homelessness, mental health and food insecurity since 2022. She established value-based reimbursement programs, including a \$153.5-million hospital initiative, a \$50-million community clinic grant, a \$15-million Medi-Cal wellness incentive and a \$10-million skilled nursing facility access program. Managing a \$4-billion budget with a low 4.6% administrative cost, Huang implemented zero-based budgeting and developed payment methodologies for 13 entities and over 13,000 providers. Her strategic leadership during COVID-19 ensured financial stability for CalOptima Health, serving 950,000 low-income Orange County residents and aligning with its mission to provide excellent, dignified care.



Private Company—Large

**Jim
Jackson**Chief Financial Officer
Saviynt, Inc.

Jim Jackson, CFO of Saviynt, Inc., is an accomplished executive with 15 years of CFO experience in the software and energy sectors. Previously an investment banker at Merrill Lynch and Morgan Stanley, he has engineered multiple IPOs and PE-backed exits. At Saviynt, Jackson oversees a \$150-million-plus ARR business, driving over 30% growth. He streamlined the company's capital structure, achieving imminent profitability and a refinancing investment from AllianceBernstein. He previously served as CFO at Tanium Inc. and Breitburn Management, securing \$10 billion in financing. Jackson also holds directorships at SkyBridge Capital and Anacapa Advisors. As CFO of Tanium, he quarterbacked IPOs for two spin-offs, a private equity-backed MBO, raising \$5 billion of debt and equity growth capital, and securing \$5 billion in bank financings.

Andrew Guarni, as the executive vice president and chief financial officer at Hoag, directs critical financial operations vital to the hospital's prosperity. With over three decades of expertise in health-care finance and administration, he brings profound knowledge and skill to his position. As CFO, he manages all facets of hospital accounting, including payroll, accounts payable and treasury functions. Guarni's strategic insight has notably enhanced revenue cycles and reduced days in AR to industry benchmarks. Under his guidance, Hoag has achieved significant expansion, including the recent acquisition of a major emergency room management provider in Los Angeles County. His leadership was instrumental in securing funding for critical projects, exemplified by Hoag's \$909-million bond issuance for the Irvine expansion.



Education/Nonprofit

**Andrew
Guarni**EVP & Chief
Financial Officer
Hoag

Congratulations to our CFO Michael Cornforth and all of the other nominees for the 2024 CFO Leadership Awards produced by LA Times B2B Publishing.



Michael Cornforth

Chief Financial Officer



CFO LEADERSHIP AWARDS NOMINEES



Education/Nonprofit

Tiffany LawChief Financial Officer
Orange County Power Authority

Born in Hong Kong, Tiffany Law experienced the effects of pollution firsthand, inspiring her career in clean energy. Now CFO at the Orange County Power Authority (OCPA) since October 2021, she oversees financial operations for this community choice electricity provider. OCPA serves over 230,000 customers, significantly reducing greenhouse gas emissions by providing renewable energy. Law emphasizes integrity, strong internal controls and transparency, crucial for public trust and financial health. Under her guidance, OCPA is on track for an investment-grade credit rating by 2027, with a robust fiscal strategy leading to a \$38-million reserve contribution for 2023-24. Law's previous roles include CFO at Central Coast Community Energy, where she achieved an "A" credit rating and spearheaded innovative financial strategies.



Private Company—Small

Samuel LeiaghatCOO & Chief Financial Officer
Pom Pom at Home

Samuel Leiaghat serves as the COO and CFO of Pom Pom at Home. In 2008, he cofounded Pom Pom at Home with his mother and subsequently founded Loomstead, a direct-to-consumer bedding company featured in Forbes and Business Insider. Returning to Pom Pom, Leiaghat modernized the business, transitioning from QuickBooks to NetSuite, implementing a WMS system, automating tasks and building a sales team focused on growth. Recent expansions include partnerships with Saks Fifth Avenue, Bloomingdale's and Cocom Republic. The company also supports charities like Happy Trails for Kids and Citizens of the World Charter School. Born in Belgium and raised in Los Angeles from the age of two, Leiaghat blends his European heritage with his American upbringing.



Private Company—Large

Richmond McMurrayChief Financial Officer
Arosa

Richmond McMurray serves as the CFO at Arosa, where he oversees finance and talent management functions. His leadership has driven strategic initiatives, growth, operational efficiency and risk management. Despite being a first-time CEO and new to the home health industry, McMurray has made a significant impact. He upgraded Arosa's accounting software from QuickBooks to NetSuite, led the most efficient audit in company history, reduced accounts receivable by five days and spearheaded a debt refinancing initiative that lowered the company's cost of capital. His strategic vision and proactive approach have greatly enhanced Arosa's performance and financial strength. McMurray's educational background comes from California State University, Northridge, where he obtained a B.S. in accounting and followed with a J.D./M.B.A. from Harvard Business School in 2012.

Michael Lynn, CFO and co-founder of Pray.com, drives the app's mission to foster faith and community. With over 16 million downloads, Pray.com offers daily prayer and faith-based content. He spearheaded initiatives to address mental health crises exacerbated by COVID-19, backed by research showcasing the app's positive impact. Prior to Pray, Lynn spent 13 years at Merrill Lynch, bringing financial expertise to his role. Committed to community service, he served on the board of LA's Best After-School Enrichment Program. Inspired by entrepreneurship, he left Merrill Lynch to cofound Pray after connecting with fellow co-founder Steve Gatena. A confirmed Catholic, Lynn values faith's importance and has broadened his perspective through Pray.com.



Private Company—Small

Michael LynnChief Financial Officer
Pray.com*[Continued from page 16]*

"Digital technology can accelerate progress toward sustainability goals, going beyond compliance to help enterprises reach targets, enable new business models and unleash revenue streams," said Moyer.

According to Gartner, digital technology plays an important role in driving both financial and sustainability outcomes. For example, the

Internet of Things (IoT), data and analytics can optimize wind turbines, which reduces costs and greenhouse gas emissions. AI and IoT can reduce food loss costs and waste; whereas a circular economy marketplace can create new revenue and reduce waste.

Climate Change Driving Agenda

The Gartner survey revealed 54% of CEOs say their businesses are affected by changing

weather patterns, at least moderately. Over half (51%) acknowledge changing weather patterns are causing them to plan changes to the way they operate or have already done so.

"CEOs see that climate change is causing weather pattern shifts that are directly impacting their business operations already," said Moyer. "Those operations must be adapted with technology playing a vital role in driving these changes, especially in the dynamics of supply chains."

The Gartner survey revealed the biggest impact of changing weather patterns cited by CEOs is operating dynamics (30%), particularly changes to logistics such as warehousing, timing and routing of deliveries. Relocations (including nearshoring) came in second (14%), followed by automation, technology and data (13%). ■



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CFO LEADERSHIP AWARDS NOMINEES



Private Company—Large

Lorenzo Sebastian Moran

Chief Financial Officer
24 Hour Home Care

Lorenzo Moran serves as the chief financial officer at 24 Hour Home Care, an in-home caregiving company dedicated to underserved communities. He is known for his strong financial stewardship and operational improvements. Moran's success in securing over \$6 million in grants has significantly enhanced services for over 10,000 Medi-Cal beneficiaries and families with developmental disabilities in Los Angeles. He has played a crucial role in obtaining federal and state grants, enabling 24 Hour Home Care to offset pandemic-related expenses and fund new programs. His leadership has also driven acquisitions, expanded the company's footprint and improved financial processes. Moran established systems to reduce workloads, fostering a supportive work environment.



Private Company—Large

Jenny Rosales

Chief Finance Officer
Northwestern Mutual-Orange County

Jenny Rosales has been the chief financial officer at Northwestern Mutual-Orange County since 2019 and brings a wealth of experience in public accounting and financial planning for various enterprises. Rosales' strategic acumen was crucial during the 2023 merger of the Irvine, Newport and Anaheim Hills districts, doubling the agency's size and seamlessly integrating operations. As a strategic partner, she engages in collaborative decision-making with the managing partner and senior leadership team, ensuring that the growth strategies for Northwestern Mutual-Orange County are not only financially sound but also aligned with the broader vision of the firm. Beyond finance, Rosales actively supports childhood cancer research through organizations like Alex's Lemonade Stand and the NEGU-Jessie Rees Foundation.



Private Company—Large

Vidhyashankaran Mahalingam Shivaraman

Chief Financial Officer
PIH Health

Vidhyashankaran (Vid) Shivaraman, chief financial officer at PIH Health, oversees a \$1.7-billion budget for a nonprofit healthcare network serving three million residents across Los Angeles, Orange County and San Gabriel Valley. Since 2021, he has led the organization through financial recovery post-COVID-19, maintaining an S&P A rating and achieving positive margins. Shivaraman has spearheaded strategic growth projects, real estate development and managed care contracting, resulting in significant savings and improved cash flow. He has led negotiations for an expanded line of credit and refinanced \$300 million of debt with significant savings. Additionally, he has negotiated new supply chain agreements, which resulted in savings of \$12 million over five years. Shivaraman's leadership in finance began at Downey Regional Medical Center, now PIH Health Downey Hospital, where he advanced from intern to CFO.

Romolo "Ron" Santarosa, senior executive vice president and chief financial officer at Hanmi Financial Corporation and Hanmi Bank, has been pivotal in the bank's growth since 2015. Under his leadership, Hanmi's assets increased from \$4.2 billion to \$7.6 billion by 2023. Santarosa has driven key initiatives in growth strategy, cost reduction and technology implementation. He successfully navigated the bank through the 2023 banking crisis, maintaining strong liquidity and credit quality. Santarosa's efforts resulted in new branches and a significant rise in loans and deposits. A dedicated community member, he serves on the Rancho Palos Verdes Planning Commission and the Los Angeles Area Council for the Boy Scouts of America.



Public Company—Large

Romolo Santarosa

SVP & Chief Financial Officer
Hanmi Bank/Hanmi Financial Corporation



Congratulations to
Lorenzo Sebastian Moran

For being recognized as a nominee of the
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2024 CFO LEADERSHIP AWARDS



Thank you for your hard work and dedication in carrying out 24 Hour Home Care's mission of *impacting people's lives by making a difference every day.*

Congratulations to all the nominees!

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CFO LEADERSHIP AWARDS NOMINEES



Public Company—Large

Dave Stephenson

 CFO & Chief Business Officer
Airbnb

Dave Stephenson, newly appointed chief business officer of Airbnb, served as the company's CFO for the past five years. His tenure was marked by exceptional leadership, navigating Airbnb through the COVID-19 crisis by raising \$2 billion in debt and successfully steering the company's record-breaking 2020 IPO. Stephenson realigned Airbnb from a divisional to a functional structure, accelerating innovation and significantly reducing operating expenses. As Head of Employee Experience, he implemented the Live and Work Anywhere program, achieving record employee satisfaction and diversity. His efforts contributed to Airbnb's inclusion in the S&P 500 and Fortune 500. Beyond his corporate achievements, Stephenson champions community involvement and inclusivity, supporting initiatives like the Host Endowment and Directed Share Program.



