

An Orange County Business Journal Special Report

WOMEN IN BUSINESS AWARDS

TIFFANY KETTERER-BUCHANAN DRIVES
FINANCE GAINS AT CROWDSTRIKE
HOLDINGS
PAGE 18

NEW TITLE, NEW GOALS FOR ALIGNMENT
HEALTHCARE'S DAWN MARONEY
PAGE 18

CHARLENE GARZA'S HORIZON
PERSONNEL SERVICES ADDRESSES
OC LABOR CHALLENGES
PAGE 20

JILL GRIFFIN TAKES ON CEO ROLE
AT ADVANTAGE SOLUTIONS
PAGE 20

SLOANE KEANE GETS BIG
BROTHERS BIG SISTERS OF OC
BACK TO PRE-PANDEMIC NORMS
PAGE 20

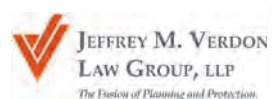
NOMINEE BIOS FOR OCT. 20
WOMEN IN BUSINESS AWARDS
PAGE 66



Diamond Sponsor

JPMORGAN CHASE & CO.

Platinum Sponsors



Gold Sponsors



Silver Sponsors



2021 Women in Business Winners Guide Growth

■ By KATIE MURAR

Last October, the Business Journal honored five women business leaders from diverse industries at the 27th annual **Women in Business Awards**.

The event recognized outstanding professional women who have made significant contributions to their organizations, their professions and the Orange County community.

Their backgrounds and industries are varied—from nonprofit leaders feeding or educating local residents to a business owner helping to address the labor short-

age—but all remained resilient throughout the pandemic and have kept their respective firms in growth mode during the challenging economic environment that followed.

The Business Journal recently caught up with the five winners to see just how they're managing this as their worlds changed in the past year.

The next Women in Business Awards is scheduled for **Oct. 20** at the **Irvine Marriott**. **Beacon Pointe Advisors** CEO **Shannon Eusey** is the keynote speaker.

Bios for the nominees for the upcoming event begin on page 66.



New American Funding co-founder Patty Arvielo addresses crowd at 2021 event

Tiffany Ketterer-Buchanan: Leading During Volatility

■ By KATIE MURAR

Tiffany Ketterer-Buchanan began her career with **CrowdStrike Holdings Inc.** (Nasdaq: CRWD) nine years ago as the first finance hire, working beside the CFO and one of CrowdStrike's co-founders.

She has since worked her way up from accounting manager to controller to senior vice president of finance, making her one of the most promoted people at Austin, Texas-based CrowdStrike, which got its start in Irvine and still has sizeable operations in the city.

She's helped the growth trajectory of the rapidly growing cybersecurity company in turn.

The firm reached \$2.1 billion in annual recurring revenue at the end of the second quarter, up 59% year-over-year and a 145% jump from 2020.

Since winning a Business Journal **Women in Business Award** in October, "CrowdStrike has continued to grow its



Tiffany Ketterer-Buchanan
SVP, Finance
CrowdStrike Holdings

platform that protects and enables people, processes, and technologies that drive modern enterprises," Ketterer-Buchanan told the Business Journal this month.

The company, whose cloud-based technology is used to detect and prevent breaches, is now valued at nearly \$40 billion. The company's stock has fallen 12% in the past month, and is off about 43% from its 52-week high of \$298.48 seen in November 2021.

"Today, most enterprise software organizations are facing similar macro-economic headwinds," Ketterer-Buchanan said.

She attributes her success to being able to lead during challenging times, and has proved successful before, having led the company through the largest cybersecurity IPO in history.

Organizations today are prioritizing investments during a time of market volatility, and are "looking to standardize with a security partner they can trust, like CrowdStrike, to achieve better protection with less time, fewer resources and lower total cost of ownership," she said. ■

Dawn Maroney: National Expansion for Alignment Healthcare

■ By ISABELLA LIEBERMAN

Since being honored at the Business Journal's 27th annual **Women in Business Awards** in October, **Dawn Maroney** has seen her responsibilities and reach grow as CEO and Markets President of **Alignment Health Plan California**, a unit of Orange's Medicare services provider **Alignment Healthcare Inc.** (Nasdaq: ALHC).

In April, Maroney received a newly expanded role with oversight of new market management and development.

Adding to her previous duties managing provider contracting, pharmacy, sales and marketing, product development and membership eligibility, Maroney is now helping Alignment scale nationwide.

"Our team is focused on scaling our senior-first vision and developing new approaches to advance the quality of care for seniors," Alignment Healthcare CEO **John Kao** said in a statement. "Investing in our talented leaders is a crucial part of our long-term path toward sustainable



Dawn Maroney
Markets President
Alignment Healthcare

growth."

Alignment took additional steps in scaling in June. If approved by the **Centers for Medicare & Medicaid Services (CMS)**,

the company plans to expand to four Florida counties and two Texas counties in 2023.

Alignment also plans to ramp up its

presence in eight counties across Arizona, California, Nevada and North Carolina. Starting Oct. 15, the same day Medicare Advantage enrollment opens, coverage will be available to an additional 1.1 million Medicare-eligible seniors, bringing its total to 8.2 million seniors.

"We are continually perfecting a model where seniors can enjoy the benefits of 'having a doctor in the family' while upholding our quality of care as we grow," Maroney said in a statement. "Our members consistently tell us they love our diverse plans that cater to where they are in their health journey, with benefits that take care of more than just their clinical needs."

Last month, **UCI Health** joined Alignment's provider network, with Medicare Advantage members now with access to services at **UCI Medical Center** and to over 900 UCI Health primary and specialty care physicians. ■

Where IT goes for IT support.

As an IT leader, you know your team can solve almost anything. But when it comes to solving everything, even your experts could use more experts in their corner. Cox Business has a complete portfolio of cloud solutions to help you overcome any challenge, all supported by a provider you already trust.

Get started at
www.coxbusiness.com/cloud

COX
BUSINESS® | Cloud
Solutions



Charlene Garza: Touting Top Jobs Internally, Externally

■ By PETER J. BRENNAN

Horizon Personnel Services says its top five trending jobs this year are: machine operators, material handlers, warehouse associates, customer service reps and on-site supervisors.

The Orange-based company owned by **Charlene Garza**, a Business Journal **Women in Business Award** winner in 2021, this year is also touting jobs like commercial drivers, warehouse workers and janitors. Most of Garza's staffing work is in food manufacturing, logistics and warehouses that supply large clients like **Walmart**.

The company, too, is looking to hire.

"Join our team as a recruiter," says a February tweet. "Hiring ASAP. Full-time & benefits. Great pay."

Garza formed her first company, **StaffChex**, in 2004 in Sacramento before moving to Or-



Charlene Garza
Owner
StaffChex
Horizon Personnel Services



ange County because of demand.

Since insurance rates are so much

higher in California than other states, in 2012 she formed Horizon Personnel

Services, which now holds all its California offices. Meanwhile her offices in Georgia, Arizona, Missouri and Nevada are run through StaffChex.

Her two companies provide "a workers comp solution" where she assumes responsibilities, a practice that helps companies avoid liabilities such as insurance lawsuits.

In turn, Garza is a keen observer of insurance trends.

Garza's industry is also a bellwether of future economic activity.

"We usually can forecast and see what's going on based on what our business is doing," she told the Business Journal last year. "Most companies, when things start picking up, they hire us."

Her two firms last year employed 6,630, including 130 internal employees and had a run rate around \$250 million. ■

Jill Griffin: New Tech, Higher Wages, CEO Role

■ By KAITLIN AQUINO

Advantage Solutions Inc. Chief Executive **Jill Griffin** is raising wages and investing in internal tech to combat labor market instability.

The Irvine-based marketing organization (Nasdaq: ADV), which is Orange County's largest and most valuable marketing firm, has deployed a new recruiting software that has accelerated its hiring speed by 50%, according to Advantage officials. The company is also investing in wages to improve its retention rate as wage inflation remains at historically high levels.

"Our success continues to hinge on our talent, and at Advantage, we are talent first," Griffin, who was promoted to CEO earlier this year, told analysts on an earnings call.

"It's really important that we're constantly a place where we can attract and retain the very best talent to come and innovate and grow," she told the Business Journal last No-



Jill Griffin
President, Chief Commercial Officer
Advantage Solutions



vember, after being honored at the Business Journal's 2021 **Women in Business Awards**.

Services at Advantage range from helping companies such as **Unilever** and **McCormick**

& Co. on their individual product sales, to working directly with giant retailers like **Walmart** and **Kroger** on their own sales and marketing strategies.

The company, which went public in 2020, reported a 15% year-over-year increase in second-quarter revenue to \$981 million. The growth was primarily driven by its marketing and sales segments, which saw gains of 31% and 8% from the year prior, respectively.

Griffin, who has worked at Advantage since 2008, was promoted from chief commercial officer and president to CEO in April this year. She succeeded **Tanya Domier**, who assumed the role of executive chair after running the company for nine years.

Griffin "has many special qualities that will help her succeed as our next CEO," Domier said in a letter to Advantage employees.

"Not only is she extraordinarily intelligent with great energy and passion for the business, she is a deeply strategic thinker with great vision for the future and a respected leader who lives and embodies core Advantage values." ■

Sloane Keane: Getting Big Brothers Big Sisters Back in School

■ By EMILY SANTIAGO-MOLINA

Big Brothers Big Sisters of Orange County and the Inland Empire (BB&BS) is back to pre-pandemic measures and in-person programs.

The nonprofit was able to maintain its community-based programs by going virtual, but its school platforms were more directly impacted.

Chief Executive **Sloane Keane** pointed to reports of learning loss, mental crises and negative behavior because of the lack of support.

"The youth we have not been able to serve are crying out," Keane told the Business Journal.

This year, the organization has been granted access to 45 elementary campuses across 21 districts, marking a much-needed return.

Facilitated by BB&BS staff, the after-school programs are back on-site once a week for elementary students to be tutored by fellow high school students.



Sloane Keane
CEO
Big Brothers Big Sisters
of Orange County
and the Inland Empire



The goal is to be back to pre-COVID numbers by December, approaching 1,400 matches. Almost 75% of the nonprofit's site-

based matches should be filled by the end of 2022 which would be a 10% increase in matches from 2020, according to Keane.

The organization has also continued its post-18 program for graduating mentors transitioning from minor to adult, focused on upward mobility.

"We have a responsibility to invest in the future," Keane said.

By January of next year, BB&BS of OC will have 100 employees across its two offices, a 25% increase from the prior two years.

Keane is now looking to volunteers to help meet community needs post-COVID.

More than 100 youth are awaiting a mentor in OC and the Inland Empire, according to the nonprofit. On July 1, BB&BS began its "100 mentors in 100 days" campaign which now has about 250 inquiries and over 50 new volunteers.

"We cannot do this without people raising their hand and people investing in their community," Keane said. ■

Our
differences
fuel our insights.



Including different perspectives enables us to give our clients the most unique solutions for their growing businesses.

Experience the power of being understood.
Find out more at rsmus.com

THE POWER OF BEING UNDERSTOOD
AUDIT | TAX | CONSULTING



RSM US LLP is the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.



Celebrating women's resilience

Resilience isn't only surviving hard times. It's reinventing in the face of challenges and emerging stronger as a result. For women everywhere this is a theme that defines so much of what empowers us.

Transforming the workplace

At the peak of the pandemic, 4 million women left the workforce for various reasons, many of them to care for their families and home school their children. The good news is that, as schools and some caregiving facilities reopened, more than half of the women who dropped out of the workforce have returned, and unemployment rates for women have declined.

For other women who continued to work throughout the pandemic, balancing work and family obligations became a top priority. They needed solutions that acknowledged their roles as both caregivers and breadwinners. These women are crafting the workplace of the future, as they demonstrated that work flexibility and productivity can co-exist.

JPMorgan Chase helped women small business owners by offering programs like Curated Coaching for Entrepreneurs, with free virtual trainings on business topics at times that were convenient for business owners and entrepreneurs to meet.

In addition, JPMorgan Chase launched new training programs for women employees, providing them with opportunities to network and continue to advance their careers.

We rolled out a virtual Fast Forward program during the pandemic with digital content and live coaching. The response has been overwhelming, and nearly 6,000 employees have taken the program with another 2,000 getting ready to start. Many women have told us it's changed their lives.

Financing women small business owners

In 2018, we announced a three-year goal to lend \$10 billion to women small business owners. At the time, of course, no one anticipated a global pandemic that would hit small business owners the hardest. But that didn't stop us. In fact, it made us more determined as the need was so much greater.

Not only did JPMorgan Chase hit its lofty goal, we surpassed it. Since 2019, we have now extended over \$12.7 billion in credit to women small business owners. JPMorgan Chase financed more than 400,000 women-led businesses. That's 400,000 dreams that we helped to fund and that improved women's economic security. We all see these businesses every day in our communities... and we all must continue to support them.

Continuing our work for equity

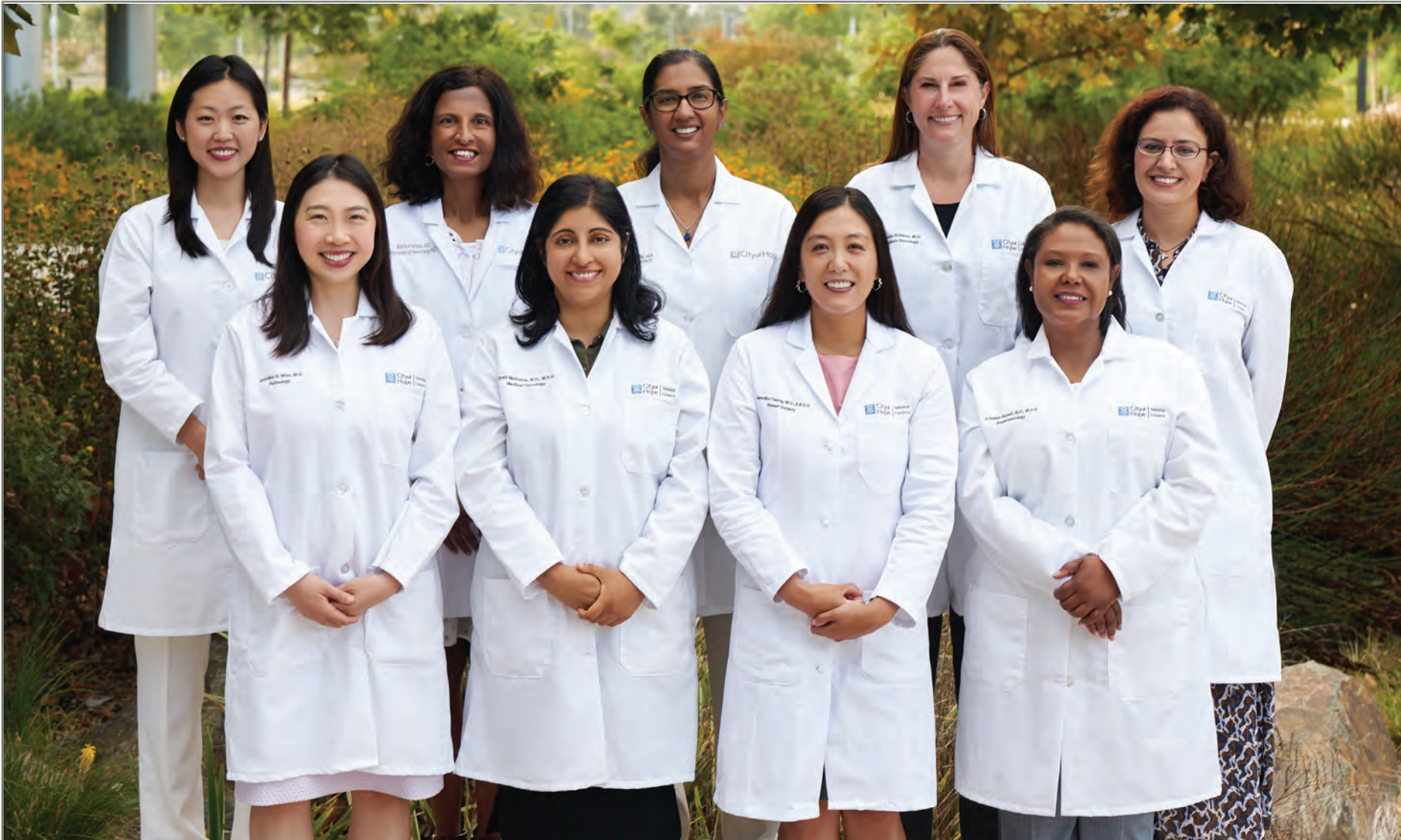
While we have reached our goals, we still have big plans for women. Our mandate has always been to fuel women's ambition and advance financial equality. Moving forward, we are focusing our efforts on more underserved segments, such as businesses owned by Black women and Latinas. And as part of our racial equity commitments, we will continue to coach these businesses so they can thrive.

As individuals, we each have the ability to be resilient. And as a community, we have the power to come back stronger together.

Learn more: jpmorganchase.com/WOTM

JPMORGAN CHASE & CO.

Meet City of Hope Orange County's Women Physician Leaders Advancing Cancer Cures



These dedicated experts are among the women physician leaders who practice at Orange County's most advanced comprehensive cancer center. Pictured from left to right: Jessica Cheng, M.D.; Jennifer S. Woo, M.D.; Amrita Krishnan, M.D.; Jyoti Malhotra, M.D.; M.P.H.; Tanya Siddiqi, M.D.; Jennifer Tseng, M.D., F.A.C.S.; Amanda Schwer, M.D.; Priscilla Grace Harrell, M.D., M.P.H.; Dina Ragheb, M.D.

City of Hope Orange County celebrates the great women in every field who contribute to our community.

We're especially proud of our outstanding women physician leaders who are leading the way in the fight against cancer. They practice at Orange County's most advanced cancer center, where they are raising the bar for scientific expertise and delivering exceptional outcomes for patients.

City of Hope Orange County Lennar Foundation Cancer Center is home to a team of cancer-fighting physician-scientists assembled from across the country, and more than half of our new colleagues are women.

These brilliant and accomplished women are among the best minds in the world for preventing, treating and curing cancer. With their highly specialized expertise, distinguished history of research breakthroughs and compassionate approach, our faculty is transforming our ability to address cancer for generations.

Each of our physicians is highly specialized in her field. They have spent their careers researching and treating specific types of cancers, from gastrointestinal cancer to multiple myeloma, breast cancer and many more. This focused work is essential for providing discoveries and insights that will lead to cancer cures.

In addition to their clinical expertise, our physician leaders are committed to providing compassionate care for each and every patient. Their expertise in the cancer journey means they understand what people with cancer and their families are experiencing. When you choose one of our outstanding City of Hope Orange County physicians, you are gaining access to specialists who are both top-ranked and patient-centered.

We further celebrate that many of our women physician leaders are also wives and mothers. They are an inspiration to the next generation of women physicians balancing their career and their family.

It is said that women are like superheroes — and City of Hope Orange County's women physician leaders demonstrate why. Join us in celebrating their leadership, their ability to inspire and their commitment to serving our community. ■



TO MAKE AN APPOINTMENT AT ANY OF OUR FIVE ORANGE COUNTY LOCATIONS, CALL 888-333-HOPE (4673)

- Newport Beach
Fashion Island
- Newport Beach
Lido
- Huntington
Beach
- Irvine
Sand Canyon
- Lennar Foundation
Cancer Center

HOPE IS HERE

THE MOST ADVANCED CANCER CARE IN OC

City of Hope, an NCI-designated comprehensive cancer center, has opened its visionary cancer and academic research center in Irvine. Cancer research that has led to breakthrough treatments used around the globe is conducted right here. Patients who once traveled for expert care now have the world's best cancer-fighting minds close to home. **This is the Hope you've been waiting for.**

888.333.HOPE (4673) | [CityofHope.org/OC](https://www.cityofhope.org/OC)



City of
Hope® | ORANGE
COUNTY



National
Comprehensive
Cancer
Network®



Jennifer Tseng, M.D.,
Associate Clinical Professor, Division of Breast
Surgery, Department of Surgery

© 2022 City of Hope



Supporting Female Founders Through Private Investing

Step into wealth-building with private investing, while supporting a new crop of female entrepreneurs.

The last year was a transformative one for all businesses, but particularly for women-owned businesses. Though many female-founded businesses struggled to raise capital, representing just 2.3% of total venture capital funding according to data from All Raise, something more powerful emerged: a resilient and purpose-driven community of female founders and funders, who together are committed to breaking down barriers for female entrepreneurs. This commitment to female leaders is gaining momentum as investors increasingly embrace the true value of diversity in business.

Spotlight On: Whitney Wolfe Herd, Bumble CEO

Under the leadership of Whitney Wolfe Herd, Bumble built a majority-female leadership team to strengthen and professionalize Bumble's operations and invest in new features. These enhancements ultimately helped take the company public in February 2021 in a historic IPO valued at \$14 billion. The IPO made Wolfe Herd the youngest female entrepreneur ever to take a company public in the United States. To help other female entrepreneurs succeed, Bumble recently launched Bumble Fund, focusing on early-stage investments in businesses founded and led by women of color and other underrepresented groups.

A Spectrum of Investment Options

To provide a real diversification benefit to client portfolios, Northern Trust provides an alternatives platform that brings together leading institutional investors that generate unique and differentiated sources of risk and return. Each of the firms we work with has made significant commitments to increase funding and support for women-owned businesses and female fund managers. We reached out to some of these firms to better understand what is driving this demand and the associated risks, rewards and success stories.

Each of these firms underscored the material benefits of diversity at the portfolio company level. Some of the unique attributes and value female leaders may contribute include:

- Leadership in key female-oriented sectors such as women's health, education and recruitment
- An inherent understanding of the need to support and promote diverse perspectives, which in turn contribute to more effective and innovative decision-making processes, stronger governance and improved financial outcomes
- A history of overcoming hurdles and stereotypes that make them uniquely positioned to handle the ups and downs of an early-stage company
- A tendency to be more open to asking for different thoughts and opinions

While there are many ways in which women add value in leadership roles, it is also critical to consider the risks involved in each unique company and leader. For example, most institutional investors often look for serial entrepreneurs who have a track record of success across multiple companies, and female founders are harder to find with this criterion.

Spotlight On: Three Firms Committed to Female Founders and Funders

50 South Capital is committed to diversity, equity and inclusion consistent with the corporate values of Northern Trust. The team has broadened the tent of inclusion to provide more opportunities for investment, and to incorporate diverse perspectives. Whether it is supporting female founders, or women-run venture capital funds, 50 South Capital is actively engaged in activities aimed at leveling the playing field of opportunities consistent with the belief that this will ultimately accrue to the benefit of investors. In their view, it is a virtuous cycle: when venture firms have more diverse teams, they tend to back more diverse founders.

Blackstone believes supporting women and female-founded or owned companies is critically important to its culture. The company is committed to driving gender diversity at the firm and across its portfolio, where its scale allows for a massive impact. In fact, 50% of the independent private equity board seats staffed in 2019 were with women.

Carlyle has prioritized diversity, equity and inclusion, both internally and in portfolio companies, leading to increased value creation. An analysis of portfolio companies found that when the board was diverse, the average annual earnings growth was 12% higher than companies without a diverse board. More than half of Carlyle's \$246 billion in AUM is managed by women, and the company has formally linked progress in diversity, equity and inclusion into its compensation process.

Putting Words into Action

How can women interested in supporting other women gain access to these private investment opportunities and approach them in a way that complements their overall goals?

A key issue with any private investment is the high risk associated with investment failure. When looking at the universe of venture opportunities, even the best performing venture funds that focus on maximizing return over time and with no constraints on their investment universe actually lose money on more than 50% of the investments. When you consider narrowing the universe to female founders or female-run venture capital firms, that can present an even more challenging environment. As investors, we know that risk and return are related, so we cannot avoid risk, however we must manage risk.

There are some key considerations that can help to mitigate this risk:

- **Size:** First and foremost, assess how large of an allocation and the amount of illiquidity you can absorb as an investor, and still meet your high-priority financial goals over time. It is critical to appropriately size any investment in private assets, but particularly because those investments may carry an even higher risk.
- **Structure:** For most investors, we believe the best way to gain exposure to private investment opportunities is through a fund structure, and not direct investing. The fund structure will provide needed diversification at the deal level and provide important deal due diligence. General partners also bring tremendous experience and expertise to bear.
- **Diversification:** We recommend investing in multiple funds, or in fund series, to gain vintage year and important sources of diversification. It also makes sense to invest across a spectrum of opportunities: first-time founders/early stage/seed stage, but also balanced with more seasoned entrepreneurs in order to offset risk.

Supporting female founders is the ultimate "pay it forward" opportunity: these founders create track records that attract capital, they create important networking opportunities for each other, they encourage important skills and experience-building that is critical for continued capital growth in this important market. Just as there is tremendous excitement on the entrepreneurial side, there is growing interest on the investor side of the equation. This is not a trend: It is the new normal.

The most important question for investors is, how much? Once women are confident they can fund all of their lifetime goals, it opens up a whole new world of opportunity to support other diverse entrepreneurs while building their own wealth.

Visit northerntrust.com/orangecounty to learn more about how we can help you build a personalized plan that will reflect your values and help you achieve what's most important to you.



WHEN WOMEN COME TOGETHER,
THE OPPORTUNITIES ARE
LIMITLESS

Northern Trust congratulates the
**ORANGE COUNTY BUSINESS JOURNAL'S
28TH ANNUAL WOMEN IN BUSINESS AWARDS NOMINEES**
including our own



Dawn M. Keeney
Senior Vice President
Senior Fiduciary Officer



MONIKA LOPEZ
Senior Vice President
Senior Investment Officer

YOUR TRUSTED PARTNER IN ORANGE COUNTY

Northern Trust Orange County proudly serves many of the most successful families, companies and nonprofits, having earned their trust through decades of outstanding service and advice. Empowering women to navigate life moments and do more with their wealth is an essential component of our legacy.

Let us help you realize your wealth's full potential.

660 Newport Center Drive Suite 1100 | Newport Beach, CA 92660
www.northerntrust.com/orangecounty



A NEW



At Alignment Health, we are champions of aging well, because we believe aging should be rewarded. With Medicare Advantage Plans that customize to your needs, you won't have to let anything, including your age, define how you live.

OF



Let Alignment Health work for you. Call to learn more.
1-888-979-2247 (TTY:711) 8 am - 8 pm, Monday - Friday



Alignment
Health



ERA



AGING.

AlignmentHealthcare.com



5 Tips to Raise a Financially Savvy Daughter

By City National Bank



While society has made strides to move past gender bias when it comes to wealth and property, many parents still teach their sons and daughters different lessons about money.

According to one survey, parents are more likely to teach fiscal restraint to daughters and wealth building to sons. The survey found that boys were much more likely to be taught about bank accounts, credit cards and investing before they reach high school. Girls were more likely to learn about budgeting from their parents.

“Women are living longer than men, and many are single for much longer. Understanding financial matters means that a woman doesn’t have to risk her independence and autonomy,” said Nichole Walker, a senior vice president/senior wealth planner at City National Bank.

The following steps can help families prepare their daughters for successful wealth management in the future.

1. Set an Example

Even when children are very young, they are watching and learning from their parents’ money behaviors. Research shows that children begin forming financial habits as early as age 7. This makes speaking with your daughter about money at every age important, as well as being a positive role-model.

3. Prioritize Investing

Girls below 13 years of age were more likely than boys to own a piggy bank or savings bonds. Despite this, boys between the ages of 13 and 18 were more likely to have their savings placed in a certificate of deposit (CD), money market account, trust fund, shares of stocks, bonds or mutual funds, according to a recent study.

Rather than falling into the familiar patterns of teaching daughters about saving money but neglecting to teach them about growing money, make it a

priority to teach your daughter about investing. Even young girls who have started saving some money can invest in a certificate of deposit account or an investment account for minors.

4. Encourage Earning

If you want your daughter to appreciate and understand the value of her inheritance and your family’s wealth, encourage her to earn money of her own.

“Teaching skills to a daughter — like asking for a raise or pursuing a promotion — reinforces that confidence she will need to manage her own wealth later in life,” Walker said.

5. Speak Openly About the Risks & Rewards of Wealth

Open discussions about various investment options can help a young person understand how to balance risks and rewards intelligently. Walker encourages parents to teach their daughters about investments so they understand their options and feel comfortable taking risks when needed.

6. Manage Expectations

In addition, work to set financial expectations for your daughter throughout her life by asking her about her dreams and goals. Such conversations can be a great forum for understanding her expectations and sharing yours.

Certainly, daughters can manage, protect and grow family wealth just as well as sons. But parents can set them up for success by working to instill the lessons and values that will prepare them for a strong future. Get in touch with a wealth planner from City National Bank today for help setting up your family’s financial future.



Nichole Walker
Senior Vice President
Senior Wealth Planner
(415) 576-3988
Nichole.Walker@cnb.com

This article is for general information and education only. It is provided as a courtesy to the clients and friends of City National Bank (City National). City National does not warrant that it is accurate or complete. Opinions expressed and estimates or projections given are those of the authors or persons quoted as of the date of the article with no obligation to update or notify of inaccuracy or change. This article may not be reproduced, distributed or further published by any person without the written consent of City National. Please cite source when quoting. City National Bank Member FDIC. City National Bank is a subsidiary of Royal Bank of Canada. © 2022 City National Bank. All rights reserved. cnb.com

Investment and Insurance Products:

• Are Not insured by the FDIC or any other federal government agency • Are Not deposits of or guaranteed by a Bank or any Bank Affiliate • May Lose Value

GET A NEW LENS ON BUSINESS.

There isn't one solution to
optimize your operations.
There are many.

We'll get to know you and your business
to see what expert insights, integrated
technology and custom banking options
can best help you scale.

Talk to a dedicated Relationship Manager
and a team of experts at City National® today.

We make it our business to be personal.



Discover *The way up*® at cnb.com/business

City National Bank Member FDIC. City National Bank is a subsidiary of
Royal Bank of Canada. ©2022 City National Bank. All Rights Reserved.





IT Modernization Could be the Growth Catalyst Your Business Needs. And Research Shows the Juice is Worth the Squeeze.

By Jodi Duva

Lemons are in season pretty much year-round in many parts of California. This is good news if, like me, you're someone who enjoys a cold glass of lemonade on a hot summer day or spritzing a little lemon over a summer salad. The juice from a fresh lemon (or any citrus fruit for that matter) – ripened to perfection and packed with amazing health benefits – it's worth the squeeze.

So, what does citrus fruit have to do with IT modernization? We're glad you asked. For 30% of small to midsize businesses (SMBs), the complexities of IT modernization and cloud migration are challenging to consider and, therefore, easy to put off or avoid altogether. It sounds like a lot of hard work – and will it really pay off? *Is the juice worth the squeeze?*

In their efforts to upgrade their IT and cloud infrastructure, a survey of 80 SMBs revealed these organizations are most challenged by perceived security issues, a lack of expertise in emerging technologies, demonstrating a return on investment for modernization and uncertainty about available cloud solutions and implementation.

But current research shows there is good reason to invest in an upgrade. Small to midsize businesses that migrate to cloud services are:

- **45%** More likely to see improved security and lower risk
- **40%** More likely to benefit from reduced IT expenses and costs
- **34%** More likely to have improved application control and agility

Cox Business offers a complete portfolio of cloud services designed to make the management of IT infrastructure simple for any business size, allowing them to

focus on their long-term strategic goals. Choose from any of our Managed Cloud Services to manage your IT needs in-house, or tap into Cox Business Professional Services for a customized solution managed by a dedicated team of Cox professionals.

IT is the backbone of any business, but most business owners don't have the time to take care of everything technological on their own—nor should they. Cox Business Cloud Services aims to support business owners by eliminating a lot of the difficulty and confusion from IT, hosting your business' files, processes, training software, and other technology needs from the cloud. It's a one-stop shop that simplifies IT and lets business owners focus on projects that directly boost their revenue.

When it comes to IT modernization for small to midsize businesses, we can confirm that the juice *is* worth the squeeze – and Cox Business Cloud Services can help. Learn more and set up a consultation at cox.com/cloud or give us a call at (866) 961-1075.

Jodi Duva is vice president for Cox Business in Orange County.

COX
BUSINESS®



Strong Families, Safe Kids

Olive Crest Honors Women in Business in Orange County



Child Abuse Prevention



Family Crisis Intervention



Homes for Children, Teens, and Aged-Out Youth



Foster and Adoption Placement and Support



Counseling and Mental Health Treatment



Educational Support and Services



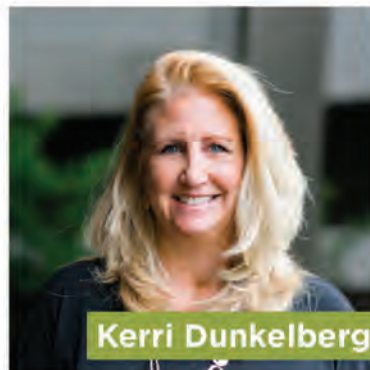
Independent Life Skills Training and Mentoring



Olive Crest Academy (K-12)



Donald Verleur



Kerri Dunkelberger

Right now, too many children are being abused and neglected. In Orange County, there are over 3,000 children in the foster care system. Every year, about 23,000 foster youth "age out" of the child welfare system in the United States when they turn 18, and 60% of them will become homeless within the same year. These numbers are staggering and are continuing to increase.

For almost 50 years, Olive Crest has demonstrated an extraordinary record of service, unrelenting in our commitment and dedication to help children in crisis and broken families. From the first 4 girls we helped in 1973, Olive Crest today has grown to serve 4,000 children and families each day.

"Our many innovative programs reflect our conviction that strengthening the family is one of the most powerful ways to help heal children," said Kerri Dunkelberger, Executive Director of Olive Crest in Orange County. "Our 98% stability rate is a testament to the unwavering commitment that the Olive Crest family extends to the children and families we serve, even after they have graduated from our programs."

Take Andrew's story for example. At the age of 14 he was in a gang and addicted to methamphetamine. He felt trapped in a cycle of abuse and abandonment.

By age 18, Andrew was homeless. Living on the streets was a rough experience and included anything he could think of to survive. He remembers stealing food, spending restless nights "sleeping" on chairs inside laundromats, and stealing cars when he ran out of options.

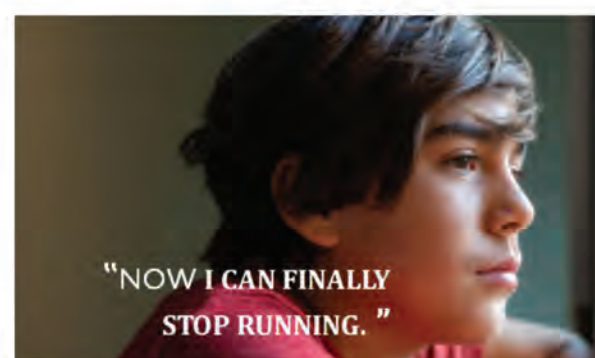
This would have ended tragically for Andrew, as it does for thousands of children, if it wasn't for an unlikely recommendation. While incarcerated, Andrew was introduced to Olive Crest.

When asked what he wants to do someday, Andrew laughs and says, "I want to chase something bigger, get paid for the work I put in. I know I have charisma and am a natural leader, and so, I want to chase deals, and make it on my own." Then after a moment of quiet reflection he added earnestly "... and help people, people like me who have no hope."

"I could talk to you all day about what Olive Crest has done for me," said Andrew. "They've taught me to mature and become a man, and to care about being a leader. I thought I would be on my own when I 'aged out' of the system, but they gave me the opportunity to get a place of my own and grow a savings account. **I've been running my whole life; now I feel like I can finally stop running.**"

Olive Crest CEO Donald Verleur has witnessed countless transformations like Andrew's. "While we're proud to have had the privilege of serving over 200,000 children and families, there's more work to be done," said Verleur. "With your support, we plan to serve 1.2 million children and families by 2030. Will you join us to break the cycle of child abuse and enable children and families in crisis to become healthy, productive citizens in our community?"

