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AWARDS CEREMONY AT HOTEL IRVINE March 12, 2019
Ex-Telogis Exec Debuts App-Based Concierge Service

Targets Include Tech Cos.
Seeking Worker Perks

By CHRIS CASACCHIA

A former Telogis Inc. executive aims to free up time for office workers and other employees by providing pickup and concierge services during the day via smart phone app.

“The problem is not uniquely mine,” said MyShoppero founder Krishna Vanka, who’s juggling demands of entrepreneurship and his 3-year-old son, Aditya. “This is a common issue for all employees.”

The Alioso Viejo-based company has signed a handful of corporate clients since its July launch, including shared-office provider TechSpace, where it’s headquartered. Two human resources benefits companies are also aboard: BeaconPath in Mission Viejo and TriNet Group Inc. in the Bay Area—the latter with 2,000 workers.

Vanka wants a hundred clients by year-end and has begun by targeting tech firms—which like the service as a recruitment and retention perk to offer workers—and the HR industry, loaded with companies that have networks of corporate clients who may also seek out the service.

Driver’s Seat
Businesses pay $79 a month per employee; costs can decline based on more users, who

offload shopping, dry cleaning runs, and ordering goods and services from local businesses, excluding restaurants.

AI-based software creates optimum routes for drivers—“shoppers”—who shuttle between businesses and the workplace. Requests logged by 1 p.m. are completed by 4 p.m., within a 5-mile radius; longer trips are done by the next day. Food comes in freezer bags keeping contents cold for up to six hours.

Users pay only for the goods or services with no added fees. On an average day, 20 to 30 users access the service.

Sharing Rides
MyShoppero holds potential benefits for others within its developing network: local independent retailers and drivers from ride-sharing companies such as Uber or Lyft.

The company pays $25 an hour for its after-work crunch time, which commonly coincides with some of the slowest-demand periods for ride-sharing.

“We’re tapping into this time frame when they’re not making money,” said Vanka, a graduate of the Los Angeles chapter of the Founder Institute, a startup accelerator in more than 180 cities (see Startups & Innovations column, page 32). The service intends to help funnel business into the local economy, drawing consumers to flower shops, pet stores, bakeries and others and potentially away from online retail.

“We’re trying to reverse the cycle,” said Vanka, who’s hyperfocused on growing the business in OC. “If we can do this in Orange County, we can do this anyplace.”

He raised more than $100,000 last year from friends and family to get the boot-strapped company off the ground.

Car Guy
Vanka became the first product manager at Telogis in 2013, shortly after the telematics specialist raised $93 million in a Series A funding round led by Menlo Park investment firm Kleiner Perkins Caufield & Byers, now Kleiner Perkins.

Alioso Viejo-based Telogis used GPS tech-nology and proprietary software to help commercial fleets create better routes, track shipments and deliveries, manage mobile workforces, and smooth workflows.

By the time he left Telogis in 2017, he was vice president of product management, responsible for half the company’s annual rev- enue, which topped $100 million at the time.

His departure came a year after Telogis was acquired for $900 million by Verizon Communications Inc. The software maker is now part of a unit called Verizon Connect, which manages vehicle fleets.

Women

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And definitely don’t tell her that it’s even harder for women entrepreneurs.

“It doesn’t matter if I’m a female,” said Smith, who’s ramping up work at Brevvie, a service company she co-founded last year. “It doesn’t matter what I am. If I’m good enough, I will get funding.”

Recent headlines bear that out.

A pair of women entrepreneurs from the Business Journal’s OC 500 Directory of Influencers, including Krishna Vanka, of MyShoppero, and Heidi Golledge, of Brevvie, have launched startups in the past few months, with no added fees.

Business rules are the same, regardless of gender, the entrepreneurs tell the Business Journal.

Here are some of their stories.

Like Rabbits
Golledge’s first venture didn’t sell for $105 million; it was more important.

The Jobot chief executive began breeding rabbits at age 11, selling them to local pet shops to help her single mom, Virginia, who worked two jobs to support four kids. Her father was a fighter pilot in Vietnam who never made it home.

She recalls her mother saying in West Virginia, where her mom grew up, “You either owned the coal mine or you didn’t.”

In the late 1990s, Golledge saw a shot at something like the former: an emerging in-net environment. “Where you didn’t have to literally own the coal mine; you could get a dot com name and ... a great idea.”

The idea was CyberCoders, co-founded in 2000 with Lance Miller and sold a baker’s dozen years later to Calabasas-based On Assignment Inc.—now ASGN Inc.—on NYSE-traded, IT and professional services firm with a $3.3 billion market cap.

Golledge had a five-year noncompete clause after the sale and ran CareerBliss, a site launched about the same time as CyberCoders that provides an online career community for job seekers.

In October, she started Jobot in El Segundo, which melds artificial intelligence with real recruiters to pitch companies to highly sought candidates.

Jobot is adding an office and moving the company’s headquarters to OC, where it plans its hiring push.

At least four businesses counting the bunnies; what gives?

“I don’t golf.” Golledge said. “Building a unique culture and helping people and men-toring them ... that’s exciting for me and fun.”

Power Tools
Kristine Smith has about two decades of residential real estate experience, including five years at the Irvine Co., and currently as vice president of marketing at Surferite Properties in Newport Beach.

Over that time, she saw living spaces get ting smaller, with less storage space for resi-dents, who nonetheless still owned

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After 10 years of providing in-home tutoring for middle and high school students locally—and “the driving, the scheduling, the whole having-a-parent-at-home” this entails—Adam Sadri said an old-school tutoring mentality was ready to graduate. His Irvine-based Tutor Nerds this month launched TutorNerd.com to make the process easier for his clients and company. “We saw the limitations of in-person tutoring,” he said. “So we’ve refined the experience.”

Sadri is the founder and chief executive of both companies, which are running alongside each other. The venture is self-funded so far; as it doubles its tutor count to 150 and gets to about 300 clients, the self-described nerds will seek some backing and Sadri expects a gradual overtaking of the old-school operations by the online version. “I didn’t want to take a successful business and change its business model and having done that, God forbid, not be successful,” Sadri said.

On-ground tutoring is $68 to $89 an hour depending on the subject; online runs $63 to $74 per session. The idea is akin to fellow Irvine Co. alum Marie Quinn Taber’s foray into the sharing economy. Taber studied languages in school but said without practice people can’t achieve fluency—and spent some time spent in the Midwest—full immersion cubed—and with advances in VR technology, a business idea was born.

Brevvie, short for Briefly Rent Everything, is friends-and-family funded so far to the tune of about $70,000. She’s working full-time.”

If it can keep trash out of the landfill, “I’m happy about it,” she said. “We can stop consuming for the sake of consuming and really think about what we’re buying, why we’re buying it, and if we really need it long term.”

Brevvie is friends-and-family funded so far to the tune of about $70,000. She’s working full-time. The idea is akin to fellow Irvine Co. alum Torres’ Parcel Pending—a system for packages, which are running alongside each other. The venture is self-funded so far; as it doubles its tutor count to 150 and gets to about 300 clients, the self-described nerds will seek some backing and Sadri expects a gradual overtaking of the old-school operations by the online version.

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The software maker is pushing the envelop in electronic language education—and stamping it with enough postage for foreign airmail. It pairs virtual reality software with Oculus Go headsets to help users meet-up with native speakers in 50 virtual destinations. Ironically enough, many locales are in the U.S.

“Everything we do is a challenge,” Taber said. “That couldn’t be further from the truth.”

Sadri: growing self-funded venture

Women

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items—tents, coolers, luggage, party games, cameras, vacuum cleaners, etc.—used occasionally but stored constantly.

Sadri: growing self-funded venture

The George apartments in Anaheim near Angel Stadium, owned and managed by Lyonn Living; and The Runway complex in Playa Vista.

Class Acts

Wolters’ Maven taps software for language learning. It’s grown from her work in teaching English to international students and others: they struggled with vocabulary and Wolters struggled to find a way using existing materials to help. So, in the entrepreneurial refrain, she launched her own.

Maven generates learning material based on selections users make as they read. The startup in June was accepted into UCT’s Applied Innovation Wayfinder program.

The proof of concept intends to attract investors and Brevvie wants 20 additional OC multifamily installations this year.

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Newbies Offline

Many new businesses are based around tech; these aren’t. Natalie LeFlore wanted a daily planner to help her stay on track with her spiritual growth. She couldn’t find one, so she made it herself.

Planfully was in beta last year and sold out; her initial 2019 run did so as well—in a few weeks.

Planners sell online for now, but LeFlore aims to sell the product at conferences and bookstores next year, and expand the line to include journals and notebooks under the same brand. “There can be a sort of fatigue that comes with relying on our devices,” LeFlore says, “especially with something as intimate as spiritual growth. Having a tangible place to write and reflect was something I felt would add value.”

Like many—and amid the ballyhoo of traditional retail demise—Eileen Dukes Beamish opened Mane Beauty Lounge in Mission Viejo. After 30 years in the corporate world, including as a vice president at recently acquired Irvine-based Booker, a bookkeeping and accounting platform for spas and salons, she opened her own such shop.

She opted against a franchise so no one else was “dictating the narrative” and used her life savings to fund the salon, which currently has six stylists.

People sometimes assume, “that my husband funded my investment or that it’s a hobby,” she said. “That couldn’t be further from the truth.”

—to Jasmine Spearing-Bowen
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The early days of a business can so often be a bustling, exciting cavalcade of refining products, building a customer base, and establishing a market presence. Amity this heady rush to grow and sustain your venture, it can be tempting to let any thought of a future exit take a backseat.

The truth is, if you have a sense of your ultimate goal, you can more effectively plan for it and operate the business accordingly—even if your horizon is decades away.

From keeping the business in the family to selling to employees to going public, digging into the nuances of each opportunity ensures you pursue the right path for you and your company—and increases your chances of a successful transition.

Here’s how to get started.

What exit works best? It depends on your goals

There’s no one defined exit strategy for business owners. Determining your own exit plan depends on a variety of factors, from financial needs to your desire for the future of the business to the aims of other investors or family members involved—and beyond.

Understand all your exit options

Part of creating an exit strategy is cultivating an awareness of the choices you have for financially exiting your company. For example, selling a business outright may not be an option if you can’t find a buyer or receive the valuation you’d like. Understanding the available options and you may discover there are more avenues for realizing the value of the time and money you’ve invested into your company than originally thought.

Selling to a family member

According to SCORE, nearly 20 percent of U.S. small businesses are family owned.

These family partnerships can include spouses, grown children, or a combination of extended family leadership and employees. For many business owners, maintaining family control is the priority when contemplating an exit strategy. In these cases, creating a succession plan is one of the most important tasks a business owner can undertake.

After all, a sudden or ill-planned exit may leave a family-owned business without a sense of direction. A lack of plan, even while you’re still with the company, can also enable the current generation of leaders to maintain the status quo, even if it’s at the expense of innovation and growth that would benefit the up-and-coming family members. Selling the business to another member of the family requires careful deliberation.

Selling to your employees

Sometimes the people who work for your company are the best option for its next owners. They’re already personally vested in the company and may even be share-holders. They’re committed to the mission of the business and likely possess a solid understanding of its inner workings. Still, selling a business to employees remains relatively uncommon—employees often either aren’t interested in buying the company or don’t have access to the capital necessary to make the purchase.

The good news is that if you have an employee—or group of employees—ready and willing to make the leap, your company can benefit from the continuity of keeping the sale with someone already familiar with the organization and a smoother transition overall.

Selling to a third-party buyer

This is the most common path sought out by owners seeking to exit their business. Selling your business on the open market often helps business owners garner a higher price for the company than selling it to family members or employees. It also removes some of the unique complexities related to those transactions. Your list of potential acquirers depends on your business and industry, but could include larger companies, private equity firms, or an individual.