Private Company—Large

Sinohe Terrero

 CFO & COO
Envoy

Sinohe Terrero joined Envoy as chief financial officer in January 2020, expanding his role to chief operations officer in August 2022. He led Envoy through the pandemic, securing a \$111-million Series C funding round in 2022. Terrero's leadership has fostered organizational collaboration and driven workplace innovation, positively impacting Envoy's clients. Prior to Envoy, he served as CFO and COO at Quid and VP of finance and analytics at Etsy. He is also a managing partner at NuMundo, promoting Latin American startups and a board member at Code2040, supporting Black and Latinx technologists. Terrero's strategic and operational expertise continues to propel Envoy's growth and success.



Public Company—Midsize

Bryan Thompson

 Chief Financial Officer
Arixa Capital

Bryan Thompson joined Arixa Capital as chief financial officer in 2023, steering the company through strategic growth amidst an elevated interest rate environment. He played a pivotal role in launching a \$100 million-plus joint venture with Oaktree Capital Management, enhancing Arixa's lending program. Thompson also secured over \$250 million in senior warehouse facilities and implemented an interest rate swap to hedge against interest rate risks. Under his leadership, Arixa expanded into new markets and was recognized in the Inc. 5000 and Los Angeles Business Journal as one of the fastest-growing private companies. With over 25 years of experience, Thompson previously served as CFO at Anchor Loans, playing a crucial role in its acquisition by Pretium. Outside of work, he actively volunteers as CFO for the Forever Fund and supports a local ministry, demonstrating his commitment to community service.



Private Company—Small

Kehvon Thomas

 Chief Financial Officer
iBorrow

Kehvon Thomas, chief financial officer at iBorrow, has managed over \$2 billion in bridge loan investments, demonstrating keen insights and innovative solutions in commercial real estate finance. He oversees all finance and accounting operations, providing strategic guidance and managing four substantial credit funds. Thomas played a pivotal role in maintaining operational stability and profitability during the pandemic and rate hikes. In the past two years, he has closed over 30 transactions worth more than \$680 million, including major loans for properties across the U.S. His leadership extends to the Urban Land Institute's Los Angeles chapter, where he fosters collaboration and real estate development. Thomas' adaptability, positive attitude and strong relationships have driven iBorrow's success.



Private Company—Large

Christopher Toumajian

 Chief Financial Officer
EP Wealth Advisors, LLC

Christopher Toumajian, CFO of EP Wealth Advisors, oversees capital planning, financial reporting, human resources, real estate and M&A integration. Under his leadership, the firm has grown to nearly \$22 billion in Assets Under Management (AUM). As part of the executive committee, he has been instrumental in creating and implementing strategic roadmaps, policies and corporate governance. Over the past two years, Toumajian has driven inorganic growth through II partnerships. Before EP, he served as CFO in the visual media marketing space and held key roles at Euronet Worldwide. Outside of work, he is a board member for Lady Rams Aquatics and mentors in the Corporate Mentoring Program at California State University, Long Beach.



Education/Nonprofit

James Uli

SVP & Chief Financial Officer

Rady Children's Hospital-San Diego

James Uli, senior vice president and chief financial officer at Rady Children's Hospital-San Diego, oversees financial operations, including accounting, budgeting and revenue cycle management. With over 20 years in healthcare finance, he previously served as CFO at Keck Medicine of USC and other prestigious institutions. Since joining Rady Children's in February 2020, he has secured low-interest debt issuance, enabling the hospital to save millions and fund new projects, including a billion-dollar patient tower. Uli's strategic financial planning maintained the hospital's AA bond rating and expanded its financial portfolio. During the COVID-19 pandemic, he ensured financial stability without closing programs or delaying expansions. He restructured debt, improved efficiencies and supported community initiatives, like setting up vaccine clinics. Uli's leadership and collaborative approach have been pivotal in navigating financial challenges, earning him recognition in the CFO Leadership Awards.



Private Company—Large

Seth Wunder

 CFO & Chief Investment Officer
Acorns

Seth Wunder, CFA, serves as chief investment officer and chief financial officer at Acorns, a leading subscription service in U.S. consumer finance focused on making micro-investing accessible. He oversees investment products, finance and accounting, legal and business operations. With 25 years of experience, Wunder has founded billion-dollar hedge funds and held senior roles at major firms, including Morgan Stanley. He holds a degree from the University of Michigan. Since joining Acorns as CIO in 2021 and becoming CFO in 2022, he has driven initiatives like the Mighty Oak Card, promoting smarter spending and integrating banking with automatic saving and investing. Under Wunder's leadership, customers have significantly increased their emergency savings, highlighting his commitment to financial wellness.

Chikako Tyler joined California Bank & Trust (CB&T) in 2010, advancing through roles in risk management and corporate credit and finance before becoming CFO in 2018. In 2021, she added treasury management and enterprise incentive compensation to her responsibilities. Under Tyler's leadership, CB&T has grown significantly, with a 40% increase in combined loans and deposits over six years. She has spearheaded process efficiencies, achieving \$10 million in cost savings while driving revenue growth. Also, she founded CB&T's Banking on Women business resource group and created statewide mentoring and diversity initiatives. Recognized in American Banker's Most Powerful Women in Banking, Tyler is dedicated to fostering innovation and supporting California families and businesses. Her leadership continues to earn accolades for CB&T as an award-winning business bank.



Public Company—Large

Chikako Tyler

 Chief Financial Officer
California Bank & Trust



PIH HEALTH GOOD SAMARITAN HOSPITAL



PIH Health Congratulates **Vid Shivaraman MHA** Chief Financial Officer, PIH Health

Nominee of the 2024 CFO Leadership Awards
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PIH Health is a nonprofit, regional healthcare network that serves Los Angeles County, Orange County and the San Gabriel Valley. Our fully integrated network includes 3 hospitals, 31 outpatient facilities, 7 urgent care centers, home healthcare services and more—all focused on providing you with world-class, award-winning care.

LA's Health and Wellness Partner | PIHHealth.org



CEO VISIONARIES

No matter the industry, the buck always stops at the desk of the chief executive officer. Tasked with making vital decisions as they relate to every facet of running a business – from production to marketing to human resources, to name a few – the CEO must possess a multitude of qualities that define a captain of industry.

The nominees listed on the following pages in alphabetical order have all been acknowledged by peers and colleagues for their intuition, resilience and their ability to lead. Time and time again, they deploy these qualities and numerous others to inspire their employees, connect with consumers and push their companies to achieve ever loftier goals.

It's not a role for everyone, but the ones who embrace it and can deliver year after year deserve special recognition – just like the ones here.



Adam Bass

President & CEO
Buchalter, APC

Adam Bass, president and CEO of Buchalter since January 2013, has led the firm to substantial growth, expanding to over 480 lawyers and establishing new offices in Napa Valley, Sacramento, Seattle, San Diego, Portland, Salt Lake City, Denver and Nashville. Under his leadership, Buchalter has advanced significantly in industry rankings, achieving spots on The American Lawyer's AmLaw 200 and Law360's 400 Largest Law Firms lists. The firm has earned a 100 out of 100 score on the Human Rights Campaign Foundation's Corporate Equality Index and various diversity awards. As a member of the American, California and Los Angeles County Bar Associations, Bass has also served as an arbitrator for the Los Angeles Superior Court and worked with the Dispute Resolution Section of the Bar Association.



Michael J. Beals

President
Vanguard University

Dr. Michael J. Beals has served as president of Vanguard University (VU) for 10 years, guiding Orange County's oldest four-year university to significant growth and achievement. Under his leadership, VU has become a leading institution for Christian higher education in California. His student-focused strategies have driven record enrollment, earning VU the U.S. Department of Education's Hispanic Serving Institution designation and over \$9 million in grants. Dr. Beals has overseen the creation of multiple academic schools and new STEM programs, leading to the launch of the Patty Arvielo School of Business and Management. His tenure has also brought a 412% increase in net assets, extensive campus expansion and success in athletics.



Trever Acers

Founder & CEO
Objective, Investment
Banking & Valuation

Trever Acers, founder and CEO of Objective, Investment Banking & Valuation, has over 20 years of experience in investment banking, acquisitions and strategic advice. Leading Objective since 2006, he has driven its growth and innovation, establishing the firm as a middle-market leader. His strategic acumen and commitment to fostering an inclusive corporate culture have earned him a nomination for the "CEO Visionary" award. Previously, Acers held key roles at TGG Capital, The Oxford Investment Group, Passage Venture Capital Partners, EMC Corporation and KPMG Consulting. He holds an M.B.A. from UCLA Anderson School of Management and a bachelor's degree from the University of San Diego. Under Acers' leadership, Objective has excelled in operational efficiency and employee development, emphasizing transparent communication, professional growth and a strong mentorship program.



Patty Arvielo

CEO & Co-Founder
New American Funding

Patty Arvielo, co-founder and CEO of New American Funding (NAF), has led the company to remarkable success in the mortgage industry. Since its inception in 2003, NAF has thrived under her guidance, promoting sustainable homeownership and generational wealth. Arvielo's initiatives, such as Latino Focus and NAF Dream, have significantly increased homeownership among Hispanic and Black communities. She also established partnerships, like with Uqual, to assist potential homeowners in improving their credit. Recognized for its DEI efforts, NAF received the Mortgage Bankers Association's Residential Diversity, Equity and Inclusion Leadership Award. Arvielo's visionary leadership and commitment to inclusivity have solidified NAF's reputation as an industry leader, transforming lives and communities.



Melissa Beck

President
Anonymous
Philanthropy

Melissa Beck joined Big Brothers Big Sisters Orange County & Inland Empire, applying entrepreneurial strategies that tripled the nonprofit's size and impact. Her innovative leadership garnered numerous accolades, including Best Place to Work in OC and Ernst & Young Entrepreneur of the Year. In 2018, Beck joined Anonymous Philanthropy to revolutionize philanthropic practices. She has played a crucial role in the company's growth, overseeing operations, culture and finance, while developing impactful campaigns such as "End the Misinformation" on childhood drowning. Today, she leads initiatives like the Skilled Careers Coalition and Talent Nova, striving to maximize philanthropic impact. Beck also serves on UC Irvine's Board of Trustees, chairing the Alumni Association Board of Directors and guiding the search for the university's new dean.



Anuj Bhalla

Founder & CEO
serviceMob

Anuj Bhalla is a distinguished entrepreneur, data scientist and consultant with over 15 years in the customer service industry. He has worked with top companies like Google, Microsoft and Facebook, enhancing their operations through his expertise in analytics. At Accenture, he led the service analytics practice, filing three patents to leverage data-driven strategies to improve customer experiences. Bhalla holds a bachelor's degree in applied mathematics and computer science from UC Berkeley and an M.B.A. from MIT Sloan School of Management, where he was a Sloan Fellow. Inspired by his entrepreneurial spirit, he founded serviceMob, aiming to revolutionize customer service with AI and machine learning. Bhalla's innovative product development has significantly improved service experiences, earning serviceMob recognition as a top MIT startup in STEX25.