**For more information and to get involved:
call 800.550.CHILD (2445)
or visit www.olivecrest.org**





Closing the Wealth Gap for Orange County Women Entrepreneurs

By Manishi Parikh

Today, women entrepreneurs are the new majority. Every day of 2020, women started nearly 2,000 small businesses. Of those, 64% were started by diverse women. But according to a study, conducted by the Nasdaq Entrepreneurial Center, Penn State University, and Fair Pay Workplace, pay, ownership, and valuation disparities are compounding the already large gender wealth gap.

Barriers to profitability and pay inequality

According to the study, access to capital is the number one barrier negatively impacting the profitability of women entrepreneurs. The top-three reasons women entrepreneurs don't seek additional funding are:

- Don't want to accrue debt
- Don't think they'd be approved by a lender
- Decided to wait until their company hit a milestone to be in a stronger position to raise funds

The second identified barrier is declining sales followed by the unpredictability of business conditions. Fifty-nine percent of women entrepreneur respondents said their income varies from month to month, and 53% said they're spending equal to or more than their income. Additionally, more than half of early-stage women entrepreneurs (55%) do not pay themselves for the work they do for their company.

On average, women pay themselves \$53,000 less than men. Men who are entrepreneurs earn an average salary of \$232,659 versus women entrepreneurs who earn an average \$179,444. And the broader workforce pay gap shows that among entrepreneurs, women earn 77% of what men earn.

Investment disparity

Additionally, data shows there is a significant gender gap in the venture capital system. Nearly 75% of investments in 2019 and 2020 went to white men, but less than 2% went to women of color. According to the Center for Venture Research:

- Only 5% of accredited women investors have access to invest in venture capital funds, even though women control 50% of wealth today.
- Only 1.8% of VC investments go to solely women-led startups. There are no large funds focused solely on women founders.
- Only 5% of general partners in VC firms are women.

In 2020, the total impact of these pay and investment disparities added up to a \$140 billion gap. If the current growth trajectory of women entrepreneurs continues, the Global Gender Gap Report 2021 calculates that it will take 135.6 years to close the gender gap worldwide.

Closing the gap and empowering women entrepreneurs

While Orange County women are founding new enterprises every day, data reveals there's still a long way to go to ensure they have equal opportunities to succeed. Fortunately, there are resources and people to help.

Closing the gender wealth gap starts with education and awareness, empowering women in Orange County and across the country to break the cycle of debt, and equipping them with the tools and financial knowledge to start their own businesses and be successful entrepreneurs.

Here are a few actions Orange County women entrepreneurs can take to turn potential roadblocks into building blocks for success:

Explore funding options

Start with a strong foundation that will help with business decisions and strategic planning. It will also help to build wealth that can be reinvested into scaling the business over time.

There are many assistance options to help businesses and non-profits continue your road to recovery. The U.S. Small Business Administration (SBA) is a great starting point to learn about available federal resources and programs. Traditional lending products such as 7(a) loans, 504 loans and SBA express loans can provide access to capital.

There are also many free resources and tools to help women business-owners understand other credit and financing options. Additionally, when choosing a lender, consider financial institutions that have demonstrated a commitment and track record of working with minority and women-owned businesses, as well as a lender who may have implemented programs focused on women-owned businesses.



Identify your support network

Having a support system to lean on is a huge asset for any business owner, but it's especially important for women. Connect with mentors and other experts such as a local commercial banker to exchange knowledge, share best practices and gain new insights.

While COVID has created many unique challenges to in-person networking and meeting face-to-face, it's as important as ever to seek virtual ways to get involved with organizations dedicated to supporting women business owners.

For example, the National Association of Women Business Owners (NAWBO) and the Women's Business Enterprise National Council (WBENC) have chapters and regional partners across the country that offer peer-to-peer professional development programs for members. These organizations are dedicated to helping women find the right financial tools to successfully run and grow their businesses. Another great resource for women business owners is SCORE, which offers online newsletters and webinars in addition to an extensive database of female mentors.

Orange County business owners should also consider the immense value of having an assigned relationship manager at their primary bank. According to a recent Barlow survey, 70% of small businesses who interact with a dedicated account officer are very satisfied with their bank compared to those who don't.

Be you and set measurable goals

When establishing business goals, women business owners should consider both their personal and business objectives, and see where they align. What's motivating *you* to establish your business and what makes *your* business unique? One of the most important things women entrepreneurs can do to stand out is to be their authentic selves, while planning and setting measurable goals along the way.

One way to organize your thoughts is to create a written business plan to shape your strategy. Your business plan should reflect changes in your business, the industry or the market. With COVID-19 impacts, it is equally important to incorporate the changing needs of customers and economic conditions in order to keep your plan current and respond to the ever-changing environment.

No matter which sources you choose to fund your business, build a network, and establish a plan, remember that knowledge is power. By taking the time to arm yourself appropriately, you can confidently navigate potential roadblocks and pave the path for your business success.

Manishi Parikh is Wells Fargo Orange County Commercial Banking market executive. She can be reached at Manishi.G.Parikh@wellsfargo.com or (949) 251-4171.



YOU.

You would travel anywhere
for the best care. We'll save
you the trip.

World-class healthcare.
Right here in OC.

YOU.
EMPOWERED BY HOAG.

hoag®





Protecting Equity in Your Residence

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

The journey of entrepreneurs can provide essential groundbreaking advancements for industry and society. Unfortunately, not all of those who follow this path are always happy with some of the side effects that go along with being a successful businessperson. They can put the entrepreneur at risk for lawsuits, both legitimate and frivolous. Steve is just such an entrepreneur.

Successful in his pursuits, Steve now has a large estate he wants to protect for his children, especially his Silicon Valley personal residence. On advice from counsel, he set up an irrevocable dynasty trust for his wife, children, and grandchildren using the Nevada more protective trust laws. Using his generous \$12.06M federal gift tax

exemption, Steve transfers the title of the house to the trust. Then he rents it from the trust at fair value rent removing the value of the home from his gross estate. And more importantly, he becomes a tenant (and not an owner) so the home will not be at risk in case of an unforeseen lawsuit.

Steve feels secure that his business can continue breaking new ground while protecting his existing estate from future misadventures.

As time goes on, Steve's company does recall a defective product, and lawsuits ensue.

While the business does take some hits, the significant equity in Steve's personal residence is safe because he established a legal entity separate from himself and his business that could not

be liable for the business's legal claims. Litigants considered attacking the trust, but after determining that road would be expensive and uncertain, he was able to avoid the personal liability of the lawsuit with a very modest monetary settlement. Steve's home was never at risk.

If you are sitting on substantial equity in your residence or vacation homes, and fret over the potential loss of these valued real estate assets from lawsuit risk presented by your business activities, consider using the NV trust gift/le



**JEFFREY M. VERDON
LAW GROUP, LLP**

The Fusion of Planning and Protection.

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

1201 Dove Street, Suite 400, Newport Beach, CA 92660
333 Twin Dolphin Drive, Suite 220, Redwood City, CA 94065

949-333-8150 • www.jmvlaw.com



More Effective Leading by Working With Rotary

When you give back to your community, you don't expect to get anything back. But that's exactly what happened when the COVID shutdown was about to impact my employees and my business.

When COVID hit in 2020, St. Jude's Fullerton hospital reached out to my Fullerton Rotary club for assistance in getting masks and shields — supplies the hospital desperately needed for its healthcare providers. At the same time, as a non-essential manufacturing business, my company was about to shut down. Rather than sending our employees home, we pivoted to help run a face shield project sponsored by our Rotary district.

Rotary clubs in our district donated funds to purchase materials and trained volunteers to assemble face shields. Our project met the hospital's needs and enabled the donation of over 90K face shields to frontline healthcare workers. All told, our clubs raised \$132K, brought together 787 Rotarians and community members who collectively volunteered 3,919 hours of their time, and my business was kept open.

When I joined Rotary in 2007 seeking the opportunity to enrich the lives of others, I didn't know what I would find. I found clubs filled with vibrant, compassionate business and community leaders of all ages, and from all walks of life. I knew I was in the right place when I saw firsthand that each Rotarian embraces the Rotary motto of "Service Above Self."



Since joining Rotary, I have been president of the Fullerton Rotary Club and have recently been inducted as district governor for district 5320, which comprises Orange County and other cities surrounding Long Beach. As district governor, I oversee 48 Rotary clubs and approximately 60 youth-oriented clubs in local high schools and colleges.

My goal for my tenure in 2022/2023 is to do more good in our communities and to expand our reach and impact by encouraging local business leaders to partner with or join Rotary. We are a predominantly volunteer organization with world class fiscal oversight, so 93% of what we raise gets to its intended cause.

Clubs in our district meet every week or month. Together we directly impact the lives of those in our community through significant economic support and hands-on volunteer efforts. During fiscal year 2021-2022, clubs in our district provided over \$500K in grants to local nonprofit organizations and over \$2 million on other community service.

We also reach across the globe to partner with other Rotary clubs, which are found in 220 countries (more countries than are in the United Nations). Together, we work to bring about peace in our world by helping humanity in areas struggling with extreme poverty, famine, disease, war, lack of education and limited access to clean water.

As a Rotarian, my life has changed in so many ways, both personally and professionally. I have become a better leader, a better humanitarian, and have expanded my network to include Rotarians from around the world who have been instrumental in helping me in my business and in doing more good.

Dan Ouweleen
District Governor, Rotary District 5320

DO MORE LEADING



Rotary brings together people like you. Leaders from all cultures and occupations who want to use their distinct expertise for good.

People whose sense of responsibility inspires them to give back to their communities. Who step forward to tackle the toughest challenges — and persevere to create lasting change in communities around the world.

There are no secret handshakes, funny hats, flamboyant regalia or fancy titles. Rotary clubs are filled with business and civic leaders who call each other by their first names because friendship and service are more important than ego.

Just a simple pin that represents the value of service to others. A pin that opens the door to more than 46,000 clubs in over 200 countries around the world. And makes Rotary's 1.4 million members your new friends.



JOIN TODAY
Rotary5320.org

Sale-Leaseback: Unlock Equity Tied Up in Real Estate

Businesses looking to access capital may find a lucrative source through sale-leaseback (SLB) transactions. In an SLB, a business sells a real estate property or portfolio of properties, and at the same time executes a long-term lease to occupy the property or portfolio. Effectively, the business is transitioning from the role of property owner to tenant.

Sale-Leaseback Arbitrage Value

Many middle-market companies don't realize the true value of the real estate owned under today's market conditions for SLBs. Unlike the value generally placed on real estate that is "owner occupied," an SLB value can be worth significantly more. The underlying cause for this arbitrage of values is due to the increased weight given to the seller's (future tenant's) credit by an investor in an SLB transaction.

An SLB investor is a passive real estate owner looking for long-term, secure returns that are usually protected against inflation through modest annual rent increases. These investors are willing to pay lower cap rates (i.e., higher prices) for SLBs the stronger the business' perceived credit.

"In a lot of cases, companies may not realize that they have too much money tied up in an underperforming asset. Sale-leasebacks allow companies to take that equity out of the real estate and invest it elsewhere where they can generate a higher return."

Is a Sale-Leaseback the Right Fit for You?

An SLB is an equity-raising strategy that companies pursue for a variety of reasons. For some companies, 50% or more of the value of the company may be locked in its real estate. Capital tied up in occupied real estate typically increases in value by about 2%-3% per year.

Other key benefits to an SLB include:

- Finance an acquisition or reinvest in their business.
- Fully monetizing company value when an SLB is combined with a larger M&A transaction.
- Maintain control of the property through a long-term lease.
- Tax advantages, as tenants can deduct their full rent payment as a business operating expense.

- Valuable tool in succession planning for a family-owned business, as it allows the owner to separate the real estate from the operating company, generate liquidity at a premium, and diversify for retirement.

Best Practices for Maximizing Value

For companies considering an SLB, key steps that can help to maximize the value and ensure that the transaction aligns with business strategy include:

1. Evaluate goals and objectives. Answer three key questions:

- What are my capital needs?
- What are my strategic plans for the company, and how might that impact my use of the property?
- Does the facility functionally work for business operations in the short term and long term?

2. Hire a professional experienced in valuing SLB transactions. There is underlying value in the real estate, but what drives the SLB market is a company's credit profile. SLBs are often viewed in the investment marketplace as corporate bond-like assets because they are typically backed by companies that sign long-term leases of 10-15 years or sometimes longer.

3. Take a targeted approach. Targeted marketing puts the opportunity in front of the right pool of potential buyers.

4. Use a highly structured, competitive bidding process. Multiple rounds of competitive bidding help to generate optimal offers.

5. Seek guidance on structuring terms and closing. There are different control measures that can influence pricing, such as rent and lease term. It is important to set the rent at a level that helps to achieve the highest value possible but not so high that it negatively impacts a company's business operations and cash flow.

When looking at SLBs, it is important to take into account real estate, credit profile, and an organization's goals and objectives. It also is important to look beyond pricing metrics and make sure that there is a good cultural fit and alignment of goals between the buyer and seller. ■

Aaron Olson is Senior Vice President, Regional Manager, Middle Market Banking for Fifth Third Bank in Orange County. To learn more about Fifth Third Bank, contact Aaron.Olson@53.com.



FIFTH THIRD BANK



Ingram Micro Inc.

At Ingram Micro, we’re committed to helping the world *Realize the Promise of Technology*. This vision rings a similar tune with the goal we have for our people—helping all our associates realize their full potential.

Creating and maintaining a culture of inclusion and diversity is a cornerstone belief at Ingram Micro. Our focus is to equip every team member with the resources, tools, education and partnerships required to support an inclusive workplace; one in which every associate can thrive. When our associates feel valued for who they are, they are more inclined to bring new ideas and innovation to the forefront, directly benefiting our business, our customers and our partners.

As the heart and soul of our company, each member of our global team—28,000 and counting—offers unique insights shaped by individual experiences, backgrounds, lifestyle choices, physical traits, varied perspectives and more. Our unique perspectives generate innovative ideas; our lived differences help us find new futures; and our varied strengths and weaknesses enable our growth and continued success.


In the past year, we were honored to join the ranks of other prominent companies noted for their DE&I achievements. Most recently, we celebrated our perfect score on the Human Rights Campaign’s Corporate Equality Index. We have also been awarded Great Place to Work® Certification™ for 2022-2023 in the U.S. and 14 other locations around the world. Our locally led, associate-driven Employee Resource Groups have been growing, including our Women’s Leadership Forum, which provides our female associates with the tools, resources and opportunities to develop new skills and accelerate their own career development.

“Our organization is committed to welcoming unique and authentic perspectives and differences of all types. Promoting the free flow of ideas, openness, kindness, and respect for everyone will make us better as individuals and as an organization, while further strengthening our business,” said Scott Sherman, executive vice president, Human Resources at Ingram Micro. “We continue to



incorporate diversity and inclusion into our learning and development curriculum, as well as in our talent acquisition activities locally and throughout the globe.”

We are excited about our programs and our progress, and we see the potential to do and achieve even more. Great things happen when people from varying backgrounds and cultures work together in an open and collaborative environment. We look forward to continuing to be an employer of choice in Orange County—and around the world—as we build further on our vision of helping every Ingram Micro associate realize their full potential!



SUPPORTING A WORKPLACE WHERE EVERYONE THRIVES.

Let’s shape tomorrow.

Learn more at careers.ingrammicro.com.

Together

Ingram Micro

Protecting your company against cyber threats

By: Raymond English

Business Information Security Officer and Vulnerability Management Executive, MUFG Union Bank



In a world of ever-growing cybersecurity threats, it's no longer enough to focus on your own company and its defenses and the fraudsters plotting to break through them. You also have to worry about the potential danger posed by vendors in your supply chain.

This danger is often referred to as "third-party risk," and there are two primary forms:

- **Risk associated with service partnerships.** Your company assumes additional cybersecurity risk when you use third parties to support or directly provide a service. Often this requires your business to share customer data with the third party. You can no longer count on just your company's own defenses to protect your customer's data. You also must rely on the defenses of those third parties.
- **Risk associated with your interconnectedness with a supply chain partner or vendor.** A third party, having access to your network, could unwittingly serve as an access point for a fraudster to compromise the network or data stored there.

Failure to extend your information security perimeters can lead to customer data breaches and account takeovers, potentially resulting in operational disruptions; loss of data, including intellectual property; financial losses; and reputational damage.

Evaluating a third-party's policies and practices

To minimize third-party cybersecurity risk, companies need to thoroughly review the information security policies and practices of their vendors.

Start by reviewing the vendor's Service Organization Control 2 (SOC 2) report, an outside auditing firm's evaluation of its controls. Confirm the vendor has implemented key security principles such as segregation of duties and "least privilege." The latter ensures only vendor employees who need it will have access to your data.

Also investigate if a vendor has any technical vulnerabilities: Does its software have all the necessary, up-to-date patches? Are its security settings properly set, allowing it to defend against unauthorized access? And is any of the vendor's technology at the end of its life or no longer supported by the supplier?

Review higher-risk vendors at least once a year. Also, consider reviewing vendors with access to your company's most sensitive data and core banking processes on site, where your staff member or a contracted auditor can see if the vendor is actually practicing the principles attested to in the SOC2 report.

Companies can also use third-party information security ratings providers to bolster their evaluations. These providers will review a vendor's technology controls and provide a report with a score. Choose a provider that is commonly used by your industry.

Also include in your evaluations a review of the vendor's financial health and stability. This can tell you if the vendor is well-positioned and a healthy company, and therefore more likely to invest appropriately in information security.

Avoiding a supply chain attack

Here are five actions you can take to protect your company against supply chain cyberattacks:

1. **Stay informed.** Keep abreast of news that might require you to take action to protect your systems and data from a supply chain attack.
2. **Use fewer vendors and evaluate each one more thoroughly.** Using few vendors reduces your overall exposure to cyberattacks and allows you to conduct deeper and more effective security reviews.
3. **Limit and control third-party vendor access.** The more access to data a third party has, the greater the risk for a cyber incident.
4. **Identify and evaluate the controls of any fourth parties.** Does your vendor contract with other parties that might have access to your network or data? If so, you need to subject those fourth parties to a security review as well.
5. **Increase the cybersecurity awareness of your employees.** Regardless of where attacks originate, it's important that you have employees who are alert and educated about potential cyber threats.

Addressing a huge and growing risk

Supply chain cyberattacks are a huge and growing risk. These days, all businesses are connected to the internet, and the threat has magnified as we've moved from local to global supply chains.

As a result, all companies must work to fully understand the risks they face related to third parties, have a complete list of all companies involved in any of their supply chain activities, and ensure they have the proper controls in place to protect themselves.

At Union Bank, your privacy and security are our top priorities. Learn more about how you can safeguard your information and financial assets at www.unionbank.com/commercial/insights/fraud-prevention

 **UnionBank®**
A member of MUFG, a global financial group



UCI Health

A clinical trial was my best hope. The treatment saved my life.

At UCI Health, we're actively enrolling patients in more than 400 clinical trials for cancer, digestive health, cardiology, neurology and neurosurgery. With every new discovery and breakthrough moment, our research improves the lives of our patients and shapes the future of medicine for Orange County and beyond.



Learn more about our clinical trials
at ucihealth.org/clinicaltrials
Or call 714-464-6920

Model used for illustrative purposes.



Gender Equity as a Business Imperative for Private Equity

Despite the challenges, there is much the private equity industry can do to improve gender diversity

In recent decades, great strides have been made in improving gender equity in the workplace. However, significant disparities persist in private equity, which continues to be a male-dominated business.

Kerensa Butler, partner and Southeast private equity leader at RSM US LLP, spoke with Private Equity International to discuss the importance of supporting gender diversity and the measures she's seen as effective in addressing the issue.

What is holding private equity back when it comes to achieving gender equity?

Until recently, there was no significant mandate to address underrepresented populations in our industry, with gender inequity being at the forefront of the issue. General partners answer to their investors, and only in the past few years have limited partners started to ask for gender-focused investing or gender-smart investments. Now LPs are focusing on a fund's efforts around diversity, equity, and inclusion, requiring private equity firms to take action toward doing the right thing.



Kerensa Butler
Partner, Audit Services

Another issue is the fast-paced, transactional nature of our business, which makes work-life balance challenging, particularly for working parents. Historically, private equity firms have not had policies supporting flexible work arrangements. Adding to the problem, many firms are running high-profile companies with very few people, limiting their capacity to build a truly inclusive culture.

“Creating goals and measuring progress are critical to holding a business and people accountable.”

Kerensa Butler,
Partner, RSM US LLP

Finally, there are not many role models for women in private equity, making it difficult for young female professionals to see themselves rise as leaders within their firms. As the world changes and we get more women and other underrepresented populations in leadership, they will become the sponsors to achieve more equity.

Private equity firms are working hard to create a sustained effort where diversity is an everyday focus. They are making changes and creating programs, striving to move from awareness to sustained progress relative to DE&I.

Why should managers prioritize increasing gender diversity at senior levels?

Research suggests diverse teams deliver better returns on investment. Gender-balanced teams bring more perspectives to the table, resulting in varied insights to help companies avoid problems and increase their valuation. Managers should commit to building a diverse and inclusive industry. It comes down to values. If a firm believes in investing in a company and securing its future, then investing in its people goes hand in hand.

At RSM, we adhere to our values of integrity, teamwork, respect, excellence, and stewardship. We believe that doing right by our people makes us all happier, creates better results, and enables the firm to attract and retain more top talent.

What sort of actions can managers take to address this? What have you seen working?

Leaders must be vocal about their intentions. The private equity firm needs to say it is committed to DE&I values and is aware there is work to do, and then move forward with embedding meaningful change into the culture.

I have seen private equity firms do everything from setting goals for their firm and portfolio companies to investing in specific types of diverse entities. They might have goals for achieving a certain level of diversity on the board, their investment committee, or the boards of their portfolio companies. Likewise, for hiring, they might require that each new class of associates be split 50-50 based on gender.

There are other measures firms are introducing, such as recognizing that if you go into a meeting and find everyone around the table looks the same, you will probably not get the results you want. Some firms have a policy that every meeting should comprise an odd number of participants and have diverse people in the majority.

Firms can also set up mentoring programs. The key to supporting future leaders is to ensure each up-and-comer is assigned a senior sponsor trained in effective mentorship.

Another key ingredient is to create more workplace flexibility. During the pandemic, we have seen a lot of mothers pushed out because work-life balance became impossible. It is time for new workplace policies that do not force people to choose between family and career.

How important are data measurement, tracking, and targets to achieving progress in this area?

People often say that what you don't measure doesn't change. Creating goals and measuring progress is critical to holding a business and people accountable.

With investments, key performance indicators need to be agreed upon at the portfolio level to track metrics such as the number of diverse new hires, the number of diverse retained hires, and the percentage of women on boards.

We can also compare valuations achieved by diverse investment committees to those by nondiverse committees, which many private equity firms are now doing. Plus, LPs are asking for specific KPIs, so managers must be able to report on more metrics relative to DE&I efforts.

How might firms better consider gender diversity when investing, as part of their ESG agendas?

The rise of environmental, social, and corporate governance continues to gain traction in private equity, again largely due to investor demand. Beyond the evidence that having a strong ESG proposition can produce strong returns, there is a general mindset shift happening in support of investments that make the world a better place.

DE&I is considered a social component of ESG, which is also where gender diversity investing fits in. The concept is to make a difference from the perspective of women and other underrepresented populations by opening up access to startup capital and producing goods and services designed for women and minorities—without sacrificing investment returns.

For private equity funds considering this avenue, the easiest thing to do is invest in female-led businesses. Finding such investment opportunities requires expanding your networks and increasing diversity in your business development and sourcing teams. Across the board, managers need to be elevating and celebrating women and advancing them into leadership roles.

It is essential to assemble gender-balanced leadership teams with goals for board and senior management diversity and to consider replicating this model at every business level. These goals will differ by sector. For example, traditionally male-dominated industries may focus on attracting female talent through scholarships or apprenticeship programs. However, levers can typically be used, and KPIs are a great way to measure and track progress.

There is a fight for capital, and LPs are focused on this issue because they have a responsibility to ask. LPs can set the tone by prioritizing DE&I considerations before making investing decisions.

At RSM, we are seeing a push for ESG policy development, and reporting of financial and nonfinancial issues is apparent in ongoing portfolio management, as well as in mergers and acquisitions due diligence for both buy-side and sell-side transactions.

In response, we continue to invest in our robust set of ESG solutions, from gap assessments to evaluation methodology, while leveraging capabilities from across the firm.

About RSM US LLP

RSM's purpose is to deliver the power of being understood to our clients, colleagues and communities through world-class audit, tax and consulting services focused on middle market businesses. The clients we serve are the engine of global commerce and economic growth, and we are focused on developing leading professionals and services to meet their evolving needs in today's ever-changing business environment.

RSM US LLP is the U.S. member of RSM International, a global network of independent audit, tax and consulting firms with 51,000 people across 123 countries. For more information, visit rsmus.com, like us on Facebook, follow us on Twitter and/or connect with us on LinkedIn.



Providing Integrated Housing and Healthcare for Women Experiencing Homelessness

Illumination Foundation has been providing integrated housing and healthcare services to those experiencing homelessness for the past 15 years. Our mission is to disrupt the cycle of homelessness in Southern California by providing a comprehensive safety net of client-centered services for the most vulnerable individuals, families, and children.

Over the past three years, we have seen an increase in vulnerable women referred to our programs, specifically single moms and senior women. As a community we need to invest in the health and safety of women experiencing homelessness who face unique challenges and barriers. We prioritize the safety, security, and health of the women in our care, providing comprehensive services to meet their complex housing and healthcare needs. In turn, making for the most efficient and effective use of community resources.

“Illumination Foundation is not a shelter, it’s a village.” — Mary

There is more work that needs to be done to support women and the need is great. The most recent homeless count in Orange County found that there were 5,718 people experiencing homelessness, including 2,069 women, 389 families, and 718 seniors. It is widely believed that the actual number of persons experiencing homelessness in our community is much higher than this one-day snapshot indicated.

- According to the Census Bureau, more than 83% of families experiencing homelessness are female-headed.
- Single mothers experience disproportionate economic hardships which puts them at increased risk of homelessness—a situation which can quickly spiral downward with dire consequences for their children.
- At Illumination Foundation, the number of single mothers we serve has increased 114% during the past three years.



• At Illumination Foundation, the number of senior women (62+) we serve has increased 188% in the past three years.

Illumination Foundation believes that every person has an intrinsic right to home, health, and dignity. From street to home, we provide a full continuum of care and resources to bring people the support they need.

Our model of integrated housing and healthcare has made an enormous impact on women experiencing homelessness. Through this approach, we ensure that our clients are provided with the tools, support, and resources necessary to attain the highest quality of life possible.

You can be part of the solution in disrupting the cycle of homelessness. By supporting Illumination Foundation you invest in the lives of women, you invest in our communities, and you invest in a better future.

You can make an impact today. Make a difference as an advocate, partner, donor, or volunteer. Join Illumination Foundation in our mission to disrupt the cycle of homelessness. For more information, go to www.ifhomeless.org.



Celebrating 15 Years of Housing and Healthcare Integration

Illumination Foundation has been providing integrated housing and healthcare services to those experiencing homelessness for the past 15 years.



Be part of the solution in disrupting the cycle of homelessness. You can provide home, health, and dignity to individuals, children, and families.

We invite you to partner with us to make a life-changing impact for our most vulnerable community members.



ifhomeless.org

Lugano Diamonds celebrates

WOMEN IN BUSINESS

We at Lugano Diamonds are honored to celebrate women in business. Not only do we have spectacular women at every level of our company, but we are also proud to make jewelry that adorns some of Orange County's most successful women in business. Lugano and every other company are enriched by the tenacity, skills, and perspectives of women who have worked twice as hard to get where they are. This month – and every month – Lugano Diamonds salutes Orange County Women in Business with a collection of jewelry that symbolizes each leader's accomplishment, determination, and mastery.



EBONY & DIAMOND POWER COUPLE

Pink Diamond & Ebony Ring

Black ebony and a nearly 2.5 carat pear-shaped pink diamond couple with an authoritative nod to strength and compassion – two powerful attributes for business and women in the workplace.



A PINK ACE OF SPADES

Spade Design Earrings

Strong but understated jewelry can empower women in the workforce to be powerful agents of change by inspiring confidence, action and results. Four carats of pink diamonds doesn't hurt either.



RUBBER MEETS DIAMONDS

Multishaped Rubber Bracelet

From voting in a corporate board room to presenting a captivating TED Talk, this distinctive bracelet created from a duo of black rubber and artfully placed pink diamonds helps to grab attention.

LUGANO[®]
DIAMONDS

NEWPORT BEACH | ASPEN | PALM BEACH | OCALA | HOUSTON | LUGANODIAMONDS.COM | 949.720.1258





PNC Bank and Chip Ganassi Racing have teamed up for Women in Motorsports, an initiative focused on gender equality and economic inclusion for women in the workforce. This internship program (pictured) engaged female college students in on-site learning and career-development experiences over several months during this year's INDYCAR season. Initiatives like Women in Motorsports help address one of the drivers of the economic gender gap, women's underrepresentation in the workforce.



How PNC is Helping to Close the 257-Year Economic Gender Gap

According to the World Economic Forum's 2020 Global Gender Gap Report, if progress continues at its current pace, it will take women another 257 years to catch up economically to men. That is not fast enough for us at PNC Bank, which is why we launched Project 257®: Accelerating Women's Financial Equality last year.

Building on our longstanding commitment to support female financial decision makers, Project 257® is focused on our efforts to help close the economic gender gap. This includes the continued growth of PNC's network of more than 4,500 PNC-Certified Women's Business Advocates; our partnership with the global nonprofit Coralus (formerly SheEO) through which it has expanded its 0% loan pool and community of support for women and nonbinary business owners; and the establishment of our internal Project 257 Task Force to identify and catalog the work that's been done within the bank, work we have planned and the synergistic opportunities to continue our efforts to close the financial gender gap.

PNC's Women's Business Development practice was officially established in 2000 to reflect our recognition of the increasing impact of women as decision makers and influencers. We strive to bring women together through interesting and informative programs, focusing on financial wellness and empowerment for customers and non-customers alike. The devotion from our employees across the nation echoes PNC's commitment to empowering women business leaders and decision makers.

As we continue to expand our presence here in Orange County, we want every female financial decision maker to feel seen and heard. PNC recognizes that this

commitment to fairness and equality is not only right, but essential for attracting businesses and talent, and growing the local economy.

Women are a driving force of economic growth in the U.S. – and economic gender equality would further propel the economy. Research from the Federal Reserve Bank of San Francisco noted that women's equal representation in the workforce would have added approximately \$1.17 trillion, or eight percentage points, to the 2019 GDP – roughly the equivalent of \$1 trillion in additional consumer spending and more than eight million new jobs. PNC Initiatives like Women in Motorsports help address one of the drivers of the economic gender gap – women's underrepresentation in the workforce. And at PNC, we continue to support initiatives like this to empower women at all levels.

I am keenly aware of the economic inequities that women confront, and my wife and I want both my son and daughter to grow up in a world where they are paid equally for equal levels of work regardless of gender. I am proud to be part of a company like PNC that is making intentional strides toward equality. And as the Regional President for PNC in Orange County and Inland Empire, I am privileged to serve alongside the dynamic women on our team as we leverage the power of our resources to move all forward financially.

Project 257 is a service mark of The PNC Financial Services Group, Inc. PNC and PNC Bank are registered marks of The PNC Financial Services Group, Inc. ("PNC")

Jarrold Ingle is the PNC regional president and head of corporate banking for Orange County and Inland Empire. He is a veteran banker with over 25 years of experience in the industry. He is also a PNC-Certified Women's Business Advocate.



TGR Foundation:

CHAMPIONS FOR YOUTH



Jin Thatcher has a passion for helping under-resourced communities. As a graduate of Western High School and University of California, Irvine, Jin works tirelessly to drive meaningful impact for youth in Orange County through her role as Executive Vice President of Tiger Woods' nonprofit, TGR Foundation.

Throughout her 19 years with TGR Foundation, Jin has been a champion for youth, leading numerous initiatives to expand the foundation's reach and impact including the Earl Woods Scholar Program and TGR Learning Lab. Both programs have impacted thousands of lives.

Jin and her team designed the Earl Woods Scholar Program to help first-generation college students achieve their dreams of graduating college. The program delivers transformational impact beyond financial aid by supporting students as they navigate the journey from high school through college and into a successful career.

The TGR Learning Lab opened in 2006, executing Tiger's vision to create a "safe space for students to learn, grow and chase after their dreams". Serving middle and high school students in Anaheim and the surrounding communities, the Lab has been completely reimagined under Jin's guidance and is ready to relaunch in the fall of 2022.

Complete with technology upgrades, modernized classrooms, collaborative workspaces and hands-on learning opportunities, the Learning Lab will continue to help students learn, grow and thrive for years to come.

Yeon Jin Lee has seen what it means to be a champion from multiple angles. As a first-generation college student, the Earl Woods Scholar Program ignited her passion and empowered her to achieve personal and professional successes.



After immigrating to Los Alamitos to pursue greater opportunities, Yeon Jin and her family faced several challenges securing residency and access to education. With the support of TGR Foundation, she graduated from the University of California, Berkeley, secured her green card, excelled in an engineering position at NASA and ultimately followed her passion for filmmaking to the University of Southern California, earning a Master of Fine Arts in Film and TV Production.

Using filmmaking as a tool for advocacy, Yeon Jin shares untold stories of undocumented immigrants and marginalized communities. She has produced several award-winning films and podcasts. She currently works as a Producing Program Assistant in the USC School of Cinematic Arts.

"Jin Thatcher has been my champion through college and my career journey. All the staff and students at TGR Foundation have been a second family to me, providing me with financial, emotional and mental support needed to really succeed academically and professionally."

-Yeon Jin Lee
Earl Woods Scholar Alumna



WE ARE CHAMPIONS FOR YOUTH

At TGR Foundation, we connect passions with purpose to help students learn, grow and thrive.

BE A CHAMPION

TGRFoundation.org/CHAMPIONS



@TGRFound



@TGRFoundation



@TGRFound

The Power of the Huddle

I can certainly attest to the power of huddling from my own professional experience, and how that type of teamwork helps nurture successful women throughout their careers.

I started out in social work with a nonprofit organization before I realized my passion for banking, commercial banking in particular. I was intrigued with the left brain-right brain mix that the business required. Given the client focus of commercial banking, you have to be intuitively in touch with others; at the same time, you need good thinking and analytical skills.

To say banking was male dominated at that time is an understatement. The industry was firmly in the bow-tie era when I got my start. There were plenty of women in retail and in certain corporate functions, but not so many in client-facing roles—certainly not as many as there are today. Trying to work my way up in that environment was a challenge, but I never thought of it as being difficult. Instead, I gave myself permission to say, “I can figure this out.” That statement has become a kind of mantra for me.

I knew one of the ways to figure it out was to find people who could help guide me up the ladder. Since my career began doing group social work, I was naturally attracted to the power of the group. As a banker, I also saw the power of thinking like an investor in terms of my career (again, left brain-right brain). For me, that not only meant investing in my success, but returning the favor to everyone who had contributed to my success as well.

I knew I had to find people who understood the value I could bring. I made sure my work was on point, on time and added value to the desired outcome. Sooner or later, I understood who was pleased by consistent and deep execution. By doing the work, doing it well, doing it for the benefit of others, and then staying connected with those who understood the value in what I was doing was how I started creating my huddle.

Enlightened self-interest

One of the earliest investors in my career was a male partner at what was then called Peat Marwick (now KPMG). He was the person who would bring me to client meetings and trade associations. After about three years, I asked him why he invested so much time in my development. He said, “I took you at your word that you wanted to be good at this, and I trusted that you knew how to do the work and that you would be willing to do the work.” That has stuck with me ever since.

From then on, I gave myself permission to spot the type of people I wanted to surround myself with. I was fearless about calling people up, asking if I could take them to lunch. To improve my weak spots, I aligned myself with CPAs and attorneys who were very active in the segments that I wanted to pursue. But I knew it couldn’t just be all about me.