If a third-party sale is your plan, the earlier you prepare the better. An investment bank can often provide invaluable advice as you work to identify potential buyers and then negotiate a deal that meets all of your financial and business objectives.

Initiating a public offering

Going public—that is becoming a publicly traded company via a stock offering—is an option reserved for a small percentage of companies. Businesses that explore an IPO are typically highly scalable companies that have already achieved a significant amount of growth and are looking for even more. Consider that in 2017, only 160 companies with a market capitalization of more than $50 million went public. IPOs have been on the rise over the past few years, and notably, the majority of companies that go public aren’t yet profitable. The public offering provides a way to raise a significant amount of cash, and pay out initial investors as well as the company’s founders and owners.

Know that an IPO requires a significant amount of strategic planning, expertise, and guidance to execute correctly.

Liquidating your assets

In the event that you’re unable to find a buyer—or perhaps uninterested in selling—you may choose to wind your business down. While not necessarily the most profitable way to exit a business, in some cases it may be the only viable option. That said, owners may be able to realize a financial return via selling the company assets.

Closing a business is a big decision—and you’ll want to collate as much value from what you’ve built as possible.

Think Ahead from the Beginning

Launching your company requires a lot of hard work, courage, and financial resources. You’ll need to put that same effort into setting your company up for success when it comes to an exit strategy.

Take the time to consider all of your options during the business planning phase so you can keep your goals in your line of vision. For example, if you plan to leave the business to your children, then incorporating them into the company early is critical. Similarly, if you’re looking to sell to a larger industry player or PE firm, then you’ll want to know what these potential acquirers look for in a purchase—and incorporate those into your own objectives.

One last tip: Continue to review—and, if necessary, revise—your exit options as the business grows and evolves. You can even use those reviews as an opportunity to figure out how to optimize your business today so it’s a more attractive asset when you are ready to exit.

With the additional effort, you and your business will be set up for the best possible outcome.

Joe Yurosek

Fifth Third Bank hired Joe in December 2017 as California Market President to lead the Golden State’s commercial vertical and market expansion strategy. An Orange County native and long-time resident, Joe has more than 25 years of banking experience, he joined Fifth Third from Comerica, where he served as market president for the Orange County region. He also was responsible for corporate middle-market strategy in Orange County, Long Beach and San Diego and co-led sponsor coverage strategy for Southern California. Joe holds a bachelor’s degree from California Polytechnic State University-San Luis Obispo and earned his MBA from University of Southern California’s Marshall School of Business.

Fifth Third Bancorp is a diversified financial services company headquartered in Cincinnati, Ohio. As of December 31, 2018, Fifth Third had $146 billion in assets and operated 1,121 full-service Banking Centers and 2,419 ATMs with Fifth Third branding in Ohio, Kentucky, Indiana, Michigan, Illinois, Florida, Tennessee, West Virginia, Georgia and North Carolina. In total, Fifth Third provides its customers with access to approximately 52,000 fee-free ATMs across the United States. Fifth Third operates four main businesses: Commercial Banking, Branch Banking, Consumer Lending and Wealth & Asset Management.
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Strategies to Consider Now For a Tax-Efficient Business Exit Later

By City National Bank

If you own a thriving business, sooner or later you’re likely either to sell it, hand it to family members or take it public. Whether you’re just starting out or thinking about retiring in the next few years, it’s not too soon to consider your strategy for managing this change to your greatest financial asset.

A key part of that planning includes considering what steps you’ll take to mitigate tax burdens for yourself and your successor.

“The day you open your business is the day you have to plan for exiting it,” said Natasha Davis, City National Bank senior wealth planner, who has helped numerous clients position their companies for sale or transfer. In fact, she said, “the later you start planning, the fewer alternatives you may have when your business eventually changes hands.”

“Even if you expect to hold onto your company for the foreseeable future, the business represents value within your estate,” she noted. “It’s also wise to prepare for the unexpected — perhaps even an unexpected offer far exceeding your estimated valuation.

Options for Asset Protection and Tax Savings

Start by consulting with your financial planner, lawyer and accountant, who can help you evaluate your estate and plot the most financially sound moves.

Davis asks clients first about their company governing documents, which may limit what they can do in structuring the business. You may need to change these documents, so ask your advisors to review them and make suggested improvements.

Any business faces a number of potential exit scenarios. Owners might sell or transition it to the next generation — or transfer the business through a sale-gift combination — or sell to employees or an outside third party. “In typical third-party sales, planning should ideally occur long before a transaction,” said Davis. “That’s because once an offer is on the table, options become more limited.”

The GRAT Option

One popular tool is a grantor retained annuity trust, or GRAT. “It provides a vehicle into which an owner can place a low valued business interest, but retain an annuity for a period of time, with growth occurring outside his or her personal estate,” Davis explained. “If you wait until someone makes an offer on your business, however, it’s too late to benefit from transferring shares to a GRAT, since you can’t value an asset at less than its known worth,” she said.

One City National Bank client who planned to eventually sell a family business obtained a valuation of roughly $10 million and placed his company shares into a GRAT. His brother and co-owner did the same. The following year, they received an offer to sell the business for $65 million.

“When the GRAT, they each have an annuity for a period of years from the liquidity event, but ultimately were able to save millions in estate tax by passing the lower value shares into the GRAT during their lifetimes,” said Davis. “This strategy may also be applied to interest in a company pre-IPO allowing families to pass along assets quickly while avoiding paying estate taxes on soaring post-IPO share prices,” Davis added. “It’s always important to consult with an attorney and a CPA for a comprehensive analysis of your unique situation. One of the risks: If the business owner dies before the GRAT expires, the value will be transferred to family members and the GRAT will expire. It’s important to properly structure the GRAT.”

The GRAT’s Long-Term Implications

Eventually, as the couple ages or decides to give up control of the assets, they may choose to transfer general partnership interests to heirs.

Before Accepting An Offer

Business owners sometimes find themselves presented with an unexpected offer that sounds too good to refuse. Davis urges them to carefully evaluate the tax and long-term implications before they accept.

Consider, for instance, a business worth $10 million that earns $1 million a year, with the owner perhaps taking home $500,000 annually. Along comes an eye-popping offer to sell for $30 million, which might net the owner $15 million.

Will that $15 million generate $1 million a year? Will it support the owner’s family for the next 20 or 30 years? “People might be wowed by a large offer, but may be better off keeping the business and going into work for a few more years, so they generate that $1 million annually,” said Davis.

“The earning potential of a living, breathing business is much better at times than the earnings potential of the stock market,” she said.

In one instance, though, a client with a tech business held off, feeling the company was in a position to increase in value significantly in five years.

“So with that we did do some planning,” said Davis. “The client is now restructuring and positioning the company for sale, possibly in a few years.”

Given the complexity and the number of options available, it’s important to consult with professionals to evaluate your situation before a sale. City National Bank’s wealth planners can help you weigh your options. To learn more, contact us.

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Natasha M. Davis, JD, LL.M, MBA (Taxation)
Senior Wealth Planner
Wealth Planning Group
City National Bank
(949) 223-4575
Natasha.Davis@cnb.com
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— Ryan Shea, CEO | Entrepreneur Media
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New Law:
Created by the Tax Cuts and Jobs Act (TCJA), Opportunity Zones were designed to increase investment in low income communities throughout the country. In June of 2018 over 8,000 communities in all 50 states, the District of Columbia and five U.S. territories were designated as Qualified Opportunity Zones (QOZ).

What is a Qualified Opportunity Fund (QOF)?
Any gain from a sale or exchange of property by a taxpayer, to an unrelated person, that is invested in a QOF are any investment vehicle, organized as domestic corporations or partnerships, that holds at least 90 percent of its assets in QOZ property. Disregarded entities are not, however, eligible to be QOZs.

QOZ property includes: QOZ stock, QOZ partnership interest, or QOZ business property. QOZ Property is tangible property used in a trade or business. QOZ Partnership Interests and Stock are equity interests in certain businesses that operate in QOZs.

Who can invest?
C Corporations (including RECs and REITs), individuals, partnerships, S corporations, and trust and estates can invest.

How does a taxpayer defer the gain?
Any gain from a sale or exchange of property by a taxpayer, to an unrelated person, that is invested in a QOF within 180 days of the sale is excluded from income until the earlier of the date the investment is sold, or December 31, 2028. Only the gain needs to be reinvested, not the proceeds from the sale.

To elect to defer gain, the taxpayer makes a deferral election by attaching Form 8949 to their Federal income tax return in the year of sale. It should be noted that, when a partnership elects to defer gain it is done at the partnership level. However, if the partnership does not elect to defer the gain, the gain is allocated to the partner and the partner can defer the gain individually.

The 5, 7 and 10-year rule
Once a taxpayer holds an investment in a QOF for five years his or her basis in the property is stepped up by 10 percent of the deferred gain. Additionally, once investments are held for seven years the basis is increased by another 5 percent of the original gain. Finally, if the investment in the QOF is held by the taxpayer for at least ten years and the taxpayer makes a basis adjustment/permanent exclusion election, the basis of the property equals the fair market value of the investment when the investment is sold or exchanged. Since the basis equals the FMV, there is no gain or loss realized on the sale or exchange.

Example
Taxpayer is an individual who purchased land for $1,000,000 in 2014. The land has appreciated to $1,200,000 in 2018 and is disposed of/sold. Before 180 days expire, the $200,000 gain is invested in a QOF which is invested in QOZ property. As such, the taxpayer owes no tax in 2018 with respect to the the $200,000 gain.

Manuel Ramirez, CPA, MST, FABFA, is Chairman and an International Tax Partner at RJI CPAs. Manuel is a founding member of the firm and has served as President and CEO since 1993. Manuel was appointed by Governor Arnold Schwarzenegger as a member of the California Board of Accountancy in 2007 and served as President of the Board in 2010. Manuel continues to consult on various international and multi-state companies and can be reached at 949.852.1400 or mramirez@rjicas.com.

Justin A. Hudson, CPA, MACC, is a Tax Manager with RJI International CPAs. He specializes in mergers and acquisitions and International Tax. He is a CPA in the state of Georgia. He earned his Bachelors in Accounting and Masters in Tax from the University of Georgia. Justin can be reached at 949.852.1400 or jhudson@rjicas.com.

Please reach out if you need further assistance with this matter!

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A distinguished collection of jewelry must include luxurious diamond earrings. Elevate your appreciation for diamond studs to a new echelon with Lugano’s Old Miner’s Cut Diamond Studs. Each earring showcases a more than eight carat cushion cut diamond and a collective 17 carats of glistening diamonds. Each diamond is placed on a bed of round brilliant collection VS diamonds and set in 18k white gold. Be immersed into a culture of luxury.

Emerald and Diamond Ring
History shares Cleopatra was passionate for emeralds. Similar to her, these stones are intoxicatingly beautiful and alluring. Lugano captures the essence of the storied gem in the Emerald and Diamond Ring. An enchanting nine carat emerald cut emerald surrounded by two distinctive kite diamonds is divine. Set in 18k white gold and detailed with round brilliant collection VS diamonds, this ring will beautifully stand the test of time.

An experience as remarkable as our collection
We welcome you to view our stunning collection at the Lugano Diamonds Grand Salon located at 620 Newport Center Drive, Suite 100, Newport Beach, and our additional locations in Aspen and Palm Beach. Please call 866.384.2666 or email info@luganodiamonds.com for more information.
Advertify, Ladera Ranch
Daniel Robbins, CEO
As head of marketing and operations for OC Facial Center, Daniel Robbins has helped grow the company to a two time Inc 5000 winner with over 2.5 million in revenue yearly. In 2018, Robbins decided to launch a digital marketing agency, Advertify, to help local businesses drive customer growth and expand online through e-commerce and Amazon sales. Leading up to the launch of Advertify, Robbins created a groundbreaking medical grade men’s skincare brand called ‘his’. He launched an advanced pigment technology sunscreen that helps to hide and cover-up skin imperfections including uneven skin tone, acne, scar and redness. He understood the importance of the amount of press the men’s skincare line received and now hopes to help other businesses by providing a service that is affordable and works. Robbins is also a writer on men’s skin health and has been featured in Forbes, Medium, Thrive Global and Huffington Post.