Sunny Bhatia
MD, MMM, FACHE, FAGC, FSCAI
President, CEO & Chief Medical Officer
Prime Healthcare

Dr. Sunny Bhatia, president, CEO of Prime Healthcare Region I and corporate chief medical officer, is a quadruple board-certified interventional cardiologist. He is a fellow of the American College of Healthcare Executives, American College of Cardiology and the Society for Cardiac Angiography and Interventions. Under his leadership, Prime Healthcare's Region I hospitals have earned top accolades for quality and patient safety. Dr. Bhatia has been repeatedly recognized among the "100 CMOs to Know" by Becker's Hospital Review. He aligns physicians and hospitals to provide high-quality, cost-effective care, leading initiatives with an estimated \$15 million financial impact. He also spearheaded an urgent care partnership with Carbon Health, enhancing healthcare access nationwide. Dr. Bhatia is active in charitable causes, including the World Children's Initiative and the Uganda Heart Project.



Sean Breuner
Founder & CEO
AvantStay, Inc.

Sean Breuner, founder and CEO of AvantStay, leads a technology-driven hospitality brand reshaping group travel. With over 20 years of experience, he founded AvantSpace, a thriving coworking space, and chaired Generation SF, a nonprofit charity. Previously, he was head of growth at Heighten, which was acquired by LinkedIn. Breuner founded and led two real estate companies, Pacific LMG and Coastal Realty, both successfully acquired. His background includes roles at Morgan Stanley and BM Tonkin. He's an angel investor and advisor in disruptive finance and real estate and holds board positions. Breuner holds degrees from UC San Diego and Columbia Business School with distinction.



Young Chang
President & CEO
A-Sha Foods USA Co., Inc.

Young Chang serves as the president of A-Sha Noodles, renowned for its patented, century-old noodle recipe from Tainan, Taiwan. Since its inception in a local LA. market in 2015, A-Sha Noodles has become the top choice for healthier, nutritious instant noodles. Under Chang's leadership, A-Sha has collaborated with iconic brands like Sanrio's Hello Kitty and BT21 while maintaining brand integrity. The company has earned recognition on the Inc 5000 list for four consecutive years and ranked #4 on the Los Angeles Business Journal's list of Fastest Growing Private Companies. Chang led partnerships with the LA. City Mayor's office for AAPI Month and hurricane relief efforts, donating 100,000 meals after Hurricane Ian. His mission is to redefine ramen as a luxury product with high-end ingredients, offering a healthier alternative through A-Sha Noodles.



Alicia Cox
Founder & CEO
Prjkt Restaurant Group

Alicia Cox, the founder and CEO of Prjkt Restaurant Group, is a trailblazer in beachfront dining along California's coastline, earning recognition for her innovative concepts and community engagement. With a background in marketing and the restaurant industry, she has opened notable SoCal restaurants and launched her own wine label. Cox's focus on elevated seaside dining experiences includes bringing brunch to Huntington Beach, hosting events like Orange County's first Pride event and opening The Salty B Boutique. She launched the Endless Summer publication, highlighting local talent and expanded into mobile concessions with SeaScoops. Cox secured exclusive contracts for major events and has a 10-year agreement with the California State Park System for beach concessions with her latest venture, California Fork & Spoon, set to open in 2024.

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Emil Davtyan

*Founder & Managing Attorney
D.Law*

Emil Davtyan, the founder and CEO of D.Law, deserves recognition for his exceptional leadership and dedication to advocating for California workers' rights. He achieved academic excellence, graduating summa cum laude from Woodbury University and cum laude from Southwestern Law School, where he excelled as a judicial extern at the U.S. District Court. After starting his career defending companies, he founded Davtyan Law Firm (now D.Law) to help California workers, recovering nearly \$1 billion to date. Coming from a blue-collar background himself, Davtyan's journey embodies the American Dream, giving him a unique perspective. His adaptability during the pandemic led D.Law to field over 70,000 inquiries and expand through strategic acquisitions, including industry leaders Kevin T. Barnes' and Yeremian Law firms.



Lilit Davtyan

*Chief Executive Officer
Phonexa*

As Phonexa's CEO, Lilit Davtyan spearheads the development of an all-in-one performance marketing automation suite, overseeing business development, strategic growth, client relationships and operational transformation. Formerly the company's CFO, she has consistently managed an average of \$200 million in revenue yearly across Phonexa Holdings and its related entities since 2016. Davtyan's remarkable career has earned her recognition in esteemed networks like Forbes Business Council and Chief, and she's received several prestigious awards, including CFO of the Year by the Los Angeles Business Journal in 2020. With over a decade of experience in business and tax planning, including roles at PricewaterhouseCoopers, she brings extensive expertise to her leadership role.



Cástulo de la Rocha

*President & CEO
AltaMed Health Services*

At the helm of AltaMed Health Services Corporation, president and CEO Cástulo de la Rocha has transformed it from a single storefront clinic into California's largest Federally Qualified Health Center (FQHC) and a top-five national leader. Recognizing the link between community health and prosperity, he expanded AltaMed to 61 sites with over 4,900 employees, serving nearly 500,000 patients yearly. Under his leadership, AltaMed has addressed critical healthcare workforce shortages and formed partnerships with institutions like the University of La Verne, launching the Cástulo de la Rocha College of Health and Well-Being. AltaMed's expansion of PACE and acquisitions like Healthy Smiles for Kids and ChapCare have furthered its impact, while its culturally relevant care approach continues to drive exceptional health outcomes.



George DeVries

*Chairman, CEO & President
American Specialty Health Incorporated*

George DeVries, co-founder of American Specialty Health (ASH), started with a vision from his Southern California home to improve healthcare quality and reduce costs. Today, ASH is the nation's largest independent administrator of specialty health care programs, covering millions of members for 257 health plan clients. DeVries pioneered industry firsts, receiving national recognition for innovations in complementary care. He has served on the White House Commission on Complementary and Alternative Medicine Policy and led ASH to develop groundbreaking programs like Healthyroads® and Active&Fit®. ASH's recent initiatives include virtual physical therapy, fall prevention and well-being coaching. He has been honored as a CEO Visionary by LA Times B2B Publishing and "CEO of the Year" by the San Diego Business Journal.



Gloria Dioum

*Founder & CEO
EmpowHer Profits*

Gloria Dioum, founder and CEO of EmpowHer Profits, is a resilient and insightful entrepreneur who embarked on a transformative journey in 2020 amid a global pandemic. In 2020, amidst the global pandemic, drawing from her expertise in high-tech corporate finance, she envisioned a tranquil retirement filled with travel and contribution to Los Angeles' tech and finance sectors. However, observing the economic hardships faced by small businesses, Dioum launched EmpowHer Profits, bridging the gap with strategic financial guidance. Raised in St. Lucia watching her mother navigate entrepreneurship, her journey led to an M.B.A. in finance and a career in Fortune 500 companies. EmpowHer Profits offers personalized guidance for business growth. Outside of work, Dioum also mentors startups and holds an M.B.A. from Gal Poly, San Luis Obispo.



Susan Dwyer

*Co-CEO & Managing Principal
Hendy*

Susan Dwyer is the dynamic co-CEO and managing principal at Hendy, overseeing day-to-day operations and leading a creative powerhouse of architects and designers. With 20-plus years of experience, her innovative approach transforms corporate spaces into extraordinary human experiences. Projects like 5.II Tactical's headquarters and Pacific Life's office showcase her client-centric design philosophy, creating immersive environments for the modern workforce. Dwyer infuses each project with client-defined elements, such as integrating 5.II Tactical's materials into office art. Recently appointed co-CEO, she shares oversight of human resources and growth, aiming to expand the firm into new markets. Dwyer also leads Hendy's Corporate Studio and is dedicated to developing the next generation of leaders, fostering an entrepreneurial spirit within the team.



Alison Edwards

*Chief Executive Officer
Groundswell*

Alison Edwards, CEO of Groundswell, formerly known as the OC Human Relations Council, has dedicated over 25 years to advancing equity and human-centered approaches in organizations and schools. Leading the organization since 2017, she spearheaded its rebranding to "Groundswell," expanding its reach and services in Orange County. Groundswell's initiatives, under her guidance, include the Community Dialogue Series and the "Shaping Tomorrow" virtual series, addressing DEI topics and implicit bias. Edwards empowers Orange County leaders through grassroots organizing and diverse leadership development, aiming to combat hate-fueled violence and create equitable futures. With a B.A. in ethnic studies and American studies and an M.A. in cultural studies, her vision for human-centered cultures drives Groundswell's mission.



Rob Ellin

*CEO & Chairman
LiveOne*

Rob Ellin, founder and CEO of LiveOne, has a track record of entrepreneurial success across digital technology and media. His leadership at Digital Turbine and iWon, among others, showcases his ability to navigate public markets and build successful ventures. With LiveOne, Ellin emphasizes a creator-driven approach, expanding distribution through strategic partnerships and B2B deals. His \$20-million distribution contract and partnerships with major platforms demonstrate his strategic vision. He fosters diversity, professional development and inclusive leadership at LiveOne. Under Ellin's guidance, the company champions inclusivity, social responsibility and sustainable practices, reshaping the digital entertainment landscape. He has directed LiveOne's energy towards creating an environment where creators feel valued and supported, thereby ensuring they produce their best work.



Eric Ellingsen

*President & CEO
California Bank & Trust*

Eric Ellingsen, president and CEO of California Bank & Trust (CB&T), is a leader committed to equity, inclusion and community impact. With a global perspective shaped by his upbringing in Norway, Venezuela and Canada, he champions diversity in the workplace and supports minority businesses. Ellingsen's leadership during the pandemic led CB&T to process over 9,300 PPP loans, totaling \$1.62 billion, aiding small businesses. Under his direction, CB&T achieved \$10 million in cost savings and sustained revenue growth. His journey from a temporary junior accountant to CEO reflects his dedication and expertise in finance and banking. Ellingsen earned recognition as "CFO of the Year – Large Public Company" and among the "Top 50 Most Influential in San Diego."



Tim Ellis

*CEO & Co-Founder
Relativity Space*

Tim Ellis, CEO and co-founder of Relativity Space, is a visionary leader driving innovation in aerospace. Under his guidance, Relativity made history by launching the world's first 3-D-printed rocket into space and securing \$1.8 billion in launch service agreements. His strategic partnerships with the U.S. government led to significant milestones, including securing launch site awards and test site agreements at NASA's Stennis Space Center. Ellis' ability to raise \$1.33 billion from leading investors highlights his entrepreneurial prowess. Under his leadership, Relativity achieved significant milestones, including launching the Terran R rocket and securing major contracts with telecommunications giants. Ellis' contributions have been recognized by prestigious accolades and holds degrees in aerospace engineering from the University of Southern California.