I’m a big believer in enlightened self-interest. For me, that means if you do two strategic and intentional favors for someone else, you’ve earned the right to ask for a favor in return. When you apply this principle, you learn really quickly who’s willing to show up to help with something important to you.

Enlightened self-interest means that I never show up as a taker. The world, including banking, is full of takers—people self-focused about what other people could or should be doing for them. I’ve always operated on the flip side—that is, I will get more people rallying for me when I figure out how to be value with something that’s important to them.

Finding and maintaining a huddle is other-focused, not self-focused. That’s why when seeking information or guidance, I always lead with, “I would like your advice.” Because who says no when you ask for their advice?

The power of the huddle is that it sets up a mutual engagement and support environment. At its core, a huddle is teamplay. When you play for the good of the team, there will be something good that comes back to you as an individual. At its best, a huddle creates a multiplier effect. When you have one person who’s energized, then you add three more who are equally as energized, the sum of the group is greater than its parts. When it’s done right, even if there are only two of you at the table, it feels like you have the power six people.

When you have a well-functioning huddle, your gatherings are less like meetings and more like caucuses. It’s about showing up with energy that’s geared toward a mutual exchange of value and trust. I’ve found that meetings don’t always imply that level of trust. Huddles are also situational. I have huddles involving charitable work and various business activities. But the concept is not so structured that you need to create specific huddles for specific purposes. I’ve found that the members of your huddle should be versatile enough that it can help with spontaneous situations.

To get to that level, a huddle requires constant engagement. I’ve tried very hard over the years to avoid takers and finding relationship tenders. You pick people who are aligned with who you are, and who won’t disappear once they get what they wanted. In a well-tended huddle, no one should ever feel obligated to help you.

Putting in the work

As I’ve advanced in my career to a leadership position, the needs of my huddle have changed. I look for people with positive energy and drive, and a steady state of curiosity and open-mindedness. You can’t be successful in this business if you’re not constantly learning. After all, every time you’re talking to a prospect, you’re trying to understand their business, their needs and their goals. The same applies to creating and maintaining your huddle.

A final insight: the huddle doesn’t find you; you have to find your own huddle. Ultimately, you are the owner of your career, and it’s your job to find those who are willing to be investors. You have to do the work to make people interested in helping you. And the way you do that is not by asking them to help you. It’s by helping them, doing the work, then showing them that you’re worthy of their help.



Katie Kelley
Vice Chair, BMO Harris Bank

As Vice Chair, Katie engages with the business in developing new and existing clients in the commercial bank. She also strategically engaged in growing market share in all of BMO Harris Bank’s regional markets.



Empowering Women Leads to Firm Growth

The faces of many accounting firms have long been male, with men dominating the ranks of partner and principal in overwhelming numbers across the industry. Data from the U.S. Bureau of Labor supports these observations: while approximately 60% of all accountants are women, they only represent around 25% of firm leadership.

Though the industry has always been considered slow to change, UHY is committed to closing that gap, investing more resources into training, pairing women with mentors that encourage them to take a leadership role, supporting policies expanding work-life balance, and formulating succession plans that create specialized paths to leadership.

Empowering women is just as much part of UHY's growth strategy as a new market, representing an investment into not only the firm's growth, but the next generation of leadership. In January, UHY announced this year's promotions included 12 new partners, half of which consisted of women for the second consecutive year.

"Our mission as UHY evolves is to continue to empower the women within our firm and help them grow, having flexible workplaces as necessary and providing the tools they need to be successful and assume management positions," Michael Mahoney, Regional Managing Director, said. "Our track record shows it; we continue to promote more and more women to partner every year."

From manager level, women across UHY are creating and leading growth initiatives that result in greater opportunities in new and existing markets. Some

of the biggest increases in revenue are coming from the Employee Benefit Plan Audit practice, Client Accounting and Advisory Services, Tax, Transformation Solutions, and SPAC Support Services, all captained in part or whole by women partners and principals.

Part of UHY's empowerment strategy is creating ways for women to balance the priorities of their professional and personal lives.

An estimated 1.1 million women left the workplace during the pandemic to serve as a primary caregiver, creating a critical gap in their careers. By expanding our work-from-home policies and implementing flexible scheduling, UHY has provided greater opportunities for women to continue building their careers and engaging in professional growth while managing their personal responsibilities.

These small adjustments have paid off with big dividends, creating an increase in revenue, retention, and recruitment year-over-year across the firm.

Women are key to creating future growth, representing more than half of the potential future workforce. Firms willing to bridge the gaps and open space for women in leadership will create sustained growth capable of withstanding economic downturns. As an aging workforce leaves management positions vacant, a strong class of businesswomen, entrepreneurs and leaders may be the key to innovation in an industry that has long followed the "that's the way we've always done it" mentality.

To learn more about a career with UHY, visit www.uhy-us.com/careers.

Congratulations
CRYSTAL LI

We are proud of all your accomplishments and for being nominated as a **2022 Women in Business candidate!**

UHY Audit. Advisory. Tax. Consulting.

4 Park Plaza Suite 350 Irvine, CA 92614
949 517 1607

www.uhy-us.com

The Merage School Brings Tremendous Value to Students and the Business Community

Digital technology has drastically changed how companies operate and grow. Will you be able to keep up with the pace of change and innovation? More importantly, will you be prepared to lead the way?

The UCI Paul Merage School of Business' programs offer a personalized educational experience to help students and partners develop the tools and leadership skills to think creatively and strategically about the challenges and opportunities created by digital technologies.



Count on a Commitment to Unparalleled Educational Quality

The Merage School and its programs consistently rank among the top schools nationally and globally. Worldwide, business leaders choose the Merage School, realizing that its unique combination of curriculum, career advancement, collaboration culture is unparalleled in peer institutions.

"We have made a commitment to our students to provide the highest quality education possible," said Ian O. Williamson, Dean of the Merage School. "Our faculty, students, staff and the business community continually collaborate to ensure our curriculum and resources meet the demands of our students and the employers that hire them. This open dialogue provides tremendous value to our school, our students and the business community."

The UCI Paul Merage School of Business is proud to offer three highly ranked MBA programs:

The **Full-Time MBA (FTMBA)** program is geared toward highly motivated professionals who want to develop critical leadership skills and increase their career potential. Graduates from this unique two-year program represent diverse academic, professional and cultural backgrounds, and rejoin the workforce with a leadership skill set for the digital world.

The **Fully Employed MBA (FEMBA)** program is designed for early to mid-career working professionals and managers who want to pursue a graduate education while they continue their career climb. Students have the flexibility to customize the program around their career objectives and graduate in as few as 24 months. Classes are offered weeknights on-campus and in a hybrid format that combines the best in online learning with four on-campus Saturdays per quarter.

The **Executive MBA (EMBA)** program is designed for those who want to immerse themselves in the dynamic thinking required in our current business environment and aligns with the career goals of mid to senior-level professionals. Classes are held every third weekend for 21-months beginning in September in a format that supplements in-class sessions with state-of-the-art online learning between class weekends. A Healthcare Leadership Track has been built out within EMBA for those who want to apply their knowledge of business as a leader in the changing healthcare industry.



In addition to these well-respected MBA programs, the Merage School offers four specialized one-year master's degrees designed for early career professionals ready to launch into their field.

The one-year, full-time **Master of Finance (MFin)** program thoroughly prepares students for entry and mid-level finance positions such as risk management, asset and wealth management, real estate management and forecasting. Closely tied to professional practices, MFin's curriculum is well-suited to preparing students to sit for the CFA examinations and obtain the Chartered Financial Analyst (CFA®) charter.

Now available in a one-year or two-year format, the **Master of Innovation and Entrepreneurship (MIE)** is the only program of its kind in the UC System, and provides extensive integrated and immersive academic and practical experience for those looking to embark on careers as entrepreneurs (innovating to form new companies) and intrapreneurs (innovating within existing companies).

The **Master of Professional Accountancy (MPAc)** program prepares students for a successful accounting career by offering an intensive and comprehensive one- or two-year format, focused on developing an advanced level of technical mastery and professionalism. Graduates meet the new State of California Board of Accountancy education standards required for the Uniform Certified Public Accountant (CPA) Examination.

The **Master of Science in Business Analytics (MSBA)** program, now offered in a Four Quarter as well as Five Quarter delivery option, prepares students to compete in the high-demand field of big data and business analytics across various industries and around the globe. Students receive the tools necessary to harvest, transform and model data to discover business insights from large volumes of structured and unstructured data.



Empowering the Entire Leadership Pipeline

In addition to our degree programs, the Merage School's **Leadership Development Institute (LDI)** provides individuals and organizations with relevant and research-based solutions to build sustainable, future-proof leadership. With a focus on developing leaders at all levels and enabling effective organizational leadership, the LDI has developed its solutions to mirror and support the advancement and flow of the talent pipeline through its open enrollment and custom programs.

UCI Paul Merage
School of Business

Leadership for a Digitally Driven World™

For more information about The Paul Merage School of Business and our programs, please visit merage.uci.edu.

Ranked #1 for Percentage of Female Faculty & Students*

For nearly a decade, we've been empowering future female leaders by providing them with the knowledge and connections to succeed in the business world.



Digital disruption is on the rise, at every company, within all industries. Such transformation needs a new kind of leader. You. UCI's Paul Merage School of Business is dedicated to breaking through the glass ceiling and preparing leaders to go beyond conventional thinking and embrace the challenges of digital disruption in a world where creative leadership and rapid innovation is required.

Take the next step.

merage.uci.edu

UCI Paul Merage
School of Business

Leadership for a Digitally Driven World™

*Financial Times

Congratulations to the nominees of the 2022 Women in Business Awards!

Reserve Today

Event Date: November 10, 2022



The Orange County Business Journal is currently accepting reservations for the 12th annual General Counsel Awards. The program is designed to recognize the significant role in-house counsels play in the success of businesses within our community.

- General Counsel of Public Company
- General Counsel of Privately Held Company
- Specialty Counsel (attorneys who focus on certain areas of law for organizations)
- Rising Star Award (senior-level, in-house counsel and recently named GCs)
- In-House Legal Team (2 or more members)

Dinner & Awards Program

November 10, 2022
6:30 p.m. – 8:30 p.m.
Tickets*: \$275
Table of 10: \$2,600



Reservation Information

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



Master of Ceremonies

Arnie Pinkston
Corporate Vice President,
General Counsel at
Edwards Lifesciences LLC



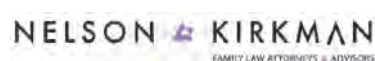
Diamond Sponsor



Platinum Sponsors



Silver Sponsor



*Tickets are non-refundable. Ticket price includes a one year subscription to the Orange County Business Journal (\$30 allocated to the subscription). New subscribers only. Current subscribers may gift the subscription to a colleague.

Congratulations Dr. Ramin Baschshi

*2022 Women in Business
Awards Nominee*

Dr. Baschshi currently serves as President & CEO of Unlimited Possibilities and as the Board Chair of First 5 Orange County.

*First 5 Orange County
and Unlimited
Possibilities
are proud to honor
Dr. Ramin Baschshi for
her excellence in
business leadership
and advocacy for the
most vulnerable
children and families in
our community.*



"Dr. Baschshi's passion for supporting young children and their families is evident throughout her career, and she's helped ensure countless young children receive the resources they need to reach their full potential. As a board member and current Chair of First 5 Orange County, Dr. Baschshi has been a steadfast advocate for early childhood development programs and supported prioritizing early childhood at the policy level. We are thrilled for Dr. Baschshi to receive this well-deserved honor!"

Kim Goll, President & CEO
First 5 Orange County

"Under Dr. Baschshi's tireless efforts and visionary leadership, Unlimited Possibilities has grown exponentially. Not only has her dedication to improving the lives of children and families with disabilities made an incredible impact, it will continue to shape our organization for generations to come. I am incredibly proud to work alongside such an inspiring business leader, and I look forward to watching all that Ramin will continue to accomplish through her advocacy for an inclusive Orange County. Congratulations, Ramin!"

Bradley Barlow, Esq., Board Chairman
Unlimited Possibilities



Women United Local Women Creating Local Change



Comprised of 350+ local business and community leaders, Orange County United Way's Women United members actively create positive change in our community. Through their support of United Way's three initiatives—**United for Student SuccessSM**, **United for Financial SecuritySM**, and **United to End HomelessnessSM**—this powerful and diverse group works to break barriers and improve lives by ensuring local students succeed, struggling OC families gain financial security, and our homeless neighbors find a place to call home.

Networking with a Purpose

Women United members enjoy meeting and networking with like-minded individuals who are passionate about creating long-lasting change within their communities. Networking engagements and event series like **Local, Global & Me**—presented in partnership with Bank of America—are created to empower women.

The next series starts this fall. Presented in three parts, each session will focus on holistic health and well-being, and will feature Dr. Mahtab Jafari, Health and Wellness Coach and Director of UCI's Center for Healthspan Sciences. Don't miss the first session on November 17, 2022. **For more information, contact Jessica Vanderwell at JessicaV@UnitedWayOC.org.**



"We are purpose-driven women from various walks of life, coming together to make our communities better. United Way allows me to bring my gifts and talents to the table and make a lasting impact on others."

—Trina Norman, South Cal Feeder Operations Manager, UPS

Profound Local Impact

Women United members are huge supporters of United Way's Impact Hubs, which are holistic solutions that bring comprehensive programming to local schools and other centers for community life and provide students and their families with easy access to vital services. By implementing a multi-generational approach to tackle poverty and housing instability, Impact Hubs serve the needs of children, their parents, and other local families.

The annual **Women's Philanthropy Fund Breakfast**, hosted by Women United, is Orange County's #1 breakfast fundraiser. Since 2004, this inspirational event has raised millions of dollars to help struggling OC families to transition from surviving to thriving.

"I love that United Way doesn't just provide services for the well-being of children, rather they work to make the entire family successful. When I give to United Way, I know my dollars are going toward their focused approach, which provides foundational support for parents who face overwhelming barriers as a result of generational poverty. Cycles are being broken thanks to their efforts and I'm honored to be a part of this work."

—Brenda Springer, Founder & CEO, Reveille, Inc.



Inspirational Leadership

Women United provides members with meaningful opportunities to join **Leadership Councils** and other impactful committees in which they can use their talents to create positive change.



"What I love about being part of Women United specifically is that it allows me to show up in a real way for my community, even when I can't physically be there."

—Nisha Verma, Senior Legal Counsel, Labor & Empowerment, Falck, and Women United co-chair

Nisha was crucial in the development of a brand new career development program offered through a partnership between United Way's United for Student Success initiative and her company, Falck Mobile Health.

Through this collaboration, Falck has provided underserved high school students in OC the opportunity to attend a two-day First Responders Academy. So far, nearly 100 students have participated and gained technical and hands-on skills through CPR instruction, partial EMT training, and an ambulance ride-along with Falck first responders.

Breaking Barriers and Improving Lives in Orange County



UNITED FOR
FINANCIAL SECURITYSM



UNITED FOR
STUDENT SUCCESSSM



UNITED TO END
HOMELESSNESSSM

To learn more about Women United or to join, please contact Melissa Silva at MelissaS@UnitedWayOC.org or 949.263.6171.

ORANGE COUNTY UNITED WAY
**WOMEN
UNITED®**

Join a diverse group of 350+ local women who actively engage in philanthropy, volunteerism, and advocacy to break barriers and improve lives in Orange County.



MEMBER BENEFITS:

**PROFOUND
LOCAL IMPACT**

Tangible transformation through Impact Hubs

**ESTABLISHED
NETWORK**

350+ OC members, 70,000+ worldwide network

**EXCLUSIVE
EVENTS**

Networking mixers & volunteer opportunities

**MEANINGFUL
ENGAGEMENT**

Join the Leadership Council and other committees



WOMEN UNITED MEMBERS CAN DONATE AT TWO GIVING LEVELS:

Alexis de Tocqueville Society Level

- 1 Invest \$10,000 or more annually, of which \$3,500 or more supports United Way's mission in Orange County

At the Alexis de Tocqueville Society level, your networking opportunities expand even more. Connect with hundreds of top philanthropists and community leaders at special events throughout the year.

Leaders United Level

- 2 Invest \$1,000 or more annually to support United Way's mission in Orange County



"I'm honored to be a part of this influential group of women and play a role in positively impacting outcomes for women and children facing poverty, unemployment and housing instability."

— Maggie O'Sullivan, Executive Director, JPMorganChase, and Women United co-chair



"We cannot accomplish all that is needed as individuals, but with Orange County United Way and the Women's Philanthropy Fund, our dollars go further together."

— Laurie Dubchansky, Founder/CEO, Havaplan Financial, and Women United co-chair



TO LEARN MORE ABOUT WOMEN UNITED OR TO JOIN, PLEASE CONTACT:

Melissa Silva | MelissaS@UnitedWayOC.org | 949.263.6171



HOW TO BOUNCE BACK AFTER YOUR DIVORCE



By **Paul Nelson, Esq**

Imagine this: Your divorce is now final. Congratulations (or condolences, depending on your state of mind). Like a wedding or graduation, a divorce is a life milestone. Things will never be the same. But they might be much better! In the spirit of producing the latter outcome, today's column features advice from life coach Anita K on how to prepare for life's next stage.

But first a little info on Orange County-based Anita K. She has been featured by *Good Day LA*, *Better Homes & Gardens*, *Fox 11 Los Angeles*, *Huffpost*, and *Axios*. Trained and certified by Tony Robbins' Robbins-Madanes program, she's counseled dozens of clients on how to grow and thrive post-divorce. The following Q&A is an excerpt from my interview with her in my forthcoming book, *The Ultimate Guide to Your California Divorce* (publishing in 2023).

Q: How is a person supposed to deal with all the negativity they're feeling?

A: This is when "self-care" comes in. You must make your mental and emotional health a priority. This can mean seeking counseling from therapist or a priest. Going to a yoga retreat. Working with a nutritionist. Making sure you eat right, get enough sleep, and exercise. Prioritizing self-care is absolutely key because it's one of the few things you have control over, and maintaining your physical, mental and emotional health will help ease the pain you are experiencing. (And it's a lot better for you than junk food, alcohol, and/or smoking.)

Q: As painful as divorce is, can it also be an opportunity?

A: Any trauma that shatters complacency is an opportunity for self-reevaluation. You know how the COVID lockdowns caused millions of people to reassess what they wanted to do with their lives? In just a few months, many, many people

changed jobs, switched careers, and embarked on whole new lifepaths. Divorce offers the same challenges and opportunities. Your old life has been stripped away and now you can rebuild it in a way that may be better, more fulfilling.

Q: How long does recovering from a divorce usually take?

A: Expect it to take at least a year. For me, personally, it was two years. But trust the process. It will happen. It may not seem that way when you're in the middle of it but, trust me. You will get through it.

Q: Is there anything that will speed up the recovery process?

A: Forgiveness can help remove the toxic atmosphere you're living in. Now, you might say, how can I forgive my ex? He/she cheated on me 12 times. That's unforgiveable. And, from a

moral perspective, that may be true. But holding that resentment isn't going to help you move on. Once you can stop making everything about you—when you come to understand that cheating was the result of a weakness and failure in your spouse's character—then you can find the strength to move on.

Q: Do you have any final recommendations for divorce recovery?

A: I'm a big fan of vision boards. Every year, I put together a board filled with pictures that help me visualize the experiences I hope to have and the life I wish to live in the year ahead. It's a tool I use to focus my mind on the goals I desire to achieve. (And this can include entering new relationships and finding a new love.) A divorce may be the end of a marriage, but it's not the end of your story. You have the whole rest of your life to live. Learn from your experience and use those lessons to move toward the future you want.

NELSON  KIRKMAN

Family Law Attorneys & Advisors

When the stakes are highest

NelsonKirkman.com

Empowering Women through High Stakes Divorce



PAUL NELSON

4100 Newport Place Dr.
Suite 250
Newport Beach
California 92660

949-760-8888
nelsonkirkman.com

Law firm professionals turn to Nelson Kirkman when business and complex financial challenges are present.

Our history of trial success is legendary in the industry which positions us to fervently protect you, while moving towards a speedy resolution.

NELSON  **KIRKMAN**

FAMILY LAW ATTORNEYS  ADVISORS

High Stakes Divorce Lawyers





Promoting Diversity, Equity and Inclusion in the Workplace

When you promote diversity, equity and inclusion in the workplace, you create an enhanced employee experience that helps connect your business closer to your customers. When your employees and customers alike feel welcomed and accepted, they're more likely to develop bonds of loyalty with your company and to value working for and doing business with you.

However, incorporating diversity, equity and inclusion (DEI) into the workplace doesn't come automatically to most leaders and organizations. Take a look at some of the very real benefits of promoting DEI as well as some effective ways to bring DEI to your workplace.

The Benefits of Promoting Diversity, Equity and Inclusion

Diversity, equity and inclusion is far more than a buzzword. Studies show that workplace diversity boosts innovation and improves financial performance and resilience. A diverse workforce expands your company's perspective and enhances your ability to connect to customers and to solve problems. Diverse companies show evidence of better performance, better decision-making, and higher rates of acceptance of job offers from qualified candidates.

DEI also helps connect management and employees in healthy ways, building relationships and communication. Improved company culture results from DEI hiring in 78% of companies, with financial performance showing improvement in 62% of companies. As it turns out, when employees feel included, innovation and productivity thrive.

So what are some steps you can take to promote DEI in your own workplace?

Ways to Promote Diversity, Equity and Inclusion in Your Workplace

You can have a major impact on your employees and your corporate culture through promoting diversity, equity and inclusion in your workplace. Follow these practices to help boost DEI, including in hiring and onboarding.

Prioritize Diversity in Your Executive and Management Teams

When your employees see diversity and inclusivity in the C-suite, they know that the company as a whole makes DEI a priority.

Prioritizing DEI when hiring management makes a difference to the entire company. While you may not often have the opportunity to affect the composition of the C-suite, you should seize the moment when it arises. Providing advancement opportunities to front-line and mid-level managers with an eye to DEI also sends a positive message. An emphasis on DEI across management will improve communication and transparency, and it will help you continue to attract top talent.

Encourage Employees to Express Themselves

When employees don't feel valued or when they feel unsafe expressing themselves in the workplace, they're likely to quit. You can foster a positive atmosphere when you create a company culture where all employees feel respected regardless of age, gender, religion, race, sexual orientation, cultural or national background, or physical abilities.

How you do this will vary from one company to the next. You might create a communications platform that allows all employees to participate in the way they feel most comfortable. You might also seek out diverse speakers for seminars and meetings. Including diverse facilitators for new hire onboarding also sends a profound message. It's also important to make sure all your managers avoid discriminatory practices of any kind and create an environment in which employees can voice concerns without any fear of reprisal.

Respect and Accommodate Multicultural Traditions and Holidays

You can let your employees know you appreciate an inclusive culture when you make an effort to acknowledge different cultural and religious traditions. Keeping track of multicultural holidays lets employees who celebrate those holidays know that you see them. Consider offering floating mandatory holidays that employees can use to attend festivities that matter to them without having to tap into vacation. You should also pay attention to these

holidays when calendaring meetings, special events or intensive work projects and deadlines.

Other small efforts to acknowledge multicultural traditions and needs can go a long way and send a message of inclusivity. Take a moment to acknowledge holidays and ask employees about their special plans to celebrate.

Enforce Your Company's Anti-Discrimination Policies

Most companies have anti-discrimination policies on the books, but if a company fails to enforce them, company morale will suffer.

Establish a baseline expectation that all employees will be treated with respect, inclusivity and kindness from the top of your organization all the way through the hierarchy. Any abusive words or actions, including divisive language, should be reported to HR right away, and appropriate actions should be taken immediately. If exclusionary and insulting words or actions are swept under the rug, your employees will not take any other DEI efforts seriously.

Broaden Your Recruiting Strategies and Efforts

It's all too easy, when recruiting and hiring, to fall into the easy path of interviewing and choosing candidates who look and sound just like the employees you've hired in the past. Perhaps that's why research shows that many traditional hiring processes are riddled with unconscious bias, with women, people of color, and older adults ignored during recruiting.

By reaching out to untapped groups, you can foster DEI in your own organization. Start by taking a good look at your job descriptions, many of which may have sat untouched for years or even decades. Rewrite them so they're gender-neutral, and consider how they might read to disabled people or other people from historically excluded communities. Your HR department can create a bias-blind system for reviewing applications and resumes so demographics don't play a part in decisions of whom to interview. Setting DEI goals for hiring can also help you diversify your organization, bringing a wealth of perspectives, backgrounds, and skills to the table.

Let Marquee Staffing Help You Build DEI in Your Company

At Marquee Staffing, we have deep experience helping companies find qualified candidates while also helping clients expand their internal DEI. We pair local knowledge of business needs in Orange County with wide national outreach capabilities to help you find just the people you're looking for. Contact us now to see how we can help you promote DEI within your organization.

Renee Loignon Dion Chief Financial Officer

Renee joined Marquee Staffing in 1994, today she is the company's CFO, overseeing not only all Finance and Accounting functions for Marquee Staffing, but also responsible for Marquee Staffing's Accounting Division. Her expertise and understanding of the Finance and Accounting industry is a great match for candidates and clients looking to partner with an expert in their field in support their job search or staffing needs.

To learn more about Marquee Staffing please visit us at www.marqueestaffing.com





QUALIFY PEOPLE, NOT RESUMES

Marquee lets you take back your most precious commodity: Time.

The medical device industry is fast-paced and high pressure. You're forced to do more and do it faster in a rapidly changing regulatory environment.

Who has time to recruit effectively? You do, when you partner with Marquee Staffing.

Partner with Marquee to win the war for talent and beat the competition.

WE ARE EXPERTS IN:

- Regulatory compliance
- Clean room manufacturing
- Medical device engineering
- Quality inspection / control / assurance
- Regulatory and clinical affairs

CONTRACT • CONTRACT-TO-HIRE • DIRECT





Giving blood so others may live

Dr. Minh-Ha Tran

Critical shortages highlight need for more donors

Every day in hospitals across the country, patients need lifesaving blood products. But a nationwide shortage of has put severe stress on U.S. — and Orange County — healthcare systems.

Dr. Minh-Ha Tran, medical director of UCI Health transfusion services and a UCI School of Medicine professor of pathology, explains why it is crucial that more people become regular blood donors.

What is causing chronic U.S. blood shortages?

U.S. blood donations have declined steeply since 2015, with only about 5% of eligible U.S. adults — mainly baby boomers — now participating regularly. “Since there is no substitute for blood, recruiting new donors across all age groups is of utmost importance,” Tran says.

Shortages intensified during the pandemic, which dealt a significant blow to blood collections across the country. Mobile blood drives at high schools, colleges and businesses ground to a halt. Those regular donors instead had to go to blood collection centers, where many feared exposure to COVID-19. Even when mobile blood drives resumed, social-distancing mandates limited the number of people who could give blood at the same time. By late 2021, supply disruptions caused by pandemic-related staffing shortages and increased delivery costs further reduced the collection and distribution of blood.

“As things have eased somewhat, we’re working as hard as we can to rebuild our supplies and donor base,” Tran says.

Does UCI Medical Center have a special need for blood products?

As a Level I trauma center, UCI Health has Orange County’s busiest emergency department. Typically, a medical patient needing a transfusion requires about one or two units of blood. Major surgical cases may require up to four units. But a trauma patient with catastrophic injuries may need 40 to 50 units of blood.

“It’s common for us to order 20 to 30 units of red blood cells at a time to support ongoing transfusion needs and to partially replenish inventory levels in anticipation of the next major trauma case,” he says. “But vendors are only able to supply these units if they are getting sufficient donations from first-time and repeat blood donors.

Fortunately, UCI Health is blessed with amazing donors who come to our blood donation centers in Orange and Irvine,” he says. “They have been tremendous, responding to the challenge.

However, donations have not caught up with the need.

What will ease the shortage?

Tran emphasizes that the need is constant. “Blood transfused into a patient today was collected, tested and processed days or weeks ago. But blood products have a limited shelf life. It’s a delicate balance. We must be careful to avoid building excess inventory that could result in high discard rates, wasting this life-giving resource.”

The best way to make a difference is for healthy people to become regular donors of whole blood or platelets, a type of blood cell that helps stop bleeding and promotes healing. People can donate whole blood every 56 days, while platelet donors can give as often as every two weeks.

What motivates people to give blood?

Some UCI Health blood donors have had family members who needed a transfusion, Tran says. Some had a transfusion of their own and want to give back. Many others donate because they understand the need or they hear about a crisis and want to help.

Donating blood is a fairly quick process, with every precaution taken to keep donors and blood supplies safe. It takes about an hour to donate whole blood and about two to three hours for platelets. The payoff is instantaneous.

“In truth, donating blood is an amazing gift”

Tran says. “Donors tell us they get great satisfaction knowing they’re helping to save another person’s life. There is something very special about that.”

Learn how to become a blood donor at ucihealth.org/donateblood

UCI Health



Congratulations,
**Cindy
Shopoff**
on your Women in
Business Awards
nomination.

Shopoff Realty Investments | 18565 Jamboree Road, Suite 200, Irvine, CA 92612
(844) 4-SHOPOFF | Shopoff.com



Prego
RESTAURANT

A Family Affair

Family owned and operated, serving Orange County for more than 30 years

Brittany & Ruth Bedi

@PREGO_OC
WWW.PREGOOC.COM
IN THE DISTRICT AT TUSTIN LEGACY

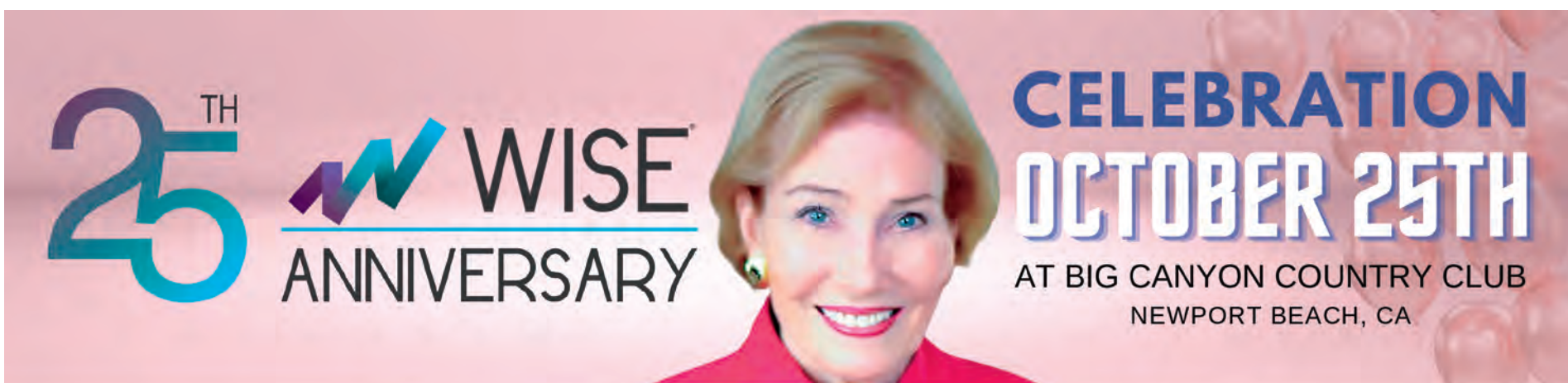


The Women Behind Prego

Meet mother and daughter, Ruth and Brittany Bedi, an important part of the ownership team behind Prego Ristorante - a dining staple in Orange County for more than 30 years. They serve hospitality, tradition and innovation on their daily menu, providing patrons with exceptional food and drink, and attentive service.

Prego is open seven days a week offering lunch and dinner, weekly specials, seasonal wine dinners, and private dining and event services.

pregooc.com
info@pregoristoranti.com
(949) 553-1333
2409 Park Ave, Tustin, CA 92782

25TH **WISE**
ANNIVERSARY

CELEBRATION
OCTOBER 25TH
AT BIG CANYON COUNTRY CLUB
NEWPORT BEACH, CA

In 1997, a small but powerful group of women organized a conference for women, entitled "Invest in Yourself." It was a stunning success with over 500 in attendance. Fast forward 25 years, Women Investing in Security and Education (WISE®) remains true to its mission to financially educate and inspire women and girls across all socio-economic backgrounds. Each year WISE online communications empower thousands of members with its accessible financial information. On October 25, 2022, WISE will announce the establishment of the

**Victoria F. Collins Legacy Fund for
Financial Empowerment**

to provide scholarships for underserved girls and to ensure the sustainability of WISE.

Victoria Collins, Ph.D., co-founder of WISE, has enriched the Orange County community through her philanthropy and leadership. She is an inspiration to all who know her. The WISE board members are honored and proud to establish a legacy fund in her name.

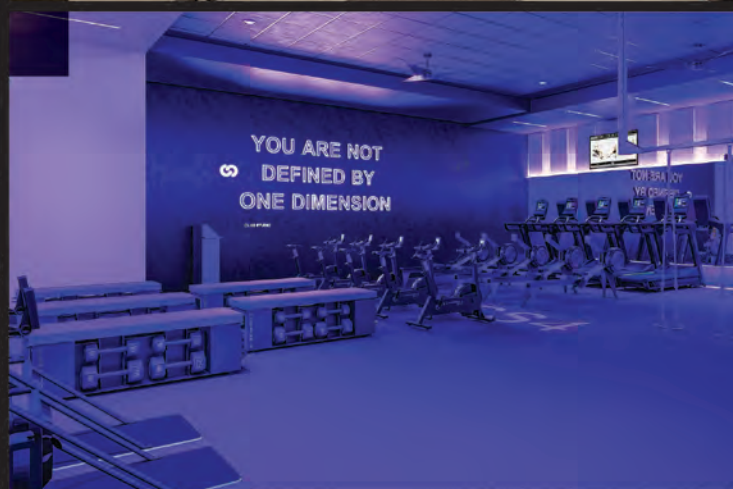
**JOIN US! OCTOBER 25TH FOR OUR
25TH ANNIVERSARY CELEBRATION**

Big Canyon Country Club 5-7PM.
For more info visit, www.wiseinvestors.org

CLUB STUDIO | IRVINE



COMING SOON!



WHERE YOU CAN DO IT ALL WITHOUT
HAVING TO GO EVERYWHERE TO DO IT.

LUXURY GYM & BOUTIQUE STUDIOS
BOX / RIDE / HOT YOGA / PILATES / STRENGTH
CRYOTHERAPY & RECOVERY LAB

Introducing the next era of elevated fitness.

Premium club featuring state-of-the-art equipment, first-class amenities, and unlimited classes.

*Take advantage of our exclusive pre-opening rates for a limited time!
Book your appointment at the Preview Center today.*

clubstudiofitness.com

JOIN THE WAITLIST ➤



Preview Center Now Open!

CLUB STUDIO IRVINE
5715 Alton Parkway
(949) 418-1430



CORRINE ALLEN

Chief Operating Officer
Servant Leader
Advocate for Good



For your leadership, your steadfast dedication to Goodwill of Orange County's mission and the people we serve, and your innovative outlook—thank you. As our Chief Operating Officer, you make it possible for us to do more good for our community. Congratulations on your Women in Business Awards nomination.



Not Your Average Cocktail Party

On October 23, enjoy the sport of kings as the Orange County Polo Club's inaugural Pro-Am Silverado Cup brings you an exclusive day of polo and fun in picturesque Silverado Canyon, while benefiting Surf and Turf Therapy.

The Silverado Cup is a United States Polo Association (USPA) sanctioned arena polo tournament played with both amateur and professional polo players. On Friday night, teams will be finalized with a draw at the VIP Party and sold in a Calcutta format. There will be three straight games on Saturday. On Sunday, October 23, the three teams with the best record will battle it out in the Silverado Cup Finals before a large crowd. Following the finals match, VIP guests will gather at the Clubhouse for a trophy ceremony and Champagne toast.