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

All Green Electronics Recycling, Tustin
Aman Sadeghi, CEO
Aman Sadeghi is a serial entrepreneur who has started a number of successful companies in the last 20 years. He is most widely known as founder and CEO of All Green Electronics Recycling, which was recently named the 366th fastest-growing company in the U.S. by Inc. magazine. He is also currently the principal and CEO of Titanium Success Inc., a peak performance and coaching company, which was started a year ago, but has already experienced exponential growth. Being a presenter at a TEDx Conference in 2012 gave him a taste of life as a public speaker and desire to take his personal and professional life one step further. As a key speaker, Sadeghi teaches skills in the three key areas of business/entrepreneurship, finance, fitness and relationships to create change, not in months or years, but in a matter of hours. All Green Electronics Recycling is a global leader in secure e-waste recycling, hard drive destruction, IT asset disposition, and has been featured in Forbes, Medium, Thrive Global and Huffington Post.

Antonello’s, Tustin
Antonio Cagnolo, Owner/Chef
Antonio Cagnolo, Owner/Chef
Antonio Cagnolo, Owner/Chef
Antonio Cagnolo is a highly rated chef in the noted Zagat Guide for more than two decades. Under his leadership, Antonello’s has established a much-needed roof repair despite living in a mold-infested home. Antis attributes his success to loyal customers and partners who are inspired by the company’s philosophy that “the more you give, the more you grow.”

Antis Roofing & Waterproofing, Irvine
Charles Antis, Founder/CEO
Antis Roofing & Waterproofing keeps families safe and dry and is nationally recognized as a leader in corporate social responsibility. Early in his career, Founder Charles Antis met a single mother and her seven children who were unable to pay for a much-needed roof repair despite living in a mold-infested home. Antis repaired the roof for the family of eight so inspired by the experience that he began a life-long practice of giving back first and without question — erring on the side of generosity. Antis attributes his success to loyal customers and partners who are inspired by the company’s philosophy that “the more you give, the more you grow.”

Arbela Technologies, Irvine
Nima Bakhity, CEO/President
Nima Bakhity brings more than 20 years of experience in software, business consulting and implementation of complex and multi-national financial and supply chain solutions. He is one of the founders of Arbela Technologies and has been president and CEO since October 2006. Under his leadership, the organization has become trusted advisors to numerous firms, delivering high-value business and technology consulting services to companies around the world. Arbela Technologies has helped manufacturing clients grow profitably 20-50 percent a year. Arbela Technologies prides itself on helping companies lower the costs of offshore manufacturing – providing organizations a competitive edge by giving them an end-to-end solution by digitizing their processes. The company can then deliver customized cloud-based products involving social media, marketing, sales, manufacturing, purchasing and more.

Arman Sadeghi, CEO
All Green Electronics Recycling

Antonello is the proud recipient of the following awards from local and national organizations in 2017: U.S. Chamber of Commerce Best Corporate Steward Award for Small and Mid-Market Business, Outstanding Mid-Size Business Award at Orange County’s National Philanthropy Day, and Civic 50 Orange County Awards presented by the Orange County Business Journal.

Amnion Life LLC, Newport Beach
Dr. Amir Fasshi, CEO/Founder
Amnion Life LLC has developed a revolutionary new incubator system for preemies in a hospital NICU. AmnioBed offers a patented, cost-efficient solution that has the potential of improving preterm infant’s chance of survival, decrease long term morbidity and reduce the time needed in neonatal intensive care. AmnioBed's patented and groundbreaking incubator technology creates a simulated amniotic fluid environment to nurture and protects against two of the largest shortfalls of current technology - hypothermia and dehydration. Dr. Amir Fasshi, the company founder, developed the AmnioBed technology. The ultimate goal of the AmnioBed is to directly target the PTB infant population to improve outcomes, reduce complications and decrease costs associated with length of stay (LOS) in NICU and longer-term societal costs. Fasshi attended UCLA for his undergraduate degree, UCSF School of Medicine and completed his residency in the field of radiology at the Keck/ USC Medical Center.

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

Antonello’s frequently works with the NHS, the Department of Health in the US and top hospital groups like Mayo, Cleveland Clinic, Stanford etc...advising on the patient to patient care model and the real time care platform that 11 Health has built.

American Advisors Group, Orange
Reza Jahangiri, CEO
Reza Jahangiri is the founder and CEO of American Advisors Group (AAG), the nation’s leader in reverse mortgage lending and a pioneer helping older Americans responsibly use their home equity to Retire Better. Jahangiri’s vision has been to build on the strength of AAG’s nationwide advertising campaign featuring acclaimed actor, Tom Selleck, to create the nation’s first senior-focused, product-agnostic home-equity-solutions company. American Advisors Group was formed in 2004 and today AAG has over 1,200 employee-owners and offices in 135 markets across the nation committed to helping older Americans achieve their vision of a better tomorrow. Some accomplishments include growing revenues from $10 million in 2010 to over $1.4 Billion in 2017 and championship of consumer protections for reverse mortgage product. Jahangiri also helped lead a major brand transformation in 2018 into a full suite of home equity solutions for seniors, thereby transitioning AAG brand online, producing business to a solutions provider. In 2018, Ernst & Young awarded Jahangiri Entrepreneur Of The Year® in the financial services category in Orange County.
wherever you’d like to take your business in 2019, we can help you get there.

IPO
Valuation
Mergers & Acquisition Advisory
Exit
Growth
Assurance & Advisory
  • Quality of Earnings
  • Readiness Assistance
Tax Advisory

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clothing by asking the right questions and understanding clients wants and needs to help guide them into creating distinctive and personalized wardrobes. Using creativity and contemporary styling details, Viggiano has built a loyal following of successful businesswomen in Orange County. Taylor specializes in custom-made men’s business and casual wardrobes. Working side by side with his son, Chris, their focus is to continue developing strong relationships throughout Orange County and the surrounding areas. Austin Taylor has been featured on many television pieces, including ABC’s Extreme Makeover, Fine Living Channel and Wealth TV.

Axonics Modulation Technologies Inc., Irvine
Raymond W. Cohen, CEO
Raymond W. Cohen is a serial entrepreneur who has been responsible for formation and operation of companies that have added to the business landscape of both Orange County and impacted the health and welfare of people around the globe. Following several successful corporate endeavors and profitable company sales in the medical technology and device fields, Mr. Cohen and his team set their sights on the underserved and often disabling market of incontinence. Axonics developed and is focused on commercialization of an implantable neuromodulation system directed towards clinical indications associated with urinary and bowel dysfunction. In addition, Mr. Cohen has led the Axonics organization from concept to corporate formation, and in 2018, a successful IPO valuing the company at close to $400 million. The company has experienced over 40% year-over-year growth in 2019, and in the first six months of 2020, Axonics has more than doubled its revenues year-over-year. The company has generated millions per month in sales. His ability to build an efficient organization while concurrently practicing lean fiscal decision-making, has secured Axonics’s year-over-year increases.

B. toffee LLC, Irvine
Betsy Thagard, Founder
An award-winning handcrafted toffee. B. toffee’s “crunchy perfection of sweetness” offers the ultimate indulgence. Combining the finest, freshest, and most natural ingredients, Betsy Thagard and her team of passionate bakers are relentless in the pursuit of creating the perfect toffee. Her provocative manipulation of savory butters, fine domestic sugars, premium Guittard and Callebaut chocolates, topped with delectable pecans are unlike any other toffee in the world. Since B. toffee’s inception in 2009, the sweet treat has caused a stir in the candy confection world. With a dedicated following and ever-growing customer base, Thagard has turned her passion into a profitable business. B. toffee received top gold honors for “Top Toffee” and “Best Packaging” by the Taste Awards in San Francisco and has also been awarded the “Official Toffee” at the Golden Foodie Awards – the highest culinary food honor in Orange County. B. toffee can be found in many high-end specialty markets both locally and nationwide, including Dean & Deluca, Whole Foods, Bristol Farms, and at several luxury resorts, like Bacara Resort & Spa in Santa Barbara.

Beeya, Laguna Beach
Ladan Davia, CEO/Founder
Beeya is a meta-search engine for jobs that uses artificial intelligence to match job seekers with over 11 million job listings daily. Some of these partners include Indeed, Zip Recruiter, Adzuna, and 43 other affiliate partners. A job seeker can go to Beeya and search by industry and location and get all job listings, in one place. If a user makes a free account and puts their resume, Beeya’s algorithm will read the resume and match the user to all of those jobs. Ladan Davia started her first company in the tech space, Excelerate Test Prep, at 21. When she discovered the troubles people had during the hiring and employment process, she started Beeya at 23. The website brings the online job hunt, social network and professional network ideas all onto one platform. Beeya is now serving 98 companies and almost 7,000 employees in Orange County. Davia also serves veterans and is currently working a deal for one of the largest beverage companies in the world. B. toffee has generated millions per month in sales. His ability to build an efficient organization while concurrently practicing lean fiscal decision-making, has secured Axonics’s year-over-year increases.

Below Invoice Inc., Laguna Hills
Cole McKeon, President
Below Invoice founder and president, Cole McKeon is revolutionizing the luxury and exotic automotive industry by changing the way people acquire vehicles. His independent automotive concierge service has helped customers save thousands of dollars and countless hours. Below Invoice was founded in 2014. With the mission of streamlining the automotive buying experience from start to finish. Whether you’re looking for a Lexus or a Lamborghini, Below Invoice provides a comprehensive set of services including locating your desired vehicle, negotiating optimal lease or purchase options, and delivering the vehicle to the location of your choice. McKeon’s established relationships with premier dealerships across the nation allow Below Invoice to secure vehicles otherwise unattainable. His company’s competitive pricing and unique years spent in the automotive sphere experience has earned him the respect of customers across the nation. Below Invoice is currently in the midst of compiling one of the biggest off-market exotic and hypercar offerings in the nation.

Beyond Fifteen Communications Inc., Irvine
Lauren Ellermeyer, Co-Founder/President
Beyond Fifteen Communications has a penchant for going beyond the norms of traditional PR to bring the highest level of media and market attention to its clients’ brand propositions. By skillfully tying entrepreneurial ideas to results-driven strategies, the agency is setting new standards of PR execution, while redefining the agency/client relationship. Since 2009, co-founder Lauren Ellermeyer, has leveraged her progressive business style, keen eye for new talent, and public relations and social media expertise, to grow a home-based startup, into a flourishing nationally acclaimed communications powerhouse that has doubled in size year over year since 2010; with 23 percent increase in revenue in 2017. Apart from cultivating Beyond Fifteen’s collaborative, “client-first” business approach, Ellermeyer pours generous support into a variety of community organizations. She is a long-time partner of TextOrangeCoast, and currently serves as a board member and Philanthropy chair for American Family Housing. In addition to serving on multiple executive leadership boards, her favorite extracurricular activity is inspiring students and industry leaders alike on how to bring their entrepreneurial ideas to fruition.

BHE Management Corporation, Laguna Niguel
Maria Brower Hemmel, Founder/President
Maria Brower Hemmel is the founder and president of BHE Management Corporation, a 25-year-strong premiere Homeowners Association management firm representing many major homebuilders in Orange County. The firm was formed in 1993 to provide clients with professional, personalized association management. Hemmel leads her firm in a manner that ensures both the developers, who hire her firm consistently to create the initial association rules and budgets, as well as the homeowners themselves. This creates relationships that continue for more than a decade in nearly every case.