Apollo Emeka

*Managing Director
Apollo Strategy Group Inc.*

Dr. Apollo Emeka, executive leadership coach and founder of Apollo Strategy Group, envisions a world where everyone achieves their full potential. His Pasadena-based startup has transformed leadership and business strategies since 2017, generating over \$500 million in value for 100+ leaders and businesses across various industries. Drawing from his diverse background, including serving as an FBI intelligence analyst and U.S. Army Special Forces member, Dr. Emeka founded Apollo Strategy Group with a commitment to authenticity and inclusion. In the last 24 months, his team has innovated business growth strategies, amplifying underrepresented voices through initiatives like the Achievement Index Podcast. Through thought leadership and articles like "How To Make Boards More Diverse" and "Veterans Aren't Afraid of Diversity," Dr. Emeka challenges traditional leadership notions.



Stephan Jan Erkelens

*President, CEO, &
Co-Founder
RevHub Orange County*

Stephan Erkelens, president, CEO and co-founder of RevHubOC, brings over four decades of entrepreneurial expertise, particularly in the coffee industry and finance. His journey from executive roles in commodities to philanthropy led him to establish RevHubOC, aiming to solve social and environmental problems through entrepreneurship. Under Erkelens' leadership, RevHubOC has successfully incubated 30 impact-ready startups, made significant investments and secured notable recognitions and funding. Over the last 24 months, they've launched multiple cohorts, made investments and supported hundreds of entrepreneurs. Erkelens' involvement in addressing diversity challenges in entrepreneurship aligns with NorthSTAR's mission, which has supported over 10,000 aspiring entrepreneurs, with a focus on underrepresented populations.

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Lorenzo D. Esparza

*CEO & Founding Principal
Manhattan West*

Lorenzo Esparza, CEO of Manhattan West, founded the firm with an investor-centric approach, providing a wide range of financial services and alternative investments. Raised by Mexican immigrants, his journey instilled in him the value of hard work and financial planning. With experience at Alliance Bernstein and JP Morgan Securities, Esparza launched Manhattan West in 2016 to offer attractive returns in exclusive alternative investments, like AI and digital assets. He fosters a culture of excellence, inclusion and integrity, positioning the firm as a leader in serving clients' financial needs comprehensively. Manhattan West has surpassed \$1 billion in AUM, emphasizing lasting client relationships and financial partnerships. Esparza chairs the firm's investment committee and leads numerous private investment funds, reflecting his expertise and commitment to client success.



David Faye

*Chief Executive Officer
Faye*

David Faye is a seasoned entrepreneur and leader with over 35 years of experience in building businesses and leveraging information technology for growth. As the CEO of Faye Business Systems Group (Faye), he specializes in providing a wide range of IT solutions including accounting, ERP, CX and CRM software. In 2009, Faye founded Faye Business Systems Group (Faye), where he remains the CEO today. Faye is a global software and services company specializing in CRM, CX and productivity software environments. His vision is focused on developing innovative IT solutions and providing expertise in implementing and optimizing software like SugarCRM, Zendesk, Salesforce and more. Under Faye's leadership, Faye has become a leading software company, winning multiple awards including being recognized as SugarCRM President's Club Partner of the Year.



Robert Feldman

*CEO, President & Co-Founder
WOWS Insurance Services*

Robert Feldman, a seasoned insurance professional with 25 years of experience, is the CEO and president of WOWS Insurance Services, specializing in insurance for fire zones and hard-to-insure properties in California. He co-founded WOWS to tackle the state's insurance challenges, particularly for homeowners struggling to secure coverage. Feldman's co-founders, Joel Silver and Drew Engler, bring extensive expertise to the team. Silver, with over 25 years of management experience, oversaw large teams generating substantial sales. Engler, with 10 years of insurance specialization, partners with carriers on coverage offerings for hard-to-place properties. WOWS Insurance Services addresses the urgent need for coverage as California faces unprecedented challenges, with millions of acres burned and soaring premiums.



Jonathan Fitzgarrald

*Chief Executive Officer
Equinox Strategy Partners*

Jonathan Fitzgarrald, CEO of Equinox Strategy Partners, has dedicated 27 years to the industry with 10 years at his current organization. A Brigham Young University graduate, he has significantly influenced the professional growth of individuals in law, accounting and business management through client development, service training and coaching. Fitzgarrald champions a unique approach to unlock the potential of undervalued professionals, often achieving up to a 20% revenue increase for firms in the first year. His prior experience includes leading sales and marketing for top business law firms. He is also actively involved with various boards, including Raise A Child, the Beverly Hills Bar Foundation and the Motion Picture & Television Fund, showcasing his commitment to social justice and community service.



EM Garcia

*Chief Executive Officer
Sherman Oaks Hospital
and Encino Hospital
Medical Center*

EM V. Garcia, PhD, DNP, DHed, MSN, MBA, MAEd, BSN, APRN, NP-C, CNOR, CSSM, FAFLNC, serves as the chief executive officer of Encino Hospital Medical Center and Sherman Oaks Hospital under Prime Healthcare. With responsibilities encompassing overseeing smooth hospital operations, managing profit and loss and integrating strategic plans, he ensures high-quality, cost-effective clinical programs. Garcia fosters collaboration between departments, medical staff and affiliates, while also providing leadership in nursing, allied health and ancillary services. Beyond his executive role, he is a nursing professoriate and nurse practitioner, actively participating in clinical and surgical services. He holds multiple post-doctoral, doctoral and graduate degrees, along with various nursing and healthcare management certifications. Garcia has developed several hospital programs and led acquisitions, demonstrating his commitment to healthcare excellence and leadership.



Marissa Goldberg

*Chief Executive Officer
Doheny Eye Institute*

Marissa Goldberg, CEO of the nonprofit Doheny Eye Institute, has been instrumental in advancing vision care in Los Angeles. With over 30 years at Doheny, she has held various roles before becoming CEO, forging a powerful alliance with UCLA's Stein Eye Institute. Under her leadership, Doheny continues to attract top vision scientists, securing funding for transformative discoveries and doubling its assets in the past decade. Goldberg facilitated Doheny's transition to a new headquarters in Pasadena, expanding research capacity and strengthening collaborations. She recruited key leaders like Chief Scientific Officer Deborah A. Ferrington and Chief Development Officer Molly Ann Woods. Committed to community health, Goldberg serves on boards including PIH Health and the National Alliance for Eye and Vision Research.



Boris Goldstein

*Chief Executive Officer
Brainbit Inc.*

Boris Goldstein, CEO of Brainbit Inc., is a visionary leader known for his expertise in technology and healthcare. With a background in applied mathematics and a Ph.D., he has been at the forefront of innovation throughout his career. Goldstein's journey began in the corporate world, where he excelled in developing high-tech solutions and founded successful companies. In 2000, he ventured into startups, demonstrating his ability to identify emerging trends. His latest venture, Brainbit Inc., aims to revolutionize healthcare through neurotechnology, developing wearable EEG devices to monitor brain activity in real time. Goldstein's leadership fosters innovation and customer focus, driving Brainbit's success. He is a thought leader advocating for ethical AI use and contributes to industry discourse. Outside work, he is dedicated to philanthropy, supporting education and healthcare initiatives.



Holly Hagler

*President & CEO
Meals on Wheels
Orange County*

Holly Hagler has led Meals on Wheels Orange County for over 13 years, advancing its vision and advocating for senior health. She serves on the Meals on Wheels America board and is a founding board member of Meals on Wheels California, advocating for healthcare integration. Hagler's commitment led to key roles in strategic planning and collaborative initiatives for aging services in Orange County. She contributed to the Orange County Strategic Plan for Aging Report, highlighting issues like food insecurity and social isolation among seniors. These efforts earned recognition, including being named Nonprofit of the Year and Hagler's acknowledgment as a top influencer in Orange County and the CEO Visionaries Award by Los Angeles Times B2B Publishing. Senator Tom Umberg also selected her as Women of Distinction for the 34th Senate District in 2024.



Nima Hakimi

*Chief Executive Officer
Convoso*

Nima Hakimi co-founded Convoso in 2005 and serves as its CEO, driving the company to become a leading provider of AI-powered contact center software. With a focus on customer success, he ensures Convoso stays at the forefront of technology, continually evolving its products to meet customer needs, including integrating conversational AI into its CCaaS solution. Under Hakimi's leadership, Convoso is entering new markets and developing innovative products to boost the performance of success-driven companies. He is a respected industry leader, often invited as a panel speaker and advisor, sharing expertise on best practices, compliance and strategies for sales and lead generation teams. As a board member of REACH, Hakimi advocates for responsible practices in lead generation and advises contact centers on compliance and profitability.



Pamela Cohen Hirsch

*Co-Founder
Baby Quest
Foundation*

Pamela Hirsch, co-founder of Baby Quest Foundation, has a vast amount of leadership experience. For nearly 20 years she owned The Princeton Review, Peninsula in Northern California, which earned a place on the Inc 500 list of the country's fastest-growing private companies. In 2001, she sold her portion of The Princeton Review when it went public and relocated to Los Angeles. Motivated by her daughter's fertility challenges, Hirsch founded Baby Quest Foundation in 2011 to offer financial assistance for fertility treatments. Under her leadership, Baby Quest has grown significantly from awarding \$9,000/year to recent awards in 2023 totaling \$380,000, helping produce 165 babies with grants totaling nearly \$3 million. Featured on prominent platforms like the Today Show and MSNBC, Baby Quest has gained recognition for its impactful work.



Les Hiscoe

*Chief Executive Officer
Shawmut Design and
Construction*

Les Hiscoe's career in construction management has been marked by a remarkable ascent from project manager to CEO, driving Shawmut's revenue growth from \$558 million to \$1.6 billion. Under his leadership, Shawmut has significantly expanded its presence in the LA market, diversifying its offerings beyond luxury retail. Hiscoe has spearheaded initiatives to expand Shawmut's footprint in Southern California, forming joint ventures and assembling skilled teams for large projects. Recent endeavors include the historic conversion of the UCLA Nimoy Theater, the Gloria Kaufman Performing Arts Center and notable projects like the Wende Museum and Parkside Market in Anaheim. Shawmut's commitment to diversity and inclusion has earned accolades such as being named one of Mogul's "175 Top Companies for Female Leaders" and Fortune Magazine's "Best Place to Work" among others.



Erik Huberman

*CEO & Founder
Hawke Media*

Erik Huberman, the founder of Hawke Media, began his entrepreneurial journey at the age of six and has since been revolutionizing industries. With Hawke Media, his vision was to disrupt marketing for the better and he's achieved just that. Alongside its core marketing services, the introduction of HawkeAI has helped over 5,000 companies benchmark analytics and improve results, solidifying Hawke Media's position as an industry leader. In the past decade alone, Hawke Media has generated \$2.9 billion in gross revenue, assisted 4,755 brands in successful growth, employed over 900 talented professionals and garnered 90 prestigious awards and recognition. Remarkably, this growth was achieved without debt or outside capital. Today, Hawke Media is recognized as the top-performing marketing agency in the U.S., a testament to its commitment to challenging the status quo.