Orange County Polo Club is a venue unlike any other, offering both stunning event spaces and a variety of polo experiences for spectators and players alike. The Club is a private facility open to members and their guests only, and the Silverado Cup provides a rare opportunity for VIPs to access this unparalleled front-row polo experience at a world class facility. Although the ranch is located only thirty minutes from Newport Beach, you'll immediately find yourself transported to the countryside as you drive through the rolling hills and winding roads of Silverado Canyon.



A few sponsorship opportunities are still available! Polo is a unique way to promote your brand to a wide audience of professional, entrepreneurial, and affluent individuals with significant spending power. Sponsorship offers you the chance of greater recognition to a demographic that values quality, expertise, craftsmanship and excellent service. Our outstanding events deliver a commitment to excellence in everything from start to finish: high impact experiences that captivate your target audience and put your company name, product and awareness at the forefront, while delivering quantifiable results on your business investment.

We are grateful to our sponsors for joining us in support of Surf and Turf Therapy, and we look forward to the marquee event becoming one of Orange County's premier social events of the year! Join us for an exclusive day of polo and fun in picturesque Silverado Canyon. Support this great cause, while experiencing the



thrill of polo from the VIP tent with food, bar and music. Gates open at noon and valet parking is included.

Surf and Turf Therapy is a 501 (c)(3) non-profit organization committed to bettering lives through non-traditional therapeutic activities. Physical, occupational and speech therapy services target functional goals using non-traditional approaches, including surfing and horseback riding. These unique approaches offer unparalleled opportunities to address deficits in strength, balance, body awareness, and language. The focus of treatment is on improving daily life skills, such as walking, talking, and writing, rather than simply teaching individuals how to surf or ride.

For further information, including sponsorships, please call Katie Johnson at (616) 889-3894. Tickets can be purchased at ocpolo.com/silveradocup.

THIS IS YOUR
EXCLUSIVE INVITE!



BENEFITTING SURF & TURF THERAPY

SUNDAY, OCTOBER 23RD

JOIN US FOR AN ACTION PACKED
DAY OF POLO IN PICTURESQUE
SILVERADO CANYON.

**SPONSORSHIP
OPPORTUNITIES
AVAILABLE!**

GATES OPEN AT NOON.

TICKETS AVAILABLE AT:
[OCPOLO.COM/SILVERADOCUP](http://ocpolo.com/silveradocup)



2022 Women in Business Award Nominees

Theresa Aberle, Partner, CPA

Baker Tilly, Irvine

Theresa Aberle is a certified public accountant and partner at Baker Tilly US, LLP. She has 15 years of experience servicing Orange County businesses in multiple industries such as technology, manufacturing and distribution and retail. She specializes in corporate taxation and accounting for income taxes. She enjoys supporting a workplace where everyone thrives, and she helps to accomplish this by leading Baker Tilly's woman's program, Growth and Retention of Woman ("GROW") and furthering diversity and inclusion in accounting. The mission of GROW is to enhance the attraction, development, retention, and advancement of women. As a partner and leader of GROW, Aberle networks, mentors, shares her knowledge and strategizes with women and men in the accounting profession. Her goal is to help women and men reach their full potential and feel valued.



Brateil Aghasi, CEO

WISEPlace, Santa Ana

Brateil Aghasi is a visionary leader with a passion for serving women and children. As the CEO of WISEPlace, she is leading the path towards a new \$35 million development project to build 45+ units of affordable housing to end homelessness for seniors and vulnerable populations. This is the first housing development in WISEPlace's 98-year history. She is entrusted with developing a trauma-informed approach to case management, focusing on survivors of domestic violence, by providing quality mental health and therapeutic support, along with financial empowerment services to provide housing, hope and stability that ends homelessness in our community. In her role, Aghasi leads the strategic vision and direction of the organization, completely rebranded the entire organization, increased program and operational effectiveness and implemented various new fundraising campaigns and initiatives. Thanks to Aghasi's leadership, WISEPlace revenue and people served has more than tripled in just three years as she has completely rebuilt WISEPlace. Aghasi started her career as COO of WHW, after spending eight years there she was recruited by Big Brothers Big Sisters OC/IE as CPO. She also generously volunteers her time and expertise on the Boards of CSUF, UCI as a guest lecturer and One OC. She was named Santa Ana Chamber Person of the Year 2020, Non-Profit of the Year 2021 and NAWBO Agency Leader of the Year 2011.



Teresa C. Alarcón, Partner

Mortenson Taggart Adams LLP, Irvine

Teresa Alarcón brings over 20 years of experience in the areas of white-collar criminal defense, parallel administrative proceedings, and business litigation. She represents individuals and businesses in state and federal matters, including Foreign Corrupt Practices Act and commercial bribery investigations and prosecutions, all types of fraud, investor clawback claims, environmental crimes, campaign finance, contract disputes, SEC and regulatory agency enforcement actions, internal investigations, and grand jury proceedings. Alarcón was recognized as a "Southern California Rising Star" in 2007, 2009, and 2010 by Super Lawyers®. She is the co-author of Investigating Corporate Employees in Civil and Criminal Litigation – A Necessary But Difficult Task, Federal Bar Association Newsletter, Spring 2010, and is a certified CLE provider on matters relating to professional ethics and internal investigations. She is fluent in Spanish.



Corrine Allen, Chief Operating Officer

Goodwill of Orange County, Santa Ana

Corrine Allen has been a part of the Goodwill of Orange County team for 23 years and now serves as chief operating officer. Allen embodies servant leadership, encourages out-of-the-box thinking and creativity from all Goodwill team members, and promotes kindness and empathy as one of the most important tools in your professional toolbox. Allen's strategic thinking helped elevate Goodwill's retail operation, and sustain it through the pandemic and into a new era of thrift popularity. Under her leadership, Goodwill's retail operation has grown an impressive 113%. With an eye for streamlining efficiencies and developing team members, Allen strikes the perfect balance between maximizing operations and organizational impact and people-centered leadership to build up future Goodwill leaders.



Daisy Anawalt, Human Resources Manager

Hydration Room, Corona del Mar

Daisy Anawalt is single-handily responsible for enhancing company culture at Hydration Room in multiple ways: From creating an employee recognition program, increasing staff retention, and developing robust training programs to improving the overall employee experience. In turn, she has empowered staff to give patients the utmost care while in their hands.



Kari Armstrong, CEO & Principal

Unscripted Interior Designs, Santa Ana

Kari Armstrong is CEO and principal of Unscripted Interior Design, an award-winning national interior design firm specializing in model home design and merchandising, commercial design, custom residential design and art consultation with offices in California and Colorado. Founded as HRI Design in 1981, Armstrong acquired the company in 2007 and rebranded to

Unscripted Interiors in 2021. With over 24 years of experience doing some of the country's most celebrated interior and merchandising designs, Armstrong has continued to build off the company's four decades of award-winning history. The firm has been the recipient of over 100 regional and national industry accolades for design excellence working in multiple states, garnering top honors from the National Association of Home Builders, PCBC's Gold Nugget Awards and Great American Living Awards among others. Armstrong, alongside sisters Kate Pourhassanian, COO, and Kasey Miller, CFO, lead the female and family-owned firm with passion, commitment and constant inspiration.



Janice Arrigo, Realtor

Surterre Properties, Newport Beach

Janice Arrigo has over 30 years of real estate experience. Throughout her career, she has established a commitment to excellence, resulting in her curating an established following of clientele. Many of her clients are premier business executives, who rely on her to handle all aspects of their executive relocation services. Residing in the Newport Beach area for over 40 years, Arrigo has accumulated extensive knowledge of the nuances and unique qualities each residential neighborhood has to offer. Her experience also extends to selling new homes for many of Orange County's most prestigious home builders. Her industry achievements have earned her awards such as "Orange County Builders Association - Sales Team of the Year" and other sought-after recognitions. Prior to beginning her career in real estate, Arrigo was a financial analyst for TRW Space and Defense Systems and holds a Bachelor of Science degree in finance.



Laureen Asseo, CEO & Founder

Fresh N Lean, Anaheim

Laureen Asseo is heading a food revolution by making food fast, instead of unhealthy fast food, as founder and CEO of Nutrition Corporation. Based out of Anaheim, CA, Asseo directs the operations and culinary teams of Nutrition Corp. in distributing millions of healthy, convenient meals for active lifestyle consumers through their brand Fresh N Lean. Her dedication to changing the way America eats has led to the amplifying of nutrition education and accessibility in the 21st century. Asseo is founder and co-CEO (with her brother Thomas) of Fresh N Lean, the #1 ready-to-eat meal delivery service in the U.S. with more than \$100 million in annual revenue. Asseo, a first generation American, was only 18 years old in 2010 when she founded the company from her one-bedroom apartment, first to help her father, who was facing serious health problems after years of overindulging in processed American foods. From her success with her father, her business grew to friends and neighbors before becoming a nationwide success and leader in its space. Fresh N Lean now offers various meal plans including Mediterranean Diet, Whole30 Approved®, Paleo, Vegan, Low Carb Vegan, Protein+ and Keto, with more to come.



Deborah Barlow-Taylor, CEO

Fusion of Ideas, Lake Forest

Deborah Barlow-Taylor, the CEO of Fusion of Ideas, is a consummate leader of a large and diverse team. Barlow-Taylor's role with the company was neither inherited nor handed. It was the fruit of 15 years of relentless work. Growing the company from a start-up to a thriving corporation was largely due to Barlow-Taylor's many roles and responsibilities over the years. From sales and marketing to finance and operations, she stepped in when needed, regardless of the task. This experience gave her a deep appreciation of the critical functions that make up a business. What began as a kiosk at the Shops of Mission Viejo is now a 22,000 sq ft. building in Lake Forest, California. Deborah Barlow-Taylor is fulfilling her dreams through her perseverance, authenticity, and heart.



Isabelle Bart, Executive Director

Small Business Development Center @UCI Beall Applied Innovation, Irvine

Isabelle Bart leads a team of business consultants who help tech start ups refine their strategy, prepare to pitch to investors and get funded to scale their business. A partner program of the Small Business Administration, SBDCs are hosted by universities, colleges, state economic development agencies and private sector organizations to help start and grow small businesses.



Ramin Baschshi, M.D., President & CEO

Unlimited Possibilities, formerly UCP of Orange County, Santa Ana

Ramin Baschshi, M.D. is known throughout the community as an advocate for child welfare and inclusion. She believes that every child and family deserves access to the services they need to thrive, no matter their financial circumstances or diagnosis. Dr. Baschshi is currently the president & CEO of Unlimited Possibilities, formerly known as UCP of Orange County. Since her appointment to CEO in 2018, Dr. Baschshi's leadership has contributed to the organization's nearly tripled financial growth, leadership diversity, program development, facility relocation, innovation, and rebranding. When many





Great leaders inspire us

Leaders engage us, allow us to take chances, unite our voices, and focus our ideas into action.

Wells Fargo is a proud sponsor of the Orange County Business Journal's 2022 Women in Business. We congratulate this year's nominees and salute their commitment to excellence.

Manishi Parikh

manishi.g.parikh@wellsfargo.com

2022 Women in Business Award Nominees

nonprofits closed their doors during COVID-19, Dr. Baschshi stood firm in keeping the organization's doors open, retaining all staff, and doubling the organization's service capacity in 2021. Since the start of her leadership to today, her success is evident in the many ways she has propelled the nonprofit organization forward and created a more inclusive environment for those in the Orange County community.

LaSharnda Beckwith, Ph.D., D.B.A., President & CEO

Lutheran Social Services of Southern California, Orange

On April 20, 2020, as the world shut down due to COVID-19 Dr. Beckwith was unable to walk through the doors of LSSSC in Fullerton, one of Southern California's longest standing social service agencies licensed in all 10 counties. What she achieved in leadership as the new CEO during this crisis could very well become a title for her 5th book. Unable to even meet in-person for a year with any of her nearly 200 staff, 22 board members, and thousands of supporters, Dr. Beckwith led a massive project to convert 70 programs providing critical services to online/hybrid delivery. Additionally, they addressed heightened COVID trauma for the most vulnerable. During this time, she created a diverse dream team of experienced executives to build and fund an innovative model for Community Wellness Centers that address every aspect of a client's healthy and wholesome existence. The first opens its doors in 2025.



Vanessa Benavides, CEO & Founder

Go RN and Staff Grit, Santa Ana

Vanessa Benavides, the founder and LatinX CEO of healthcare startup, Go RN, and native to Orange County is a beacon of innovation and empowerment. Her 20+ years in healthcare ranges from entrepreneurship to patient care, as Benavides is a registered nurse. Her multidisciplinary background in nursing plus her keen sense of curiosity lead her to Magnet, a healthcare innovation incubator through St. Joseph's Hospital. Thus, GoRN was born in 2016 as technology "for nurses designed by nurses". GoRN has exponentially grown 350% from staffing two shifts per day pre-pandemic to 700+ shifts per day in 2021 with the use of our dynamic platform. Our technology grew to being utilized across Southern California to support COVID emergency response, homeless crisis management, and nationally with opportunities in acute, non-acute, and travel. The platform has simplified three complex problems: staffing and scheduling, and transportation through our latest strategic partnership, Uber. Benavides knew our revolutionary technology could impact other industries, thus StaffGrit was born in 2021. This would not be possible without Benavides' innovative mind and servant leadership.



Letitia Berbaum, Partner & COO

The Zandbergen Group, Laguna Beach

Respected for her dedication to serving her clientele with excellence, Letitia Berbaum is paving the way for future generations of female financial advisors. With over a decade of experience, Berbaum has established a proven track record, helping her clientele become financially fit so that they can thrive through life's ebbs and flows. As COO and partner at The Zandbergen Group, Berbaum specializes in wealth management, asset transfer strategies for high net worth individuals and multi-generational families, and full-service strategic planning for business owners - from those seeking an entrepreneurial framework to those exploring an exit plan. Berbaum has been recognized as an outstanding wealth manager and has been named as an Orange County Five-Star Wealth Manager for five consecutive years. She has earned the Accredited Investment Fiduciary® (AIF®) designation and holds both Series 7 and 66 securities registrations and Long Term Care Insurance, Life & Health, and Insurance licenses.



Kimberly Dwan Bernatz, CFA®, AEP®, Managing Director

CIBC Private Wealth, Newport Beach

Kimberly Dwan Bernatz is team executive and head of CIBC Private Wealth's Newport Beach office. In this role, she leads the client service team and the firm's growth initiatives in the Pacific Southwest. She has more than 20 years of investment, estate, retirement and financial planning experience. Over the course of her career, Bernatz has worked with high net worth individuals, families and nonprofit organizations to craft customized plans for clients in the areas of wealth and estate planning, personal trust and investment management. In predecessor firms, she has also been responsible for team management, setting and implementing sales and marketing strategies as well as for fiduciary and new business risk assessment. Bernatz has been quoted and published in The Wall Street Journal, The Orange County Register, MoneyRates.com and Nonprofit Business Advisor, and received the WomanSage Family Matters Business Award in 2011.



Pooja Bhalla, Co-CEO

Illumination Foundation Medical Group, Orange

Dr. Pooja Bhalla joined Illumination Foundation in 2017 as chief operating officer, responsible for the strategic planning and daily operations of all programming, including recuperative care, behavioral health, and housing. From March 2020 through today, she has directed efforts to mitigate the spread of COVID-19 within the population of those experiencing homelessness in Orange County. In February 2021, Dr. Bhalla was promoted to the newly-created role of executive director of



Healthcare Services, and on July 1, 2022 was promoted to co-CEO. She focuses on the complex issue of healthy equity in order to improve quality outcomes and reduce health disparities. Dr. Bhalla leads Illumination Foundation's Enhanced Care Management and Community Supports healthcare team as part of California's CalAIM initiative to bring better healthcare to underserved populations. She also implemented an innovative partnership with IFMG, a private medical group which provides primary care and mental health services for this vulnerable population.

Tania Bhattacharyya, Founder

Lumos Marketing, Irvine

Tania Bhattacharyya founded Lumos Marketing, a thought leadership consultancy for purpose driven women ready to stand out as they stand up for their mission. Over the last eighteen months, she helped over fifty women grow their influence to drive impact and raise revenue using their unique superpower: their lived experience. Her superpower is helping overlooked and underestimated leaders gain clarity in their message, confidence in their thought leadership, and ghostwriting content so they can show up (on autopilot), opening the doorway of opportunity and influence. She consults with a hybrid approach - offering personal brand messaging strategy and ghostwritten content, with coaching to dismantle imposter syndrome. She is the host of the podcast The Campfire Circle which explores the idea of replacing the 'boardroom table' as the ultimate space of leadership with a campfire circle: a place to share our stories, build community, and spark new ideas.



Kim Bibb, Realtor

Villa Real Estate, Newport Beach

Kim Bibb is a co-founder of Villa Real Estate, a top agent in Newport Beach, and a top agent in all of California as well. As Villa's highest-producing agent, not only is Bibb the unparalleled expert in the highly sought-after Peninsula Point submarket, where she resides and has transacted more than \$2 billion in sales, but she has been the icon of luxury real estate throughout all of Newport Beach for over twenty years. Bibb has dominated the Newport Beach market, selling hundreds of elite coastal homes while setting new high-water marks for exceptional properties on the Oceanfront and Bayfront. Bibb closed over 40 transactions totaling \$191 million in 2021 alone. In addition to achieving many sales records, selling numerous one-of-a-kind estates, and making multigenerational family properties her expertise, Bibb is known for setting the gold standards for market intelligence and client service in coastal Orange County.



Maureen Bissonnette, Principal, Marketing

Ware Malcomb, Irvine

Maureen Bissonnette began her career at Ware Malcomb in 1998 as a marketing assistant. She quickly demonstrated exceptional leadership skills, marketing savvy and dedication that proved her to be an invaluable member of the Ware Malcomb team. A member of Ware Malcomb's leadership team since 2008, Bissonnette is one of four female principals in the firm. As principal, Marketing, she has built a substantial and award-winning marketing team which includes more than 25 marketing, communications and graphic design professionals. She continues to elevate the marketing program through the creation and execution of winning strategies for all major pursuits. She has played an integral role in the firm's transformation from a regional to an international design firm with 28 offices across the Americas.



Anabella Bonfa, Attorney at Law

Wellman & Warren LLP, Laguna Hills

Anabella Bonfa is an experienced business litigator whose practice centers on breach of contract and other business related torts. Bonfa represents clients in many different industries, including sales, manufacturing, service industries, and multi-level marketing. Bonfa primarily handles cases involving business and partnership disputes, theft of trade secrets, unfair competition and fraud. This includes prosecuting and defending cases involving theft and alleged theft of customer data, supply lists, pricing information, business strategies, marketing information and other financial data. Bonfa's cases usually involve extensive discovery practice, including electronic discovery and forensic issues involving collection of data from computers and other electronic devices. Bonfa acts as a consultant to other counsel in cases where assistance is needed with extensive discovery and discovery motion practice.



Adrienne Brandes, Realtor

Surterre Properties, Newport Beach

For nearly two decades, real estate professional Adrienne Brandes has been Orange County's go-to when it comes to luxury living. Having personally closed over \$300 million in sales since 2014, Brandes attributes her success in part to the indispensable skills she honed while earning her master's degree in counseling psychology at Chapman University. Over the years, Brandes has been honored with countless accolades ranging from Orange Coast Magazine's Real Estate All-Stars to RealTrends + Tom Ferry's America's Best Real Estate Professionals. Understanding that every real estate transaction is a deeply personal and unique experience, Brandes



Thomas Jefferson Created the First U.S. Asset Protection Plan

You can do the same for your family.

With the fear that his bankrupt son-in-law would abscond with his daughter's inheritance to pay his many creditors, Jefferson had to think of a way to protect his daughter. He got creative in 1826 and crafted the **first American asset protection plan**.

"I do hereby bequeath all of the residue of my property, real and personal, according to the powers vested in me, to be held in trust for the sole and separate use of my dear daughter, Martha Randolph."

—Thomas Jefferson



**JEFFREY M. VERDON
LAW GROUP, LLP**

The Fusion of Planning and Protection.

1201 Dove Street, Suite 400, Newport Beach, CA 92660
303 Twin Dolphin Drive, 6th Floor, Redwood City, CA 94065

949.333.8150 ▼ www.jmvlaw.com

JMV Law Group paid for this space and is solely responsible for its content.

2022 Women in Business Award Nominees

seamlessly manages the emotions and expectations of her clients according to their specific needs - and ultimately makes their real estate dreams a reality. As an expert negotiator, Brandes also ensures that her clientele obtains simply the best possible results in every buying or selling scenario.

Allyson Brooks, M.D., Ginny Ueberroth Executive Medical Director Endowed Chair and Chief Quality Officer, Hoag Women's Health Institute *Hoag, Newport Beach*

Dr. Allyson Brooks is a board-certified Obstetrician/Gynecologist who retired from clinical practice in 2014 after 21 years in private practice in Newport Beach. During her clinical practice Dr. Brooks delivered over 2,000 babies, provided comprehensive and compassionate health care to women of all life stages and from ages 12 through 92, performed over 1,000 minimally invasive gynecologic surgical procedures and received Most Compassionate and Best Doctor awards. Her mid-career transition from clinical practice to executive medical director of Hoag's Women's Health Institute has allowed her to be intimately involved in the design and development of innovative programs focused on the expanding needs of women in Hoag's community. As the inaugural recipient of the Ginny Ueberroth Endowed Chair in Women's Health in 2015, Dr. Brooks has focused her efforts on the recruitment of physician and allied health specialists in obstetrics, breast cancer care, complex gynecological surgery, mental health, pelvic health. Examples of the programs developed by these specialists include breast cancer survivorship, high risk breast & ovarian cancer prevention, laborist program, advanced practice nurse practitioners in breast care and mental health.



Judy Brower Fancher, President *Brower, Miller & Cole, Newport Beach*

Judy Brower Fancher sources original art and sculpture for corporate offices, multifamily community common areas, and luxury residences. She combines her 20 years of global exploration and art acquisition in 25-plus countries with her Interior Design Institute certification to select art that reflects a company's corporate culture, a multifamily community's geographic culture, or a family's heritage and culture. She then marries these elements seamlessly to the design of the property. With an eye to DEI and luxury interior design, her art selections are with noted and emerging contemporary artists from across the country and around the world. Brower, Miller & Cole creates Interiors with Culture.



Rebecca Brusuelas-James, Associate Dean, Administration and Finance - University of California, Irvine School of Medicine, Associate Vice Chancellor of Finance, UCI Health Affairs

University of California, Irvine - School of Medicine, UCI Health Affairs, Irvine

Rebecca Brusuelas-James is the associate dean of finance and administration for the School of Medicine at the University of California, Irvine. In this capacity, she serves as the chief financial advisor to the dean and leads financial and daily school wide business operations involving a \$775-million-dollar annual budget and approximately 5,000 faculty, staff, students, volunteer faculty and residents. She has been the one constant source of trusted, credible leadership in the School of Medicine since 2008, having served as a key leader and advisor to four School of Medicine deans, two vice chancellors and several hospital CEOs. In 2013, she took over leadership of both administration and financial operations, where she led a team that performed a multimillion-dollar financial turnaround of the School of Medicine bringing them into solvency for the first time in over a decade. She also oversees the financial operations for the office of the Vice Chancellor for Health Affairs and is a key strategic financial advisor to the Vice Chancellor for Health Affairs.



Wendy Bucknum, Director of HOA, Community Association Consulting *Murow Development Consultants, Irvine*

Wendy Bucknum has extensive and diversified experience with community association/homeowners associations, including financial & budgetary experience, phasing developer communities & public sector experience. Ms. Bucknum has extensive experience in the public service arena having served as Mayor of the City of Mission Viejo & currently on the city council since November 2014. In addition, she is a commissioner on the Local Area Formation Commission, Orange County (LAFCO), serves on the Southern California Association of Governments Council as well as the CEHD Committee & the Regional Housing Needs Assessment Subcommittee (RHNA), Vice Chair of the OC Council of Governments (OCCOG), serves on the Association of California Cities Orange County Board. Prior to this she served as a Mission Viejo City Commissioner for Community Services Commission for four years.



Danica Bunnett, Chief Operating Officer *Bluon, Irvine*

Stanford graduate Danica Bunnett came to Bluon in 2017 as an intern as the company was making its initial transition from an R&D company to the industry changing software company it is today. She rapidly rose the ranks, from director of operations to VP of operations to COO by mid 2021. Bunnett commands attention and respect from a virtually all-male industry of professionals and technicians alike. More importantly, she accomplishes this with her infectious positive attitude and incredible intellect. Everyone

who works with Bunnett knows she is their leader and not their boss. Bunnett is not your typical COO. She runs ALL operations at Bluon and is always spinning up new teams, systems and methods to enable the company to continue its rapid expansion in the \$100billion HVAC industry. Bunnett is a next generation player coach who knows how to keep people focused, inspired and full of purpose.



Dana Butler-Moburg, CEO

The Shea Center for Therapeutic Riding, San Juan Capistrano
For 25 years, Dana Butler-Moburg has been the CEO of J.F. Shea Therapeutic Riding Center in San Juan Capistrano. The Shea Center is dedicated to improving the lives of people with disabilities through therapeutic horse-related programs. During her tenure, The Shea Center has grown from a \$335,000 annual budget and \$475,000 in net assets to a \$5 million annual operating budget with \$20 million in net assets. As one of the largest therapeutic equestrian centers in the U.S., in the past six years, The Shea Center has doubled in size while increasing client services to over 15,000 hours each year reaching over 1800+ clients with 56 staff and nearly 600 annual volunteers. The average retention for senior staff at the Center is 12 years. During her tenure, The Shea Center has trained therapeutic equestrian professionals from nearly every state in the U.S. and 16 different countries.



Michelle Byrge, Vice President of Corporate Marketing *Landsea Homes, Newport Beach*

Michelle Byrge joined Landsea Homes in 2018 as vice president of corporate marketing, overseeing the Southern and Northern CA, and New York divisions. She built the company's entire corporate marketing structure, and developed the brand and marketing guidelines, creating consistency across all markets. This structure allowed the business to scale, operate more efficiently, and set the foundation for future successes including becoming a public company and executing strategic homebuilder acquisitions in new markets, including Arizona, Florida, and Texas, which Byrge now oversees as well. In the last two-and-a-half years, Byrge has completed rebranding for four different homebuilders acquired by Landsea Homes, all within three months of closing. Rebrands consist of extensive market research, integrating signage, community displays, sales displays and messaging, website, internal communications, internal integration of hundreds of new employees, and education for public facing sales teams. She has successfully rebranded more than 50 new home communities through these homebuilder acquisitions.



Angela Caliger, Realtor

Surterre Properties, Newport Beach

Angela Caliger has an unwavering commitment to excellence. Her passion, energy, business acumen, and thirst for greatness have positioned her as a standout in the luxury residential real estate market. Joining Surterre in 2020, Angela leads with a strong work ethic and an honest approach in every transaction. Her clientele value her signature approach, with many of them choosing her as their dedicated, long-term partner for their residential real estate needs. She is known for making each real estate experience about the individual or family, keeping them at the heart of every deal. Originally from the Midwest, Caliger graduated from the University of Iowa. Relocating to Newport Beach, where she launched her first entrepreneurial endeavor for a start-up company, Caliger's foresight and execution played a vital role in that company evolving into a global, billion-dollar entity. Her experience in that journey catapulted her to success in the real estate industry.



Jamie Ceman, Vice President of Strategic Marketing and Communications *Chapman University, Orange*

Jamie Ceman joined Chapman University in 2018 and has since transformed the marketing and communications function for the school. Through a methodical approach to change management, she has implemented a sophisticated program including a focus on national public relations and an integrated marketing and communications approach to enrollment marketing and to alumni and constituent engagement. Her work has been a critical component to accomplishing record enrollment for the university along with a measurable increase in the national reputation of Chapman. This work has been instrumental in advancing Chapman as a national research institution, while also contributing to Orange County in measurable and immeasurable ways. In a recent study, Chapman University's economic impact for the county is almost \$540 million annually in no small part because of the faculty, staff and students that make up the Chapman community.



Rashmi Chaturvedi, President & Founder *Kaygen Inc., Irvine*

Rashmi Chaturvedi is the co-founder and president of Kaygen Inc., a minority women-owned and operated company comprising of experienced data technologists. Established in 2003 to offer talent solutions and technology consulting to clients worldwide, she focuses on helping businesses in all areas of enterprise digital transformation. Kaygen, which is notably derived from the Japanese word, kaizen, means continuous improvement. Providing services that create efficiencies and allow for a more sustainable, competitive advantage in the marketplace is the mission of Kaygen Inc. Chaturvedi is a

Where personal and professional meet

Just because your wealth management and business financial needs are different doesn't mean you need different banks to manage them. When you partner with Union Bank®, you join a single trusted resource that can deliver customized solutions to address both. So whether you're taking your start-up to the next level, managing an established middle-market company, or need advice on business succession planning, choose the right partner to manage all of your financial goals. Choose Union Bank.

Learn more at unionbank.com

Commercial Banking

Julie Beckley
Director and Senior Vice President
of Business Development
julie.beckley@unionbank.com

Wealth Management

Claudine B. Bachelor, CTFA
Managing Director and
Senior Fiduciary Management Executive
claudine.bachelor@unionbank.com



A member of MUFG, a global financial group

Wealth planning strategies have legal, tax, accounting and other implications. Prior to implementing any wealth planning strategy, clients should consult their legal, tax, accounting and other advisers.



©2022 MUFG Union Bank, N.A. All rights reserved. Member FDIC.
Union Bank is a registered trademark and brand name of MUFG Union Bank, N.A.

2022 Women in Business Award Nominees

respected technology company executive with more than 25 years of expertise in the technology industry. In 2020, at the peak of COVID, Kaygen reinvented its business model to talent-on-demand, driving 57% growth in 2021. With the increasing global shortage of technical and data talent, Kaygen is now at the forefront of assisting its global customers to accelerate their digital transformation efforts. Chaturvedi was named to the Top 50 Women Leaders of Los Angeles in 2022 by Women We Admire. She was also named 2020 Women Business Enterprise STAR by the Women's Business Enterprise National Council and named to the 2020 Outstanding CEOs list by WE USA Magazine in 2020. Kaygen was listed as a Top 40 Women-Owned Businesses by Orange County Business Journal in 2021.



Carola Cherief, VP of Sales & Marketing *Trumark Homes, Newport Beach*

Carola Cherief oversees all aspects of sales and marketing for Trumark Homes' Southern California Division, where she applies the skills she has refined throughout her homebuilding career both domestically and abroad. Since joining Trumark Homes nearly six years ago, she has served as an integral member of the division's leadership team during a time of extraordinary growth and high demand for homes in the market. She leads strategic development and execution of the division's comprehensive sales and marketing efforts for communities across the region, including Irvine, Brea, and Anaheim. Cherief has deftly guided her team and the division through both historic expansion and unpredictable pandemic conditions in all facets of community engagement and home sales.



Dr. Seema Choudhary, Founder & Director

Montessori Preschool, Irvine & Lake Forest, Irvine

Dr. Seema Choudhary, a distinguished citizen of Irvine is also known as Dr. Seema Ji by her well wishers and friends. She has been recognized as a distinguished citizen by City of Irvine & has been awarded the Outstanding Professional award by Orange County Association for the education of young children (OCAEYC). Unquestionably multi-skilled and multi-talented, Dr. Choudhary is an entrepreneur, an educator, a community activist, a business mentor and a former UCI professor. As the founder & director of Montessori Preschool, Irvine & Lake Forest, under her able guidance her schools have been diligently serving OC families for more than a decade. She is also the founder of Indian Culture & Hindi Gurukul Program, Sunday School & Math Camp. As the founder of OC Indian Women (#OCIW), which connects more than 1500 Indian Women every day through WhatsApp groups and Monthly Meetups with guest speakers, she has demonstrated creativity and initiative in getting the Indian Community united under one big umbrella, making OC the best choice for many Indian families.



Amy Cook, Founder & Owner

Stage Marketing, San Clemente

Amy Osmond Cook, Ph.D., is the chief marketing officer of Simplus, an Infosys Company. At Simplus, she led the marketing efforts from Series A through acquisition, helping the company achieve a three-year growth rate of 1,578% and acquire seven companies before being acquired by Infosys for \$250 million. Cook is also the founder of Osmond Marketing, which has been named one of the fastest growing businesses in Utah by MountainWest Capital for five years in a row. She is an adjunct faculty member at BYU-Hawaii and has taught business and communication courses at BYU, University of Utah, and ASU intermittently for the past 25 years. Cook is a columnist for the Daily Herald and a regular contributor to Forbes, the Orange County Register, and other publications. She received her doctorate from the University of Utah in Organizational Communication, and her research interests, informed by Critical Theory, include organizational identification, communication ethics, and gender dynamics in the workplace.



Tammy Cooper, CEO & CFO

Technologent, Irvine

Tammy Cooper is a senior management leader responsible for the oversight of the corporation including the strategic planning, finance, and HR functions of Technologent. Presided over unprecedented growth period for the corporation leading it through an expansive 20 year period from a 20 employee \$25 million startup to its current 265 employee operation doing over \$550 million in revenue (2021) with an established tier 1 client base of multi-billion dollar clients including American Express, Farmers Insurance, NBC, Discount Tire, State of Texas and key partnerships with Arrow and Synnex distribution and key OEM suppliers including Dell EMC, Cisco, and Oracle with over 15 corporate offices nationwide.



Whitney Costales, Chief Financial Officer

Sweet James LLP, Newport Beach

Sweet James LLP has recovered over \$500 million for accident victims and is a nationally recognized personal injury law firm. Whitney Costales joined Sweet James LLP in 2019 at the organization's inception, bolstering the start of the business with



her financial and operational expertise. In the chief financial officer position, she directs financial planning and strategy for Sweet James. Despite multiple waves of COVID and business disruption, Costales has championed numerous growth initiatives, including increased net profitability, top-line revenue, added headcount, and strategized a multi-state expansion into Arizona, Nevada, and Puerto Rico.

Cindy Couyoumjian, Financial Advisor

Cinergy Financial, Tustin

Cindy Couyoumjian is one of those rare, once-in-a-generation, financial leaders who is transforming her field. The company she built, Cinergy Financial, is not only devoted to financial services, it is in many ways an educational platform. Couyoumjian's vision has always been about educating Americans, particularly women, about the financial world around them. In addition to having 36 years in the financial industry, Couyoumjian is also the author of two books; the Amazon and wall Street best-selling book, Redefining Financial Literacy, and her upcoming book, The Rise of Women and Wealth. If that's not enough, Couyoumjian offers a bimonthly lecture series, hosted her own radio show last year, given numerous television interviews, written monthly blogs, and recorded many podcasts. Couyoumjian is also the architect of a potentially innovative multi-asset class investment strategy known as the REALM model.



Shawn Covarrubias, VP-Client Services

Apriem Advisors, Irvine

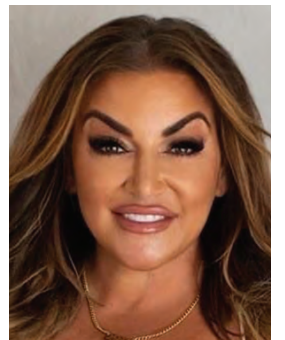
Awarded Apriem's first Miyagi Award, a recognition given to highlight an individual's perseverance and commitment exhibited throughout the year, Shawn Covarrubias embodies client service to the highest degree. She is an integral part in creating a concierge level of service, making ourselves available to our clients to answer any questions and help solve any problems, no matter how big or small. She takes lead in various aspects of the business - client services, operations, and human resources. Covarrubias was recently honored for the 2022 Distinguished Leaders - Human Resources Award in Orange County Business Journal. This recognition is designed to recognize HR executives who had to navigate a new office environment over the last two years while maintaining corporate culture with staff.