Business Communications Solutions, Irvine
Sunny Rajab, CEO
When Sunny Rajab founded Business Communications Solutions (BCS) in 2001, it started out as a small telephone communication solutions and structured cabling provider. Today, it has successfully evolved and grown with the changing technology to now include data networking, cloud, network and wireless solutions, CCTV surveillance, paging, and sound masking. Rajab has been named one of the top 25 women in the industry by Telephony magazine. BCS has been recognized as an Inc. 5000 Fastest Growing Private Company, as well as being named one of the 2016 Best Companies to Work For. BCS’s customers include some of the largest industrial and commercial companies in the Western United States. A former NFL national board member, he is currently President of the National Association of Professional Women, which he has sponsored and helped to grow from a small alliance of women to a national organization. BCS’s year-over-year increases.

CapRock Partners, Newport Beach
Jonathan Pharis, Co-Founder/President
Jon Pharris co-founded Newport Beach-based CapRock Partners, one of the fastest-growing private industrial investment and development firms, at the age of 29. At 34, Pharris became the company’s president, spearheading acquisition and fund investment strategies for the nearly 11 million square feet and $1.6 billion of industrial real estate the company has acquired, developed or has in the pipeline to-date. Under Pharris’ leadership, CapRock Partners will be under construction on more than four million square feet of Class A industrial product in the Inland Empire this year, making CapRock one of the largest industrial developers in the Western United States. A former NBA national board member, he is currently a next-generation commercial real estate leader who has positioned his company to provide long-term logistics solutions for corporate America while generating profitable returns for CapRock’s investors.

ConversionPoint Technologies, Irvine
Robert Tallack, CEO
Robert Tallack, CEO and co-founder of ConversionPoint Technologies, has built ConversionPoint Technologies from a start-up to a current valuation of $143 million in 36 months. In 2018 he helped the company achieve over $40 million in annual revenue. An industry veteran of the digital marketing business, Tallack has developed direct-to-consumer sales and marketing campaigns that have generated millions per month in sales. His ability to build an efficient organization using technology solutions to use machine learning to optimize ad purchases and lower customer acquisition costs, and a CRM that provides a robust payment processing and customer data management platform. ConversionPoint Technologies was named the third fastest growing company in Orange County in 2017 and was ranked the 93rd fastest growing software company by Inc. Magazine.

Cuddy, Seal Beach
Natalie Kala, Founder/CEO
CUDDEY is a pet product gift registry and fundraising platform that serves pet parents and rescues. It’s like a baby registry, but for animals. They serve over 1,200 rescues and over 200,000 animal supporters and pet parents. Users create gift registries and fundraisers and share them with their prospective communities for support and to celebrate an animal’s adoption, birthday, holiday, or just because. Five percent of all purchases go back to the rescue of the user’s choice. In the last 10 months, they have created over 2,000 registries and in this quarter alone (Q4 2018), they are on track to create 2,000 more registries. They are also on track to
Securing Your Retirement: Best Asset Protection Your Lawyer Never Told You About

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

Life is full of little surprises. Wondering whether your retirement plan is “bullet proof” from future lawsuits and bankruptcy should not be one of them.

Imagine this...

You’ve worked your entire life to build a successful business reinvesting into your company all along. Your long-term plan was to sell the company when you turned 60 to retire to a life of leisure, living on the proceeds. Then disaster strikes. You and your company get sued resulting in a devastating multi-million dollar judgment. There aren’t enough assets to pay off the debt and it’s going to wipe you and your company out. Because you never saved for retirement you don’t have enough protectable assets, such as a healthy IRA, to start over. And that “sell the company” retirement plan you worked so hard for? It’s gone without a net.

Luckily, there is something you can do to avoid this fate.

If you live in California, you can create a Private Retirement Plan (PRP) to secure your retirement. PRPs are used for retirement savings and because it is statutory law, it is entirely exempt from judgments and bankruptcy. Sound too good to be true? Well, there is a catch. To qualify as a PRP, the plan must be operated strictly for retirement purposes and misuse of the plan disqualifies it.

Here’s how it works: A business owner or professional with a successful company establishes a retirement plan funding it with company assets. Because a PRP is not an ERISA qualified retirement trust and does not enjoy any special tax treatment, contributions to and earnings inside the PRP are unlimited. Your company can fund a PRP with a lump sum contribution or it can secure the funding commitment with its accounts receivables, real estate holdings, and intellectual property, to name a few. This prior lien for the PRP takes priority over any of the company’s future claims including judgment creditors.

The real beauty of securing your retirement through a PRP is that the trust’s assets are protected when you and your company are making contributions, and when you commence withdrawing your benefits when you retire. Hello peace of mind, goodbye future unforeseen creditors! This is a handy safety-net indeed.

PRPs are inexpensive to create and even less to maintain, especially when you consider the unlimited creditor protection it offers. PRPs are coordinated with your current qualified retirement plans.

If you’re interested in learning more about Private Retirement Plans contact your legal or financial advisor, and if he or she isn’t familiar with the PRP, contact our firm for a complimentary phone consultation. We would be pleased to help you secure your retirement.

Jeffrey M. Verdon Law Group, LLP is a boutique law firm specializing in Comprehensive Estate Planning and Asset & Lifestyle Protection. For over 30 years we have assisted affluent families and business owners with their comprehensive estate plans, maximizing wealth transfer opportunities, and providing “firewall” asset protection planning to protect estates and family legacies.

Best Asset Protection Your Lawyer Never Told You About

Fiercely committed to the protection of your legacy, we are the bodyguard for protecting your business wealth from financially ruinous lawsuits. The Private Retirement Plan (PRP) takes priority over any future claims against your personal and business assets, now and in the future.

Hello peace of mind, goodbye unforeseen creditors.

Jeffrey M. Verdon Law Group, LLP

The Fusion of Planning and Protection.

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303 Twin Dolphin Drive, 6th Floor, Redwood City, CA 94065

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grow in transaction volume by 40 percent this quarter, which is in line with their growth in the past six quarters. Their run rate for this year is $2.3 million.

Directive, Irvine
Garrett Mehrguth, CEO/Co-Founder
Garrett Mehrguth is the co-founder and chief executive officer of Directive, a leading B2B and enterprise search marketing agency headquartered in Irvine, California. Mehrguth, fascinated by the role search marketing plays in empowering companies and people to connect, has dedicated the past five years toward that passion. Since its establishment in 2014, Mehrguth has led Directive in its expansion of four global offices—LA, NYC, Austin, and London, spearheaded the growth and diversity of its team, which has in last year experienced a 205 percent growth rate in company size, and now boasts a team of 50-plus people with over nine nationalities from their HQ and home of operations. Additionally, he is committed to bridging the gender gap that plagues the marketing technology space with, currently, 25 percent of Directive’s leadership team is comprised of women. Mehrguth led Directive’s revenue growth from zero to five million in less than five years with a 20 dollar initial investment. The company has expanded with three new locations in the U.S. and internationally into the U.K.

Diverse Janitorial, Santa Ana
Rolando Cordero, President
Rolando Cordero founded Diverse Janitorial and is celebrating the company’s 10th anniversary in February 2019. Diverse Janitorial provides post-construction cleaning and commercial janitorial services for the largest and respected clientele in the public works sector. His company has won many public works contracts and continues to grow year after year. Cordero’s company has done business with the Los Angeles County Metropolitan Transportation Authority, UCLA-Anderson School of Business, UC Riverside, and Grossmont College in El Cajon to name a few. Under his leadership, Diverse Janitorial was awarded the 2016 Top Latino Business Award by Los Angeles Business Journal. Mr. Cordero has taken the time to work “On the business” instead of “in the business”. He has received business assistance from the SBA, Score, PTAC, and SBDC which they all provide a low-cost fee. Mr. Cordero is focused on expanding opportunities for his community. He hires single parents, individuals with no High School diploma, retired veterans, and anyone that is looking for an opportunity to grow within our company.

Elite Connections, Newport Beach
Sherri Murphy, CEO/Founder & Tammí Pinczewski, VP
Sherri Murphy founded Elite Connections International over 25 years ago and has built it into one of the world’s premier matchmakers. She’s proud of the company’s A+ rating with the Better Business Bureau, hundreds of glowing reviews, and even more happy couples she has helped create. Elite Connections was founded in Los Angeles in 1994 after Sherri met her husband through a matchmaker and saw a need for a safe, effective way for successful professionals to meet their matches in a no-nonsense environment. The company has locations throughout Southern California, New York, Las Vegas and Florida, as well as matchmakers in Paris and other major cities around the world.

Ephesoft Inc., Irvine
Ike Kavas, CEO/Founder
Ephesoft develops technologies that make meaning out of unstructured data for decision-makers worldwide. Using patented supervised machine learning and a focus on efficiency and reliability, Ephesoft has crafted the next generation of enterprise content capture and data discovery solutions. Organizations use Ephesoft to automate any document-based business processes, improving accuracy and productivity, while reducing costs. Ike Kavas founded Ephesoft in 2010 and it was bootstrapped until 2017 when the company received their Series A funding. It has since grown and flourished over the past eight years. In 2015, Ephesoft was listed as an Inc. 500 fastest growing company with 1132 percent growth. Ephesoft introduced the industry’s first browser-based, cloud and Capture-as-a-Service platform, making it simple for organizations to streamline document business processes. The company employs 150 people worldwide with customers in 53 countries and has over 250 global partners, including companies like Microsoft, Box, HP, Intuit, NetSuite, K2, Blue Prism, UpPath, and Quest Diagnostics. Ephesoft strives to be stewards of the community by creating internship opportunities with local colleges, making charitable donations and providing employee volunteer efforts for local organizations.

Ergo21, Newport Beach
Steve Gambhir, President
Steve Gambhir has changed the lives of thousands of people with back, tailbone and buttock problems with his seat cushion, Ergo21. Gambhir licensed the unique technology and created Ergo21 in 2004. This cushions can be used in multiple ways—in the car, on a sofa, bed, and during yoga and meditation. The product has become so popular that Gambhir is closing in on his first $1 million in sales, and is also expanding his product line with LiquiCell-filled bicycle seats, pillow cases, and shoe insoles. With 500-plus five-star reviews on Amazon, Ergo21 is poised to become the leader in the seat cushion industry. The Ergo21 is getting rave reviews from drivers of all kind from Uber and bus drivers to pilots. In addition, wheelchair users also are getting relief from pressure sores when they use the Ergo21 cushions. This year Ergo21 is expanding its products to Canada, Japan, Europe, and Amazon and their website.

Fusion of Ideas, Lake Forest
Russ Taylor, CEO
Russ Taylor is a steward of the only American mobile integration company of its kind offering large-scale custom device branding, app development, and logistics integration programs. Founded in 2003, Fusion of Ideas entered the mobile tech industry by selling phone covers and accessories at an Orlando mall kiosk. The public first took notice when the company created the world’s first protective carbon fiber-style phone cover, StealthArmor. Taylor grew the business quickly by opening a retail store and met consumer demands by offering full-color laser and printing customization services for mobile devices. Taylor fostered strong relationships with device manufacturers, which led the business to focus strictly on business-to-business sales. Fusion of Ideas has worked with some of the most significant brands in the world, including Capital One, Audi, Major League Baseball, and Hilton, among others. Today, the company operates out of its corporate headquarters in Lake Forest and has partnered with nearly 2,000 businesses nationwide maximizing the use of mobile technology in their organizations.

Gorilla Stationers LLC, Cypress
Rosemary Czopek, President
Gorilla Stationers has been servicing businesses and government agencies throughout the country since 2012 with their diligent customer service in addition to knowledge of all products within the office solutions industry. Founded in Huntington Beach by Rosemary Czopek, an industry veteran with over fifteen years of expertise, the company prides itself as a woman-owned business that has successfully carved its niche in the office supply sphere by offering top-brand, cutting-edge items with unbelievably low prices. By 2015, Gorilla Stationers had expanded across the country, with 28 shipping facilities nationwide to ensure promised next-day delivery. Gorilla Stationers has a relationship with one of the largest vendors of office products in the world, along with direct relationships with manufacturers, which provides access to over 150,000 products, meaning bottom-line savings for customers.