CONGRATULATIONS TO OUR CEO ERIC ELLINGSEN!

Eric has been recognized as a **2024 CEO Visionary** by LA Times B2B Publishing, we celebrate all the innovative leaders who earned this special recognition.

CB&T salutes Eric and the other honorees. Thank you!

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Michael Hunn

*Chief Executive Officer
CalOptima Health*

A native of St. Louis, Missouri, Michael Hunn started his career as a Catholic priest in the 1980s, focusing on counseling hospital patients before transitioning to health care administration. With three decades of experience, he became CEO of nine hospitals across California, Texas and Missouri. Now leading CalOptima Health, one of Orange County's largest public agencies, Hunn manages a \$4 billion annual budget and 1,800 employees. Under his leadership, CalOptima has strengthened its core mission, serving nearly one in three Orange County residents. Hunn has spearheaded numerous groundbreaking initiatives, including the implementation of the California Advancing and Innovating Medi-Cal (CalAIM) initiative and the launching of innovative programs like the Street Medicine Program.



Meymuna Hussein-Cattan

*Founder & CEO
Tiyya Foundation*

Born in an Ethiopian refugee camp, Meymuna Hussein-Cattan is an award-winning leader, culturally conscious motivational speaker and a 2022 GNN Top 10 Hero. For 14 years, she's been the founder of Tiyya Foundation, providing economic and educational opportunities for refugees, immigrants and indigenous communities. Tiyya's mission is to foster self-sufficiency and active participation in society. Hussein-Cattan focuses on reshaping the refugee narrative to celebrate their strengths and beauty, fostering belonging. In 2020, she launched Flavors from Afar, a refugee-run restaurant channeling profits back to Tiyya's programs. Despite challenges, Flavors gained recognition as a top LA Times restaurant and received the Michelin Guide Bib Gourmand. In 2022 & 2023, Hussein-Cattan's initiatives at Tiyya supported refugee employment, securing over \$3 million in wages for 80+ participants.



Ronnetta Johnson

*Chief Executive Officer
Waymakers*

Ronnetta Johnson is a dedicated nonprofit professional with over 35 years of experience in nonprofit leadership. Joining Waymakers in 1995, she rose through the ranks to become CEO in 2015. With a master's degree in organizational leadership and a certificate in servant leadership, Johnson has steered Waymakers to become a cornerstone of community support. Under her leadership, Waymakers has grown from its origins as a diversion counseling project to a \$30 million agency serving over 100,000 individuals annually. Her visionary leadership led to a rebranding effort, expanded grants and increased diversity within the organization. Johnson has spearheaded initiatives tackling human trafficking, leading Waymakers to co-lead the Orange County Human Trafficking Task Force. She has also championed pandemic response strategies, ensuring the health and safety of clients and staff.



Danielle Judd

*CEO & Founder
FarmHouse Rescue*

Danielle Judd's journey from personal tragedy to founding a life-changing nonprofit is truly inspirational. In 2016, facing a life-threatening illness while pregnant with her third child, she made a vow to dedicate herself to helping others if she survived. After a challenging recovery, she found solace and purpose in rescuing animals, founding FarmHouse Rescue. Judd's ranch has become a sanctuary for over 60 animals, many of whom were abandoned or mistreated. Beyond animal rescue, she has touched countless lives, supporting those with mental health issues, individuals re-entering society after incarceration and children undergoing chemotherapy. Her Smile Box Program brings joy to young patients, and she organizes farm visits for children with life-threatening illnesses, creating unforgettable experiences.



Kathy Jumper

*Chief Executive Officer
Orange County's
Credit Union*

Kathy Jumper, CEO & founder of FarmHouse Rescue, is a seasoned professional recognized for her expertise and leadership. Recently honored as one of the 25 Most Powerful Women in Credit Unions by American Banker, she brings a wealth of experience to her role as CEO and president of Orange County's Credit Union. Previously, she held pivotal positions at Members 1st Federal Credit Union, managing diverse responsibilities within its impressive \$7 billion in assets. Actively engaged in industry advocacy, Jumper serves on committees such as NAFCU Regulatory and Cyber Committee and lends her expertise to Customer Contact Week. Leading a dedicated team, she oversees assets totaling over \$2.5 billion and serves a robust membership exceeding 135,000 individuals. Jumper has made community engagement a cornerstone of OC Credit Union's mission, fostering connections with local organizations and initiatives.



John Kao

*Founder & CEO
Alignment Health*

As the founder and CEO of Alignment Health, John Kao has led his team in revolutionizing senior care over the past decade, focusing on delivering high-quality care at a lower cost. Serving more than 155,000 seniors across six states, Alignment has achieved remarkable growth and financial success. Since its IPO in March 2021, Alignment has consistently delivered strong business results for 11 consecutive quarters, exceeding key performance indicators. With total revenue reaching \$1.82 billion in 2023, up 27.2% year over year, and health plan premium revenue of \$1.80 billion, Alignment Health is poised for further growth. In 2024, the company anticipates reaching \$2 billion in revenue and EBITDA break-even for the first time. Alignment has earned high performance and quality ratings from CMS, with over 90% of its Medicare Advantage members in plans rated four stars or higher for 2024.



Ara Katz

*Co-Founder & Co-CEO
Seed Health*

As the co-founder and co-CEO of Seed Health, Ara Katz has led the company to the forefront of microbiome science, pioneering innovations in probiotics and living medicines for human and planetary health. Under her leadership, Seed has achieved remarkable growth, with over 800% revenue increase in the last three years driven by its #1 selling probiotic, DS-01®. Recognizing a need in children's digestive health, Katz developed PDS-08, a clinically studied synbiotic, showcasing her commitment to science-driven solutions. Her journey into science stemmed from personal challenges, including her mother's pancreatic cancer diagnosis and her own experiences with miscarriage and breastfeeding struggles, which sparked her passion for health and microbiome science.



Sloane Keane

*Chief Executive Officer
Big Brothers
Big Sisters*

Sloane Keane, CEO of Big Brothers Big Sisters (BBBS) of Orange County & The Inland Empire, has been instrumental in driving significant growth and impact in youth mentorship over the past 11 years. She quadrupled annual revenue to over \$11.4 million, enabling program expansion and volunteer recruitment efforts. BBBS served over 3,500 youth and 2,200 families in 2023, with positive outcomes such as reduced likelihood of arrest and substance abuse among mentored youth. Keane launched innovative pilot programs like Sports Buddies and Big Careers, offering diverse mentorship opportunities. She also pioneered Orange County's first Nonprofit Hub, fostering collaboration among organizations for greater effectiveness. Additionally, Keane led a successful campaign to purchase a 52,000-square-foot building, bringing BBBS closer to the community it serves.



Adrienne Kessler

*Chief Executive Officer
Speech and Language
Development Center*

Adrienne Kessler has led Speech and Language Development Center to remarkable growth and impact since 2016, establishing it as a premier institution for disability services and education. She led strategic expansion with a new office in Temecula, addressing critical gaps in disability services and introducing advanced adult programs for life skills development. Kessler also leads collaborations with universities like USC, NYU and UCI for research and training, elevating service quality and clinician education. Some of her key roles include positions in influential organizations like CAPSES and City National Bank, shaping educational policies and practices at the state level. With 28 years of experience, Kessler has pioneered district-wide autism programs and expanded services at Easter Seals Southern California.



Ahad Khan

*Chief Executive Officer
Kajabi*

Ahad Khan, CEO of Kajabi, has been able to create a rapidly developing environment. His career shift from investor to start-up pioneer saw him catapult Kajabi into a leading creator empowerment platform. Under his leadership, Kajabi's revenue surged by 400%, with creators earning over \$7 billion. Khan secured a groundbreaking \$550 million funding round, valuing the company at \$2 billion. His commitment to diversity is evident, with 40% female executives, fostering an inclusive culture for long-term success. His focus on innovation led Kajabi to invest in AI tools, including Creator Studio with Adobe Express, streamlining content creation. Khan's strategic partnerships with notable creators like Colin and Samir and Sophia Amoruso further solidify Kajabi's position at the forefront of the creator economy.



Andrew Kim

*President & CEO
WaBa Grill*

Andrew Kim's journey at WaBa Grill has been marked by transformative leadership and a commitment to innovation and growth. Under his leadership, WaBa Grill achieved record-breaking same-store and total system sales with a remarkable 25% increase since 2020. In 2023, the brand's top-performing locations reached impressive average unit volumes (AUV), reflecting its strong performance in the market. Kim's focus on menu innovation led to the restructuring of product development, resulting in the successful launch of Boom Boom Tacos, a menu addition that resonated well with guests and quickly became one of WaBa Grill's most popular items. In terms of employee development, he initiated internal programs like the BKE Scholarship program and the Grill Master competition, fostering a supportive work environment and increasing employee engagement.



Nathan Kowarsky

*Chief Executive Officer
Clear Mortgage Capital*

Nathan Kowarsky, CEO and founder of Clear Mortgage Capital, has demonstrated exceptional leadership and resilience in navigating one of the most challenging mortgage markets in recent history. Over the past four years, he has assembled a team of over 150 loan officers, a remarkable achievement given the rising rates and overall challenging conditions of the mortgage market. His vision for the company revolves around providing industry-leading commission splits and lower interest rates, supported by heavy investments in cutting-edge technology. Kowarsky's career is distinguished by his recognition as one of the top four mortgage brokers in the country according to Scotsman's Guide in 2021. His dedication to professional development and his strategic vision have driven Clear Mortgage Capital's success, setting new standards for excellence in the mortgage industry.

**AltaMed congratulates our very own
Cástulo de la Rocha
for being recognized as a
CEO Visionary**

As AltaMed Health Services celebrates its 55th anniversary, we look back on our history with pride as a longtime champion for access to health care and social justice in the community. With 67 sites across Los Angeles and Orange counties and more than 5,200 employees, AltaMed is contributing to an equitable and healthier Southern California.

In 2024, we are proud to continue to provide patients with high quality, culturally appropriate medical, dental, behavioral, and senior care services on a scale we could not have imagined in 1969 when we started as a single store front clinic. Thank you, AltaMed President and CEO Cástulo de la Rocha, for leading this organization for more than 47 years and guiding AltaMed to this remarkable milestone achievement.



Cástulo de la Rocha
*President and CEO
AltaMed Health Services*



Isaac Larian

*Founder,
President & CEO
MGA Entertainment, Inc.*

Isaac Larian, founder, president and CEO of MGA Entertainment, Inc., embodies an inspiring rags-to-riches immigrant story. Arriving in the U.S. in 1971 with \$753, he founded MGA Entertainment in 1979, growing it into one of the largest privately held toy and entertainment companies globally. MGA is known for its bold, best-selling brands such as Bratz®, LOL Surprise!™ and MGAs Miniverse®. Larian is an outspoken, innovative businessman who lives by the motto "Fortune favors the bold." His passion for giving children the toys he lacked growing up fuels his philanthropy. He founded MGA Cares and supports numerous charitable organizations. Recent acquisitions include Pixel Zoo Animation and a merger with Zapf Creation AG, expanding MGA's entertainment and digital capabilities.