Alicia Cox, CEO & Founder

PRJKT Restaurant Group, Huntington Beach

Alicia Cox, founder and CEO of Prik Restaurant Group, has redefined beachfront dining along California's vibrant coastline. While her innovation and drive have led her to open multiple notable restaurants, and even release her own wine label, she has found her niche in creating elevated seaside dining experiences. In 2016, her historic Bolsa Chica State Beach concessions launched - which includes SeaLegs at the Beach, now a destination in SoCal for live music, comedy, and dining right on the sand. In early 2021, she signed a first-of-its-kind agreement with the California State Park System for new beach concessions along a 3-mile stretch of Huntington State Beach. She's won various industry awards throughout the years, including five Golden Foodie Awards, Sacramento's Small Business of the Year, Entrepreneur of the Year by the Huntington Beach Chamber of Commerce, and was most recently named a 2022 Woman of Influence by the Greater Irvine Chamber.



Coleen Cunningham, Professor and Chair - Department of Pediatrics, UCI School of Medicine/UCI Health; Senior Vice President & Pediatrician-in-chief - CHOC Children's Hospital of Orange County

UCI School of Medicine, UCI Health and CHOC, Irvine

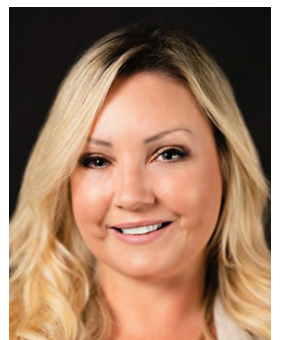
Dr. Coleen Cunningham is a world-renowned physician, researcher and leader in pediatric medicine and pediatric infectious disease. In 2020 she was recruited as the chair of the department of pediatrics at the University of California, Irvine School of Medicine (UCI) and senior vice president and pediatrician-in-chief for the Children's Hospital of Orange County (CHOC). Dr. Cunningham leads the alignment efforts of pediatric medicine, research and innovation, and medical education serving Orange County's children and adolescents, developing the next generation of pediatric experts and recruiting experts at the top of their field. This effort is responsible for making Orange County one of the new leaders in innovation and research for pediatrics nationwide. Under her leadership Orange County is quickly becoming known as a destination for pediatric medicine, providing exceptional patient care, medical education, and cutting-edge research, setting the stage for medical advancements, new investment and increased global attention to UCI Health and CHOC.



Kristin Daher, President & Chief Storyteller

Powerhouse Communications, Santa Ana

Since founding Powerhouse Communications in 2015, Kristin Daher has continually advanced its standing as one of Orange County's premier, female-led firms. She has strategically reimagined the agency's approach to PR, influencer and social media programs - leveraging innovation, thought leadership and entrepreneurship. Daher's insightful growth measures have led to new hires, a diversified client list and endless possibilities for future success. Beyond her role in growing the agency's impressive client roster and its expansive service menu, Daher has fostered a transformative culture defined by creativity, development and achievement.



A woman's work is unstoppable

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



FIFTH THIRD BANK

Fifth Third Bank, National Association. Member FDIC.
CS4579

2022 Women in Business Award Nominees

In many ways, she has molded Powerhouse in her own likeness. It's an upbeat, innovative, high-energy workplace where brainstorming yields equal parts productivity and laughs, unique personalities are always welcome, and collaboration is ubiquitous. With Daher at the helm, Powerhouse Communications remains united by the common goal of providing the absolute best for clients and the same for all who work there.

Marcella De Anda, Vendor Relations Manager & Business Manager

Taqueria De Anda, Fullerton

Starting out with founder Rafael "Don Rafa" De Anda's, (Marcella's father) taco cart in the small town of Arandas, Mexico in the 1950s, Taqueria De Anda is now a household name for residents of Orange County with 13 locations across Southern California. After immigrating to Southern California in the 1960s, Don Rafa and his wife Doña Lupe searched for the same delicious food they enjoyed growing up eating in Mexico, but their search fell short. Eventually, they decided to do something about it and planned to offer the most authentic "Mexican Taco" their community had ever tasted - thus Taqueria De Anda was born! More than 45 years later, their mission still lives on today. Marcella De Anda and her siblings run the business and continue on their parent's legacy.



Jenny Lynn De La Torre, Owner

Graphic Ink, Huntington Beach

Jenny and Vincent De La Torre, a Dynamic team, were both raised in Huntington Beach and literally met in high school. They worked together at a local restaurant and started dating shortly after meeting. In 2005 they had some savings, and both decided to start their own business. Graphic Ink Corp. is an apparel screen print and embroidery manufacturing company that is, in majority, serving the local community and surrounding areas for small business, schools, and clothing companies. Vinnie had worked in the apparel industry, previously, and knew the screen print industry well. Both felt a draw to this new venture and, so, they forged forward; Vinnie focusing on the screen print operations and Jenny focusing on the financial side of the business. When they started in 2005, they had one location and, every year since the company was founded, they have experienced growth in increased sales and increased employees. The company started in a 1500 square foot building and since then has moved to its 4th building which, now, has over 25,000 square feet. They continue to go strong, 17 years later and with 98 full-time employees!



Carol DeNembo, Vice President of Marketing

Mountain Mike's Pizza LLC, Newport Beach

Carol DeNembo is vice president of marketing for Mountain Mike's Pizza, a leading family-style pizza chain known for its legendary crispy, curly pepperoni and Mountain-sized pizzas. When the brand was acquired in 2017, and operations moved from Northern California to Newport Beach, DeNembo was hired to round out the impressive leadership team. Today, she leads systemwide marketing initiatives and oversees new franchise development strategy, providing vision and direction as Mountain Mike's continues to expand in the highly competitive pizza marketplace. In 2021, company sales surged past \$250 million for the first time. DeNembo has made huge strides to fuel and sustain growth by modernizing the 40+ year legacy brand as it expands throughout the West. In the past year, she has spearheaded the launch of a new mobile app and innovative loyalty program. She also secured a new sports partnership with Los Angeles Angels Baseball, complementing the brand's longtime sports partnerships that also include the San Francisco 49ers.



Deborah Dickson, Managing Member

Smith Dickson Certified Public Accountants LLP, Irvine

From her beginnings as one of the few women working at the "Big 8" CPA firms, Deborah Dickson, CPA, CFE, CFF, MAFF progressed to form Smith Dickson Certified Public Accountants, LLP in 1982. Dickson remains the only woman to found and manage a "Top Accounting Firm" in Orange County (as ranked by the OCBJ). In the process, Dickson has carved out a niche specialty, a Forensic CPA Litigation Support practice, in a very tough and competitive field. She has shaped this into one of the most well-known and highly-respected forensic CPA and expert witness accounting teams in California. The firm works with leading national and boutique law firms, attesting to Smith Dickson's expertise and success in this field. Dickson has earned CFE (Certified Fraud Examiner), CFF (Certified in Financial Forensics) and Master Analyst in Financial Forensics (MAFF) designations, which are important qualifications for leaders in the forensic CPA field and are only achieved by a small minority of CPAs throughout the USA.



Marie DiSante, Firm Managing Partner

CDF Labor Law LLP, Irvine

Marie DiSante is a founding partner of CDF Labor Law LLP where she has been representing employers in employment law matters for almost 35 years. She has been the firm managing partner since its inception in 1994, where she and her partners have worked to grow the firm from six to nearly 50 attorneys in five offices throughout California. DiSante has been a driving force of diversity and inclusion, resulting in women and minority attorneys now making up over 65% of the firm. While DiSante takes great pride in creating and growing one of California's most preeminent and well-respected



employment law firms, she's equally proud of building a supportive and flexible work culture that attracts the best and the brightest and provides them with opportunities to achieve their professional goals. DiSante's equal focus on excellence in client representation and on employee satisfaction and empowerment makes her a rare commodity.

Samantha Dorey, Partner

Everett Dorey LLP, Irvine

Samantha Dorey is a founding partner of Everett Dorey LLP, a full service civil litigation firm that represents multi-national corporations, non-profits, cities, public agencies and school districts in all aspects of litigation. She specializes in complex civil litigation with an emphasis in catastrophic injury, public entity defense, employment law, mass tort, asbestos litigation and environmental law. She also regularly advises clients on non-litigated matters, including development of risk management protocols and procedures related to property management and environmental issues. As a leading litigation firm in California routinely retained as trial counsel in complex and challenging cases throughout the state.



Lauren Doyle, Attorney

TLD Law, Irvine

Lauren Doyle, Esq. has a prolific track record in counseling corporations, business succession planning, and estate and tax planning. She has distinguished herself as a leader who is passionate about helping families build their legacies and creating value and success in businesses across Southern California, all while purposefully incorporating service to others as an integral part of her personal and professional life. Ms. Doyle helps individuals in selecting and forming legal entities, negotiating and drafting capital structure agreements, including stock buy-sell, operating, and subscription agreements. She handles large M&A transactions, from negotiating and drafting the letter of intent, purchase agreements, and schedules, to conducting due diligence, and managing post-closing activities. Ms. Doyle also represents families in preparing estate plans, including wills, trusts, advanced health care directives and powers of attorney. She advises clients on strategies for reducing or eliminating estate taxes, avoiding probate, defending assets from creditors, and setting up legacy trusts and special needs trusts.



Rhonda Ducote, President & Principal

Apriem Advisors, Irvine

Rhonda Ducote, AIF® with her long-standing experience and success has placed her in a unique position of influence in the financial advice industry, particularly as a woman in leadership. She is passionate about two things; helping people achieve their financial dreams and developing people and teams to be their best. She brought industry-changing initiatives that gained Apriem nationwide recognition, not just as a top financial advisory firm, but also an outstanding small business and one of the most civic-minded companies. Through Apriem's service offerings, she brings a focus on helping the underserved demographics of women, blue-collar workers, and nonprofits. She is the Legacy Builders Chair, launching the "Million Dollar Match" Campaign for Southern California Hospice Foundation and successfully secured funding for Heavenly Home, the first hospice house in Southern California. Her industry experience mixed with her passion for people has set her apart as a respected leader, advisor, mentor, and coach.



Susan Dwyer, Principal & Studio Director

H. Hendy Associates, Newport Beach

Studio director, principal, and 17-year Hendy vet, Susan Dwyer, is a licensed architect in California, Texas, Pennsylvania, Colorado, and Arizona, who received her degree in Architecture from USC. With more than 22 years of industry experience, Dwyer has made an indelible mark on the communities she has touched and has a portfolio comprised of wellness initiatives, integrated technology, innovative open-office layouts, and collaborative workspaces. Dwyer has played a significant leadership role at Hendy beyond being a studio director; she serves as a mentor to staff and acts as a key decision maker alongside CEO Heidi Hendy. She leads with the foundational knowledge of the local business environment and deep respect for each project city's history and architecture.



Devon Dykstra, Director, Retail- Western U.S.

Matthews Real Estate Investment Services, Costa Mesa

Devon Dykstra is the retail director for shopping center business in the Western United States at Matthews Real Estate Investment Services™. Her passion for commercial real estate began at a young age, as her father was in the industry for over 30 years. Dykstra recalls being a young girl joining her father on tours of California shopping centers, instantly knowing she wanted to follow in his footsteps. Dykstra joined Matthews™ in 2015 as a shopping center agent, where she worked alongside Matthews™ founder, chairman, and CEO, Kyle Matthews, who has been a mentor throughout her career. Dykstra worked relentlessly to build her network and portfolio, specializing in shopping centers across the Western United States. Now, Dykstra is a leader in the firm, inspiring women to enter the male-dominated competitive commercial real estate industry. Prior to becoming director, Western U.S., she closed over 40 transactions in excess of \$1 billion as a capital markets associate. In her current role, she has closed over 20 deals totaling over \$100 in sales volume.



We're not waiting for change. **We're working for it.**

According to the World Economic Forum's 2020 Global Gender Gap Report, it will still take another 257 years for women to catch up to men economically.

That's not fast enough for us.

With Project 257SM, we're harnessing the power of our resources to help close the economic gender gap. So that everyone has a chance to move forward financially.



Project 257 is a service mark of The PNC Financial Services Group, Inc.
©2022 The PNC Financial Services Group, Inc. All rights reserved.
CORP SPON PDF 0722 073 2085801



To learn how we can help you move forward financially, contact:

Penelope Vance

PNC Private Bank
penelope.vance@pnc.com

Raquel Bone

PNC Institutional Asset Management
raquel.bone@pnc.com

Xiomara Arroyo

Organizational Financial Wellness
xiomara.arroyo@pnc.com

pnc.com/women

2022 Women in Business Award Nominees

Leslie Espiritu, Director, Human Resources

Ware Malcomb, Irvine

Leslie Espiritu joined Ware Malcomb in 2013 as human resources manager and quickly proved herself to be an invaluable member of the firm and leadership team. She was promoted in 2014 to human resources director, a title she still holds today. Espiritu oversees both the human resources and recruiting departments and has seen exponential growth in her nine years with the firm. Upon arrival, Ware Malcomb had 16 offices and 165 team members. Today, the firm has 28 offices and more than 900 employees across four countries. Espiritu was instrumental in safely leading Ware Malcomb through the COVID-19 pandemic and is heavily involved in various committees and philanthropic efforts within the firm. She's also been on internal committees for Ware Malcomb's Open House, 50th Anniversary and yearly company party.



Carol Fawcett, Corporate Vice President & Chief Information Officer

Golden State Foods, Irvine

Carol Fawcett joined GSF in 2017 as corporate vice president and chief information officer. She provides vision and leadership for developing and executing digital transformation initiatives to improve GSF's supply chain management operations, cost effectiveness, service quality and business development. Over the past five years, her leadership has successfully guided the company's IT transformation, increasing associate and team collaboration across business areas, facilities, and functions. Fawcett's thought leadership has been featured in various industry seminars and publications, including CIO.com, CIO Talk Network, and CIOReview. Recently, Fawcett delivered a keynote address during the Southern California CIO Virtual Executive Summit, where she shared thought leadership about today's enterprises having access to endless amounts of data and how CIOs must continually find true meaning and value in the data. From emerging technologies like blockchain to Enterprise Resource Planning (ERP) software implementations, Fawcett spoke about leveraging data analytics initiatives throughout the GSF family of companies.



Pegah Fazeli, CEO

Prime Management Company, Irvine

Prime Management Company Inc has over 30 years of experience in providing complete professional management services for income properties throughout Southern California. Prime Management prides itself in its extensive knowledge of policies, regulations, procedures, and practices as they pertain to the various industries in which it deals in, e.g. retail of consumer goods, fuel service stations, health care facilities, single and multiplex housing, commercial buildings, new developments, etc. Prime Management manages and services over 20 businesses and properties throughout Southern California. Pegah Fazeli started the company six years ago to manage innovative businesses in the Southern California area. She is expanding operations into various new cutting edge fields, such as health care and energy.



Idit Ferder, Chief Operating Officer

Lugano Diamonds, Newport Beach

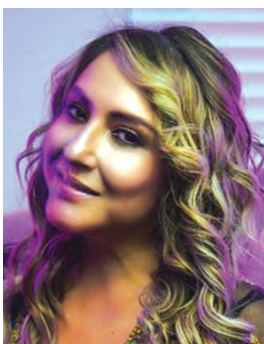
As the co-founder of Lugano Diamonds, Idit Ferder has been an integral part of building the foundation and vision that began the journey that brought Lugano to its current level of success. Ferder brought the initial plan of community support and philanthropy to the forefront of everything we do. Corporate responsibility has positioned Lugano as good stewards of giving. They support Arts, Health, Education, and Children's organizations in every community in which they do business. As the COO of Lugano Diamonds, Ferder has overseen the design and build of the current salons and the development of the new design concepts for Lugano Diamonds and Lugano Privé.



Raquel Figlo, CEO

Raquel Figlo Public Relations, Lake Forest

Rock-Solid Results in Creating a Legacy for Music, Entertainment, & Lifestyle Brands. Raquel Figlo Public Relations promotes creative thinkers and propels interesting brands to the next level. Raquel Figlo is committed to bringing goals and objectives to fruition with high enthusiasm and commitment. She goes beyond emails and taps into the right connections, giving you the right kind of news, routinely. Through crafting a consistent, honest, and authentic story, together she works with you to build you a share-worthy identity, culture and distinguished brand voice. Specializing in public relations, social media, influencers, talent management, and more for music, entertainment & lifestyle.



Laura Foti, Senior Vice President, Marketing & Investor Relations

Specright, Tustin

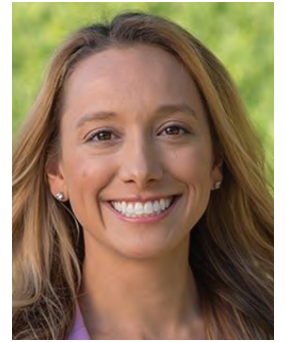
Laura Foti leads marketing and investor relations at Specright, the first cloud-based platform for Specification Management. Hired as the first marketing leader, Foti's has taken Specright from an unknown software startup to being named a Gartner Cool Vendor, one of the most esteemed recognitions in software. She's played an instrumental role in Specright's growth, helping raise more than \$40 million dollars of investment with some of the top venture and growth equity firms in the country. Since joining Specright, the

company has 10x'd revenue and grown to more than 100 people. This year, she planned and led the first Specification Management Summit conference in Austin, Texas, which had almost 200 attendees including leaders from Bumble Bee Seafood, BASF, Caterpillar, Gartner and other Fortune 1,000 companies in attendance. She also hosts "Beyond the Shelf: the Product and Packaging Podcast," where she interviews the industry leaders behind the products we love and use everyday, with 1,000+ downloads in the first seven episodes.

Lisa Fratzke, Partner & Executive Strategist, Head of Client Strategy

Fratzke Consulting, Fullerton

Lisa Fratzke is a partner and executive strategist at Fratzke Consulting, specializing in helping clients achieve transformative growth through integrated marketing communications, employee engagement and culture change. Inspired by the quote "Be curious, not judgmental," Fratzke has an innate curiosity that informs her consultative approach with clients. She has a passion for working with clients to get to the heart of an issue and developing strategic initiatives that drive awareness and positive change. Her holistic approach leverages brand storytelling, technology and the principles of human behavior to help clients tell their stories better than anyone else internally and externally to drive employee engagement, customer loyalty and business growth. Fratzke is responsible for leading the strategic vision of Fratzke's top clients and has successfully expanded the firm's reach and revenue through the development of Fratzke's Communications & Culture practice. Fratzke is currently organizing a Think Tank for women in communications, based in Orange County.



Mandy Fry, President & Partner

Z SUPPLY LLC, Costa Mesa

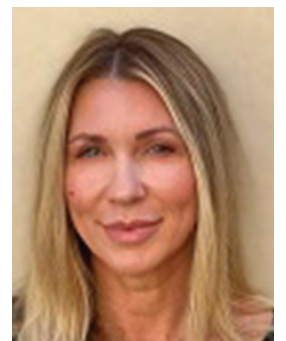
Mandy Fry has overseen tremendous growth within Z SUPPLY since she joined the company, and subsequently was named president and partner. She's overseen the launch and growth of the proprietary wholesale platform, shopB2Z, which now has a virtual showroom and user-friendly tech features that create a specialized shopping experience for more than 3,100 retail partners. This year, she launched two new divisions to the company - Z Supply Eyewear and Z Active - while continuing the success of the brand as a whole in all its categories. She also oversaw the establishment of the Z SUPPLY Foundation, which raised \$250,000 in its first fundraising campaign for select California college scholarship programs in the fields of art, design and marketing. The Foundation also raised an additional \$50,000 to help implement 2022 programs. Under her direction, Fry has grown the company 45%.



Mandy Gagnon, Loan Officer

Omni Fund, Irvine

Mandy Gagnon is a dynamic, driven and diligent lending officer and single mother who has overcome a great deal of difficulties early in her life to ensure her family is cared for. She came from a generally dysfunctional family, struggles with emotional and mental health and through her drive, she has successfully grown a thriving business serving Orange County and the surrounding areas. She has aligned herself with many professionals across the region to build a business for herself and the people she serves. Through the relationships she has nurtured and fostered, her business will continue to help underserved communities - single mothers who have left a life of abuse behind. She has managed to do all of this and keep family as her number one priority.



Kelli Gerasimou, VP, Finance

Ivantis Inc. (subsidiary of Alcon), Irvine

Kelli Gerasimou has acted as CFO working with the former Ivantis CEO to both build and scale company and ultimately sell successfully to Alcon in January of 2022. Gerasimou built the accounting and finance team from the ground up and was involved in all facets of system implementations as well as strategic operational initiatives that led to a successful commercial launch of the Hydrus product as well as the ongoing growth of the company. Gerasimou was the point person in working with investors and legal counsel in conjunction with the sale to Alcon. Gerasimou helped navigate the team through an IP lawsuit as well as the unknowns of the elective procedure availability during Covid. Gerasimou also handled all bank debt, all international strategic and tax planning.



Shayna Goldberg, Chief of Human Resources

SetSchedule, Irvine

Shayna Goldberg has always been the leader for all employees. She has created a healthy and happy environment for employees which stimulates growth and success. Over the past year, she has facilitated the introduction of new benefits and ancillary benefits helping the company compete with benefits provided by large companies. Goldberg has implemented the Early Management Development Program, created opportunities for volunteering and sponsoring events such as Make A Wish, Cardz for Kidz, and has created job



Wherever
you're going
next, **we'll**
help you
get there.



BMO is proud to support the empowerment
and growth of women in business.

Kelly Wang, Commercial Banking

☎ 310-807-0569

✉ kellyl.wang@bmo.com



BMO Harris Bank N.A. Member FDIC.

bmoharris.com/commercial

2022 Women in Business Award Nominees

opportunities for hundreds of employees. Because of her achievements in 2021, she was nominated for OCBJ's Women in Business award and this year she was recognized as one of the Distinguished HR Leaders in Orange County by OCBJ and won a Bronze Stevie in the recent American Business Awards under the HR Executive of the Year category.

Sue Grant, Founder & Executive Volunteer

The Literacy Project, Newport Beach

Sue Grant curated an impactful career within the nonprofit industry. Founding The Literacy Project, the organization has served 10,500 underserved students from low-income families. Under her leadership, she helped raise over \$4.45 million to provide a reading program at "no cost" to both the child and school within three states. The nonprofit's 30-hour program significantly changes a child's ability to read, averaging skill increases from 76% to 129%. The agency has donated \$1.92 million worth of reading games to 47,250 family members, promoting family literacy. Grant has invested heart and knowledge as a dedicated mentor to over 50 interns (Chapman University, CSUF, and UCI). She earned the California Congress of Parents, Teachers and Students Service Award, U.S. Congressional Service award, and a top five finish at the World Literacy Awards. She was a founding director with Coalition for Reading Excellence (Washington, D.C.), and participates in EURead's Educational Summit in Brussels.



Kim Gros, Co-Founder & Chief Visionary

SteelCraft, Garden Grove

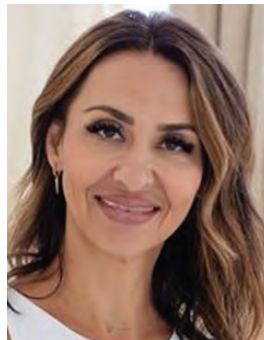
Kim Gros' unique vision for outdoor urban eateries built sustainably within shipping containers began on her long daily commute to Disney in Burbank and came to life - thanks to her creativity, resourcefulness and sheer tenacity - in the SteelCraft concept. Balancing her full-time job at Disney in HR, she secured a development partner, Howard CDM, mortgaged her home to co-invest, and the journey began. What started five years ago in Long Beach expanded to Garden Grove (and Bellflower) three years ago. Today, Gros continues to be involved on a daily basis as the visionary behind SteelCraft. Thanks to her passion for building community and innate ability to identify and champion unique food concepts, SteelCraft Garden Grove is a thriving hub for its neighborhood and for visitors from beyond its borders. It also is an incubator for small, family-run and BIPOC-owned businesses.



Pegah Grossi, President

Ambiance Design Consultants Inc., Fountain Valley

Solé Shades is a boutique, Southern California based manufacturer of custom window coverings. The company had its start as a high-end residential drapery workroom founded by Pegah Grossi and her mother Ferdos, over 20 years ago. A foundation of complex customization and a demanding clientele set the standards of high-quality workmanship and meticulous attention to detail, which remain their hallmarks today.



Holly Hagler, President & CEO

Meals on Wheels Orange County, Anaheim

Holly Hagler is the president and CEO of Meals on Wheels Orange County, a nonprofit providing social, nutrition, and health services to older adults. Prior to the pandemic, the organization delivered one million meals annually to older adults in Orange County, and dramatically increased to two million during the height of it. Meals on Wheels Orange County is the largest nonprofit providing this service in the county and also offers services such as Adult Day Health Care, Case Management and Care Coordination. Hagler's career spans senior-level business and nonprofit positions. She serves on the board of directors for Meals on Wheels America and California, the leadership council for the Orange County Strategic Plan for Aging, and is co-chair of Partners at Home Network. She previously served as board chair for the National Association of Nutrition and Aging Services Providers and as a co-chair of the Orange County Aging Services Collaborative.



Kaaren Hall, Founder

U-Direct IRA, Irvine

Despite being in the midst of a recession and mortgage market collapse, Kaaren Hall founded and made a resounding success of uDirect IRA Services. She discovered a strategic way to put her 20+ years in mortgage banking, real estate, and property management to use. The solution was an untapped market for both her skills and for investors - self-directed IRAs. Learn more about Hall and her thriving company at uDirectIRA.com. Hall is also CEO/Founder of OCREIA - the Orange County Real Estate Investors Association. Founded in 2012, OCREIA offer real estate investing education for all levels of investors on a large variety of real estate investing topic. Learn more at OCREIA.com.



Nicole Hall, Principal

Areas Interior Design, Newport Beach

Nicole Hall began her interior design career in Newport Beach in 1995 and became a nationally known designer with projects in the commercial and residential sector in over five states and



have been in the industry for over 25 years. She founded Areas Interior Design in 2002 and landed the biggest project with a budget of \$80 million dollar penthouse project in Seattle, WA. Hall also worked as a consultant with Paragon Construction Consulting firm and consult in major mix-use and hospitality projects.

Rebecca Hall, President & CEO

Idea Hall, Costa Mesa

Founded by Rebecca Hall in 2003, Idea Hall is a nationally recognized creative communications agency committed to championing good both at home in Orange County & beyond through an integrated marketing model that brings marketing, branding, public relations and advertising services together under one roof. Hall and her team have worked with some of OC's most established commercial real estate businesses, as well as nonprofits taking on some of the county's biggest issues - including homelessness and mental health. The agency has also attracted top local talent through its strong corporate culture where people come first. Over the past two decades, Hall has earned the reputation of being one of the first and most successful female entrepreneurs in the county. She attributes her success to staying ahead, constantly innovating and maintaining strong relationships.



Caterina Hall-Richards, Director of Operations

Bracken's Kitchen, Garden Grove

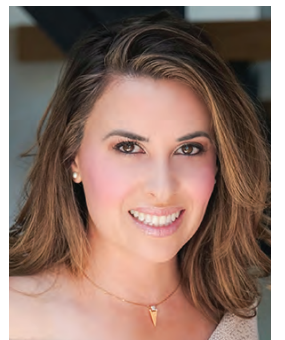
Caterina Hall-Richards is director of operations at Bracken's Kitchen, a 501c-3 charity fighting food insecurity in Orange County. She manages a comprehensive array of services and programs overseeing all day-to-day operations with a staff of 24 and 460 volunteers. She works closely with Founder/Culinary Director Bill Bracken to ensure all programs grow successfully while attending to the needs of their agency partners. Hall-Richards is instrumental in the development of programs, promotional initiatives, grant writing, and community relations. She also assists the operations and fundraising teams in the planning, organization, and execution of public and private fundraising initiatives. Hall-Richards was a volunteer chef in the kitchen for two years before accepting her new role in December 2018.



Ashley Harter, CEO

The Harter Group Inc., Foothill Ranch

Ashley Harter brings over 10 years of unrivaled experience to every customer that we have the privilege to work with. Her attention to detail and credentials are what sets her apart from the rest when it comes to real estate contracts and home valuations. Her expertise is backed by a Masters in Real Estate from the University of San Diego. Having provided market and financial analysis to real estate investors, developers, buyers, and sellers alike, she utilizes her skills to help clients NET more money. Harter was born and raised in the South Orange County area which is why her local knowledge is a trusted, honest resource for all of her clients. Her precise analytic skills and price positioning has won her accolades throughout her career. She has finished first in international real estate competitions, outperforming Ivy League universities across the world and nation. Her drive to achieve the best outcomes for her clients started from her background as a nationally competitive synchronized swimmer. Harter has helped propel The Harter Group to notable accolades, which include receiving the National Honor Broker Agent Advisor, the Best Of Mission Viejo Award, as well as the Pricing Strategy Advisor Award.



Courtney Haubach, Associate- Net Lease Retail

Matthews Real Estate Investment Services, Costa Mesa

Since joining Matthews™ in 2021, Courtney Haubach has displayed an exceptional level of drive, professionalism, and knowledge of the commercial real estate market, which has contributed to her success in the single tenant net lease sector. Haubach specializes in the acquisition and disposition of drugstore assets, completing sales with companies such as CVS, Walgreens, and RiteAid. In her first nine months, Haubach totaled over \$18 million in sales volume, a feat rarely reached in such a short time. Haubach began her career amid a global pandemic but refused to let the economic climate falter her work ethic. In less than two years with the company, she has already gained numerous private investors, 1031 Exchange buyers, developers, and institutional investors as loyal clients. Haubach prides herself on paving the way for women in the commercial real estate industry by showing up and acting as a resource. Haubach hosts educational events such as Women in Brokerage to introduce CRE as a career choice for young women.



Erin Hawley, SVP Global Sales

Spiritual Gangster, Irvine

In her 20+ year career in sales, Erin Hawley has worked her way up from sales assistant to global SVP of sales. Her depth of knowledge in building a brand's sales comes from her extensive understanding of the entire process of creating and growing a brand into a national and international powerhouse. She is a team builder, an optimistic force, and an intense strategist. Her dedication to the companies she works for shows up in every detail of reporting, analysis, and decision making. She prides herself on action and responsibility, and her engaging attitude and willingness to step right into the problem alongside her team makes her one of the most desired leaders in the industry.





Idit Ferder

CHIEF OPERATING OFFICER

LUGANO[®]
DIAMONDS

As the co-founder of Lugano Diamonds, Idit has been integral to Lugano's success. She has shepherded the company through a period of exponential growth while ensuring that it remains grounded in every community it touches. Her fingerprints are evident in every one of Lugano's salons and its new membership club, Lugano Privé, which provides curated experiences for Lugano clients.

Idit has designed each of Lugano's exquisite salons, earning acclaim for her unique approach to redefining the high luxury retail environment. Outside the retail space, she also creates each of Lugano's rapidly growing offices, a unique and highly technical manufacturing and design workshop, and Lugano's newest 40,000 sq. ft. headquarters.

As COO, Idit is responsible for the entire operation of Lugano and the expansion to new communities in the U.S. and soon in Europe. Idit has been an animating force behind the company's commitment to philanthropy and is working to ensure that Lugano gives back to every community into which it expands. She thus serves on the boards of a variety of charitable institutions. Idit sits on the Board of the Orange County Museum of Art (OCMA), is a Fellow of the Aspen Institute, is involved in Tikkun Olam Makers (TOM), and is a Trustee of the Aspen Art Museum.

Idit and her husband Moti are champions of the arts, having created an endowment for OCMA that will underwrite the cost of admission for the public for ten years. They have also built a gallery in the new Herbert Buyer Center in Aspen to study the Bauhaus movement and art scene.



Lugano Diamonds is proud to recognize Idit Ferder on her 2022 OCBJ Women in Business Awards nomination.



2022 Women in Business Award Nominees

Heather Heleloa, Director of Sales & Marketing *THE RANCH Restaurant & Saloon, Anaheim*

As a k  naka maoli and first generation of her family born on the mainland, Heather Heleloa is also first in her family to receive a college degree. Earning a Bachelor of Arts in Communications from California State University, Fullerton, she is poised to earn a Master of Science in Hospitality and Tourism from the University of Southern California. She is the director of sales and marketing at THE RANCH in Anaheim, a top-rated independently-owned luxury concept comprising an award-winning Restaurant, live entertainment Saloon, and private Events Center. Recently nominated for her third term as an executive officer, Heleloa serves as vice president of the California Restaurant Association, Orange County Chapter. She honors her Native Hawaiian heritage as Secretary of 'Ahahui o Lili'uokalani Hawaiian Civic Club, and creator of Heleloa.com, a directory of Pacific Islander news, events, businesses, and people throughout Southern California.



Madelynn Hirneise, CEO *Families Forward, Irvine*

Madelynn Hirneise began her career at Families Forward in 2012 as a housing resource specialist and served as senior director of the organization before taking the helm as CEO in 2019. She's been instrumental in designing, developing, and implementing Families Forward's strategic housing acquisition and partnership programs, and has overseen the nonprofit's housing program, prevention and diversion, career services, and community resources. Under her leadership, Families Forward has seen an increase of nearly 75% in its housing continuum while maintaining a reputation in the community as leaders in quality care for unhoused families. She's dedicated to the mission of the organization which exists to prevent and end family homelessness by providing access to housing and resources that create lasting stability. Hirneise brings a passion for helping others to her role as CEO and strives to see an Orange County where every family has a home and the opportunity to thrive.



Poppy Holguin, Owner

Jan's Health Bar, Huntington Beach

In 2010, Poppy Holguin purchased the original Jan's Health Bar location in Huntington Beach. Applying her knowledge of business and marketing, she has since expanded the brand to four additional stores: Costa Mesa in 2013, Laguna Beach in 2015, Corona del Mar in 2017, and Irvine in 2021. In 2018, she renovated the brand's flagship location, expanding it from 800 square feet to 2000 square feet. This year, the brand celebrates 50 years in Orange County and is poised for future growth as Holguin eyes expansion into Long Beach with the opening of a sixth location.



Krista Hollinger, Chief Operating Officer *Planned Parenthood of Orange and San Bernardino Counties, Anaheim*

After serving as a program manager for Planned Parenthood of Orange and San Bernardino counties (PPOSBC) during her master's degree studies, Krista Hollinger rejoined the organization as its new chief operating officer in December 2021. Hollinger spearheaded the development of PPOSBC's Abortion Aid program. The program increases abortion access at all PPOSBC health centers and provides financial assistance to patients who are forced to travel to California for abortion care from states where abortion is illegal or severely restricted. Since the Supreme Court overturned Roe v. Wade, the number of patients calling PPOSBC for abortion appointments from outside the state, including Arizona and Texas, has doubled. Hollinger's leadership of a multi-departmental operations team has allowed PPOSBC to secure resources and train staff to book appointments at Orange County health centers and to pay for hotel rooms, rideshares, gas, and even flights for out-of-state patients that need assistance getting this critical care.



Lynn Hopkins, Chief Financial Officer *Banc of California, Santa Ana*

Lynn Hopkins has led Banc of California through several financial milestones, including a successful subordinated debt raise of \$85 million in October 2020, to refinance the Company's preferred stock. In 2021, she oversaw the acquisition and integration of Pacific Mercantile Bank, and brought Banc's total assets to over \$9 billion, accelerating Banc's operating scale and growth in key markets. She also oversaw an investment into fintech Finexio's \$10 million funding round. Banc is using Finexio's payment services to extend more products to business clients starting in 2022. Since joining the bank, she, along with CEO Jared Wolff and the entire executive team, have worked to improve Banc of California's performance and balance sheet through strategic initiatives such as deploying excess liquidity, dramatically improving the bank's funding sources, and reducing expenses while continuing to invest in technology and resources for future growth. Banc of California reported assets of \$9.6 billion at the end of the first quarter of 2022 versus \$7.9 billion a year ago.



Amanda Horton, Realtor

Surterre Properties, Newport Beach

Amanda Horton has been a top-producing licensed real estate broker since 2002. With her full-time work ethic and proactive approach, Horton assures sellers and buyers that

every transaction will proceed in a professional and efficient manner. Amanda and The Horton Team are dedicated to providing the highest level of service to their clients from the first meeting to well beyond the end of a transaction. An Orange County native, Horton was raised in Laguna Beach, and is an active sponsor of El Morro Elementary and member of the Laguna Beach Parents Club. She currently serves as President of the Laguna Beach High School Alumni Association and in a director position on the Laguna Beach High School Scholarship Foundation. Her in-depth knowledge as a local resident, homeowner, and real estate broker provides an unsurpassed level of expertise about the area. She enjoys sharing marketplace knowledge to guide clients throughout the process.