H. Hendy Associates, Newport Beach
Heidi Hendy, Managing Principal
Heidi Hendy launched H. Hendy Associates in 1979 to drive innovation in the field of interior architecture and planning. Under Hendy’s leadership, the firm has become a leading industry force as one of Interior Design Magazine’s Top 200 Architecture Firms for 32 consecutive years. In 2019, with $10 million in revenue and 25 percent year-over-year growth, H. Hendy Associates will commemorate a significant milestone—its 40th anniversary. Hendy has led the firm to become one of the longest-standing women-owned interior architect companies locally, creating a lasting legacy for the Orange County business community. Under her leadership, the firm helps clients seamlessly relocate or remodel, with interior architecture services spanning strategic facilities programming, employee satisfaction analysis, change management and space planning. While each project astounds visually—efficiency and functionality—are the driving forces behind every design. Hendy has helped Fortune 500 companies and national and recognized brands, including Kawasaki, Behr Paint Company and OlUai create effective workplace environments that become strategic tools for business success. In addition to the many LEED certified professionals at the firm, the WELL accreditation sets H. Hendy Associates apart, its ability to incorporate wellness concepts into every design not only wins over clients but reduces employee absenteeism and increases productivity.

Helix Semiconductors, Irvine
Harold Blomquist, President/CEO
Harold Blomquist has more than 35 years of experience in high-technology electronic and the semiconductor industry. He has been CEO of his last four companies—with a talent for driving enhanced profits and investor returns. Blomquist has consulted to and advised Fortune 100 firms and global leaders in the consulting world. Prior to becoming CEO of Helix, Blomquist played pivotal roles in successful liquidity or capital growth.
How Can an Entrepreneur Benefit from a Self-Directed IRA?

It was in September that Richard first came up with the idea for his company, a tech start-up with huge potential. Like all ground-level entrepreneurs he needed funding and raising seed capital was not something he learned at Berkeley. Necessity being paramount he adapted and reached out to family and friends. It was from this group he learned that an IRA could fund his business.

As long as Richard stayed away from investors who are “disqualified” to his IRA (Individual Retirement Account) he could raise capital from this source:

Who’s Disqualified
- you
- your spouse
- your parents and/or your adoptive parents
- your natural grandparents
- your natural children and/or your adopted children
- your stepchildren
- The spouse of your natural children
- your grandchildren
- Any fiduciary
- Any people providing services to your IRA

By March his business had the capital it needed to go to the next level. Right now there is something like $9.2 trillion in IRAs in America. Only about three percent of those funds are invested in alternative assets like real estate, private stock, notes, precious metals and more.

For Richard, his company flowed back a portion of the profits back to these IRA accounts. It was a win-win. Whether raising seed capital or funding expansion, IRAs can be a source of capital.

It’s not unusual for people to think Self-Directed IRAs are something new. Actually they were created when ERISA was enacted by then president Gerald Ford in 1975. IRAs have always been able to hold any asset except life insurance and collectibles. A Self-Directed IRA is just like a typical IRA with the only exception being the asset class they hold.

Now well into his third year, Richard’s company is humming along in no small part due to the creative thinking of his investors who had already established Self-Directed IRA accounts.

Feel free to contact me to learn more about this issue by calling me directly on a no obligation basis. Kaaren Hall (714) 831-1866 KHall@uDirectIRA.com
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providers in the US. At the helm of Kareo, Rodrigues has raised over $90 million in total capital.

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

Kate B Cosmetics, Irvine
Kate Bailly, CEO
Kate Bailly, law school sweethearts, are co-founders of Kate B Cosmetics - a subsidiary of parent company Kate B Global. Under Kate B Global, Kate and Bailly are three companies of which both the husband and wife duo own and manage. They include Kate B Realty, a complete and full-service real estate brokerage representing clients in residential and commercial property transactions; the Bailly Law, a private law practice with emphasis on business and real estate law, and newly created Kate B Analytics, an educational program to empower women to dream and achieve their goals of entrepreneurship. Their mission was to advocate for the beauty industry by developing innovative, on-trend products that are safer and have more natural, beneficial ingredients. Their products are free or have fewer artificial ingredients and toxic chemicals. Their message has connected with thousands of women who want to look beautiful but do not want to sacrifice their skin.

KME Systems Inc., Lake Forest
Mark Essayian, President
Mark Essayian is president of KME Systems Inc., a technology implementation company he founded in 1993, provides IT consulting and support services to a wide range of clients. Under Essayian’s leadership, KME Systems has grown into one of Orange County’s most sought-after IT business partners and an influential voice to IT brands worldwide. With just over a dozen employees, the company has enjoyed nearly 40 percent growth YoY (2017 to 2018) and established a $4 million dollar book of business that is recurring and profitable. KME Systems employee and client retention rates are through the roof, with more than 150 clients on board for more than 25 years. Essayian has expanded within the IT industry by developing innovative, on-trend products to offer accelerated growth. Levyx has been successful at cultivating the art world-class engineering talent to the area. Levyx’s award-winning products are improving the way we live our lives by deriving data-driven solutions much faster than conventional data center approaches. These solutions impact a full range of industries including banking, healthcare, and human genetics.

Koder Inc., Irvine
Elmer Morales, CEO/Founder
Elmer Morales is a serial entrepreneur, self-taught software engineer, and angel investor. He is the founder and CEO of Koder. He has 15-plus years of experience building innovative software and leading high-performance engineering teams at companies such as Microsoft, Accenture, and American Express. Koder is an Irvine-based gig platform where top coders complete software development tasks and projects offered by businesses and entrepreneurs. Morales leads the company and is responsible for recruiting and leading a global team of coders, blockchain developers, and software delivery managers. The platform helps companies scale their software engineering teams using a freelance, on-demand workforce. In September of 2018, Koder launched the public beta version on the Apple store. Customers download the Koder app and create tasks by defining specs and programming skills. Koder’s algorithm invites its network of coders to perform the requested work. To date, the Koder platform has over 1,000 coders and thousands more in the queue.

Leaf Communications Consulting Inc., San Clemente
Dan Leaf, President/CEO
Leaf Communications, created in 2013, evolved from Dan Leaf’s previous company Leaf Communication Consulting, a leading DAS and In-building wireless design turn key operations company, implementation and maintenance company for the major carriers in the Western Region of the United States. Leaf Communication Consulting completes full design-build systems to the Fire Life Safety NFPA requirements, Cellular demand for enterprise solutions, as well as the direct relationship with the Cellular Operators as they grow and continue to build out their networks.

Learning Ovations, Irvine
Joseph “Jay” Connor, Founder/CEO
Under the leadership of Jay Connor, Learning Ovations launched its research-based software, A2i Professional Support System, in K-3 classrooms this year, as a part of a $14.85 million U.S. Department of Education scale-up investment. A2i is an “Every Student Succeeds Act” Tier 1 program, designed as having strong research-based evidence, with a mission to radically improve reading outcomes in a systematic level. The Irvine-based startup has rigorously tested the professional support system in seven separate randomized control research trials in multiple states over 13 years, and currently holds a research partnership with the University of California, Irvine. In 2018, Connor was the leading force behind Learning Ovations’ debut in four states, 37 communities, and 850 classrooms to serve 22,000 students. Next academic year, Connor and Learning Ovations will strategically partner with additional communities to serve an increased number of students. A2i uses algorithms to analyze student assessment data to help teachers understand the type and amount of instruction needed to maximize literacy for each student.

Levyx Inc., Irvine
Reza Sadri, CEO
Reza Sadri is a 25-year veteran of Orange County’s vibrant tech scene. Sadri has been a serial executive at multiple local publicly-traded technology companies including STEC and PROCOM. Also an entrepreneur at heart, Sadri has founded several start-ups including his current project, Levyx. Co-founded with Tony Givargis, a professor at UCI, Levyx is revolutionizing how modern data centers process Big Data workloads. Levyx is a venture-backed enterprise software startup that has raised multiple rounds of financing and counts industry-leading storage companies such as Intel, Samsung, and Dell among its partners. As a cutting-edge storage solution provider poised for accelerated growth, Levyx has been successful at attracting world-class engineering talent to the area. Levyx’s award-winning products are improving the way we live our lives by deriving data-driven solutions much faster than conventional data center approaches. These solutions impact a full range of industries including banking, healthcare, and human genetics.

MAB, Santa Ana
Omar Karim, Founder
Over the past 16 years, MAB digital marketing and its founder Omar Karim, has shape-shifted with opportunity, proving a diversity in skill set and a natural business sense. Starting as a lead aggregation platform in the early 2000s, MAB has since morphed into a digital agency offering digital marketing with specialties in search, development, social and brand. Along the way, MAB found success as an agency focused on real estate marketing until the market crash in 2008 caused Karim to switch gears and become a partner in a FinTech startup that was sold to a publicly traded bank in 2013. Karim and the MAB team now bring this breadth of experience to their clients. The company recently spun off two in-house projects and is bringing on marquee clients like Mayweather Fitness and OC Goodwill. They also report that customer retention is at an all-time high and revenue is growing at a rate of 50 percent YoY. Additionally, MAB executives are active chairs in Forge54, a nonprofit organization that provides pro bono marketing services to local nonprofits-in-need.

Madison Alexander PR, Tustin
Dan Chmielewski, Principle
With nearly 30 years of experience, Dan Chmielewski has spent most of his career working in IT security, enterprise networking, IT software, and internet platform technologies at large corporations such as 3Com and Data General, and working on large accounts at agencies with clients such as Lotus Development, Mitsubishi Mobile Computing, and Legent. In addition, Chmielewski has worked with startups like Gradient Technologies and Moss Software, and held senior leadership positions with technology firms in New York, Boston, and Southern California. And in 2019, he founded Madison Alexander PR (MA PR), a boutique technology communications consultancy focusing on filling the void for start-up and smaller technology companies, mostly in cybersecurity, to provide senior PR representation to help them land press and grow. PR is a relationship business and Madison Alexander has developed great relationships with the media by delivering on what we promise when we pitch. MA PR does not have monthly retainers and has a team approach to accounts allowing senior, experienced PR representation that generates coverage, awards, and speaking ops.

Managed Direct Response, Irvine
Pat Mercuri, President
Pat Mercuri is recognized as an innovator in the direct marketing and lead generation industries. He has more than 20 years of experience and is recognized for his expertise in direct response, having introduced a number of innovative marketing programs for key companies in the mortgage, solar, automotive and retail services. During his career, Mercuri has raised more than 200 million lead-generating marketing materials. His working day starts at 7 a.m. and he doesn’t stop until everything for the day is done, which is what has earned Managed Direct Response so efficient in turnaround for print and production.
“Business is Family. That’s why I’m a Mechanic.”

Brady O’Connell, George O’Connell and Kevin O’Connell

“People come to O’Connell Landscape Maintenance because they like the family values; they like that they get to talk to an O’Connell. We have a lot of customers of 30 plus years, and that’s unheard of in our industry. We’ve done it by being honest, and with integrity and hard work, and we follow through on everything. With Mechanics Bank it’s the same – it’s a wonderful relationship. They’re so easy to deal with. I mean, how many CEO’s return your phone calls these days? It’s really important for us to have a good banking relationship – they take a personal interest in us. I’m a Mechanic because I believe in what they are to us: Family.”