Chuck Le

*Founder
7 Day Dental*

Dr. Chuck Le, founder of 7 Day Dental, is a distinguished leader in dentistry. Immigrating to the U.S. in the 1970s, he achieved his DDS from the University of Southern California in 1989. Since opening the first 7 Day Dental office in Anaheim in 1990, he has expanded to four Orange County locations. Outside of work, Dr. Le's contributions extend beyond dentistry; his community service includes disaster relief efforts in Thailand, Vietnam, Japan and Haiti. He initiated "Dentists Pulling From the Heart Day," providing free dental care to those in need. Dr. Le supports numerous charitable organizations and local youth programs.



Randall S. Leff

*Co-Managing Partner
Ervin Cohen & Jessup*

Randall S. Leff brings over 30 years of legal expertise to Ervin Cohen & Jessup, a midsize firm that blends the benefits of both large and small firms. His success stems from a personalized approach tailored to client objectives. Committed to continuous learning, he keeps abreast of new laws and pivotal case decisions. Inspired by a remarkable mentor, Leff aspires to the high standards set by him – brilliant judgment, a strong team, impactful results and a lasting legacy. He emphasizes that while big verdicts make headlines, it's the interpersonal connections and respect that leave the most significant mark. His perspective highlights the profound impact legal professionals can have beyond courtroom victories.



Brett Lyon

*Broker/Co-Founder
Lyon Stahl Investment
Real Estate*

Brett Lyon, co-founder of Lyon Stahl Investment Real Estate, boasts over a decade of experience in handling hundreds of millions in real estate transactions. His integrity and market knowledge set him apart. Under Lyon's leadership, Lyon Stahl has grown significantly, now boasting a large team across multiple offices. His dedication to ongoing learning is demonstrated through his continuing education efforts. Lyon's success includes notable transactions such as the sale of 16 Fleet St, a significant multifamily building. Not only does he handle a large transactional volume, but he also oversees operations, strategy and growth at Lyon Stahl. Lyon's hands-on approach and emphasis on team collaboration make Lyon Stahl a unique brokerage firm.



Brian K. Malliet

*Founder, CEO & Chief
Investment Officer
BKM Capital Partners*

Brian K. Malliet is the founder and CEO of BKM Capital Partners, guiding its strategic growth since 2013. Under his leadership, BKM has nearly doubled annually, expanding its platform across six U.S. states. With over 36 years of commercial real estate experience, he has acquired over 150 industrial assets worth \$3.5 billion and facilitated 150 million square feet of transactions. BKM Capital Partners now manages a portfolio of over 60 assets valued at \$2.2 billion. Malliet's innovative approach has secured nearly \$1 billion in capital commitments for the BKM Industrial Value Fund series. Even during economic challenges BKM has grown, adding significant assets in 2023. He champions community service, DEI initiatives and sustainable practices. Malliet's leadership has earned him numerous awards, including the GlobeSt Industrial Influencer Award.



Jim Metevier

*Chief Executive Officer
Mountain Mike's
Pizza, LLC*

Jim Metevier, CEO of Mountain Mike's Pizza since 2023, has leveraged over 30 years of restaurant industry experience to propel the brand from regional prominence to national success. Under his leadership, Mountain Mike's has achieved significant growth, with nearly 300 locations across 11 states and a robust development pipeline. Metevier's strategic initiatives have driven impressive financial results, including a 32% increase in same store sales over five years, an 83% rise in total system sales and surpassing \$1.1 million in systemwide average unit volume (AUV). He has also expanded digital sales to 43% of total revenue, enhancing customer engagement and operational efficiency.



Perkins Miller

*Chief Executive Officer
Fandom*

Perkins Miller, CEO of Fandom, has steered the tech platform through a transformative period, leveraging over 30 years of experience in digital, sports and entertainment sectors. Under his leadership, Fandom has experienced unprecedented growth, expanding to over 350 million monthly unique visitors across 250,000 fan-powered communities. This growth has solidified Fandom as the #1 global hub for fan engagement, offering deep connections across a diverse range of intellectual properties. Under Miller's guidance, Fandom has expanded its portfolio through strategic acquisitions, including Gamespot, Metacritic, TV Guide and others. His forward-thinking approach has also prioritized Gen-Z engagement, leading Fandom to become the top platform for Gen-Z users with partnerships across entertainment and broader cultural themes.



Edward Mirzabegian

*Chief Executive Officer
Antelope Valley
Medical Center*

Edward Mirzabegian, MHA, brings over 30 years of health-care leadership to his role as CEO of Antelope Valley Medical Center (AVMC). He returned to AVMC in 2019 after prior tenures as COO and CEO, where he transformed financial performance from an \$18 million loss to a \$24.6 million profit by 2010. Mirzabegian's career includes leadership roles at Avanti Hospitals Healthcare System, HealthCare Partners IPA and Prime Healthcare Services, among others. Under his leadership, AVMC has expanded its emergency department by 7,200 square feet and is pursuing an \$800 million new hospital project. He has partnered with LifePoint to establish a behavioral health and rehabilitation hospital in Lancaster with 78 beds. Mirzabegian remains dedicated to providing over \$50 million annually in indigent care.



**Joel
Montminy**

*President & CEO
Montminy & Co.*

Joel Montminy spearheads Montminy & Co.'s operations and client assignments globally, specializing in mergers and acquisitions, buyouts, equity placements, restructurings, valuations and strategic advisory. Founded in 2009 during the Great Recession, Montminy & Co. has grown profitably each year, handling over \$6 billion in transactions across 15 countries. The firm, recognized among Los Angeles' top boutique investment banks, employs 25 professionals and maintains a culture of trust, performance and results. Montminy's recent accomplishments include nearly \$1 billion in transaction volume over the past 18 months, including high-profile Southern California deals. Outside of work, he serves as chair of the board of trustees of the Village School in Pacific Palisades and supports organizations such as the U.S. Olympic & Paralympic Committee and St. Jude's Children's Hospital.



**Pardis
Nasser**

*Chairman & CEO
Palm Tree LLC*

Pardis Nasser is the founder of Palm Tree, a leading modern M&A advisor that integrates investment banking and financial consulting services for private equity sponsors, business owners and management teams. With a career spanning over \$30 billion in transactions, he started in M&A at PwC and later worked at Jefferies and Platinum Equity, where he managed complex business transactions. In 2010, Nasser launched Palm Tree as an independent sponsor, evolving its strategy to offer integrated financial services by 2016. Today, Palm Tree operates nationwide with offices in Los Angeles, Chicago, Detroit and Dallas, led by a team of accomplished managing directors.



**Anne
Nguyen Oliver**

*Founder & CEO
House Of M Beauty*

Anne Nguyen Oliver is the founder and CEO of House of M Beauty, the Vietnamese-owned skincare brand available at Nordstrom, celebrated for its repeated sell-out success since its launch. Her journey with House of M Beauty is deeply personal, rooted in her battle with postpartum depression following the birth of her first child. Through research, Oliver discovered the mood-enhancing properties of medicinal saffron, which not only alleviated her depression but also transformed her skin, imbuing it with radiance. Her impactful contributions extend to humanitarian efforts during the pandemic where she and House of M Beauty donated essential supplies like hand sanitizers, masks, face shields and beauty products to healthcare workers, frontline heroes and elders in her community. Oliver's philanthropic endeavors also include support for charity fundraisers such as the CHOC Foundation.



**Steve
O'Connell**

*President & CEO
California Credit Union*

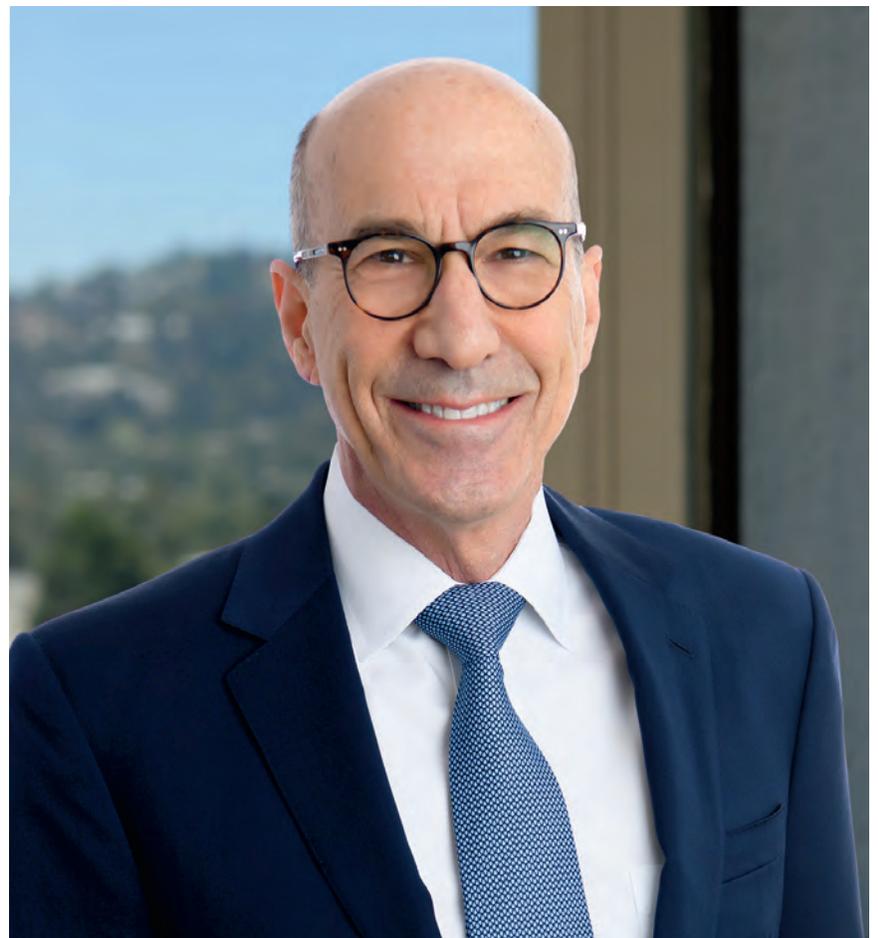
Steve O'Connell leads California Credit Union as president and CEO, achieving robust financial growth with assets nearing \$5 billion and serving 200,000 members in 2023. Under his guidance, the credit union recorded its second-highest loan production and a 96.7% member satisfaction score, enhancing digital banking and operational efficiencies. Committed to community impact, O'Connell directed \$750,000 in 2023 and over \$2.5 million in five years to local initiatives. His focus on financial inclusion led California Credit Union to become a certified Community Development Financial Institution (CDFI), offering tailored services to underserved communities. Additionally, he fosters women's leadership with programs like the Women Empowering Women Employee Resource Group, reinforcing a culture of empowerment and growth within the organization.