Stacy Hubbard, Principal & Managing Director OC *Marsh McLennan Agency, Aliso Viejo*

Stacy Hubbard joined MMA in 2011 and has been one of the key drivers behind the Orange County location's reputation for excellence in service. The insurance industry has historically been a sales-oriented field. Many of the accolades in the brokerage side of the business have traditionally fallen to sales teams. Hubbard's work has demonstrated the value of focusing on service for clients, not only impacting client retention but also new business development. As evidence of her impact, Hubbard was one of the first associates in the firm in a non-sales role named principal. In the face of the numerous challenges brought on by the global pandemic, Hubbard remains steadfast in her commitment to excellence in service. She continues to be an example for her colleagues in how to be there for clients in the moments that matter.



Deeniece Huynh, Project Manager

Howard Building Corporation, Costa Mesa

Deeniece Huynh has managed projects for some of the largest names - Anduril, Netflix, Vans, Riot Games, Blizzard Entertainment. Her 20 years of experience inform strong leadership, organized workflows, and integrated collaboration and have been a driving force behind the completion of several multimillion dollar projects. In an industry known for being inflexible, Huynh is adaptive. This allows her to find alternate solutions to any challenge. Her fresh approach to each project and her consistent follow through has helped her create strong relationships with clients, architects, and subcontractors. In 2018, her team was awarded a Commercial Real Estate Women-Orange County (CREW-OC) SPIRE Award for Vans. She attributes her success to working alongside several talented individuals every day building something from nothing.



Janet Jacobson, Medical Director

Planned Parenthood of Orange and San Bernardino Counties, Anaheim

Since 2013, Dr. Janet Jacobson has been providing compassionate, high-quality patient care at Planned Parenthood of Orange & San Bernardino Counties (PPOSBC). When she became medical director in 2019, Dr. Jacobson helped pivot the organization to a combination of tele-health and in-person care. PPOSBC became one of the first local healthcare organizations to provide drive-up prescription pickup during the height of the pandemic, and Dr. Jacobson orchestrated the PPOSBC program that provided over 16,000 COVID vaccines to the community. Dr. Jacobson was also critical in developing the PPOSBC Abortion Aid Program, which enables all nine PPOSBC health centers to treat thousands of women needing to travel to California for abortion care, and offers travel assistance when possible. After Roe v. Wade was overturned, Dr. Jacobson became the face of PPOSBC in the media, giving interviews to outlets including the New York Times, the Los Angeles Times, and the OC Register.



Shannon Jenkins, Managing Partner

TLD Law, Irvine

As managing partner, Shannon Jenkins has played an instrumental role in the growth of TLD Law, a Southern California-based, full-service law firm. Since he joined TLD Law in 2000, the firm has expanded significantly, more than doubled the number of employees, has become certified as a Women Owned Business by the WBENC, and joined the exclusive National Association of Minority and Women Owned Law Firms (NAMWOLF). With an extensive background in employment law defense, Ms. Jenkins has spearheaded the employment law practice of TLD Law, where she works with all sizes of employers and executives in business litigation and employment related disputes. During her tenure with TLD Law, Ms. Jenkins's legacy of excellence, knowledge of through individual and class action cases, and vision for the firm she has cultivated with fellow members of the leadership team has allowed the firm to make significant moves, even throughout these unprecedented past two years.



Gloria Jetter Crockett, President & CEO

Make-A-Wish Orange County and the Inland Empire, Irvine

When Gloria Jetter Crockett joined Make-A-Wish Orange County and the Inland Empire in September 2019, little did she know





Congratulations to JAMS President **Kimberly Taylor, Esq.**, Women in Business Award nominee.



First hired as a general manager in 1999, **Kimberly Taylor** moved quickly through the ranks at JAMS, serving as associate general counsel, regional VP, COO and, since 2021, as president. She has been a key driver of JAMS' extraordinary growth over the last two decades. During the pandemic, Ms. Taylor helped navigate a seamless transition to remote operations as well as virtual mediations and arbitrations. Under her tenure, JAMS has also emerged as a leader in diversity, equity and inclusion (DEI) with the appointment of a full-time DEI program manager and implementation of numerous initiatives to increase diversity among JAMS neutrals and associates in addition to the ADR industry at large.



The world's largest private alternative dispute resolution (ADR) provider, JAMS and its panel of 400+ experienced mediators and arbitrators offer custom solutions to address conflict at any stage. Learn more about our in-person and virtual ADR services at jamsadr.com.

**Local Solutions.
Global Reach.®**

2022 Women in Business Award Nominees

her biggest obstacle as CEO would be leading the organization to granting wishes for immunocompromised children during a worldwide pandemic. Knowing wishes are proven to create hope and inspiration for children with critical illnesses, Jetter Crocket swiftly sprang into action to guide and motivate staff, volunteers, and donors to quickly pivot to meet the needs of these families without putting the health of wish kids in jeopardy. Her leadership empowered the organization to grant 165 wishes in Fiscal Year 2021 by bringing the wishes to homes with virtual shopping adventures, virtual meet and greets, new playsets and even furry friends. After all, the power of a hope-filled wish is life-changing.

Hong Jiang, President

Virginkar & Associates, Fullerton

Hong Jiang is 100% owner of Virginkar and Associates, Inc. Hong is an experienced engineer and business owner, who acquired Virginkar and Associates, Inc. The acquisition of this company was finalized on June 30, 2018. Virginkar and Associates Inc. referred to as VAI, is an engineering management consulting firm operating for over 20 years, provides services throughout all phases of a consulting project including planning, preliminary and final engineering, procurement, manufacturing & construction, testing & commissioning. Parent company HJI Group, Inc. is Hong Jiang 2nd company and is the parent company to VAI, and has an international presence and these two companies offer the identical management consulting. The two companies will remain separate at this time.



Ronnetta Johnson, CEO

Waymakers, Santa Ana

Ronnetta Johnson is a dedicated non-profit professional; she has been in leadership positions with Waymakers for more than 25 years, appointed CEO in 2015. During her tenure with Waymakers, Ms. Johnson has developed and implemented a variety of trainings and seminars and has been instrumental in the creation of service components which have gained national, state, and local recognition as best practice models. Johnson is committed to mentoring and professional development for future generations of leaders. Johnson's commitment in this area goes beyond the confines of Waymakers sharing her expertise regionally and statewide serving as in many capacities. She held many Board positions for the California Crime Victims Assistance Association, including President. She is currently a member of the CCVAA Training Committee and serves as a core member of the curriculum development and implementation team.



Meghana Joshi, Senior Project Manager

Little Diversified Architectural Consulting Inc., Newport Beach

Meghana Joshi is an award-winning architect with 18 years' experience in architecture, design, and project management. As a senior project manager in Little's Retail Studio, she positively impacts the design industry and the communities she serves. Joshi received the 2018 American Institute of Architects (AIA) California's "Associate" award and "Presidential Citation" as well as 2019 AIA Orange County's "Service Award." At AIA Orange County, she is the founder/ chair of the Women in Architecture Committee, and Committee for Equity, Diversity & Inclusion. Her professional contributions were honored at "Say it Loud" exhibit at the AIA National 2019 Conference. Joshi is the founder of "Project Amplify," celebrating minority architects throughout the world.



Manna Kadar, Founder & CEO

Manna Kadar Beauty Inc., Irvine

Manna Kadar is the self-made, self-funded minority mompreneur behind the fast-growing Manna Kadar Cosmetics family of brands that includes Manna Kadar Beauty, Goddess by Manna Kadar, Beauty and the Bump, Haute Dog luxury pet products, Mason Man Skincare, and Manna Kadar Luxe Bath and Body. The creator of the "7 Minute Face," Kadar's three-step, award-winning Beauty Simplified System quickly gained the attention of national outlets such as E! News, Good Morning America, and The Today Show.



Shawn Kato, Partner, Tax Services

Baker Tilly, Irvine

Shawn Kato is a tax partner with Baker Tilly with over 25 years of tax and accounting experience specializing in publicly traded and privately held C-corporations. Areas of expertise include ASC 740 (Income Tax Accounting), Section 382 (Limitation on Tax Attributes), business combinations, and stock-based compensation. Most recently she has helped several of her clients navigate the financial and governmental tax reporting required in IPO and de-SPAC transactions. Kato is passionate about mentoring and teaching others in her field, which she does both within and outside the firm.



Dawn Keeney, Senior Vice President

Northern Trust, Newport Beach

Dawn Keeney is a senior vice president and is the senior fiduciary officer for Northern Trust's Orange County region. Keeney is responsible for overseeing all aspects of the

region's fiduciary practice, including oversight of all trust relationships, management and mitigation of fiduciary risk, review of all new trust business, and oversight of all court-related matters including administrative petitions and fiduciary litigation. Keeney works with her clients and their advisors to develop integrated tax and estate plans and wealth management strategies.



Adrienne Kessler, CEO

Speech and Language Development Center, Buena Park

CEO Adrienne Kessler joined Buena Park's Speech and Language Development Center in 2016 with the goal of revitalizing and expanding the 60-year-old legacy center. Under her leadership, the center now offers innovative education and therapies for individuals with disabilities and special needs at every stage of life, including adults through an adult day program. Kessler also engineered the opening of an office in Temecula to address an urgent need for disability services there. She also has advanced quality services for those with disabilities by partnering with universities including USC, NYU, Chapman, UCI & CSUF to conduct original research and serve as a training site for the next generation of clinicians. She continues to shape policy and practices for special education statewide in her role on the Board of Directors for the California Association of Private Special Education Services, where she works with the California Department of Education and State Legislature.



Joone Kim-Lopez, CEO & General Manager

Moulton Niguel Water District, Laguna Hills

Joone Kim-Lopez provides visionary leadership for MNWD, a public water, wastewater, and recycled water agency serving six cities in Orange County. During her 10-year tenure she has fostered cohesive board relations with transparent processes and policies, and transformed operations and culture focusing on workforce, innovation, and strategic external alliances. She has also restructured financial systems, investment portfolio and bond issuances/refinancing resulting in a credit rating upgrade from AA to AAA, allowing for agency growth and expansion. Lastly, she has positioned the agency to innovate and engage numerous public-private partnerships elevating the agency's profile as a statewide leader, and advanced commitment to promote diversity, equity, and inclusion in the industry. Kim-Lopez also launched joint forums with Southern California Building Industry Association; developed environmental partnerships among water/energy utilities and businesses; collaborated with state/federal legislators and regulatory agencies to shape legislation and policies to improve demand management efforts, open/transparent data processes, workforce development and emergency responses; and partnered with international institutions to promote digital solutions to increase resiliency in resource planning and management.



Robin King, Corporate Relations Director

J.F. Shea Therapeutic Riding Center, San Juan Capistrano

Robin King brings 20+ years of business development, marketing and sales experience to The Shea Center. As a seasoned executive from the for-profit world, King combines her knowledge of cause marketing, event sponsorship sales & passion for building relationships, with her desire to engage organizations in corporate social responsibility to broaden the footprint of corporate support at The Shea Center. She along with her incredible development team, engage board members and passionate committee members to raise millions of dollars to support the essential services and programs at The Shea Center every year. King leads all efforts to introduce corporate partners to The Shea Center, leading to more corporate volunteers, sponsors, committee and board members. King has been responsible for over \$25 million dollars worth of advertising and marketing campaigns spanning decades. Representing hundreds of radio stations, locally and nationally for American Airlines, PepsiCo, P&G, Nationwide, The 49ers and the San Jose Sharks to name a few. With that said, she has never allowed that success to get in the way of what is truly important to her clients, colleagues, sponsors and donors. It is most important that King leads by example to elevate corporate culture and engage in a high level of emotional intelligence. Her keen ability to bring people together, make connections, and have a network of truly amazing business leaders and past colleagues comes naturally to King. She continues to utilize her skills from her marketing and sales background to exceed all fundraising goals while contributing as a member of The Shea Center Communications team.



Sharon R. Klein, Partner & Chair, Privacy, Security & Data Protection Practice

Blank Rome LLP, Irvine

Sharon R. Klein is a recognized leader in privacy and data security law, as well as in her Orange County and professional communities. Sharon Klein is a Blank Rome partner; chair of her firm's Privacy, Security & Data Protection practice; and managing partner of its Orange County office. Cybersecurity risk, and legislation aimed at curbing it, are rapidly evolving globally. Approximately 37 percent of global organizations were the victim of a ransomware attack in 2021. Klein ensures that her business clients minimize their risks and comply with a myriad of regulations while leveraging the growing value of





ALWAYS BE READY®

For mind and body, from head-to-toe, 5.11 is the pioneering, purpose-driven brand making purpose-built gear for those who demand more of themselves, for the greater good and for those on the mission of a lifetime.



DEBRA RADCLIFF

CHIEF MARKETING OFFICER
5.11®, INC.

5.11 is proud to recognize Debra Radcliff, Chief Marketing Officer, on her 2022 OCBJ Women in Business Awards nomination. Debra is an exceptional leader, utilizing her extensive retail and marketing background to continue to expand 5.11's robust position in the outdoor apparel and gear industry.



2022 Women in Business Award Nominees

data. Since joining Blank Rome in 2021, she has led and expanded the firm's Privacy, Security & Data Protection practice, adding both attorneys and services. The national, 40+-attorney group helps companies strategically prioritize digital assets, navigate nuanced privacy rules, and protect information from malicious cyberattacks, breaches, and other threats in the daily headlines.

Lee Ann Kline, President & Founder *STEM Advantage, Huntington Beach*

Lee Ann Kline is president and founder of STEM Advantage. Kline began her career as a programmer at IBM. As a Mathematics and Computer Science major with an MBA from The Wharton School, University of Pennsylvania, she was keenly aware of the lack of women in her field and the need for role models. As her career progressed and she became a consultant at Ernst & Young (EY), she observed firsthand the lack of gender and racial diversity in technology organizations she served. Inspired to create change, Kline leveraged her network to create STEM Advantage in 2012. Her honors include EY Better Begins With You global winner for Strengthening Our Communities and Certificate of Congressional Recognition for STEM Advantage. In 2021, the Los Angeles Business Journal honored STEM Advantage as Diversity, Inclusion + Equity Nonprofit of the Year.



Whitney Kumar & Kamryn Villegas, Co-Founders

Kamryn Whitney Court Reporting, Irvine
Kamryn & Whitney, identical twin sisters, started the company in 2013 and grew it into a multi-million-dollar company. The legal field is a male-dominated field, and they turned the company into one of the most revered and respected court reporting agencies in California. Their company works with the biggest law firms in Southern California and has covered many high profile cases. They have been featured on podcasts as leaders in legal technology; featured in magazines; do public speaking engagements, and are active in promoting our profession. They work hand-in-hand with court reporting school to do so. Kumar and Villegas have just been invited into the exclusive Forbes Business Council.



Gina Lara, Tax and Forensics Senior Manager

Smith Dickson, Certified Public Accountants LLP, Irvine
Gina Lara is ever progressing and is a knowledgeable financial professional with over 15 years of experience. She holds an MBA, is a CFP, EA, and a member of the Association of Certified Fraud Examiners and CalCPA. Ms. Lara has been with Smith Dickson, CPAs for over seven years and is a tremendous contributor to the company's growing success. She is a formidable asset to her clients, helping them in the Tax and Forensic Accounting Departments. This dual role, enables her to work with individuals, business owners, and fiduciaries with tax planning and compliance along with the ability to provide financial analysis and litigation consulting services. Her greatest achievement has been working with integrity and earning the respect and trust of her clients.



Xandra Laskowski, Founder & CEO

OSEA Angel Investors, Newport Beach
Xandra Laskowski founded OSEA Angel Investors in 2017 to connect, educate and inspire women about angel investing. Since its founding OSEA Angel Investors have invested over \$700,000 and an additional \$500,000 through syndication, in companies that bring ideas, concepts and solutions to the market that make a difference in their industries. OSEA Angel Investors is the only women angel investor group based in Orange County, California. The mission of OSEA Angel Investors is to create more women angel investors. Laskowski is also very involved supporting women founders by mentoring and advising on startup strategy from idea to exit.



Julie Laughton, Owner

Julie Laughton Design Build, Laguna Beach
Julie Laughton is a graduate of Iowa State University. After completing her Bachelor's Degree in Interior Design in 1985 she moved to New York City, where she spent the beginning of her professional career working for two different Architecture firms and serving as the senior designer for an Interior Design firm. As senior designer, Laughton's responsibilities included all the hand-drafting for space planning and furniture layout, the selection of all the furnishings and materials and the supervision of all installations. Laughton takes a hands-on approach for all her projects. Equipped with her ability to visualize and her talent to draw, she can conceptualize the end result before the project even starts. She applies her expertise and experience in the custom design arena to create plans that truly work. Always painstakingly meticulous with her design details, Laughton is able to help all her clients achieve their goals for each unique home, whether it involves creating an inviting and functional kitchen, doing a room addition, remodeling the entire home or building a dream home from the ground up.



Lindsay Lawrence, EVP, Chief Operating Officer *First Foundation Inc., Irvine*

Lindsay Lawrence has played an important role in First



Foundation Bank's growth over the past six years. As chief operating officer she oversees all deposit, treasury management and operational activities for the bank as well as designing and implementing service delivery frameworks for the company. She also manages the enterprise delivery, business intelligence, and systems architect teams. Alongside her team, she helped develop and now manages First Foundation's digital bank channel. She also helped spearhead the bank's entrance into cryptocurrency alongside partners NYDIG and FiServ. She holds a vital role in the bank's day to-day operations as well as in the bank's long-term strategy and evolution.

Cadie Lee, CEO

Parisi Portfolio Inc., San Clemente

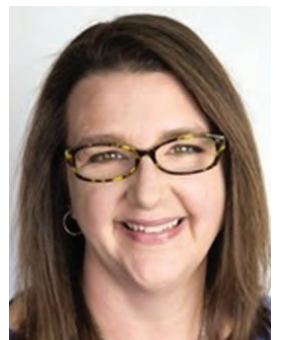
Cadie Browne Lee is a dynamic woman and business leader. Her accomplishments are not limited to the success of Parisi Portfolio, as she continues to make contributions to the industry and the community as well. As a lobbyist, Lee advocated for the multi-family housing industry at local, state and federal levels. She has also advocated for the building industry by working with the Building Industry Association. Lee has a passion for giving back to the community and has engaged in philanthropic efforts for many years with charitable organizations to include the Challenged Athletes Foundation, Operation Rebound, and the Semper Fi Fund. As a design professional dedicated to keeping at the forefront of the industry, Lee has her certification as a Certified Interior Designer, Commercial from the California Council for Interior Design. Furthermore, she has presented at leadership conferences for high profile industry executives regarding the latest design trends and developments.



Jennifer Leuer, Co-Chair of the Board

Octane, Aliso Viejo

Jennifer Leuer joined Foreground in June 2022, where she will serve as chief executive officer. In addition, Leuer has made a tremendous impact on the Octane organization since she joined the Board of Directors in June 2017 and became Co-Chair in December 2021. As a member of the organization's executive committee, she has been active leading multiple committees including strategy and marketing, for which she has helped lead an entire brand refresh for Octane, Octane Foundation for Innovation and Octane Capital & Growth. In addition, she has provided her time and expertise in scaling a new business unit for Octane that provides direct benefits to the entire Orange County innovation ecosystem. What's more, she's co-chairing the Octane Impact Fund, a \$5 million campaign that builds off Octane's legacy of tech innovation and growth to provide generational impact in Orange County.



Crystal Li, Partner

UHY LLP, Irvine

Crystal Li is a partner at UHY LLP with more than 15 years of diversified experience in public accounting, with a concentration in IPOs, Special Purpose Acquisition Companies (SPACs), reverse-mergers, and financial due diligence. She joined UHY LLP in 2016 as a senior manager and, over the past six years, has built UHY's only West Coast office in Irvine, California, into a well-regarded firm among both domestic and international businesses. Li serves as a leader of UHY's IPO and SPAC practice and an international resource for UHY International's cross-border transactions and due diligence. As a leading member of the UHY China Group, she also coordinates international audits for China-based entities in the United States and United States-based entities in China.



Jessica Liu, Founder

Petit Anjou, Newport Beach

A former Orange County attorney, Jessica Liu pivoted to the arts during the height of the pandemic when she saw a need in the market for jewelry that was safe for sensitive skin and that was available at non-fine-jewelry price points. Furthermore, noting that current jewelry brands tended to cater to trends and the consumption of fast-fashion, she wanted to bring the focus back to the customer experience and to delivering high quality pieces that are distinctively unique, yet timeless. Liu taught herself metalsmithing through books and online videos and launched her first collection the following year when she introduced her new jewelry studio, Petit Anjou.



Jamie Long, Senior Director, Professional Education & Development

Sonendo Inc., Laguna Hills

Throughout Jamie Long's tenure with Sonendo, she has implemented innovative and engaging ways for endodontists to learn about and use the GentleWave System, which provides a less invasive and less painful alternative to conventional root canal treatment. With a majority of Sonendo's customers being endodontists, Long is dedicated to improving and streamlining their learning and development journey by serving as a long-term partner and resource. She has launched a variety of forums, advanced trainings and support systems for customers. Most notably, she developed Sonendo's Sound Science® Academy from the ground up, which offers a range of high-quality programs, events and courses structured on interest and skill level. Further, Long has spearheaded two new industry conferences. In 2021, she led the first expanded EndoCon™ event. She is also heading the inaugural Women in Endodontics™ meeting in September, designed to further support leadership and growth opportunities for women in a largely male-dominated industry.



DOCTOR SOCCER PRO CROCODILE HUNTER OC girls can.

**girls
inc.**
of Orange County

strongsmartbold

girlsinc-oc.org

COMPANIES THAT CARE



Now accepting nominations!

DEADLINE: NOVEMBER 22, 2022

The Orange County Business Journal is proud to announce the third annual Companies That Care. This Special Report will recognize companies that are, despite the odds, making Orange County a better place for all. These caring companies will be featured in our December 19, 2022 issue.

We are looking for companies that have gone above and beyond for the OC community through philanthropic efforts and accomplishments. Companies will be listed in alpha order.

Nominate a deserving company today!
Link: www.ocbj.com/2022-companies-that-care/



Diamond Sponsor



Platinum Sponsor



Gold Sponsor



Silver Sponsor



Visit www.ocbj.com/2022-companies-that-care/ to access the nomination form.

Congratulations!

**Proud to announce
Cindy Couyoumjian as nominee for
the 2022 Women in Business Award**



Cindy Couyoumjian is a financial advisor, and also an author. She published her first book in 2021, Redefining Financial Literacy, a Wall Street Journal Best Seller. Her second book, The Rise of Women and Wealth, recently published in August 2022, has made USA Today's National Best-Selling books.



**CINERGY
FINANCIAL**

15145 Woodlawn Ave. #100
Tustin, California 92780
(714) 210-0549
www.cinergyfinancial.com
www.cindytheauthor.com

Cindy Couyoumjian Author | Speaker | Financial Advisor

The annual Women in Business Awards Luncheon & Program honors five OC businesswomen who have made significant contributions to their community and organizations. Registered Representatives offering securities and advisory services through Independent Financial Group, LLC (IFG), a registered Broker Dealer and Investment Advisor, Member of FINRA/SIPC. Cinergy Financial and IFG are not affiliated entities. The Orange County Business Journal selects 5 OC businesswomen out of 198 candidates whose business is located in Orange County, California. 15 judge panel evaluates candidates based on their profiles, accomplishments, affiliations with non-profits. Nominees don't have to be affiliated with the Orange County business journal. CINERGYFINANCIAL.COM

2022 Women in Business Award Nominees

Monika Lopez, Senior Investment Officer

Northern Trust, Newport Beach

Monika Lopez is a senior investment officer and senior vice president at The Northern Trust Company. In her role, Lopez oversees the activities of the Orange County Portfolio Advisors, who collectively manage \$5 billion in assets under management. Additionally, Lopez specializes in comprehensive wealth management and advisory services, with a focus on creating investment strategies that are structured to meet client goals with the highest degree of confidence. Investment strategies are highly customized and grounded in best-available thinking.



Maegan Lujan, Director of Solutions and Services

Toshiba Business Solutions, Lake Forest

Maegan Lujan has been working in sales and business development within the office equipment industry since 2004, while offering extensive expertise in the areas of imaging, print, document and content management. Throughout her career, she has helped to solve the document-centric challenges from organizations as diverse as small- to medium-sized businesses to multinational corporations across a range of industries. Passionate about solving business problems for customers, partners and employers with a focus on strategic partnerships, she employs a consultative sales approach in developing and maintaining client loyalty in competitive markets. Since joining Toshiba America Business Solutions (TABS) in early 2013, Lujan currently serves as director of solutions and professional services within the company's product marketing team. In this role, she helps define go-to-market strategies for solutions, digital signage, and service offerings while shaping TABS' distribution program which includes introducing new offerings within the company's distribution channel of direct and independent dealers and enterprise account teams.



Anna Lisa Lukes, JD/MBA, Co-Founder & CEO

The Lukes Network LLC, Aliso Viejo

Anna Lisa Lukes co-founded and has had a clear vision for The Lukes Network. Demystifying sustainability and energy, and engaging the business community and citizens in programs and initiatives that promote the Triple Bottom Line of People, Profit and Planet is the reason for TLN's existence. In addition to energy and programs that impact the Planet, TLN also sparks conversations and conducts outreach, public relations and communications activities that promote economic development and private investment in communities. Placemaking and creating a brand for a local community is another segment of TLN's work that promotes Profit and People.



Colleen Maloy, President

David Meltzer Enterprises, Ladera Ranch

As president of David Meltzer Enterprises, Colleen Maloy helps to further the brand of David Meltzer as a public speaker, best-selling author, and business coach. In her previous role as the Director at Sports 1 Marketing, Maloy oversaw the company's internship program, operated as event coordinator, and served as executive assistant to the company's CEO, among other roles. Maloy is the longest tenured employee at DME and her support of the founder David Meltzer has been integral as the company pivoted during the pandemic. Maloy's leadership has empowered the team to reach greater heights than ever before, including filming six seasons of their two new television shows (Office Hours and 2 Minute Drill), which airs in millions of homes on Bloomberg and Apple TV. She's also won the Employee of the Year award in 2018 and 2021, and has won employee of the month a team-leading twelve different times over the course of her career.



Joi Mar, Managing Director

Green Street, Newport Beach

The finance industry is scrutinized for its lack of diversity and Joi Mar has done a tremendous job of showing what it takes to excel and help diversify this business. As managing director for Green Street's Market Analytics product, she's at the epicenter of the impressive and growing commercial real estate data and analytics platform while leading the training and development of her growing team. Mar's skills are limitless, as she is deeply involved in talent development and investing in each individual on her team. She recognizes the importance of diversity in the workplace, is a founding member of Green Street's Diversity, Equity & Inclusion Council, and sits on the front lines of harnessing women's curiosity in finance. When Mar noticed the lack of female applicants, she spearheaded the Women in Finance event- an opportunity for students to network and learn to "Ace the Interview". There are many facets to her that include being a friend, wife, and working mother who continuously leads by example.



Maria Martinico, Principal

SmithGroup, Los Angeles

Maria Martinico, Workplace Practice Leader for SmithGroup in Los Angeles, Orange County and San Diego, has over three decades of experience embedded in the design and project delivery of commercial and workplace projects. As a principal of one of the nation's leading architectural, engineering and design firms, she is responsible for overseeing the operations, design and implementation for commercial projects across central and



Southern California. In her role, she utilizes her leadership skills to bring the project team together and determine the viability of creating customized spaces, carefully curated to exceed client expectations. Martinico earned a Bachelor Degree of Science in Interior Design from California Polytechnic State University, San Luis Obispo and has an Master Degree of Business Administration from Chapman University. She has a wealth of knowledge of the interconnectivity between business and design. Her experience spans all phases of projects for a variety of client types, including corporate campus and headquarters offices, hospitality, creative agencies, law firms, professional service firms, financial firms, science and technology, sporting stadiums, healthcare facilities, and more, helping her to lead a skilled team and deliver great projects.

Kate Marr, Executive Director

Community Legal Aid SoCal, Santa Ana

Under Kate Marr's leadership, Community Legal Aid SoCal has grown from \$8.5 million in revenue in 2017 to almost \$12.7 million in 2022, the staff has grown from 90 to 124, and the organization has expanded its free legal services for low-income residents in areas of law including family security, housing, health, economic justice, immigration, and seniors, resulting in significant life-changing impact for clients. Marr led the more than 60-year-old organization through a complete rebrand, a restructure of its legal program into substantive legal units, and the development of a case management program in order to provide more extensive and holistic services to clients. In 2020 the organization made a commitment to a culture of justice, equity, diversity, and inclusion and that commitment is reflected in the makeup of its staff and internal policies. It also adopted the values of accountability, collaboration, compassion, equity, and trust.



Celine Martin, Company Group Chairman, Cardiovascular & Specialty Solutions (CSS) Group

Johnson & Johnson, Cardiovascular & Specialty Solutions Group, Irvine

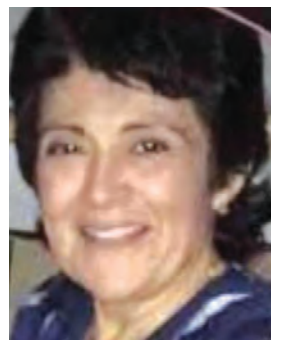
Celine Martin is Company Group Chairman, Cardiovascular & Specialty Solutions (CSS) Group. This includes Acclarent, Biosense Webster, Cerenovus and Mentor, which collectively generate more than \$5 billion in annual sales and employ more than 12,000 purpose-driven, high-performing individuals. These businesses harness the power of science, innovation and technology to help more than 1.2 million patients each year in the areas of Electrophysiology, Neurovascular, Ear, Nose & Throat, and Breast Reconstruction and Aesthetics. Throughout her 25-year career at Johnson & Johnson, Martin has played a vital role in advancing the ambition of Johnson & Johnson MedTech, including developing new categories and advancing standards of care for atrial fibrillation, stroke and minimally invasive surgery. Martin is also well known as a champion for women in STEM, working to inspire the next generation of female leaders both within J&J and the industry as a whole. Based in Irvine, California, she also helped establish a West Coast hub for Johnson & Johnson.



Liliana Mattow, VP of Technology

LibreChem Inc., Seal Beach

After years as director of R&D, Liliana Mattox had accumulated technical expertise and key contacts. She founded LibreChem in June 2020. In 2021 some business colleagues elected to join LibreChem. Sales increased, but so did business challenges. Supply disruptions in 2021 and financial realities of running a company. Mattox is following all chemical industry trends and looking forward to have more time to be more involved in Community. They are manufacturing specialty cleaners and the majority of their clients are in food industry and paint manufacturing. She is very involved in the research and formulas for using only non aggressive natural ingredients and prevent the usage of harmful products.



Teresa McQueen, Corporate Counsel

Western Growers, Irvine

Teresa McQueen is corporate counsel for Western Growers. In that capacity she provides advice and counsel to the organization on employment law matters and commercial trade practices. She also provides legal guidance to Western Growers members on employment law, human resources, and commercial agreements, as well as providing law-related educational opportunities and overseeing annual updates to the Western Growers Personnel Procedures Manual. McQueen is a skilled trial attorney, published author, certified business etiquette trainer, and an active member of the Orange County legal community.



Meghan Medlin, Chief Executive Officer & Founder

Medline Workforce & Reentry Solutions, Orange

Named the national 2021 Emerging Woman Owned Business of the Year, Medlin Workforce & Reentry Solutions (MWRS) was founded by and has been led by CEO Meghan Medlin since 2019. Since inception, Medlin has grown the company exponentially each year with 2022 expected to be yet another record-breaking year. Through MWRS, Medlin specializes in program development, training, grant management, community development and research/landscape studies. Following the launch of her company, Medlin founded a nonprofit organization, the Hub for Integration, Reentry & Employment (H.I.R.E.) in



2022 Women in Business Award Nominees

2020 to provide individuals being released from incarceration with resources and support to get back on their feet. Medlin has led the charge in bringing large scale events like the Reentry Resource Fair to the community to help individuals successfully reintegrate after incarceration. Medlin speaks nationwide on reentry related topics and serves on the Orange County Juvenile Justice Coordinating Council, and AB109 Community Corrections Partnership.

Shachi Mehra, Executive Chef & Owner

ADYA and Spice Girl Sauces, Anaheim

Shachi Mehra has been credited with bringing a new Indian experience to Southern California when she opened her restaurant, ADYA, at the historic Anaheim Packing House. Most recently, Chef Mehra launched her own retail product, Spice Girl Sauces, which currently consists of two varieties. The sauce is now available nationwide online at spicegirlsauces.com and at many Orange County specialty shops. Her commitment to presenting an authentic Indian experience highlighting fresh, local ingredients has led to the success of the restaurant and many media opportunities, including Food Network's Chopped, where she emerged as a national champion. Chef Mehra recently attended the Tory Burch Foundation's Embrace Ambition Conference with other like-minded female entrepreneurs from across the country.



Wendy Meltzer, President

Unique Hardwood, Costa Mesa

With more than 20 years' experience, Wendy Meltzer has over 1,000 flooring projects under her belt. She sold her first business in Los Angeles in 2017 and founded Unique Hardwood soon after when Legno Bastone invited her to be their exclusive OC distributor. Meltzer is proud of providing beautiful flooring for commercial spaces like the Japanese restaurant located within Chateau Marmont, The Chateau Hanare, and several Café Gratitude locations including the famous Beverly Hills restaurant. She also loves helping her residential clients select and install her beautiful flooring. In an often male-dominated industry, Meltzer is a breath of fresh air. The satisfaction of her customers is her top priority. She always takes the time to understand the job so she can recommend the right product. Her clients come to her looking for wider boards with longer lengths and they appreciate her attention to detail and in-depth product knowledge.



Daniella Menachemson, CEO

StyleNations, Ladera Ranch

StyleNations is a designer, supplier and manufacturer of bespoke commercial furniture for the hospitality industry. They specialize in designing, sourcing and manufacturing high

quality, unique furniture for cafes, bars, restaurants, hotels and other commercial venues. They have a range of over 3000 products including dining chairs, lounge chairs, sofas, bar stools, table tops, table bases everything required to fit out a hospitality venue. The company has the ability to custom manufacture the majority of products which means they can create unique furniture to your exact requirements. In just three years Daniella Menachemson has been able to work with top brands such as Marriott Hotels, Wework, Ritz Carlton and MGM. Most recently she was nominated for a Gold Stevie Award in 2022 for Top American Business.



Kendra Miller, Executive Vice President and General Counsel

BJ's Restaurants Inc., Huntington Beach

Kendra Miller has been instrumental in growing BJ's Restaurants to over 215 restaurants and \$1 billion annually in sales as the executive vice president and general counsel over the past 11 years and her commitment to building high performing teams. She is the executive sponsor of BJ's IDEA (Inclusion, Diversity, and Equity Alliance) and WeCAN (Women's Career Advancement Network) and an advocate for a workplace that is respectful and inclusive. Miller is the first female executive vice president at B's Restaurants Inc. and the only female that is part of BJ's executive leadership team.



Rochelle Mills, President & CEO

Innovative Housing Opportunities, Santa Ana

Rochelle Mills is president and CEO of Innovative Housing Opportunities (IHO), a non-profit developer of high-quality affordable housing, providing supportive services and economic empowerment programs. She oversees IHO's vision, portfolio, and long-term impact. She has been an integral leader and team member for 15 of the firm's 45-year legacy of developing, advocating for, and preserving affordable housing. Mills guides IHO's vision for catalytic real estate project and program development, implements initiatives resulting in portfolio expansion and builds strategic partnerships. During her tenure, IHO has grown its housing portfolio to more than 600 units across seven properties with plans to build 10,000 units over the next 10 years.