— George O’Connell | O’Connell Landscape Maintenance

Irvine | Newport Beach | La Jolla | Beverly Hills | Westlake Village | and 40 locations throughout Northern California and Oregon

Give us a call at 949.270.9719, visit us online at mechanicsbank.com, or better yet, come in and talk with us. It’s a great way to find out if you’re a Mechanic, too.
Manna Kadar Beauty Inc., Irvine
Manna Kadar, Founder/CEO
In January of 2012, after years of careful research and development, Manna Kadar Cosmetics was born. A prestige line of luxury skin care products formulated with the most effective ingredients and the most innovative technology, Manna Kadar designed the one and only Beauty Simplified System that minimizes the makeup application process to seven steps or less. The award-winning Beauty Simplified System separates the makeup application process in three steps: Step 1- Prime, Step 2-Polish and Step 3- Perfect. Each simplicity clearly indicates which step the product should be used indirectly on the product. This process guides women on how to easily create their desired look on a daily basis. A noted industry expert, beauty editor, and makeup artist, Manna is the author of celebrity clients, Manna Kadar has made a mark as an industry expert and a true trendsetter in the world of beauty. Kadar has been recognized by countless professional organizations for her business acumen and has received the US Chamber of Women’s Award in 2015 and has been recognized as one of the Fastest Growing Businesses by the Business Journal.

Modulated Imaging, Irvine
David Cuccia, CEO/CTO
Modulated Imaging is a direct result of David Cuccia’s undergraduate work and doctoral dissertation at UC Irvine, and he is an internationally recognized pioneer and leader in the field of Spatial Frequency Domain Imaging (SFDI). The medical device company originally spun out of the Photonic Incubator in the Beckman Laser Institute and Medical Clinic (BLI) at UC Irvine. Dr. Cuccia founded Modulated Imaging to develop optical technologies that will impact a number of clinical problems in the diagnostic and therapeutic monitoring sector, particularly prediction, staging, and monitoring of chronic wounds. To date, Dr. Cuccia and his team have successfully raised approximately $20 million in grant and private investment to expand the company, which has patented more than 110 inventions, has six patents to his name and forty co-authored SFDI publications. Recently, Modulated Imaging received $510k FDA clearance for ClariFire, a quantitative, non-contact optical device for wide-field imaging of subcutaneous circulation, and aimed at helping Diabetic patients avoid complications such as chronic wounds and resulting amputations.

Montessori Funtime Preschool, Lake Forest
Dr. Seema Choudary, Executive Director
The Montessori Funtime Preschool was founded in 2008 when Dr. Seema Choudary was just twenty-three. Since then, the preschool has expanded to include a full-day Montessori program as well. Coming from a family of educators, her pursuit of excellence in education led to gaining further education & training in ECE (Early Childhood Education) and Montessori methodology of teaching. Between the ages of two to five years, children are at the apex of their ability to learn, their brains are like sponges and can soak up learning and that’s why so important. Montessori activity time is a pivotal part of her program and with an equal emphasis on art, sport, group time, music & movement and healthy food. Kids blossom into avid capable and avid readers and are ready to further education & training in ECE (Early Childhood Education) and Montessori methodology of teaching. Between the ages of two to five years, children are at the apex of their ability to learn, their brains are like sponges and can soak up learning and that’s why so important. Montessori activity time is a pivotal part of her program and with an equal emphasis on art, sport, group time, music & movement and healthy food. Kids blossom into avid capable and avid readers and are ready to

Moxxe PR, Inc., Santa Ana
Mona Shah, Owner
Mona Shah, the owner of Moxxe PR, stands out in the OC business community. In 2004 when her father was diagnosed with pancreatic cancer, she made the decision to leave her position as media relations director at a successful OC-based PR firm to spend time with him. After he passed away, she made the decision to build the PR firm and to carry on her father’s legacy. He was a successful orthopedic surgeon, who possessed an MBA and was always striving to continue growing. Her goal was to make Moxxe successful – not into the biggest agency in Orange County, but the best. Although she services a wide variety of clientele, she has found her niche as an OC restaurant publicist and has created a reputable name for her company. In addition to handling the publicity for some of OC’s most recognized restaurant concepts, Mona Shah sits on the Board of Directors for the Newport Beach Restaurant Association’s Orange County Chapter and the Newport Beach Restaurant Association’s Orange County Chapter and the Newport Beach Restaurant Association.

NB Private Capital, Aliso Viejo
Brian Nelson, President/Founder
In 2007, Brian Nelson founded NB Private Capital - a real estate investment firm specializing in university student housing with his brother Patrick. Not an easy task heading into a deep recession. With little money, a great concept, hard work and the ability to listen and adapt to clients’ needs, Nelson led all sales and marketing efforts to help the company to raise over $100 million in real estate management and over 1500 clients. By 2017, Nelson Brothers were named by Inc. 500 as the 4th fastest private growth real estate company in the nation and 127th fastest growing company overall. In 2018, concerned about the impact rampant growth could have on the performance and relationship with investors - the keys that built the firm, Nelson Brothers decided to align the business model with NB Private Capital. The goal was to transition this same drive built around investors’ needs, not growth. The company has been active, innovative and effective and already ranked as the 29th Top Student Housing Owners by Student Housing Business Magazine.

Nextworks Strategy, Irvine
Scott Hamilton, CEO
Scott Hamilton is the founder of Nextworks Strategy, a top advisory firm to small and middle market business. Nextworks has helped clients in several industries verticals including healthcare, hospitality, technology, engineering, and construction to improve their strategy execution and ability to scale. Nextworks strategy is the pioneer in the use of collective IQ and stakeholder alignment tools via their unique business mapping services- Immersive Maps. Nextworks has also pioneered a new approach to strategic planning that allows our clients to be more agile and adaptable in today’s digitized, fast-paced markets. Hamilton has grown Nextworks Strategy into a nationally known advisory firm over the past eight years providing the ENPV Index at UCI Applied Innovation. Hamilton has assisted the leaders of several hundred firms to be more strategically effective and on average increase revenues by 11 percent or more via a typical engagement.

OC Marketing Solutions, Dana Point
Gina Waggener, Executive Director
Gina Waggener is the founder of OC Marketing Solutions. With over 10 years experience in creating dynamic events for the US and overseas. She has managed all aspects of event planning, securing sponsors, establishing long-term vendor relationships, event pre-production, execution and fundraising for small to large business. As the marketing and events director, she increased event revenue and public appeal by forming strategic partnerships with non-profits. An advantage of sales going to various charities has resulted in increased attendance and sponsorships for her clients. Waggener is most known for her ability to increase public appeal by creating dynamic events that saves a $7 million first close of B-round funding in December 2018. He has also successfully secured over $6.5 million in SBIR/STTR grants that facilitated the development of our Ox-Imager® technology and has six patents to his name and forty co-authored SFDI publications. Recently, Modulated Imaging received $510k FDA clearance for ClariFire, a quantitative, non-contact optical device for wide-field imaging of subcutaneous circulation, and aimed at helping Diabetic patients avoid complications such as chronic wounds and resulting amputations.

PeopleG2, Brea
Chris Dyer, CEO
PeopleG2 was founded in 2001 by Chris Dyer and has become a leader in providing background check solutions to both large and small businesses and non-profit organizations. Chris believes that impersonal, automated background check solutions
FIFTH THIRD
PAYMENTS AND
COMMERCE SOLUTIONS

WHERE
EXPERIENCE
AND
INNOVATION
INTERSECT.

Bridget Chayt
SVP, Director of Commercial Payments and
Treasury Management at Fifth Third Bank

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have no value in the global talent management spectrum, especially as it relates to strategically significant individuals and teams. This is why he built a company with innovative services which mitigate risk and maximize best fits — whether for a prospective candidate or an experienced professional candidate or even entire executive teams. Noted for its hands-on, human approach in a highly automated industry, People2G2 continues to grow and has been recognized as one of the Best Places to Work in Orange County, one of the Fastest Growing Companies in Orange County as well as the 2018 Inc. 5000 list. People2G2 continues on a positive revenue growth trend, and in 2018 has secured $1.25 million annual revenue as a company. In 2009, the company moved to a virtual model and has continued to be successful and achieve marked growth year after year.

Perfect Point EDM Corp, Huntington Beach

William Larry Harrell, President/CEO

Perfect Point is an entrepreneurial company founded in 2005 by Larry Harrell, focused on the Aerospace industry. Perfect Point is “revolutionizing aircraft maintenance” with a game-changing technology that removes high-strength fasteners from aircraft structures called the E-drill. The E-Drill removes fasteners 20 times faster than conventional drilling, reduces aircraft damage to less than one percent vs the industry average of 20 percent, and eliminates drilling debris. This means aircraft on the ground for maintenance is substantially reduced. The E-drill proudly flies the made in the USA flag and uses local suppliers in support of our community. They actively support military veteran programs. The company employs about 20 individuals from the local Orange County area and has current annual sales of ~$5 million. Its customer base includes Boeing, Northrop Grumman, Lockheed, the USAF, USN, USMC, Airbus, Gulfstream, and many others in the U.S. and abroad.

Plutos Sama LLC, Irvine

Matthew Browndorf, CEO

Matthew Browndorf founded Plutos Sama LLC in 2013 and now works as the CEO, chairman of the Board of Directors and managing member. Plutos Sama Holdings Inc. is a private equity company in the business of taking control positions in residential and commercial real estate ventures, micro-lending, securitizations, law firms, restaurants, mortgage servicing, and e-sports. Plutos Sama LLC developed a diverse and stable revenue stream by expanding or declining, an economy that is cyclical against to origination volume and supply of non-performing loans. Revenue streams across all business platforms are enhanced with investment banking services by the complementary platforms that service each other, providing clients with a one-stop shop for all their professional needs. Browndorf is an experienced investment advisor and has led the Plutos Sama affiliation to make successful strategic decisions positioning itself for organic growth in emerging markets while aggressively pursuing merger and acquisition growth across all brands.

Powerhouse Communications, Santa Ana

Kristin Daher, President/Founder

In just two years since purchasing Morgan Marketing & Public Relations, and rebranding as Powerhouse Communications, Kristin Daher has not only made a name for herself in the power industry, but has officially put the company on the map as a premier national PR firm specializing in the restaurant, CPG and franchise industries. A creative leader, she’s providing a wide range of media relations, communications strategy, and social media services. Powerhouse’s client roster includes MainPlace Mall, Juice It Up!, Jimmy Faces, VLOC WatchBracks, Hawaiian Host, Mauna Loa and The Literacy Project. Since first opening Powerhouse’s doors in Santa Ana, Daher has built and nurtured a successful business for her employees but has also expanded Powerhouse’s service offering while continuing to secure phenomenal media coverage for her clients. Powerhouse continues to grow and diversify with new clients, as well as partner with new vendors to offer value-added benefits and comprehensive, cutting-edge services to clients. Additionally, Daher continues to be an active participant and mentor, and most recently was elected as the 2018 YoPro Chair for OCPRSA.

Protect, Newport Beach

Bryan Derbyshire, CEO/Founder

TicketGuardian has successfully raised $13 million in capital since inception in 2016 and Bryan Derbyshire has grown his company to be the leader in the Insurtech industry in a short two years. In addition, he has created a need for the growing demand of managed care and the major need for consistent services. When they were in beta with their MVP product with their first platform partner, as when they released the initial version of TicketGuardian and saw that attendees and registrants were opting to cover their tickets at 18-32 percent conversions, they knew that they were on to something and solving a real problem that the consumer demanded and was asking for. Additionally, his company spent a year rebuilding the entire dev stack to be Enterprise ready in regards to security and scalability to take on the biggest ticketing platforms in the world, and landed their first platform that sold over 25 million paid online tickets. The technology they offer is second to none and has vertical scalability, unlike no other company.

QuestSoft, Laguna Hills

Leonard Ryan, Founder/President

Leonard Ryan has served as a leader in the Orange County mortgage industry for more than 30 years and at the helm of QuestSoft, which he founded, for more than two decades. In addition to significant growth over the past several years, Ryan and his company have beenrecognized with more awards than any other technology company in the mortgage and banking industries today. Under Leonard Ryan’s leadership, QuestSoft has excelled as the market leader in mortgage compliance automation. QuestSoft has grown its market base to more than 2,500 unique lending institutions using QuestSoft’s software to automate HMDA, CRA, fair lending and other mortgage compliance products and services. Its products give instant feedback on whether a loan application violates new laws established by the Consumer Financial Protection Bureau and state regulators.