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Randy Leff

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Tommy Oliver

*CEO & Founder
Confluent Films*

Tommy Oliver is a filmmaker and CEO of Confluent Films, dedicated to amplifying underrepresented voices in film and television. His leadership at Confluent has secured significant funding to support Black creators, highlighted by a recent \$100-150 million production fund with Goldman Sachs. Oliver's producing credits include the award-winning HBO documentary "Going to Mars: The Nikki Giovanni Project" and Apple TV+'s "Fancy Dance," premiering in theaters this June. He's also involved in projects like "Young. Wild. Free" and "To Live and Die and Live." As a mentor at Sundance and Doc NYC and a board member of The Philadelphia Film Society, Oliver shapes the next generation of storytellers while documenting Black joy in his photography series "Father Noir."



Ash Patel

*Chairman,
CEO & President
Commercial Bank
of California*

Ash Patel, chairman, CEO and president of Commercial Bank of California (CBC), brings over 30 years of banking experience to his role, driving CBC's transformation into a billion-dollar institution. Under his leadership, CBC's assets grew from \$200 million to \$2.5 billion by 2023, propelled by strategic acquisitions and a focus on community impact. Recognized as a "Best Places to Work in Southern California" in 2022 and 2023, CBC under Patel's guidance prioritizes a high-touch client experience merged with cutting-edge financial technology. He champions financial literacy and community service, with CBC donating 10,000 volunteer hours in 2023 and launching educational programs. Recently, he orchestrated CBC's acquisition of Community Bank of the Bay, positioning CBC to reach \$3.5 billion in assets and embarking on a journey towards \$5 billion.



Regan Phillips

*Chief Executive Officer
Court Appointed Special
Advocates of Orange County*

Regan Phillips' journey advocating for children began in 2001 with CASA-NYC, leading her to champion minors as an investigator at the Law Office of Harold La-Flamme during law school. Graduating in 2005 and joining as an attorney, she represented foster youth at the Lamoreaux Justice Center in Orange. Her advocacy expanded as minor's counsel and appellate lawyer, bolstered by CASA volunteers' invaluable insights. Post-parenthood, Phillips aided private adoptions and joined Rigg & Dean, later serving on CASA of Orange County's board. Appointed CEO in 2017, she drove CASA OC's transformation, doubling revenue to \$56 million and children served to 1,600 annually. Collaborating with courts and donors, she addressed OC's foster care crisis, enhancing CASA's impact through expanded family finding and early intervention programs.



Michael John Plaksin

*President & CEO
Alchera X, Inc. (dba AX)*

Michael Plaksin, currently serving as president and CEO of Alchera X, brings a wealth of experience and leadership to the forefront of AI SaaS innovation. Under his direction, Alchera X has redefined wildfire detection and mitigation solutions, leveraging groundbreaking FireScout AI technology. Plaksin's tenure at the company has been marked by significant achievements and global recognition. Notably, Alchera X has been selected by the California Governor's Office to participate in key international forums and sustainability conferences, highlighting their pivotal role in global wildfire management. Plaksin has also spearheaded strategic partnerships with organizations like RAIN and SIKORSKY to integrate early detection cameras using FireScout AI on Black Hawk helicopters.



Vera Quinn

*CEO & President
Cydcor, LLC*

Vera Quinn, CEO of Cydcor since 2020, has driven the company to consistent double-digit revenue growth by fostering collaboration and empowering its independently owned offices. Her focus on increasing sales agents' take-home pay by over 50% has enhanced campaign effectiveness, securing Cydcor's position as a top dealer for clients like AT&T and DIRECTV. Recognized repeatedly by the Los Angeles Business Journal as a "Best Place to Work," the company under Quinn's leadership combines business success with philanthropy. She personally supports Liberty Children's Home in Belize, reflecting her commitment to corporate social responsibility. She also champions local community engagement through initiatives like volunteering at nonprofits twice yearly. Continuously advancing Cydcor's capabilities, Quinn recently completed an Executive Education program on AI Applications for Growth, underscoring her dedication to innovation.



Nathan Rogge

*President & CEO
First Pacific Bank*

Nathan Rogge serves as president and CEO of First Pacific Bank (formerly Friendly Hills Bank), leveraging his 32 years of industry experience to transform and expand the organization. Since joining in December 2021, he has revitalized First Pacific Bank by restructuring leadership, enhancing infrastructure and realigning its focus on small- and medium-sized businesses across Southern California. He strategically bolstered the bank's presence by opening a regional office in San Diego, effectively serving key metropolitan areas. Under Rogge's leadership, First Pacific Bank underwent significant rebranding, aligning with its expanded footprint and enhancing lending capabilities, with the bank successfully raising \$14.1 million in capital amidst economic challenges, reinforcing its financial position.



Daniel Rosen

*CEO & Founder
Credit Repair Cloud*

Daniel Rosen, CEO of Credit Repair Cloud (CRC), pioneered the world's first credit repair software after personal financial hardship. Founded in 2013, CRC has empowered over 20,000 entrepreneurs to build profitable credit repair businesses, processing \$200 million in transactions. Recognized in the Inc. 5000 list for four years, CRC's impact extends globally with a team of 80 employees. Rosen's journey began in entertainment, mastering juggling and performing on iconic shows. After a bank error devastated his credit, he developed Credit-Aid and later founded CRC. Beyond business, he authored "The Ultimate Guide to Starting a Credit Repair Business," inspiring over 100,000 entrepreneurs. Rosen's mission-driven leadership and commitment to community partnerships, like Chrysalis, underscore his vision for CRC's role in transforming lives worldwide.



Angie Rowe

*President & CEO
Beyond Blindness*

Angie Rowe is a seasoned nonprofit leader renowned for her strategic acumen in enhancing organizational performance, community engagement and fundraising. Currently serving as president and executive director of Beyond Blindness for 26 years, she has spearheaded initiatives that significantly boosted revenue and expanded the donor base. Her influence extends through roles on various boards, including as a board member at the California Association of Private Special Education Schools (CAPSES) and founding member and treasurer at the California Agencies for the Blind and Visually Impaired (CAABVI), where she chairs the Children and Youth Policy. Rowe is also active in the Orange County Disability Collaborative and the OneOC Non-Profit Advisory Council.



Anoush M. Sadegh

*CEO & President
Ai Life Corp*

Anoush Sadegh is a seasoned entrepreneur with over 35 years in AI and technology, notably in the high-end automotive sector. Armed with a B.S. in business and advanced studies in data science from UC San Diego, he has excelled as a general manager and marketing maestro. As CEO/President of Ai Life Corp, Sadegh drives AI innovation, pioneering companions and technologies. His leadership emphasizes responsible AI integration for a smarter, sustainable society. Expertise in AI and robotics marketing, digital marketing and data science underscores his influence at the intersection of tech and business. A member of the Producers Guild of America, Sadegh navigates complex landscapes, achieving success in automotive and entertainment sectors.



Prashant Samant

*Co-Founder & CEO
Akido Labs*

Prashant Samant leads Akido Labs with a passion for social enterprise, transforming healthcare globally. Under his guidance, Akido has evolved from a SaaS startup to a health AI and care delivery company with 700+ employees and a network of 240 doctors. Throughout his career, Samant has collaborated with renowned organizations like Peugeot, Orange S.A., Stanford University and Doctors Without Borders. He co-founded the USC Digital Health Lab, addressing public health challenges in Los Angeles. He holds a Bachelor of Arts in economics from Washington University in St. Louis and is a Y Combinator alum. Samant also holds lectures on digital innovation at leading universities and serves on the board of directors for Grid110.



Lucy Santana

*Chief Executive Officer
Girls Inc. of Orange County*

Lucy Santana has led Girls Inc. of Orange County for over 20 years, transforming it into a leading chapter nationally. Under her stewardship, the organization annually empowers over 4,800 girls through innovative programs fostering strength, intelligence and boldness. Santana's initiatives span from promoting healthy body image and financial literacy to preparing girls for academic and career success. A pivotal achievement under her leadership includes securing funding through Melinda French Gates' Equality Can't Wait Challenge for Project Accelerate, aimed at enhancing women's leadership by 2030. Her personal journey as the daughter of Mexican immigrants fuels her advocacy for workplace equity, driving substantial corporate, individual and grant funding for Girls Inc. of OC.



Sona Shah

*CEO & Founder
My Private Professor, LLC*

Sona Shah founded My Private Professor (MPP) to democratize access to academic resources, leveraging her expertise in business litigation and passion for education. MPP offers top-tier tutoring from university tutors nationwide, aiming to uplift underserved communities by providing equal-quality education to all students, regardless of background. During COVID-19, MPP adapted with a B2B model, offering free and discounted online tutoring as an employee benefit to support families navigating remote learning. This initiative not only alleviated family stress but also bolstered student academic performance. Shah's dedication has earned her recognition such as Ernst & Young's Entrepreneur of the Year Nominee and awards from National Philanthropy Day, Greater Irvine Chamber of Commerce, Illumination Foundation and others, cementing her impact as a visionary leader in education and philanthropy.

CEO VISIONARIES

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Explore the report at enterprisebank.com/impact.





Jacques Spitzer

*Chief Executive Officer
Raindrop*

Jacques Spitzer is a distinguished four-time Emmy® Award-winning storyteller, speaker, author and investor. As the leader of Raindrop, an esteemed agency renowned for crafting impactful marketing campaigns, including Super Bowl and YouTube ads, he is celebrated for his innovative storytelling approach and infectious positivity. Spitzer's speaking engagements at Google, YouTube and Shopify events reflect his expertise in consumer behavior, emphasizing that customers buy into their own "why" rather than just a brand's mission. This customer-centric focus has propelled brands like Dr. Squatch and Native to unprecedented growth, generating over a billion dollars in sales collectively. Beyond his business pursuits, Spitzer plays a pivotal role as an advisor and investor in thriving consumer packaged goods (CPG) brands such as Laundry Sauce and Gruns.



Mercy Tolentino Steenwyk

*CEO & President
ForensisGroup Inc.*

Mercy Tolentino Steenwyk, founder, CEO and president of ForensisGroup Inc., and her journey embodies resilience and innovation. As a recent immigrant from the Philippines and a marketing executive in Century City in 1990, she faced sudden unemployment during the holidays. Undeterred by skepticism from industry peers, Steenwyk saw an opportunity to revolutionize the expert witness industry. With determination and an initial client secured within a week, she founded ForensisGroup on April 14, 1991. Today, ForensisGroup is a leader in providing expert witnesses across various disciplines, supporting attorneys, private agencies and governments worldwide. Recognized as a pioneer and advocate, Steenwyk continues to inspire through speaking engagements and leadership roles in organizations like the Red Cross and East West Players.