Jena Minnick-Bull, CEO & Founder

South Coast Conservatory, Laguna Niguel

South Coast Conservatory opened its first location in Mission Viejo, California in 1992 under

RECOGNIZING A
UNIQUE LEADER

CAROLA CHERIEF
VP OF SALES & MARKETING
TRUMARK HOMES
Southern California

TRUMARKHOMES

Congratulations Carola!
From all of us at Trumark Homes



2022 Women in Business Award Nominees

its former name: Mission Viejo Dance & Performing Arts Center. Jena Minnick-Bull acquired the company in 2002, and since then has grown the business rapidly, making a name for the studio in the Orange County market. She expanded to a new location in 2014, capturing the San Clement market and increasing revenue with an additional studio. Under Minnick-Bull's leadership, SC Conservatory has been awarded best dance studio finalist for over seven years in a row by the OC hotlist, best dance school in Laguna Niguel for 13 years, and Minnick-Bull was personally awarded "Woman to Watch" in 2016 by Women of Influence.

Annette Morgan, Chief Administrative Officer

City of Hope Orange County, Irvine

Annette Morgan is a health care strategy and organizational transformation expert who changed the local health care landscape by helping City of Hope fulfill its promise to bring best-in-class cancer care to Orange County. With her colleagues, she has developed and implemented City of Hope Orange County Lennar Foundation Cancer Center, a \$1 billion campus in Irvine, and the accompanying regional network of cancer care. This is the most extensive and advanced cancer resource in Orange County, and Morgan is credited with much of the strategic planning and oversight required to deliver these incredible resources. An accomplished health care professional before joining City of Hope, she is an expert at driving organizational strategy and designing operating models to deliver excellence and prepare organizations for the future. She has been recognized by Becker's Hospital Review as a health care star and by Greater Irvine Chamber as a 40 under 40 honoree.



Jessica Morrow, Head of Operations

Revive Real Estate, Irvine

Armed with first-hand knowledge of what it's like to be in the 'real estate trenches,' Jessica Morrow aims to empower real estate agents with knowledge and tools to grow their businesses and bring value to their clients. She's the architect of Revive's "Prepare to Buy" cash offers program and Revive. As she embraced the multiple challenges of a startup, no position was too small for Morrow. She mastered everything from sales and quality control to HR and corporate accounting/business development, working her way up to head of operations (effectively Revive's COO). Morrow is a driven yet humble and big-hearted individual who engenders trust. Her positive attitude and 100% commitment to whatever she undertakes results in successful contributions to Revive every time. Jessica is always "all in."



Rachel Nelson, Chief Financial Officer

CB Technologies Inc., Orange

Rachel Nelson has been a valued leader at CBT since the company's inception and has organically risen from Accounting Manager to CFO. Throughout her tenure at CBT, she has led the company with unparalleled strength and steadiness during periods of growth, economic downturns, and organizational & company transformations. Nelson is part of the executive leadership team and is responsible for the financial strategy and health of the organization, as well as the management oversight of the Finance and IT departments. Nelson has been an instrumental part of the company's transition from an IT Value-Added Reseller with annual revenues of \$1.6 million to a Premier Domain Expert Integrator in IT/OT solutions servicing Fortune 100 customers with annual revenues of \$44.9 million. Nelson is passionate about bringing up the next generation of women in tech/business; in the last two years she has facilitated internships at their headquarters, as well as scholarships at community colleges.



Patty Nemeth, Chief Human Resources Officer

Fluidmaster, San Juan Capistrano

Patty Nemeth is the chief human resources officer at Fluidmaster. She leads the development and execution of human resources strategy across all locations worldwide. Her contributions specifically in the areas of corporate communication, succession planning, global talent management, change management, training and development, have played a significant role in setting up Fluidmaster for future success. Her strong and kind demeanor make her a leading lady both on the executive team and in the community.



Leslie Nguyen, Creative Director & Co-Founder

Bosscat Kitchen & Libations, Irvine

Leslie Nguyen's achievements within the company are many. As co-founder, Nguyen (aka "Miss Bosscat") is the chief designer, visionary and heart of the restaurant. Nguyen had an idea of what she wanted Bosscat to be back at its inception in 2014: a place where people could enjoy fine spirits, great food and feel comfortable. Nguyen's tenacity and never quit attitude has been the reason for success of the business as she has personally handmade every shelf in her whiskey rooms, handmade centerpieces, hand-painted whiskey locker shelves and will always put her personal touch on everything. Her heroic story of sobriety folds into the business, as she has been sober since before the first Bosscat Kitchen location opened eight years ago - an achievement in and of itself. Now in multiple states and with large plans for more expansion, Nguyen continues to amaze the team at Bosscat Kitchen & Libations with her talents.



Melissa Northway, Financial Advisor

True Path Financial, Irvine

Melissa Northway has achieved President's Club qualifications in her first two years at True Path Financial. She also qualified for MDRT (Million Dollar Round Table) which is the top 10% of the industry. She was also recently named President of NAWBO (National Association for Women Business Owners). She specializes in helping women and business owners with insurance and retirement planning.



Lindsay Oglesby, Chief Operations Officer

Tax Relief Advocates, Irvine

Lindsay Oglesby is a pillar within TRA, continually showing up for those around her without question. She leads by example day in and day out, working side by side with her colleges and employees alike. She's furthermore been a finalist in the Women of influence Award and Authentic Leader Award. But perhaps most noble of all, whatever she asks of her team, she wouldn't hesitate to do herself first. She's the perfect representation of what we all strive to be.



Jennifer Olson, VP-Finance

Apriem Advisors, Irvine

Jennifer Olson, CFA, CFP®, CIPM, AIF® is an expert in finance and has appeared in national business publications discussing stock market fluctuations. A natural born leader, she leads various firm initiatives and various critical projects. A charitable champion, she coordinates initiatives for Apriem's philanthropic arm, Apriem Cares. She is an integral part in the success of Apriem as a nationally-recognized firm for diversity and inclusion and a top financial advisory firm. When it comes to mentoring, Olson takes it to the highest degree - a former "Big of the Year" awardee, she kicked-off a 5-part financial literacy workshop series for Big Brothers Big Sisters college-age "Littles" that establishes strong foundation for the program for years to come. She also serves as a Board of Director for the Jessie Rees Foundation. She was named in InvestmentNews 40 Under 40 list, recognizing her accomplishments, contribution to the industry, leadership and promise.



Anoosheh Oskouian, President & CEO

Ship & Shore Environmental Inc., Signal Hill

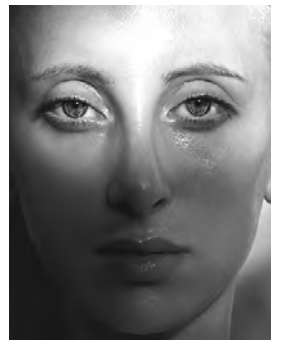
Anoosheh Oskouian's unique story, business success, and her philosophy on life has created a buzz across multiple channels. People recognize that she is a lesson ready to be taught and a voice that is necessary to be heard in this world. Oskouian and her environmental company have been featured in several renowned publications including The Los Angeles Times, CNN Money, Bloomberg, Plastics News, Los Angeles Business Journal, and more. In 2015, she was esteemed the Ellis Island Medal of Honor. In 2017, she was named National Association of Women Business Owner (NAWBO) "Business Owner of the Year" and was voted as the Top 100 "Most Influential People" by the Orange County Register. She has been a guest speaker at several conferences including the Plastics News Women Breaking the Mold Conference and USC's Global Energy Network Distinguished Speaker series. In 2021, she was a panelist speaker at the Long Beach Qingdao Association Annual Business Luncheon, where she discussed topics of clean air and environmental stewardship in the face of climate change.



Wendy Ouriel, CEO

OUMERE, Irvine

Wendy Ouriel founded OUMERE while earning her master's degree in cellular biology. In between experiments in her electron microscopy lab she began creating skin care formulations to fix her skin which was damaged by using bad skin care. After graduating, Wendy Ouriel created a cellular biology lab to create skin care and to conduct anti-aging biological research.



Yeral Patel, Founder

YourvaMD, Coto De Caza

Dr. Yeral Patel is an accomplished Family Medicine Physician and Functional Medicine Doctor. Fascinated by the human body, and passionate about helping others, Dr. Patel was inspired early on to become a leading medical professional. For nearly a decade, Dr. Patel has served patients through Kaiser Permanente and believes in creating tailored treatment protocols to empower patients. In 2015, Dr. Patel embarked on her first entrepreneurial venture, founding Perfect YOUth, where she specialized in anti-aging treatments. Following her passion for skincare, and channeling her extensive medical background, Dr. Patel's latest venture has taken her into the world of premium skincare. As the founder and visionary of YouvaMD, Dr. Patel has just released her first signature skincare product called "All I Need Serum," which is free of toxins and full of pure ingredients. Dr. Patel's expertise has been featured by the Washington Post, Authority Magazine, and Women's Health Magazine.



Reshma Peck, Chief Marketing Officer

Experian, Costa Mesa

Creating stories that not only engage, inform, and empower an audience, but also deliver on measurable business goals is a huge focus for Reshma Peck, CMO at Experian. Peck

2022 Women in Business Award Nominees

has taken her experience in big consumer brands, such as Dial and Disney, and translated it into innovative marketing strategies that have driven the Experian brand forward over the past 14 years. She leads a diverse team of high performers in multiple disciplines of marketing and operations, helping drive over \$2 billion in revenue in the last year alone. As an out-of-the-box thinker, Peck embraces creativity and has continually brought forth new ideas to change the industry for the better. Her vision and impassioned commitment to financial inclusion have contributed to successful initiatives that help power opportunities for underserved communities and small businesses gain access to the financial resources they need to make big and small life decisions.



Nora Perez, VP, Community Development
Enterprise Bank & Trust, Anaheim

With more than three decades of experience in the banking industry, Nora Perez joined Enterprise Bank & Trust in February 2022, quickly becoming an important asset to Enterprise's community development team. As vice president, community development, Perez and her team work to fulfill their mission of making low-to moderate-income areas more financially sound, while also building lasting relationships in the community. Over the last three decades, Perez has made quite the impact in underserved communities. In March 2021, she increased lending in distressed, low- and moderate-income communities by 50 percent, which enabled the bank to increase its support of all entrepreneurs, particularly within minority, women and low- to moderate-income communities. Through her work, Perez is able to volunteer for a variety of organizations, including KidSingers, Haven Neighborhood Services, Orange County Community Housing Corp and more.



Mary Platt, Director

Hilbert Museum of California Art at Chapman University, Orange
Prior to taking the Hilbert Museum position in 2017, Mary Platt served for almost 13 years as Director of Communications and Media Relations at Chapman University, overseeing the university's news, PR and media office and serving as managing editor of the alumni magazine. Before coming to Chapman, she specialized in public relations planning and counseling for major arts organizations, including Wharton Center for the Arts (Michigan); the New Jersey Performing Arts Center; Segerstrom Center for the Arts and The Getty Center. As an arts and culture writer, Platt has had articles published in the Los Angeles Times, Orange County Register, Art of the Times, Revue Magazine (Segerstrom Center) and many other media outlets. She



regularly writes the Inside Art feature for Orange Plaza Review (Orange, CA).

Dannii Portsmouth, Vice President of Human Resources, West Division
PepsiCo Beverages North America, Laguna Beach

Dannii Portsmouth, VP of HR for PepsiCo Beverages North America's West Division, is an international leader with a passion for turning business strategy into integrated people initiatives. "Every moment matters in employee experience and requires relentless focus. It also means the basics must be done well - leadership, talent, culture and hiring." Originally from the United Kingdom, Portsmouth has been essential in improving retention rates, building a culture of agility and collaboration, and transforming PepsiCo West's talent management with a focus on employee experience and DEI. At the height of the pandemic, Portsmouth implemented strategies leading to the division's highest business performance in a decade. Her approach was simply about taking care of PepsiCo's people, prioritizing what is needed to stay safe through consistent, transparent communication and addressing sick leave and childcare. Portsmouth's demonstrates that tenacity, strong leadership and humanity lead to better business practices, happier employees, and tremendous results.



Ashley Powers, Regional Director of Client Services
OneDigital, Irvine

Ashley Powers started her career in the industry 11 years ago as an entry-level specialist. Through her amazing hard work and creative thinking, she has grown in her career through five promotions and now oversees a whole service team of 61 employees including seven managers.



Tracey Prescott, RN, CEO

Beauty With a Mission, Costa Mesa
Tracey Prescott, a Registered Nurse, opened Beauty with a Mission in 2015 and is continually advancing her education in the Aesthetic field. She previously worked with Dr. Bunkis' team at Orange County Plastic Surgery in 2004, transitioning her career from the Neonatal Intensive Care Unit to the Aesthetic side of Nursing. She has worked in all phases of the Aesthetic Nursing field including: the operating room, post-operative care, clinical evaluation of surgical clients, public speaking at forums and seminars, performing and training on injectable and laser treatments. Since 2006, Prescott has focused her time on lasers and injectables, becoming a highly specialized Aesthetic Registered Nurse. She has completed advanced training for Botox, Juvederm, Radiesse, and Sculptra. Her colleague's and clients know her as the "Artist with a needle".



Greg May
*Executive Vice President,
West Region Market Leader*

t 949-608-2101
greg.may@nmrk.com

18401 Von Karman Ave.,
Suite 150
Irvine, CA 92612

NEWMARK

Newmark's achievements are possible with the inspiring women professionals driving success in our industry. We celebrate our community of women who challenge, lead and motivate each day.

nmrk.com

2022 Women in Business Award Nominees

Patty Presson, Realtor

Surterre Properties, Newport Beach

Patty Presson has built a loyal following as one of Orange County's most prominent and highly respected real estate agents. Regardless of market conditions, Presson consistently produces impressive results for her clients. A 30-year Newport Beach resident, Presson possesses invaluable insight into the local real estate market. In addition to her ability to negotiate highly favorable terms, Presson offers an unwavering commitment to ensuring her clients get the most out of their home buying or selling experience. Presson is more than an agent - she is regarded as a trusted advisor who truly has her clients' best interests in mind. From identifying and defining their objectives to strategizing ways to effectively achieve them, Presson provides a truly personalized approach that yields outstanding results time after time. Graduating from UCI with a degree in psychology, Presson invested time in California state politics and commercial banking before beginning her career in real estate.



Niki Protz, Project Manager

Howard Building Corporation, Costa Mesa

Niki Protz started in construction in New York City as a graduate student studying psychology. After two weeks at Lendlease Construction doing odd jobs to make extra money, she fell in love with construction and decided to entirely switch career paths. Since then, she has worked her way up, starting as a project engineer and working to establish herself as one of the leading female project managers in the Los Angeles and Orange County areas. In 2021, Protz and her team completed 101 Continental, a 150,000 square foot, 16 floor seismic retrofit. The project required creative scheduling and tightly coordinated teams to accommodate permit delays and complex project phasing. While she believes this buildout is her proudest achievement in terms of projects, she realized that her philosophy as a leader and her position as a role model for the next generation of female leaders in the industry is what most contributes to her success.



Jenn Quader, President & CEO

The Smart Agency, Newport Beach

A highly empathetic leader, Jenn Quader is a fearless visionary with a clear purpose. She has had an undeniably positive influence on her industry over the last decade. Quader serves as president & CEO of The Smart Agency, spearheading "Team Smart's" innovative PR, content, and marketing strategies to deliver bottom-line results to many of the most significant commercial real estate and finance companies in the U.S. A veteran communicator, Quader has worked across a wide variety of sectors, including retail, brokerage, development, capital markets, debt and structured finance, asset and property management, fund management, and construction, among others. Her experience spans multifamily, retail, office, and industrial product. Quader holds a master's degree in global communications and honed her skills working on behalf of major national and international companies including Fox/MGM Entertainment, Ford Motor Company, Michelin, and Mazda, among others.



Deb Radcliff, Chief Marketing Officer

5.11 Tactical, Irvine

Deb Radcliff joined 5.11 in November 2018 as Global Chief Marketing Officer. In this role, Radcliff is responsible for leading the strategic marketing direction for 5.11, an iconic global brand rooted in serving public safety and military professionals, providing purpose-built technical apparel, footwear and gear for people from all walks of life. Radcliff is accountable for strengthening and evolving all aspects of the 5.11 brand and marketing strategies for retail and digital direct-to-consumer, wholesale and professional channels. Over the past year, Radcliff worked with her cross-functional global teams to build and deliver key strategic initiatives that helped the company exceed revenue and customer growth targets.



Linda Rank, Founder

soul&beautyMEDx, Ladera Ranch

Respected as a visionary, and highly sought after for her specialized care, Linda Rank has been at the forefront of the aesthetic industry for over 20 years. As the founder of soul&beautyMEDx, Rank has set the standard for the new era of excellence within the med spa industry. Creating a destination featuring aesthetic solutions to meet her clientele's tailor-made needs, Rank is committed to helping her clients defy the hands of time through restorative and supportive aging treatments. The innovative new location in Mission Viejo offers an unparalleled line-up of services with industry-best practitioners. As an honorary speaker and national trainer for Allergan, Rank shares her keen aesthetic perspective and refined protocols with peers and professionals across the USA, in order to help elevate the industry. An established author, Rank developed her signature book, "Take Charge of Your Beauty," to empower individuals with skin-centric treatments and soul-deep philosophies.



Julie Rios, Senior Vice President, Western Region Marketing

Newmark, Irvine

Julie Rios is senior vice president of Western Region Marketing at Newmark. Rios has been

with the company for over six years and supports nine offices and over 230 broker professionals. Rios provides strategic direction for business pursuits and client presentations, leading pre-and post- marketing efforts across all business lines, including capital markets, landlord advisory and tenant representation. Based in Newmark's Irvine, California office, Rios leads a seasoned team across all marketing functions, including design, analytics, project management and communication. Rios is known to be an innovator of cutting edge ideas and has a strong reputation of strategic execution and talent development. Rios and her team have executed over \$104.8 billion in projects, spanning over 390.6 million square feet of real estate, within her time at Newmark.



Maricela Rios-Faust, Chief Executive Officer

Human Options, Irvine

As CEO, Maricela Rios-Faust brings strong strategic leadership, nonprofit management, and fundraising skills to her multifaceted role at Human Options. She oversees the fiscal and programmatic direction, as well as its emergency shelter and 24-hour crisis hotline, transitional housing programs, Community Based Services (eight resource centers), a Prevention Education program and all administrative and fundraising functions. Additionally, Rios-Faust developed a robust Internship Program in partnership with five local universities' "Master's in Social Work" programs. Her commitment comes from a desire to raise her daughter in a world where relationship violence is not tolerated. As a leader in supporting survivors of domestic violence, working to educate youth, evolving cultural beliefs away from victim blaming and shaming, training law enforcement and more, Rios-Faust has become a sought-after source of knowledge about domestic and relationship violence.



Joella Rogers, CEO

TFR Builders, San Clemente

Joelle Rogers has had an affinity with architecture and construction since childhood. She was exposed to these professions by her brothers and father, who worked in said fields. In 2017 Rogers and her husband decided to start up TFR Builders, Inc. This endeavor was pursued concurrently during Rogers' employment with Sunstone Hotels. While employed there, she gained extensive experience in human resources and financial controlling. TFR has worked with many developers and investors on projects based in Hollywood, Palm Springs, Orange County and Texas. These projects have varied from design-to-build, Tenant Improvement, Hospitality Work, and Cannabis Growth/Extraction Facilities. Rogers ensured the success of her business through Covid by implementing a restructuring and cutting from her own earnings. She is a strong advocate of giving back to the community and does so throughout the year. She hosts an annual golf tournament where all proceeds go to a personally selected charity benefiting children/Vets.



Angie Rowe, President & Executive Director

Beyond Blindness, Santa Ana

Since joining Beyond Blindness in 2020 as president and executive director, Angie Rowe has expanded the organization to reflect the growing needs of children with visual impairments and other disabilities - and their families. In addition to achieving impressive growth for the organization, Rowe adapted Beyond Blindness' services - critical to the wellbeing and development of children with visual impairments and other disabilities - to continue without interruption throughout the pandemic. This was no small feat, as it required transitioning to virtual services and then, as feasible, to a hybrid model - almost overnight. Rowe also led the organization through a complete rebranding (from its previous name, Blind Children's Learning Center) and strategic planning process. Under her leadership, Beyond Blindness is now the leading accredited organization for children with visual impairments and other disabilities in OC, offering expanded services, including Early Intervention, Education + Enrichment, and Family Support.



Michele Sabo Assayag, Partner Orange County

Snell & Wilmer, Costa Mesa

Michele Assayag is a commercial finance partner at Snell & Wilmer. She also practices in the areas of creditors' rights, bankruptcy litigation and restructuring, where she has had extensive experience in the representation of secured and unsecured lenders. Assayag has litigated in the state, federal and bankruptcy courts on behalf of domestic, foreign and international lending institutions, as well as on behalf of non-bank lenders and Fortune 500 companies. Prior to its 2020 merge with Snell & Wilmer, she was managing partner of the law firm Assayag Mauss, which for 25 years received WBENC certification, the gold standard for women-owned businesses in the United States. She brought to the firm her dedication and commitment to the continued advancement of women and others who identify as diverse and remains actively involved in internal and external organizations, as involvement with such worthwhile initiatives is fundamental to her world view.



Sandy Salty, Chief Marketing Officer

Trace3, Irvine

Sandy Salty, chief marketing officer for Trace3, a premier technology solutions provider, started building the company's successes almost immediately after she first entered the doors in 2006 as employee 30. With her mindset constantly centered at growth, Salty's

2022 Women in Business Award Nominees

fulfilled many roles with Trace3 on her journey to becoming CMO. Beginning with the management of the inside sales team, Salty's focus then morphed into strengthening the company's relationships. She pursued a new position for team Trace3 as VP of Strategic Initiatives & Partnerships. Salty's keen eye for what's next lead her to SVP of Marketing & Partner Relations before taking on CMO in 2019. Known for creating and pursuing "moonshot" ideas, Salty's audacity is what's founded many of Trace3's current divisions. She has an innovative air to her, and it follows with big revenue building opportunities for the company. As a female executive, Salty leads a department with the largest contingent of women in the organization. Because of her own experiences in a male-dominated industry, Salty encourages her female team members to double-down on their business acumen and to avoid letting age, title, or gender stop them from sharing ideas to make the business better. Salty teaches young female leaders how to develop a strategy around their ideas to meet the organization's triple bottom line. Her principal goal is to grow the next generation of leaders at Trace3. She's bound to do just that, as many of the approaches Trace3 holds close as the company's true differentiation began with Sandy Salty.



Talia Samuels, Founder & President
Outshine Public Relations, Newport Beach
Named one of the "Best PR Agencies in America" by Forbes, Outshine Public Relations specializes in restaurant, hospitality, and culinary public relations. Founded by Talia Samuels in 2015, her agency represents an all-star roster including James Beard Award-winning and Michelin-starred chefs, AAA Five Diamond-awarded properties, and new-to-market culinary brands. With deep roots in the hospitality industry, she has a passion for supporting hoteliers, restaurateurs, chefs, and food and beverage brands through her creative storytelling verticals. Recognized for her poise, tenacity, and integrity, Samuels is a force in her field. Her company, Outshine Public Relations, is a full-service agency providing public relations, social media management, photography, videography, and digital marketing.



Mara Samuels, Owner
Haven Laguna, Laguna Beach
Mara Samuels is the founder of Haven Laguna, a new home furnishing boutique now open in Laguna Beach. As the lead design specialist behind the brand, Samuels brings unique furnishings and one-of-a-kind finds to the Orange County coastline. Throughout her professional career, she's worked in real estate and home design & renovation. With more than a decade of experience in selling, styling, and beautifying custom



homes, Samuels was inspired to create a one-stop shop for people to find items that make their house feel like home. With a background in fine and applied arts, Samuels has a keen eye for style. Much of her inspiration comes from the nature and beauty of California's diverse terrain and landscape. Many of the items at Haven Laguna draw inspiration from nature and its simplistic beauty.

Tricia Sanchez, Owner
C3 Tech, Santa Ana
Tricia Sanchez, in partnership with her husband Tony Sanchez, founded C3 Tech over two decades ago. Inked on the heart of the company is the story of Tricia. Sanchez grew up in Santa Ana, California where her humble beginnings sparked her hard work, ambition, and determination to make her own way in the world. Sanchez attended the University of Southern California on full scholarship and after graduation, began her career in copier sales and soon became a top sales representative in Southern California. During this time, she gained valuable business experience and meaningful relationships, yet as the industry evolved, she saw an opportunity to bring back genuine quality service so in 1994, she founded C3 Tech. Since that day, C3 Tech's philosophy has been centered around client success: providing best-in-class products and services, as well as on-demand office support. In 2005, Sanchez joined her father, Rueben Martinez in his joint venture with Hudson at the John Wayne airport. Hudson's "traveler's best friend" philosophy and premier level of service resonated with her own business philosophy and Team Martinez Sanchez and Hudson have had a thriving relationship ever since. Sanchez continues to advocate for minority women in business sitting on the board of USC's Latino Alumni Association as well as Working Wardrobes. Sanchez strives not only to provide to service for her clients, but to be an impactful professional in Orange County.



Lucy Santana, CEO
Girls Inc. of Orange County, Santa Ana
Under Lucy Santana's 20+ years of leadership, Girls Inc. of Orange County has grown into one of the strongest chapters of Girls Inc. nationally. Santana and her team directly impact 4,500+ girls in OC each year, with transformative programs designed to empower girls from economically disadvantaged circumstances to become "strong, smart and bold." The organization's programs address the full range of topics for girls + young women - healthy bodies/body image, literacy and financial literacy, to making good life choices, building life skills and preparing for college and career. Thanks to Santana's efforts, Girls Inc. of OC will share \$10 million in funding from Melinda French Gates' Pivotal Ventures' Equality Can't Wait Challenge with a handful of Girls Inc. chapters nationwide, launching Project Accelerate this year.



CONGRATULATIONS

TO ALL THE POWERFUL
WOMEN LEADERS
YOUR ACCOMPLISHMENTS
ARE TRULY REMARKABLE

KAAREN HALL

CEO/FOUNDER OF
UDIRECT IRA SERVICES



uDirect IRA Services helps you invest your retirement savings outside of Wall Street.

uDirectIRA.com
info@uDirectIRA.com
866-447-6598

2022 Women in Business Award Nominees

Santana helped to create the program that is aimed at expanding the power and influence of women in the United States by 2030.

Pam Scamardo, Founder

TPK Properties, C.R.E.A.T.E. Wealth Network, Costa Mesa

Entrepreneur Pam Scamardo is the founder of The C.R.E.A.T.E. Wealth Network - the #1 free educational resource for commercial real estate investing. The organization's mission is to provide high quality commercial real estate education for all, with an emphasis on uplifting women leaders in the industry. Officially "job optional", Scamardo discovered the benefits of passive income while working in the aerospace industry. An aerospace engineer by trade, having been employed by Lockheed Martin, Boeing, and UTC Aerospace, Scamardo made a career pivot over 10 years ago and founded her first company TPK Properties. As a privately held multi-family investment company that acquires, manages and renovates medium to large sized apartment complexes, TPK Properties has successfully syndicated over 100 properties for investors in California, Arizona, Oregon, and Washington. Scamardo is proudly serving as a CREW Network Global Board Director, Forbes Council Member, and Cal State Fullerton's Center for Real Estate Director.



Sona Shah, Chief Empowerment Officer

My Private Professor, Irvine

Sona Shah is the founder of My Private Professor. My Private Professor is a virtual tutoring service that provides educational services for virtually every subject. Although trained as a lawyer Shah made the switch to follow her passion and provide educational services at scale. The Company is the first in the world to provide tutoring as a corporate benefit. In addition, the company works closely with charities to provide deserving children free tutoring as well as devices.



Breann Shook, Owner & Founder

Grandma Lucys, Rancho Santa Margarita

Breann Shook is a pioneer in the natural pet food industry. As founder and owner of Grandma Lucy's, she has passionately improved wellness for dogs and cats through quality of food. Since 1999 Breann and her husband, Eric, have been revolutionizing the industry's approach to pet food. Using unprocessed, whole food ingredients, she has forever impacted the standards for pets. With quality as a top priority, Grandma Lucy's uses a unique freeze-drying process to deliver preservative-free, shelf-stable pet food with the highest integrity. Family owned and operated; all award-winning food recipes are produced in small batches in the company's Rancho Santa Margarita facility. The following core values have remained steadfast since the beginning of Grandma Lucy's: Pets First, Think Big Stay Small, Solution-based Feeding, and Spreading the Love.



Cindy Shopoff, Executive Vice President, Operations

Shopoff Realty Investments, Irvine

Shopoff Realty Investments is a national real estate investment firm that primarily focuses on proactively generating appreciation through the repositioning of commercial, income-producing properties and the entitlement of land assets. Founded by chief executive officer William Shopoff in 1992, the story of Shopoff Realty Investments is one of success born of determination, vision and integrity. Headquartered in Orange County, California, Shopoff Realty Investments uses a multi-disciplined approach that enables the firm to uncover opportunities that others may not capitalize on or recognize. The company's practiced investment method includes a fundamental analysis of real estate markets supplemented with expertise in entitlement and adaptive reuse strategies. Shopoff Realty Investments' clients include a wide range of investors and joint venture partners that includes banks, developers, builders and high-net-worth individuals.



Susan Silvestri, Manager

Valley Vista Services Inc., Cypress

Susan Silvestri has worked for Valley Vista Services since 2007. She has been managing significant key departments in the solid waste industry for over the past 20 years. She has continued to broaden her education and after completing advanced courses through Cornell University and Harvard Business School, Silvestri has added to her overall expertise not only in customer service, sales, marketing, and insurance, but in complicated areas of contract compliance and business development. With her position as manager, Silvestri oversees many supervisors and works with ownership and its Board of Directors in the planning and implementing of new government regulations especially in the fields of recycling and organic compliance. Silvestri's overall ability to understand the intricacies of the solid waste industry has given her the unique understanding that is required to comply with all local, state and federal laws relating to the collection recycling and disposal of waste. She has a wealth of industry, public sector, and customer service experience, which enables her to take a holistic approach when strategizing the achievement of company objectives. Her extensive knowledge of all aspects of the waste industry is instrumental to her effectively leading a team of highly



motivated supervisors and department personnel. Most important Silvestri's ability to relate to community outreach and to develop programs for the education of the citizens of the cities that VVS represents has been crucial to the long-term viability of her employer.

Kristine Smith, CMO

Surterre Properties, Newport Beach

Kristine Smith joined Surterre Properties in 2017, bringing more than two decades of marketing expertise to the brokerage. Today, she is the visionary behind reimagining the agent/brokerage working environment. Leading the charge on the remodel of Surterre's Newport Beach office, Smith is passionate about curating a brokerage environment that is highly efficient and state-of-the-art. Committed to sustainability, Smith's leadership is a reflection of that. She is passionate about maximizing and leveraging transformative technology platforms in order to support the brokerage's agents so that they can achieve more in less time. Smith thrives in leading organizations through fast-paced, massive disruption, spearheading business development, and implementing effective digital strategies that adapt with market shifts. Elevating the residential real estate industry, Smith is dedicated to cultivating an environment that allows the brokerage's industry-best agents to thrive, while setting the new gold standard for brokerage excellence.



Nuka Solomon, CEO

Free Wheelchair Mission, Irvine

Nuka Solomon joined Free Wheelchair Mission in 2017 as the executive director and was appointed CEO in 2019. Through her extensive experience, she was able to streamline team management and lead strategic planning and implementation of programs to ensure maximum utilization of Free Wheelchair Mission's resources. In conjunction with the Board of Directors and founder, she implemented strategic priorities that outlined direction for the organization's growth while evaluating and exploring opportunities for increased fundraising, marketing capacity, and more effective program execution. She led her team through a period of growth, overseeing the distribution of the organization's one-millionth wheelchair and through the pandemic to meet fiscal year revenue goals and continue the work of providing wheelchairs in developing countries, despite the many challenges that have arisen.



Dr. Shauntina Sorrells, Chief Program Officer

Orangewood Foundation, Santa Ana

As Orangewood Foundation's chief program officer, Dr. Shauntina Sorrells MSW DSW, has been instrumental in improving the lives of foster youth throughout Orange County. Since joining the organization in 2019, she has launched several key programs including Orangewood's Youth Connected Program - a one-of-a-kind foster care program that approaches foster care in an innovative way to achieve better outcomes than ever before. She also helped to create and launch Orangewood's Lyon Workforce Program, a career workforce program specifically designed to create career pathway jobs for youth in trades or skills, enabling them to earn a livable wage and become a part of a corporate culture that is trauma-informed and supportive. She also designed and created Casa De Rosemary, Orangewood's home and program for young mothers that supports them in building healthy lifestyles and safe bonds with their children during the first few years of parenthood.



Jessica Spaulding, President

The Spaulding Agency, Dana Point

As president of The Spaulding Agency, Jessica Spaulding leads award-winning and results dominating public relations, marketing and strategic branding on behalf of numerous industries specializing in commercial real estate and the public sector. She enjoys a focus on economic development where she creates campaigns to encourage business investment and job creation on behalf of cities such as Glendale and Dana Point as well as San Bernardino County. Her work encompasses the best of storytelling leveraging video, digital, media and special events. Much of her work has centered on launching new brands and helping increase the role of executives as industry thought leaders.



Paula Steurer, Founder & President

Sterling Public Relations, Corona Del Mar

Paula Steurer founded Sterling Public Relations in 2008 as a Publicity, Branding, and Marketing hybrid and has scaled her company's services nationally. Known for her personalized approach to cultivating connections and curating brands, her innovative vision, and forward-thinking philosophy has become her clientele's secret ingredient for success. With a passion for building brand identities and her innate ability to connect, engage and drive brands to the next level, Steurer has become a trusted authority among entrepreneurs and executives. She can often be seen as the keynote speaker and workshop leader for nationally recognized brands such as Mindbody Inc, Vizio, and Oracle. Sterling Public Relations celebrates its 14-year anniversary this year and has become the in-demand firm for brands that desire a competitive edge.



2022 Women in Business Award Nominees

Autumn Strier, Co-Founder & CEO

Miracles for Kids, Irvine

Autumn Strier is a driven nonprofit co-founder & CEO with significant leadership skills and a lifelong passion for helping those in need, having been a recipient of support herself at a young age. She took a small corporate employee contribution program and transformed it into the highly respected and consequential nonprofit it is today. To date, the organization has raised over \$37.5 million in service of 2,680+ low-income families with children facing over 100+ critical illnesses. As its chief executive and lead fundraiser for 18+ years, Strier is the architect of every program, initiative and event run by the organization. She is also the founding president of the Board, a handpicked group of executives whose expertise and contacts span all industries. Her deep personal commitment and unwavering dedication to those in need have led to years-long relationships and partnerships that result in notable fundraising and mission delivery achievements year after year.



Carrie Strom, President & SVP

Global Allergan Aesthetics and AbbVie, Irvine

Carrie Strom is senior vice president, AbbVie, and president, Global Allergan Aesthetics and has served in this role since May 2020. Prior to joining AbbVie, Ms. Strom served as senior vice president of U.S. Medical Aesthetics at Allergan® beginning in May 2018, overseeing the aesthetic portfolio for the multi-billion dollar U.S. business. Previously, Ms. Strom was vice president of marketing, Plastic Surgery and Regenerative Medicine at Allergan and she was instrumental in the \$2.8 billion acquisition and integration of LifeCell. Carrie Strom joined Allergan in 2011 on the therapeutic side of the business before moving into aesthetics and advancing to become Senior Vice President and head of the U.S. business. Upon acquisition of Allergan by AbbVie in 2020, Strom was named global president of Allergan Aesthetics, a new global structure encompassing more than 4,000 employees and more than \$5 billion in annual revenue. While simultaneously navigating a major organizational transition and establishing a new company culture within Allergan Aesthetics, Strom's leadership helped the company weather the global impact of the COVID-19 pandemic on the aesthetics industry. After an initial impact of a 50 percent decline in revenue, due to the pandemic, she led the team to its most successful year ever in 2021. Today, Allergan Aesthetics is the global industry leader, with a strong track record of investment, innovation, inclusion and success.