Rallio, Irvine

Chuck Goetschel, CEO

Rallio is more than a social media management technology, it’s a smarter, simpler way for brands to maximize social marketing efforts. Rallio technology provides a complete social media ecosystem allowing manufacturers, corporate brands and their locations, employees, and customers to build a local community, share experiences and drive local business. The Rallio Local division also provides agency-style support services to help franchise locations manage their online reviews, advertise on social platforms and grow their local media following. With several investors and a growing team, Rallio is forecasted to triple in revenue in 2019 through its products and services for franchises, brands, and multi-unit locations.

Realtor ONE Group, Laguna Niguel

Kuba Jezgieniew, Founder/CEO

Since 2005, Realtor ONE Group has been a 100 percent debt-free and family-owned company that continues to experience tremendous growth year over year. With over 11,000 real estate professionals and 160 office locations spanning across 32 states and four provinces in Canada, Realty ONE Group continues to grow by leaps and bounds while making an impact on its professionals by providing superior service, coaching, and technology to ensure they will achieve growth within their career. Realty ONE Group is proud to be recognized by Entrepreneur Magazine’s Franchise 500 as the No. 1 Real Estate Franchise in the Top New Franchise category, INC. 500/5000 for seven consecutive years, and is ranked in the Top one percent in the Nation by REAL Trends. The quickly growing franchise has also been recognized by Franchise Times as one of the country’s fastest growing franchisors and is the only real estate brand to be recognized as one of the Top 10 fastest growing franchisors by unit.

Route Four LLC, Newport Beach

Ken Alston, CEO

Since acquiring Hydronicops in July 2018, Ken Alston has streamlined the mom-and-pop company into a professional corporation and has increased profit margins by 25 percent. Alston changed the direction of the company away from servicing small-farm, walk-in clients toward partnering with many of the largest indoor hydronicops facilities in the nation. Hydronicops now offers its clients professional PR coordination and procurement scheduling and ROI analysis tools—services that have previously not existed within the industry. Hydronicops now represents the largest indoor hydronicops farms in terms of square footage in the nation. In an effort for fast expansion, Alston identified the company’s financial needs and followed through by hiring a public-relations firm, a sales director, and a marketing team. Alston holds an MA from Columbia University and a BA from Southern Methodist University. He has been a periodic lecturer on the subject of search funds and entrepreneurship-through-acquisition at USC.

Ryan’s Recycling, San Juan Capistrano

Ryan Hickman, President

Ryan’s Recycling is run and operated by nine-year-old, Ryan Hickman. Ryan’s Recycling is responsible for recycling nearly half a million cans and bottles over the past six years with the intent to keep them from being diverted to the landfill or ending up in the ocean. Ryan’s Recycling is also responsible for raising nearly $39K in donations for the Pacific Marine Mammal Center in Laguna Beach to help with marine animal rescue. Ryan Hickman is responsible for bringing recycling and environmental awareness to the forefront through his recycle awareness events he puts on across the country and his speaking engagements to thousands of kids across the country. His videos have been watched over 200 million times across the planet and he’s not planning on slowing down anytime soon. Hickman also organizes local beach cleanup events a few times a month with locals and has been a featured inspirational speaker at many organizations - Chapman University, UC San Diego, Wyland Foundation, WE.org, Leadership Tomorrow.org, and the Pacific Marine Mammal Center.

Salas O’Brien, Santa Ana

Darin Anderson, CEO

When Darin Anderson and partners Chuck O’Neal and Paul Silva acquired an 81 percent share of Salas O’Brien in 2000, the firm’s revenue was a healthy $4.8 million. Under his leadership, revenue doubled in the first two years and the firm was listed on the MEP Giants list for the first time, coming in at No. 97. Despite a significant
Service Champions Heating & Air Conditioning, Brea
Leland Smith, Owner
Service Champions Heating & Air Conditioning was founded by Leland Smith in March of 2000, with one goal in mind: to provide homeowners a service that is beyond their expectations by developing technicians into being true champions of service. Smith started the company with just himself in the office and six technicians in the field. Service Champions now has over 200 employees. Service Champions is Southern California’s best heating & air conditioning company. They service, repair, and install all kinds and brands of heaters and air conditioners. Service Champions is the only Southern California HVAC contractor to have earned the prestigious Diamond Certified Award. Service Champions has earned the Diamond Certified Award for eight consecutive years. The honor was given to them for exceeding the rigorous standards for client satisfaction and performance.

Sessions West Coast Deli, Newport Beach
Max Schlutz, Culinary Chef/Partner
As the executive chef & partner of Sessions West Coast Deli with locations in Newport Beach, Huntington Beach and Irvine, Chef Max Schlutz presents a menu of gourmet, culinary-focused sandwiches in a relaxed environment. Unlike most sandwich shops in the region, Sessions proudly boasts a scratch kitchen with homemade sauces, sides, salads, and soups prepared daily. All sandwiches are made to order with fresh, locally grown produce; humanely and naturally raised meats; and locally baked bread delivered daily from a local artisan, OC Baking Company. Along with his two partners, Schlutz will be leading the restaurant as it continues to expand to new locations. Schlutz has created a critically acclaimed menu that has gained serious traction in the OC community. Sessions is poised for growth in 2019, with two locations currently in development.

Shine Illumination, San Juan Capistrano
Bruce Brenon, Founder/CEO
Bruce Brenon is a natural born entrepreneur who is dedicated to creating memorable experiences that attract crowds to public spaces. He started his first business (a lawn mowing service) at a young age in his Missouri hometown. That grew into a thriving landscaping business to eventually include home design services for clients homes and commercial properties. In 2006 he ventured to California and founded Shine Illumination. Brenon’s client base in SoCal grew from a few HOAs and private homes to major retail, harbor and hotel properties requesting holiday and event installations to attract thousands of experience seekers nightly. Today, Brenon and his team of 25 designers, fabricators, installation crews and project managers create legacy experiences and iconic destinations – such as Dana Point Harbor’s #HappyHarborDays and the Merry Kiss Me installation that has gone viral on Instagram. Dana Point is going into its fifth year of bringing people together and helping businesses thrive in otherwise slow winter months.

Ship & Shore Environmental, Inc., Signal Hill
Anoosheh Oskouian, President/CEO
As the pollution abatement industry’s only female CEO, Anoosheh Oskouian is unique within the environmental sector. She has nearly two decades of experience in industrial and commercial project construction of a wide range of air pollution control design and fabricating combustion equipment including thermal oxidizers, catalytic oxidizers, boilers, burners, carbon, and zeolite absorption mechanisms. During her career, Oskouian has mastered air pollution abatement, waste heat recovery, energy consumption reduction and fabrication of integrated green solutions. Most recently, she received the Ellis Island Medal of Honor from the National Ethnic Coalition of Organizations-NECO in New York (May 2015) and was named Sustainability Committee Chair by the FTA (Flexographic Technical Association). Oskouian’s in-depth process knowledge and expertise provide the foundation for designing superior, innovative and efficient equipment, along with reliable technologies that help clients collect and reduce and/or eliminate air pollution emissions within environmentally acceptable guidelines. Under her leadership, Ship & Shore Environmental has grown 57 percent over the last six years.

Sparkhouse, Irvine
Torrey Tayenaka, Founder
From founding his first production startup in high school to his multi-faceted role as CEO of Sparkhouse today, Torrey Tayenaka is an acclaimed force in high-concept, branded video production and serial entrepreneurial. Fueled by a strong desire to pay it forward, Tayenaka has his hands in a wide range of pursuits – environmental, technological, medical and charitable – that prevent him from being pigeonholed. At any given time, he may play the role of inventor, producer or promoter, designing and developing projects he believes have the potential to change the world in their own way. As the success of his creative ventures continues to rise, Tayenaka has become a sought-after consultant and speaker, devoting countless hours to helping others bridge the gap between dreaming and doing by sharing his strategies for startup success and creative resourcing. Sparkhouse is a videographer agency that combines video production and strategic marketing company.

Sterling Public Relations, Corona del Mar
Paula Steurer, President
Sterling Public Relations, Inc. was founded in 2008 as a Publicity, Branding and Marketing hybrid by entrepreneur Paula Steurer. Committed to her clientele and their diverse brands, Steurer’s innovative vision, strategic approach, and tenured industry relationships have played a vital role in propelling each company to the forefront of their respective industries. With a passion for building brand identities and her innate ability to connect, engage and drive brands to the next level, Steurer has been selected as a keynote speaker and workshop leader by nationally recognized marketing initiatives that drive results. Through her leadership, Sterling Public Relations has become the in-demand firm for brands throughout California and North Texas who desire a competitive edge.

Synoptek Inc., Irvine
Tim Britt, CEO
Founder and CEO of Synoptek and entrepreneur at heart, Tim Britt provides management consulting, including IT strategy and implementation leadership to companies that leverage technology to win — a mission he’s been on for more than 20 years. In response to the growing need for high-value consulting and IT managed services, Tim Britt opened Synoptek’s doors 15 years ago. Today, with 500-plus employees and an exceptionally high bar raised when it comes...
to customer service, Synoptek’s offices stretch from Los Angeles to New York and a dozen cities in between. Under Britt’s leadership, Synoptek has completed ten acquisitions. Between 2012 and 2018, Synoptek had more than 750 percent growth. The work was prodigious but Britt and his management team persevered, working 80-hour work weeks with diligence and ownership to realize the entrepreneur’s mission and vision. Since the evolution of Synoptek, Britt took on a philosophy that said, “we can do it better” and it spread.

Syntiant Corp., Irvine

Derek Peterson, CEO

Derek Peterson is the Founder and CEO of Syntiant Corp. Terra Tech has vertically integrated cannabis-focused agriculture company. They’re pioneering the future by integrating the best of the natural world with technology to create sustainable solutions for medical cannabis production, extraction, and distribution. Plant science research and development, food production and Closed Environment Agriculture (CEA). Through this development, they have created relevant brands in both the cannabis and agriculture industries in Nevada and California. In 2018, Terra Tech Corp. expanded their footprint in Southern California receiving permits to operate two additional retail dispensaries as well as cultivation and extraction in the City of Santa Ana. These facilities will be in addition to their existing retail asset, Būm on Tech Center Drive in Santa Ana.

Tevora, Irvine

Ray Zadmirol, Founder/CEO

Ray Zadmirol founded Tevora in 2003 after seeing a gap in the security industry and felt a better thought process around risk and cybersecurity was needed. He established Tevora as a cybersecurity consulting firm with the goal of helping organizations of any size secure one of their most valuable assets: their digital information. He envisioned a company that could partner with organizations to start from the sales process to compliance and finally, through maintenance, and built out a comprehensive set of services. Today, Tevora is proud to serve over 300 customers worldwide and offers a vast array of products and services around enterprise risk, compliance, incident response, threat management, data privacy, security solutions, and cloud security. Additionally, Tevora has been on the Inc. 5000 list of Fastest Growing Private Companies for five consecutive years and has been named a Top Workplace in Orange County the last two years. Tevora is now 100 employees strong with offices in Irvine, CA and New York City.

The 12, Costa Mesa

Josh Boyd, CEO/Co-Founder

A driven entrepreneur, respected thought leader, and fitness industry innovator, Josh Boyd is the driving force behind the nationally acclaimed brand, The 12. Founding The 12 in 2013, following his own life-changing transformation, Josh set out on a quest to bring The 12 experience to men and women across the country. Beginning with their first brick and mortar location in Irvine, California, the company also has locations in Costa Mesa and Huntington Beach, California. Expanding nationally with corporate locations in Texas slated to open in 2019, The 12 has also launched their franchise program with the first franchise locations opening in Tustin and Long Beach in quarter two of 2019. In recognition of his dynamic leadership abilities and commitment to challenging the status quo to ignite change, Josh has become an in-demand public speaker and mentor, participating in workshops, seminars and speaking engagements across the country.