Sasha Strauss

*CEO & Founder
Innovation Protocol*

Sasha Strauss is a distinguished brand strategy expert, educator and speaker renowned for his 25-year career shaping brands globally. As the founder and CEO of Innovation Protocol in Los Angeles, he has crafted brand identities for top corporations, philanthropies and academic institutions worldwide, using his proprietary IP methodology. In addition to his role at IP, Strauss has been a revered professor for 18 years, teaching brand strategy at UCLA, USC and UCI. His expertise extends to over 500 organizations across 30 industries and 20 countries, where he delivers insightful keynote speeches, including Visit California's annual summit on three occasions. Strauss' commitment to mentorship and thought leadership extends beyond academia, where he continues to provide expert commentary on branding and marketing trends for leading media outlets.



Matt Z. Tabatabai

*CEO & Co-Founder
Zuum*

Matt Tabatabai is the CEO and co-founder of Zuum, a prominent technology company based in Southern California's logistics sector. With a solid background in electrical engineering from Purdue University, he has over 15 years of experience driving Zuum's innovation and efficiency in logistics. Under Tabatabai's leadership, the company launched an AI-powered logistics platform that enhances real-time decision-making and operational transparency, significantly reducing emissions. This platform optimization improves efficiency and environmental sustainability. Tabatabai has forged strategic partnerships with industry leaders like FedEx and Hyundai, expanding Zuum's technological impact globally. This has boosted market reach by 40% and increased annual revenue by 35%, despite economic challenges, leading over 60 new jobs.



Susan Taylor

*President & CEO
Juice It Up!*

Susan Taylor has led Juice It Up! to significant growth and innovation since becoming president and CEO in 2020. Under her stewardship, the brand achieved consecutive years of record-breaking sales, surpassing \$43 million in systemwide sales by 2023, marking a 38% increase over five years. Taylor has prioritized franchise expansion, opening four new locations in 2023 with plans for 10 more in 2024, largely driven by existing franchisees who are reinvesting in the brand. Under her leadership, Juice It Up! has diversified its store formats, including successful models like the Ehrenberg, AZ location, which exceeded AUV expectations within its first year. Taylor has also championed menu innovation, introducing 22 successful limited time offers in the past two years.



Sean Tresvant

*Chief Executive Officer
Taco Bell*

Sean Tresvant joined Taco Bell in December 2021 as chief brand officer and took on the role of CEO in January 2024, overseeing global growth strategies, franchise operations and overall performance. His leadership at Taco Bell has been marked by strategic initiatives to deepen the brand's connection with its audience. Under Tresvant's tenure, Taco Bell has been recognized as one of Fast Company's Most Innovative Companies and topped Entrepreneur's Franchise 500 list for four consecutive years. His innovative strategies aim to expand Taco Bell's presence to 10,000 U.S. restaurants and drive global growth. Tresvant is a founding member of the Black Executive CMO Alliance (BECA) and advocates for diversity and inclusion through Taco Bell's Business Employee Resource Groups (BERGs).



Tim Vanderhook

*Chief Executive Officer
Viant Technology*

Tim Vanderhook is a visionary entrepreneur and the driving force behind Viant Technology Inc. (NASDAQ: DSP), a leading advertising technology company he co-founded with his brother Chris. His entrepreneurial journey began nearly 25 years ago and has since transformed Viant into a public company with 11 offices nationwide and over 350 employees. Vanderhook's leadership has been pivotal in setting industry standards through innovation and strategic growth. Significant acquisitions, such as Broadband Enterprises and MySpace, have bolstered Viant's capabilities. He also co-founded XUMO, a major ad-supported OTT streaming service acquired by Comcast. Vanderhook also contributes to community and educational initiatives, serving on Chapman University's board of trustees and encouraging employee involvement in academic programs.



Jamie Viramontes

*CEO & Founder
Konnect*

Jamie Viramontes, founder & CEO of Konnect, brings over 25 years of HR consulting experience to clients and the local business community. With a background in non-profit and Fortune 500 organizations, he equips leaders to navigate today's evolving economy. Viramontes holds an Executive M.B.A. from UC Irvine and has served as CHRO for companies like Forever 21 and UCI Health. At Konnect, his 'Center of Excellence' model offers tailored HR solutions. He is actively involved in the community, sponsoring the National Human Resource Association and the Irvine Chamber of Commerce, as well as serving on UC Irvine's Dean's Leadership Circle board. Under Viramontes' leadership, Konnect saw a 467% revenue increase in 2023.



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Paul S. Viviano

*President & CEO
Children's Hospital
Los Angeles*

Paul Viviano is a prominent healthcare leader and advocate for children's health with over four decades of experience. Since 2015, he has served as president and CEO of Children's Hospital Los Angeles (CHLA), driving its remarkable expansion and excellence in clinical care, research and medical education. Under his leadership, CHLA has become the leading pediatric facility in Los Angeles County, achieving a 50% growth in market share and national recognition for its specialties. Viviano's impressive leadership has earned him numerous accolades, including the Healthcare CEO of the Year Award from the Los Angeles Business Journal and induction into the UCLA Fielding School of Public Health's Healthcare Hall of Fame.



James K. Wallace

*Chief Executive Officer
BPM LLP*

Drawing on 40 years of public accounting experience, James Wallace has positioned BPM LLP as one of the top 35 accounting and advisory firms in the U.S. Since becoming CEO in 2015, he has driven growth, expanded services and reinforced a people-focused culture. Under Wallace's leadership, BPM's revenue grew from \$118 million to over \$260 million, and the workforce expanded from 610 to over 1,300 colleagues globally. His strategic initiatives include establishing the Sioux Falls Colleague Center and expanding BPM's international presence. Wallace champions diversity, equity and inclusion, with 50% of new partners being women and 1/3 people of color. BPM has earned multiple accolades, including ClearlyRated's Best of Accounting Award for nine consecutive years and recognition as a Best CPA Firm for Women.



Carolina Weidler

*Co-CEO &
Managing Principal
Hendy*

As co-CEO at Hendy, Carolina Weidler provides innovative leadership that unifies the company's people, culture and projects. With over 17 years of domestic and international experience and credentials as a Lean Six Sigma Black Belt and LEED AP professional, she excels in creating process-driven environments for renowned brands like Mercedes-Benz, Rocket Lab, General Dynamics and Toyota Racing Development. At Hendy, an award-winning, woman- and employee-owned national interior architecture firm, Weidler leads the Science + Technology Studio, which she envisioned and created. Notable projects include the 61,500-square-foot Mercedes-Benz Classic Center and Rocket Lab's global headquarters in Long Beach. In her role as co-CEO, starting in 2023, she mentors staff and oversees human resources and organizational growth, including the firm's Employee Stock Option Plan (ESOP).



Larry Weng

*Chief Executive Officer
Phelps United*

Larry Weng is a seasoned entrepreneur with over 20 years of experience in media, hospitality, technology, logistics and e-commerce. As founder and CEO of Phelps United LLC, a leading e-commerce brand accelerator and IT channel enablement platform, he drives the company's strategic vision and leadership. Foreseeing the critical need for robust e-commerce marketplace strategies, Weng developed a proprietary enablement platform at Phelps United. This platform provides brands with instant access to multiple sales channels, mitigating channel conflicts and optimizing brand equity. Beyond his professional life, he is a semi-professional beach volleyball player and a passionate advocate for community engagement. Weng co-created the Will Poovey Beach Volleyball Community Program, promoting growth and equal opportunities within the sport.



Jeff White

*Managing Director
Skyview Capital*

Jeff White is the managing director at Skyview Capital, leading its M&A efforts since its inception. With decades of experience in private equity, investment banking and executive management, he has held key roles at Merrill Lynch and Platinum Equity Holdings. At Skyview Capital, White drives growth through acquisitions and is a member of the investment committee. Recognized by LA Times B2B Publishing and Los Angeles Business Journal as a top finance visionary and influential private equity investor, he also received the M&A Advisor Emerging Leader Award. White has contributed to organizations like TMA, ACG and the Milken Global Conference and has served in leadership roles, including as the U.S. chair of the G8 Young Summit and on the MIYLC Membership Committee.



Mark Whitley

*President & CEO
Easterseals Southern
California*

Mark Whitley, president and CEO of Easterseals Southern California (ESSC), has led the organization's remarkable growth from a \$1.5-million nonprofit to over \$500 million, the largest of Easterseals' 70 affiliates. His vision aims to make Southern California the most inclusive environment for people with disabilities. Under Whitley's leadership, ESSC sets industry standards with a staff of 2,600. He pioneered innovative services, including the Severe Behavior Services program, the sole outpatient option on the West Coast for severe behavior challenges, providing personalized treatment that was previously scarce and costly. In the past 24 months, ESSC expanded its impact with initiatives like the START Crisis Support program and the Technology Lending Library, bridging the digital divide and advocacy efforts, ensuring legislative support for disability services.



Donna L. Wilson

*CEO & Managing Partner
Manatt, Phelps &
Phillips, LLP*

Donna Wilson, CEO and managing partner at Manatt, stands out in the legal industry as a transformative leader who champions innovation and inclusivity. Since taking the helm in 2019, she has reshaped Manatt into a dynamic professional services firm by integrating legal expertise with strategic consulting. Under her leadership, Manatt has expanded its reach with strategic hires and new offices in key markets, like Boston and San Diego, achieving record revenues exceeding \$400 million in 2023, even amidst the challenges of the COVID-19 pandemic. Wilson's commitment to diversity and inclusivity is evident in Manatt's culture and achievements, including recognitions like the Corporate Equality Index and the Women In Law Empowerment Forum Gold Standard Certification. She actively promotes inclusivity by joining initiatives like Diversity Lab's Disability Inclusion Commitments, ensuring equitable opportunities across the firm.



Min Yoo

*Founder & CEO
EVmode*

EVmode, founded by Min Yoo, addresses the reliability issues plaguing electric vehicle (EV) chargers with innovative solutions. Inspired by personal frustrations during a road trip where multiple chargers failed, he identified a critical need for dependable charging infrastructure. To revolutionize the industry, Yoo established EVmode, acquiring a majority stake in a successful Korean EV charging firm and assembling a top-tier team. The company manufactures chargers in the USA, ensuring rigorous quality control and integration of design, hardware, firmware and software under one roof. Their chargers boast a less than 1% failure rate, thanks to a proprietary management system. Additionally, EVmode offers a subscription model that includes repair services, enhancing reliability and customer satisfaction.

LEADING

THE VISION OF A BETTER

EV CHARGING EXPERIENCE

Min Yoo launched EVmode to disrupt the EV charging experience. Electric vehicle drivers lack reliable and fast EV chargers in locations they visit each day. Min's vision was to create the fastest, most reliable EV charger that fit into an EV driver's everyday lifestyle – not disrupt it.

That vision came to life when Min launched EVmode – the first fully vertically integrated EV charging company in the world that manufactures the chargers in America. EVmode, in partnership with Solyco Capital, is empowering commercial and multi-family properties across the nation to offer EV drivers a reliable and fast charging experience.



CONGRATULATIONS

Min Yoo

for being recognized as a

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