Victoria Strombom, Realtor

Surterre Properties, Newport Beach

A resident of Laguna Beach and a coastal REALTOR® since 1985, Victoria Strombom is a coastal real estate specialist. Clients and colleagues admire Strombom's remarkable ability to stay focused and calm - a skill honed through years working as a pediatric/neonatal ICU and Life Flight nurse. Always seeking a positive and professional result for all parties involved in a transaction, Strombom has earned the respect of her peers in all communities. Specializing in areas from Newport Beach to San Clemente and San Juan Capistrano to Coto de Caza, Strombom's commitment to her clients is shaped by the time-honored traditions of personal relationships and responsibility. Strombom has represented the Laguna Board of REALTORS® as a member of the Grievance Committee and is a member of the Surterre Properties® Charity Committee. Drawing on her medical background, Strombom is one of the first members trained for the Laguna Beach Community Emergency Response Team.



Mary-Christine ('M.C.') Sungaila, Shareholder

Buchalter, Irvine

M.C. Sungaila has been ranked among the top 100 Women Lawyers in California for 13 years by the Daily Journal and an Equality Trailblazer by the National Law Journal. The first chair of Buchalter's appellate practice group (one of a handful of female and Hispanic appellate practice leaders nationwide), she is also the creator and host of the Portia Project™ podcast. She has briefed and argued appeals raising cutting-edge and fundamental business issues for over two decades, helping to shape undeveloped areas of constitutional, employment, franchisor liability, product liability, class actions, probate, immigration, Holocaust art recovery, and human rights law. In 2020-2022 alone, she won eight appellate cases and served as counsel in five U.S. Supreme Court cases, from Holocaust art recovery and immigration to the placement of COVID-positive patients into a COVID-free community at the very start of the pandemic and the propriety of local sober living home ordinances.



Rachel Svoboda, Founder & CEO

Sunday Brunch Agency, Huntington Beach

Rachel Svoboda founded Sunday Brunch Agency, the first fully remote female-owned marketing agency in Orange County. It is a full-service marketing company that works alongside local businesses and entrepreneurs to help them achieve their goals by providing an innovative approach to marketing. As one of the leading marketing agencies in Orange County, Sunday Brunch tailors services to their client's specific needs to elevate their



brand to its highest potential. Svoboda built Sunday Brunch to challenge the way we do work. The flexible and dynamic work environment has been a training ground for strengthening the upcoming leaders in marketing. Rachel passes her mastery of people, talent, skills, and resources to her team through mentorship and opportunities for professional growth. As a forward thinking business owner, Svoboda embraces change and jumps head first into the ever changing marketing landscape providing clients with powerful results. At Sunday Brunch, there are no limits to creativity.

Natalie Taormina, Co-Founder

Passport Brand Design, Newport Beach

Natalie Taormina brings nearly 20 years of entrepreneurial experience and creative vision to her role as founding partner and CEO at Passport Brand Design. She co-founded the international branding agency Passport Brand Design in 2004 alongside her husband, Jeremy Creighton in Melbourne Australia, after the couple moved from New York City back to Jeremy's home country in 2004. Her vision to grow Passport into a globally respected and recognized branding agency was successful as they welcomed clients such as Coca-Cola, Nestle, Craft, Kimberly Clark, Melbourne Football Club and Cadbury, just to name a few. After 10 wonderful years in Melbourne, she felt it was time to grow Passport into the US Market. They moved back to Newport Beach in 2014 and transformed an old warehouse into Passport's US-based creative hub. While setting up Passport, Taormina also co-founded Common Room Roasters in the same space in 2015. Taormina and her business partner Jeremy Creighton went on to open Freelance Coffee Project in 2022. Located in Newport Beach's industrial district, the roastery and tasting room is the first in Orange County to focus solely on single-origin coffees. Taormina designed the space with an energy that elicits a sense of creativity, connection, and community. Since its opening in May, the specialty roastery is already gearing up for growth with a second location set to open in Laguna Beach this year and partnerships poised to take its wholesale program to the next level.



Jinger Tapia, Vice President, Deisgn

Ware Malcomb, Irvine

Jinger Tapia started her career with Ware Malcomb in 1996 as a designer, and joined the leadership team upon her promotion to director, design in 2006, principal, design in 2013 and subsequently vice president, design in 2022. Tapia's vision has helped define Ware Malcomb's standards of high quality, creativity, and futureproofing to ensure long-term real estate value for clients. Tapia leads architectural design for Ware Malcomb and oversees the Branding Studio. A licensed architect, Tapia is active in the Urban Land Institute, the National Organization of Minority Architects and other organizations. She is also a member of Ware Malcomb's Diversity, Equity and Inclusion Committee. Under Tapia's leadership, Ware Malcomb was recognized as OCBJ #1 Top Architecture Firm in 2021, and additionally ranked among the top Architecture Firms in preceding years.



Kimberly Taylor, President

JAMS, Irvine

Since joining JAMS, the world's largest private alternative dispute resolution provider, Kimberly Taylor has been on a fast-moving elevator, rising through the organization, managing its rapid growth while helping to maintain its professional excellence and values. She was first hired as general manager for a branch office in 1999 but quickly accepted additional regional management responsibilities in California and, because of her legal background, became associate general counsel. Next, in 2003, she moved to New York to help JAMS expand nationally by opening branch offices in Philadelphia, Atlanta, and Minneapolis. In 2005 she was promoted to vice president, East/Central Region. In 2011, amid national and international growth, JAMS named Taylor chief operating officer and later-chief legal and operating officer. Her latest promotion came in 2021 when she was named president. In that role, she has responsibility for overall operations and key business functions and reports directly to the CEO.



Kara Taylor, EVP, Marketing

ATTOM, Irvine

As head of the marketing department at ATTOM, Kara Taylor leads a results-driven team, comprised of brand, content and marketing strategists, as well as lead development representatives, which has largely contributed to a record-breaking year in data sales since the company's inception. Under Taylor's leadership, ATTOM's value proposition continues to gain momentum across a range of industries, further solidifying its unique position as the one-stop-shop for premium property data. With Taylor actively contributing to ATTOM's successful acquisition strategy, ATTOM continues to deliver on its mission of serving as a transformative information and property data services organization that fuels innovation, growth and strategy for its customers. This mantra has proven especially important in persevering through the pandemic and beyond. Even in today's current climate, ATTOM continues to influence and secure partnerships with industry-leading companies to further the company's expansion initiatives and demonstrate its ability to deliver new data solutions.



2022 Women in Business Award Nominees

Susan Taylor, President & CEO

Juice It Up!, Newport Beach

Susan Taylor joined Juice It Up! in 2019 as VP Franchise Operations and was soon elevated to the role of president and CEO the following year - an obvious choice to lead the brand with her nearly 30 years of experience in the restaurant franchise industry. In the three years following Taylor's arrival - and strategic application of best practices - Juice It Up! has soared to record sales and experienced impressive franchise momentum. Taylor's company contributions and successes have led to well-deserved industry recognition and acclaim. In 2021, Taylor was honored by Orange County Business Journal as one of six impressive "Women in Business." In 2022, Juice It Up! was ranked 17th on Fast Casual's Top 100 Movers and Shakers list - the only smoothie and juice concept among the top-20 brands - while Taylor was named among the nation's top-25 fast casual executives for the second consecutive year due to her extraordinary leadership and consummate support to franchisees.



with more than 15 years of domestic and international experience in creating process-driven environments for high-tech corporations such as General Dynamics, Gulfstream Aerospace, Toyota Racing Development, and Zodiac Aerospace, among others. As the principal and leader of Hendy's Science and Technology Practice Group, Weidler's talent lies in designing efficient, dynamic, and holistic environments for process-based industries. Weidler has played a significant leadership role at Hendy beyond running the Science & Technology studio, she serves as a mentor to staff, and acts as a key decision maker alongside CEO Heidi Hendy. Her unique project approach leverages process flow, client collaboration, and industry trends. Over the course of her career, she has designed systems and spaces for everything from candy factories to aircraft assembly lines, reimagining a variety of areas ranging from 2,000 to 470,000 square feet. Weidler received a bachelor's degree in architecture from Pontificia Universidad Javeriana, Bogota Colombia and received her Lean Six Sigma Black Belt from Villanova University.



Jin Thatcher, Executive Vice President

TGR Foundation, A Tiger Woods Chairty, Irvine

Jin Thatcher is a native of Anaheim, CA with a passion for helping under-resourced communities through her role as executive vice president for TGR Foundation based in Irvine. With a mission to empower youth through education, the foundation's programs have provided resources and support to more than two million youth around the world. During her 19-year career with TGR Foundation, Thatcher has worked tirelessly in support of the foundation's vision for a world where opportunity is universal and potential is limitless. In her new role as executive vice president, she leads the organization with expertise in operations, human resources, financial management, policy, and educational programming and partnerships. One of her greatest achievements is the 2006 launch and recent renovation of the 35,000 square foot TGR Learning Lab in Anaheim, CA, which serves as the hub of the foundation's education programs serving students in Orange County, Los Angeles and across the East Coast.



Elizabeth Weldon, Partner, Orange County

Snell & Wilmer, Costa Mesa

Elizabeth Weldon is a commercial litigation partner at Snell & Wilmer, a full-service business law firm with more than 450 attorneys practicing in 16 locations throughout the U.S. and in Mexico. She is a Certified Specialist in Franchise and Distribution Law, The State Bar of California, Board of Legal Specialization, and concentrates her practice on business litigation and franchise litigation, at trial, judicial reference, and arbitration. Weldon represents large and small businesses in commercial litigation matters, including breach of contract, tort, unfair competition, class action, commercial real estate, intellectual property disputes, such as patent, trademark, and trade dress claims, as well as other complex matters. Weldon joined Snell & Wilmer almost 20 years ago as a lateral associate in 2002 and was elected to join the partnership in 2010. She is licensed to practice in California and Arizona and is the co-practice group leader for the OC commercial litigation group.



Lauren Timpe-Castellanos, CEO & Co-Founder

OmniaPiel, Costa Mesa

Lauren Timpe-Castellanos founded OmniaPiel with the mission to create an environment where men & women can discuss their aging concerns and find appropriate solutions. The goal at OmniaPiel has always been to disrupt the traditional thought of injectables, educating society and our communities, that well done injectables+ skin care can remain uniquely YOU and help you feel refreshed and at home in your skin. Now with two locations and carefully curated staff of 10 employees, she is doing just that! She is also apart of the Allergan AMI Faculty in which she is training and speaking nationally.



Genevieve West, Vice President

Howard Building Corporation, Costa Mesa

Genevieve West is the first female vice president at Howard Building Corporation (HBC), a tenant improvement general contractor. Since stepping into this role in 2020, she has transformed the business development and marketing departments while demonstrating an intense passion for promoting diversity, inclusion, and sustainability in the workplace. West's expertise, agility, and reliability have been instrumental not only in business development, but in the development of company culture. By funneling her energy into HBC's inclusion and sustainability efforts, she has had resounding effects, both company-wide and throughout the community.



Rachel Umipig, Chief Compliance Officer

KBS, Newport Beach

As a vital driving force at KBS, one of the largest investors in premier commercial real estate (CRE) in the nation, Rachel Umipig is at the top of her field. A superstar serving as chief compliance officer, she is responsible for overseeing and managing the compliance program for its fund and advisor entities. Upon joining KBS in 2014, Umipig pioneered the development of a more efficient process to address cyber training, manage potential cyber-attacks, and identify the best cyber insurance for the company. Since then, she has also spearheaded development of technology processes that protect the firm's cybersecurity framework against the rising threat of online breaches and attacks. Umipig's extensive expertise has ensured the company's regulatory compliance and cyber security policies are at the leading edge of the CRE industry. She consistently inspires the women on her team to expand their company and industry knowledge, enabling KBS to optimize its client services.



Justine White, Director of Customer Support & Transportation

Toshiba America Business Solutions Inc., Lake Forest

As a well respected "Difference Maker" within the Print Industry, Justine White absolutely personifies a successful "Woman in the Supply Chain." Justine White is the director of customer support for Toshiba America Business Solutions, Inc. (TABS). She has been in the office technology industry and a talented and celebrated member of the TABS Family for over 25 years, serving in various Supply Chain and Operations capacities, always in a high impact customer facing role. And when it comes to grace under pressure, White is a shining example. Ever cheerful in demeanor, positive in outlook, and capable in action, she comes to work each day with high energy, leading and supporting our customer service teams toward the ultimate goal of delivering a superior customer experience during each encounter, every day of the week! And despite countless and everchanging challenges, she consistently delivers great business results, exercising her creativity and resourcefulness, along with a heavy dose of scrappy ingenuity, and at times pushing her team over the finish line with sheer will power.



Andrea Walter, Vice President, Marketing

Ephesoft, Irvine

Andrea Walter joined Ephesoft as the VP of Marketing in January 2021, still in the midst of the pandemic, with many obstacles to conquer. She elevated marketing operations, processes, lead generation, product launches and brand awareness by building relationships, improving reporting and using a data-driven approach to growth. Her methodology and experience elevated the marketing team, resulting in larger budgets, more headcount and trust from the executive leadership team. Additionally, being bilingual in both English and German led to increased international support, a unique insight into the European market and the ability to build closer cross-functional teams. The end of 2021 showed revenue growth for 40% in the Americas and 25% overall globally, partially attributable to marketing efforts, with a strong pipeline entering 2022.



Dianne Whitfield, Chief Human Resources Officer

Tarsus Pharmaceuticals Inc., Irvine

Dianne Whitfield boasts 20+ years of experience in HR, including over a decade in life sciences industry management. Since joining Tarsus in 2020, Whitfield has been instrumental in executing a talent strategy that drives the business during a period of critical growth, focuses on fostering and retaining a dynamic and inclusive corporate culture that emphasizes diversity, and makes a positive impact in OC. Under Whitfield's leadership, Tarsus has more than doubled its employee size and increased diversity at all levels, with leadership comprising 44% women and 62% people of color, and has been recognized as a Top Workplace by the OC Register in 2021 and OCBJ's Best Places to Work in 2022. Before Tarsus, Whitfield led HR at Evolus, where she supported organization rewiring during the pandemic and built a culture that drove employee retention. She also spent a decade at Allergan leading global initiatives to drive employee engagement and retention.



Carolina Weidler, Principal & Studio Director

H. Hendy Associates, Newport Beach

Carolina Weidler is an Architect, Lean Six Sigma Black Belt, and LEED AP professional

2022 Women in Business Award Nominees

JoAnne Williams, President & CEO

JWilliams Staffing Inc., Irvine

JoAnne Williams, founder of JWilliams Staffing (JWS), grew up in a rural farming community in South Dakota as the 7th of 8 children. Being a part of a large family in a region without much socioeconomic segmentation, her life principles became quickly evident with each venture. Williams is known for her integrity, work ethic, continuous education, mentoring, sharing knowledge, and community giving. When she decided to relocate to Southern California in her mid-20s, she had less than \$1,200 in her pocket, yet plenty of ambition. Relocating as a single mother of two small children is a challenge many women understand in balancing work and parenting. With a passion for investing in others and an unrelenting entrepreneurial drive, Williams took out a home equity loan, sectioned off half of her garage for an office, and made a giant leap of faith - JWilliams Staffing opened for business in 2004.



and regulatory environment. Providing value beyond meeting compliance requirements is a focus for each of her clients. Her leadership is integral to many vital initiatives for the Firm, such as mentoring and training programs for young professionals pursuing a Certified Public Accountant license. As a member of the Association for Corporate Growth's Board of Directors, she co-chairs the group's Women in Leadership Committee. She also serves as the Audit Committee chair for the Discovery Cube Orange County and is the Treasurer and Finance Committee Chair for Mariposa Women and Family Center.



Debora Wondercheck, Founder & CEO

Arts and Learning Conservatory, Costa Mesa

Debora Wondercheck is the founder of the Arts & Learning Conservatory. Since it's founding, the Arts & Learning Conservatory have served over 10,000 youth making arts programs accessible and equitable regardless of finances or status. Courses include theatre, orchestra, band, choir, and media with an emphasis in engagement, advocacy, and preservation. Wondercheck expanded the organization from the ground up and currently operates budgets under organizations with revenues of \$10+million annually. Under Wondercheck's leadership the Arts & Learning Conservatory is nationally recognized as an award-winning youth arts organization operating in over 40 school and youth institutions in three county's (Los Angeles, Orange, and San Bernadino). For the past eighteen years Wondercheck has stayed true to her laser focused mission of accessible arts which sets students up for success in life. She is committed to use her experience to broaden access to education by supporting innovation, reducing barriers to entry, and building strong communities.



Anika Wilson, Financial Advisors

Spinnaker Investment Group, Newport Beach

Anika Wilson, financial advisor at Spinnaker Investment Group, provides personalized financial plans and investment management to individuals, families and businesses. Since joining in January 2021, Wilson has launched multiple new initiatives for Spinnaker Investment Group. One of those is a YouTube series called Spinnaker University, geared towards educating Millennials and younger generations on the basics of wealth management and preparing for financial success. This youtube page has over 20,000 views. Another initiative is a new business division called Women & Wealth which offers tailored services specifically for women. Through Women & Wealth, Wilson works with all of Spinnaker's women clientele to educate, inspire and empower them to take responsibility for their finances, so that they have the ability to protect and control their future, and their family's future, for years to come. Additionally, Wilson frequently speaks on a variety of podcasts and youtube shows discussing wealth and financial literacy for women.



Dr. Tammy Wong, CEO

Fostering Executive Leadership Inc., Irvine

Fostering Executive Leadership Inc. is an international business results executive coaching firm. The firm consists of hundreds of leadership coaches worldwide. The coaches work with leaders by improving leadership capability, capacity, and have established a proven record with a ROI through our coaching engagements. The team works with individual leaders at all management levels and are skilled in helping leaders understand the benefit in building leadership competencies within the organization, understanding team integration, and



MORTENSON TAGGART ADAMS LLP

CONGRATULATES

Teresa C. Alarcón

Orange County Business Journal
2022 Women in Business Awards Nominee

949.774.2224
mortensontaggart.com

CONGRATULATIONS
WENDY BUCKNUM, CMCA, AMS, PCAM

from your colleagues at Murow Development
Consultants on your nomination for the 2022
Women in Business Award

MUROW
DEVELOPMENT CONSULTANTS

949.988.3270 | WWW.MUROWDC.COM
16800 ASTON ST, IRVINE, CA 92606

ORANGE COUNTY BUSINESS JOURNAL

Presents the 28th Annual



Theresa Aberle / Baker Tilly
Brateil Aghasi / WISEPlace
Teresa C Alarcón / Mortenson Taggart Adams LLP
Corrine Allen / Goodwill of Orange County
Daisy Anawalt / Hydration Room
Kari Armstrong / Unscripted Interior Design
Janice Arrigo / Surterre Properties
Michele Sabo Assayag / Snell & Wilmer
Laureen Asseo / Fresh N Lean
Deborah Barlow-Taylor / FUSION OF IDEAS
Isabelle Bart / Small Business Development Center at
UCI Beall Applied Innovation
Ramin Baschshi MD / Unlimited Possibilities
LaSharnda Beckwith, Ph.D., D.B.A. / Lutheran Social Services of
Southern California
Shirin Behzadi / Shirin Behzadi LLC
Vanessa Benavides / Go RN and Staff Grit
Letitia Berbaum / The Zandbergen Group
Kimberly Dwan Bernatz, CFP®, AEP® / CIBC Private Wealth
Pooja Bhalla / Illumination Foundation Medical Group
Tania Bhattacharyya / Lumos Marketing
Kim Bibb / Villa Real Estate
Maureen Bissonnette / Ware Malcomb
Anabella Bonfa / Wellman & Warren LLP
Adrienne Brandes / Surterre Properties
Allyson Brooks, MD / Hoag
Judy Brower Fancher / Brower, Miller & Cole
Rebecca Brusuelas-James / University of California, Irvine -
School of Medicine, UCI Health Affairs
Wendy Bucknum / Murow Development Consultants
Danica Bunnett / Bluon
Dana Butler-Moburg / The Shea Center for Therapeutic Riding
Michelle Byrge / Landsea Homes
Angela Caliger / Surterre Properties
Jamie Ceman / Chapman University
Rashmi Chaturvedi / Kaygen Inc.
Carola Cherief / Trumark Homes LLC
Dr. Seema Choudhary / Montessori Preschool, Irvine & Lake Forest
Amy Cook / Stage Marketing
Tammy Cooper / Technologist
Whitney Costales / Sweet James LLP
Cindy Couyoumjian / Cinergy Financial
Shawn Covarrubias / Apriem Advisors
Alicia Cox / PRJKT Restaurant Group
Coleen Cunningham / UCI School of Medicine,
UCI Health and CHOC
Kristin Daher / Powerhouse Communications
Marcella De Anda / Taqueria De Anda
Jenny Lynn De La Torre / Graphic Ink
Carol DeNembo / Mountain Mike's Pizza LLC
Deborah Dickson / Smith Dickson Certified Public Accountants LLP
Marie DiSante / CDF Labor Law LLP
Samantha Dorey / Everett Dorey LLP
Lauren Doyle / TLD Law
Rhonda Ducote / Apriem Advisors
Susan Dwyer / H. Hendy Associates
Devon Dykstra / Matthews Real Estate Investment Services
Leslie Espiritu / Ware Malcomb
Carol Fawcett / Golden State Foods
Pegah Fazeli / Prime Management Company
Idit Ferder / Lugano Diamonds
Raquel Figlo / Welcome to Raquel Figlo Public Relations
Laura Foti / Specright
Lisa Fratzke / Fratzke Consulting
Mandy Fry / Z SUPPLY LLC
Mandy Gagnon / Omni Fund
Kelli Gerasimou / Ivantis/Alcon
Shayna Goldberg / SetSchedule

Sue Grant / The Literacy Project
Kim Gros / SteelCraft
Pegah Grossi / Ambiance Design Consultants Inc.
Holly Hagler / Meals on Wheels Orange County
Kaaren Hall / UDirect IRA Services
Nicole Hall / Areas Interior Design
Rebecca Hall / Idea Hall
Caterina Hall-Richards / Bracken's Kitchen
Ashley Harter / The Harter Group Inc
Courtney Haubach / Matthews Real Estate Investment Services
Erin Hawley / Spiritual Gangster
Heather Heleloa / THE RANCH Restaurant & Saloon
Madelynn Hirneise / Families Forward
Poppy Holguin / Jan's Health Bar
Krista Hollinger / Planned Parenthood of Orange &
San Bernardino Counties
Lynn Hopkins / Banc of California
Amanda Horton / Banc of California
Stacy Hubbard / Marsh & McLennan Agency
Deeniece Huynh / Howard Building Corporation
Dr. Janet Jacobson / Planned Parenthood of Orange &
San Bernardino Counties
Shannon Jenkins / TLD Law
Gloria Jetter Crockett / Make-A-Wish OC & the Inland Empire
Hong Jiang / Virginkar & Associates
Ronnetta Johnson / Waymakers
Meghana Joshi / Little Diversified Architectural Consulting Inc.
Manna Kadar / Manna Kadar Beauty Inc.
Shawn Kato / Baker Tilly
Dawn Keeney / Northern Trust
Adrienne Kessler / Speech and Language Development Center
Joone Kim-Lopez / Moulton Niguel Water District
Robin King / J.F. Shea therapeutic Riding Center
Sharon R. Klein / Blank Rome LLP
Lee Ann Kline / STEM Advantage
Kamryn Villegas & Whitney Kumar / Kamryn Whitney
Court Reporting
Gina Lara / Smith Dickson, Certified Public Accountants LLP
Xandra Laskowski / OSEA Angel Investors
Julie Laughton / Julie Laughton Design Build
Lindsay Lawrence / First Foundation Inc.
Cadie Lee / Parisi Portfolio Inc.
Jennifer Leuer / Octane
Crystal Li / UHY LLP
Jessica Liu / Petit Anjou
Jamie Long / Sonendo Inc.
Monika Lopez / Northern Trust
Maegan Lujan / Toshiba Business Solutions
Anna Lisa Lukes / The Lukes Network LLC
Colleen Maloy / David Meltzer Enterprises
Joi Mar / Green Street
Maria Marinico / SmithGroup
Kate Marr / Community Legal Aid SoCal
Celine Martin / Johnson & Johnson Cardiovascular &
Specialty Solutions Group

Luncheon & Awards Program

October 20, 2022

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

Tickets*: \$175/Table of Ten \$1,650



Register Here

Please visit ocbj.com/bizevents

Congratulations

2022 Nominees

Liliana Mattox / LibreChem Inc.
Teresa McQueen / Western Growers
Meghan Medlin / Medlin Workforce & Reentry Solutions
Shachi Mehra / ADYA and Spice Girl Sauces
Wendy Meltzer / Unique Hardwood
Daniella Menachemson / StyleNations
Kendra Miller / BJ's Restaurants Inc.
Rochelle Mills / Innovative Housing Opportunities
Jena Minnick-Bull / South Coast Conservatory
Annette Morgan / City of Hope Orange County
Jessica Morrow / Revive Real Estate
Rachel Nelson / CB Technologies Inc.
Patty Nemeth / Fluidmaster
Leslie Nguyen / Bosscat Kitchen & Libations
Melissa Northway / True Path Financial
Lindsay Oglesby / Tax Relief Advocates
Jennifer Olson / Apriem Advisors
Anoosheh Oskouian / Ship & Shore Environmental Inc.
Wendy Ouriel / OUMERE
Yeral Patel / YouvaMD
Reshma Peck / Experian
Nora Perez / Enterprise Bank & Trust
Mary Platt / Hilbert Museum of California Art at Chapman University
Dannii Portsmouth / PepsiCo Beverages North America
Ashley Powers / OneDigital
Tracey Prescott, RN / Beauty With a Mission
Patty Presson / Surterre Properties
Niki Protz / Howard Building Corporation
Jenn Quader / The Smart Agency
Debra Radcliff / 5.11 Tactical
Linda Rank / soul&beautyMEDx
Julie Rios / Newmark
Maricela Rios-Faust / Human Options
Joelle Rogers / TFR Builders
Angie Rowe / Beyond Blindness
Sandy Salty / Trace3
Mara Samuels / Haven Laguna
Talia Samuels / Outshine Public Relations
Tricia Sanchez / C3 Tech
Lucy Santana / Girls Inc. of Orange County
Pam Scamardo / TPK Properties, C.R.E.A.T.E. Wealth Network
Sona Shah / My Private Professor
Breann Shook / Grandma Lucy's
Cindy Shopoff / Shopoff Realty Investments
Susan Silvestri / Valley Vista Services Inc.
Kristine Everly Smith / Surterre Properties
Nuka Solomon / Free Wheelchair Mission
Dr. Shauntina Sorrells, MSW DSW / Orangewood Foundation
Jessica Spaulding / The Spaulding Agency
Paula Steurer / Sterling Public Relations
Autumn Strier / Miracles for Kids
Carrie Strom / Global Allergan Aesthetics and AbbVie
Victoria Strombom / Surterre Properties
Mary-Christine ('M.C.') Sungaila / Buchalter
Rachel Svoboda / Sunday Brunch Agency

Natalie Taormina / Passport Brand Design
Jinger Tapia / Ware Malcomb
Kara Taylor / ATTOM
Kimberly Taylor / JAMS
Susan Taylor / Juice It Up!
Jin Thatcher / TGR Foundation - A Tiger Woods Charity
Lauren L. Timpe-Castellanos / OmniaPiel
Rachel Umpig / KBS
Andrea Walter / Ephesoft
Carolina Weidler / H. Hendy Associates
Elizabeth Weldon / Snell & Wilmer
Genevieve West / Howard Building Corporation
Justine White / Toshiba America Business Solutions Inc.
Dianne Whitfield / Tarsus Pharmaceuticals Inc.
JoAnne Williams / JWilliams Staffing Inc.
Anika Wilson / Spinnaker Investment Group
Diane Wittenberg / Haskell & White LLP
Debora Wondercheck / Arts and Learning Conservatory
Dr. Tammy Wong / Fostering Executive Leadership Inc.
Jessica Word / Word & Brown
Dominique Worthington / Medtronic
Michelle Wulfestieg / Southern California Hospice Foundation
Lisa Yamakawa / Baker Tilly
Dianne York / DYG Cosmetics
Linda Young / Elite OC Productions
Stella Zhang / American Lending Center & Sunstone Management
Heidi Zuckerman / Orange County Museum of Art



Keynote Speaker

Shannon Eusey

Chief Executive Officer,
Beacon Pointe Advisors



DIAMOND SPONSOR

JPMORGAN CHASE & CO.

PLATINUM SPONSORS



GOLD SPONSORS



SILVER SPONSORS



Tickets are non-refundable. Ticket price includes self-parking and a one year subscription to the Orange County Business Journal (\$30 allocated to the subscription. New subscribers only). Current subscribers may gift the subscription to a colleague.

2022 Women in Business Award Nominees

the creation of solid succession planning methodology to create strategic leaders within your company. Organizations they serve will benefit with the focus on building leadership, team performance, communication, accountability, and strategy through a proven track record of experience, certification, and research.

Jessica Word, CEO

Word & Brown, Orange

Jessica Word grew up in the insurance business. Her father, John M. Word III, and business partner Edward J. "Rusty" Brown, Jr., established Word & Brown General Agency in 1985. Word recalls working for the company during high school and college, and learning the business from the inside out - gaining exposure to different facets of the company and industry. The mother of two, Word is the first woman to lead Word & Brown. She became president in 2013, and was named CEO in 2021. She attributes her success to understanding how each department contributes to the company. She represents a new breed of leader, who recognizes the importance of technology, analytics, diversity, and service - a Word & Brown hallmark. With this mindset, Word and her team pioneered a digital transformation at Word & Brown, helping the company - and industry - become more relevant to future generations of employees and customers.



Dominique Worthington, Vice President, CSF Management and Critical Care

Medtronic, Irvine

Dominique Worthington is the vice president of the CSF Management and Critical Care Division for Medtronic's Brain Therapies group. Ms. Worthington has over 25 years of industry experience in both large companies and start-ups and was the chair of Medtronic Woman's Network for Irvine an employee resources group dedicated to reaching the goal of 40% women in leadership by the year 2020. During her tenure at Medtronic, she has led integration activities for Medtronic's acquisition of the Covidien Neurovascular group and several strategic acquisitions for the Neurovascular business. Prior to Medtronic, Ms. Worthington was with Edwards Lifescience where she held key leadership positions in Strategy, Operations, Planning and Information Technology. In addition, Ms. Worthington has held executive leadership positions in several successful technology start-up companies. Ms. Worthington holds a bachelor's degree in decision science from Georgia State University and a Master of Business Administration from Chapman University.



Michelle Wulfestieg, Executive Director

Southern California Hospice Foundation, Costa Mesa

Two-time stroke survivor, award-winning author, motivational speaker, and executive director of Southern California Hospice Foundation (SCHF), meeting Michelle Wulfestieg will cause you to believe anything is possible. Although half of Michelle's body remains permanently paralyzed, she has served as executive director of SCHF since 2010. Under Wulfestieg's Leadership, SCHF has supported over 7,000 distinct children and adults across Southern California. The Foundation fills vast socio-economic needs of the terminally ill, such as payment of bills, providing transportation or assisting with groceries. SCHF also makes fabulous final wishes come true for patients, and Wulfestieg often collaborates with celebrities that have included Harrison Ford, Oprah Winfrey, and Selena Gomez. Most importantly, in 2017 Wulfestieg spearheaded a five year capital campaign called, "The Heavenly Home Project." Slated to open in 2022, The Heavenly Home will be Orange County's first nonprofit end-of-life care facility, one of only three in the state of California.



Lisa Yamakawa, CPA, Partner

Baker Tilly, Irvine

Lisa Yamakawa is a tax partner in Baker Tilly's Orange County office. She has over 18 years of experience offering tax compliance and consulting services, working extensively with high-net-worth individuals, family groups, and closely-held businesses. Yamakawa's professional background includes diverse experience in the areas of individual and flow-through taxation to help clients maximize their tax savings. Her work with family groups, includes managing all the individual family needs, as well as trusts, foundations, and family-owned business entities. Beyond her tax work, Yamakawa has shown consistent dedication the growth of the firm. She is a champion for the people and uses her influence to foster diversity and inclusion. In the Squar Milner/Baker Tilly merger Yamakawa was given a seat on the national Growth and Retention of Women (GROW) committee, which has allowed her to further pursue her passion for mentoring and representing women in accounting.



Dianne York, President & CEO

DYG Cosmetics, Newport Beach

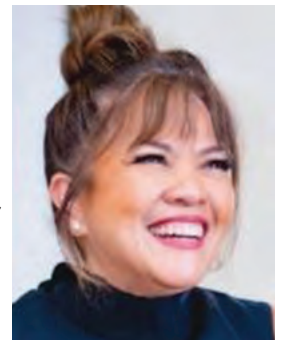
Being named Mrs. Germany 2022 has been a milestone with DYG mineral makeup. Become a queen or simply look like one with DYG mineral makeup and skin care. DYG Cosmetics has enabled philanthropic organizations such as the patrons of the Prado support 12 museums in balboa park. She has also been named a power women SD for the past three years.



Linda Young, Co-Founder & Owner

Elite OC Productions, Newport Beach

Linda Young's experience comes from more than 10 years working in the gift service and manufacturing industries. She expanded her talents into the event production industry in 2007, when she partnered with her husband Burton Young and good friend Andrea Shelly. Since the inception of the business, it has serviced high profile and nonprofit clients by understanding their goals and vision. Young's overall mission for Elite OC Productions is to treat every client like a partner and exceed the expectations of all participants from the beginning to the final stages of every event.



Stella Zhang, COO (ALC); Partner (Sunstone)

American Lending Center; Sunstone Management, Irvine

Stella Zhang joined American Lending Center as the COO in 2011. Upon arrival, she immediately built a successful small business lending team and has led to the steady growth of the lending practice. Her team manages a dynamic portfolio of over \$200 million dollars of senior loans consisting almost entirely of loans on SBA approved projects. Zhang has been named both a Coleman Report "Coleman Emerging Leader" and "Mover and Shaker."



Heidi Zuckerman, CEO & Director

Orange County Museum of Art, Costa Mesa

Since arriving at OCMA in January 2021, Heidi Zuckerman has spearheaded the \$120 million Capital and Endowment Campaign, and will complete the \$94 million building project this fall. Under her leadership, the museum has focused on increasing access to the visual arts and art making for all of Orange County, which includes working with cities, other nonprofits and schools, such as the Santa Ana Unified School District (SAUSD) and public libraries. Through these efforts, Zuckerman is committed to eliminating barriers for under-resourced schools by supplementing transportation costs and providing a healthy lunch. Additionally, she is overseeing the development of Spanish language family programs at the museum, and is spearheading innovative job recruitment strategies to help lessen the barriers entering the workforce, investing in the local community talent, and creating opportunities for ongoing professional development for young adults.



BREANN SHOOK

CO-OWNER / FOUNDER

Grandma Lucy's

Breann is a pioneer in the natural pet food industry. As founder and owner of Grandma Lucy's, she has passionately improved wellness for dogs and cats through quality of food. Since 1999 Breann and her husband, Eric, have been revolutionizing the industry's approach to pet food. Using unprocessed, human-grade ingredients, she has forever impacted the standards for pets. Family owned and operated; all award-winning freeze-dried food recipes are produced in small batches in the company's Rancho Santa Margarita facility.

As a busy mother of three, Breann remains committed to giving back and supporting the community. Together with her daughter she founded Project Pet-RAK (Random Acts of Kindness). This this charitable initiative focuses on supporting the dogs that enrich our lives. Breann is also a founding member of IndiePet; the first network supporting independent and neighborhood pet retailers.

Grandma Lucy's is proud to congratulate Breann Shook on her 2022 OCBJ Women in Business Nomination.

Family Owned & Operated
— SINCE 1999 —