The Literacy Project, Newport Beach

Sue Grant, Founder

Sue Grant is a visionary whose passion to give the gift of literacy to young struggling readers has fuelled the mission and success of The Literacy Project, a nonprofit dedicated to serving at-risk children threatened to become illiterate adults. After collaborating with the University of California, Grant developed an irresistible desire to provide disadvantaged youth with the tools to succeed in life; which inspired her to create The Literacy Project in 2009, thus beginning her lifelong journey to help ‘bridge the literacy gap.’

Today her vision and leadership has brought the reading program to more than 8,500 children in school districts throughout Southern California and has raised over $3.2 million for the cause. In 2018, the organization crossed state lines with the opening of a new chapter in Park City, Utah.

The Saywitz Company, Newport Beach

Barry Saywitz, President

Barry Saywitz is the founder of The Saywitz Company—one of the largest privately held commercial real estate brokerage firms in Southern California. The firm exclusively represents tenants, companies, and users of commercial real estate on an international, national and local basis. The company has been in business for more than 40 years and continues to be one of the leaders in tenant representation in Southern California. Saywitz’s main achievement is when he become a partner in Howard Ecker and Company in California and in 1994, he purchased the West Coast operations and changed the name of the company to The Saywitz Company. In addition, he founded Barry Saywitz Properties—which afforded him the opportunity to turn the transactional cash flow from the brokerage business into monthly stabilized cash flow from rental income. Barry Saywitz Properties started with one rental property in Newport Beach in 1997 and today encompasses more than 75 multi-family commercial, retail and industrial properties throughout Southern California.

Trilogy Financial, Huntington Beach

Jeff Motske, President/CEO

Jeff Motske, CFIP®, is president and CEO of Trilogy Financial, a privately held financial planning and asset management firm headquartered in Huntington Beach. Seeking a better version of the industry he had grown to love, Motske founded Trilogy in 1999 after observing that the ‘Wall Street-style’ mentality of his peers conflicted with the “Main Street-style” needs of his clients. For the past 25 years, Motske has empowered everyday Americans to pursue the day that work becomes an option by providing easy-to-understand advice, educational tools and supportive guidance. Today, Trilogy has 10 offices and more than 100 advisors nationwide serving $2.75 billion in brokerage and advisory assets. In just over three years, Trilogy Capital has grown to more than $930 million in assets under management—a rate of growth that is unprecedented in the RIA space. In 2018, Financial Advisor Magazine named Trilogy Capital one of the fastest growing RIAs in the nation.

uDirect IRA Services, Irvine

Kaaren Hall, CEO

Despite being in the midst of a recession and mortgage market collapse, Kaaren Hall founded and made a resounding success of uDirect IRA Services. The single mom discovered a strategic way to put her 20-plus years in mortgage banking, real estate, and property management to use. The solution was an untapped market for both her skills and for investors – self-directed IRAs. Through uDirect IRA, she has guided tens of thousands of Americans through the process of diversifying their investments using self-directed IRAs. Because self-directed IRAs can have a dramatic impact on retirees’ quality of life, Hall brings her passion for educating Americans about the little-known investment vehicle. She has educated tens-of-thousands of investors and professionals on how to build wealth by taking control of self-directed IRAs.

Union Choice, Aliso Viejo

Donald Peart, President/Founder

Don Peart, founded the company in 2004 under the name American Union Services, now Union Choice, has grown into a full-service real estate firm, focusing on the wealth building needs of first responders, public safety associations and labor unions through the development of diversified real estate portfolios. Mr. Peart has over 25 years of experience in the mortgage industry as either a principal or broker in a variety of highly successful enterprises, Union Choice, a real estate investment holding company has experienced phenomenal growth, providing financial services designed to build lasting wealth and prosperity for all its clientele. President, Don Peart is the No. 1 endorsed Home Lender for First Responders and IBEW throughout Orange County and LA County.

United Capital Financial Advisers, Newport Beach

Joe Duran, Founder/CEO

Joe Duran built United Capital, which pioneered the financial life management ethos that is catching like wildfire in the financial advice industry, from the ground up in 2006. Today, the firm manages over $23 billion in client assets and is ranked No. 2 in Barron’s 2018 list of Top 40 Independent Financial Advisors. United Capital helps clients seek the best in money management, empowering clients to understand their own goals. United Capital has experienced tremendous growth through the acquisition of firms seeking to modernize their practice, and through FinLife Partners, offering United Capital’s proprietary technology to independent third-party advisors. Since its inception in 2016, FinLife Partners has grown to $23 billion in assets under contract.
Congratulations to our Founder and CEO, JOE DURAN for your nomination of Excellence in Entrepreneurship at the 2019 OCBJ Awards.

“We are grateful for the innovation and vision you bring every single day. We look forward to continuing to grow alongside you.”

–The Team at United Capital

“ At United Capital, we always strive to be better this Friday than we were the last.”

–Joe Duran
Congratulations Nominees

2019

11 Health and Technologies Inc. - Michael Sears
Advertify - Daniel Robbins
AVITTA Biomedical - Dr. Hans Gralow
All Green Electronics Recycling - Aman Sadeghi
American Advisors Group - Russ Johnson
Armstrong Life - Ami Issawi, M.D.
Andell Industries Inc - Palmer Lolley
Aris Roofing & Waterproofing - Charles Antis
Antonelli Restaurant - Antonio Carobba
Artela Technologies - Nina Bichtlary
Austin Taylor Inc. - Ron Veghino
Axonics Modulation Technologies Inc. - Roy Cohen
B. Teffet LLC - Barry Teffet
Beegs - Louis D’Amico
Below Invoices - Cola McKinnon
Beyond Fifteen Communications Inc. - Lorraine Ellerman
BNE Management Corp. - Arnold Braun Hamel
Business Communications Solutions - Sunny Raisj
Caprock Partners - Jonathan (Jon) Primit
ConversionPoint Technologies Inc. - Robert Talbott
Cuddy - Nicholas Kaloa
Directori - Gannett Wether Guth
Diverse Jamborit - Roland Cordaro
Elle Connections - Sheryl & Tammi Murphy
Erosh Inc. - Ray Evans
Ergo1 - Steve Gable
Evercore Apogee - Joseph Carri
Fusion of Ideas - Russ Taylor
Garde Stations LLC - Rosamaria Croccop
It. Herby Associates - Heidi Hardy
Holla Samianobutsters - Harold Broquett
V/Metro - Erick Linkman
Idea Hall - Rebecca Hall
IWA/LK Inc. - Brad Hunt
Just Food For Dogs - Shawn Bethley
Keeri Inc. - Don Rodrigues
Karma Automotive - Dr. Lance Zhou
Kotre & Co. - Kayla Bhayats
KME Systems Inc. - Mark Eyscoff
Koder Inc. - Elmer Monks
Leaf Communication Consulting Inc. - Don Leaf
Learning Outlines - Joseph Connor
Levsky Inc. - Ron Suchi
MAD - Omer Kamar
Madison Alexander PR - Daniel Chmielowski
Managed Direct Response - Pat Mercat

Newman Kader Beauty Inc. - Newman Kader
Modulated Imaging - David Cordero
Montessori Freestyle Preschool - Dr. Swarn Choudhary
Munee PR Inc. - More Shih
NB Private Capital - Brian Nelson
NestWorks Strategies - Scott Hamilton
OC Marketing Solutions - Elisa Wagner
Orange Aluminum - Cameron Macdon
Otsudate Public Relations - Tako Samuels
Pendulum Property Partners - Kevin Hayes, Jr.
People2Z - Chris Dyer
Perfect Point EDM Corp - William Larry Hamal
Pielas Sano LLC - Matthew Brown
Powerhouse Communications - Kristin Cuhaj
Protech - Byron Dodson
QuaSoft - Leonard Ryan
Raffo - Chuck Gottschel
Realty ONE Group - Kuala Jungmin
Route Four Four LLC - Boyanino Mac
Ryan’s Recycling - Ryan Hlickman
Soleis O’Brien LLC - David Anderson
Service Champions, Inc. - Leoland Smith
Sessions West Coast Dell - Max Schiltz
Shine Illumination - Bruce Bonner
Ship & Share Environmental Inc. - Akinbode Okosun
Sparkhouse - Toney Togondaha
Startling Public Relations - Paula Steiner
Syncoteck, Inc. - Tim Bitt
Syntelant Corp. - Kurt Buch
TerraTech Corp - Derek Peterson
Teva — Roy Zolefjoy
The 12: Josh Boyd
The Literary Project - Sue Grant
The Saywitz Co. - Barry Saywitz
Theory Financial - Jeff Melkise
uDirect IRA Services - Lauren Hall
Unltd Choice - Donald Peart
United Capital Financial Advisors - Ian Darus
Yenge Design International - Nancy Vengovac
Ynkl - Debapriya
Ynuk - Verna Haurut
YnukSTOR LLC - Terry Wills
Ynuk – David Cole
Ynuk – Scott Catt
Ynuk – Scott Cole
Zedora Storage - Nelson Nkumbu

Keynote Speaker

Bob Olson,
CEO & Founder

R.D. Olson Development

Bob Olson is the founder of R.D. Olson Development, a Newport Beach, California-based firm engaged in the development of commercial properties nationwide with a specific focus on hotels and resorts.

A specialist in developing hospitality properties, the firm is also experienced in the development of office, retail, multifamily and recreational projects. Mr. Olson’s longstanding experience as a builder has proven to be highly beneficial for development projects.

R.D. Olson Development is recognized for its ability to identify and act on opportunities, delivering solid execution through all phases of entitlements, design and development while maintaining focus on the business strategy and the bottom line.

Reservations Information
Visit: www.ocbj.com/bizevents or call Melanie Collins, Signature Events Manager, at collins@ocbj.com or 949.664.5056

Luncheon & Awards Program
March 12, 2019
12:00 p.m. - 2:00 p.m.
HOTEL IRVINE
Tickets*: $175 / Table of Ten: $1650

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

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For more information, please visit our website at RDOlson.com
Vengo Design International, San Clemente
Nancy Vengochea, Owner/Lead Interior Designer
Nancy Vengochea has redesigned estates for notable clients seeking to create their dream homes and businesses internationally. With a keen meticulous eye for detail and ability to create spectacular living environments, it has earned Vengochea a top reputation among clients that include Hollywood celebrities, famous sports figures, and the international elite. She simplifies the complexities of luxurious high-end designs and seamlessly integrates art, architecture, and environment, with both aesthetic and everyday living.

Vincent, Irvine
Ville Houttu, CEO
Ville Houttu is the Founder and CEO of Vincent Group, a company that has grown to 300 employees and make it public in Nasdaq First North marketplace. Since founding Vincent California, Inc., Ville has grown the company to 30 US-based employees who have worked on 33 successful technical projects, including work for Logitech, Yamaha Watercraft, Irvine Company, Friar Tux, KCRW and other top-tier clients across multiple industries. Ville was awarded the 2018 Entrepreneur of the Year Award from Irvine Chamber of Commerce and has received increasing press coverage for his work in Orange County due to the quick expansion of Vincent. Ville also led the 2018 acquisition of Irvine-based Devise Interactive.

VindiSTOR LLC, Tustin
Terry Mullin, President/CEO
VindiSTOR LLC was founded in 2008 by Terry Mullin and leading technology company executives who bring decades of experience in the computer hardware and software industries. VindiSTOR's focus on distribution of non-paper based electronic information for the trade show and conference industries. Mullin continues to be an active innovator and business builder in Orange County. He has formed and led teams in market-leading companies that have brought first in class software and hardware to the market. Within his latest venture, VindiSTOR, Mullin has launched a new era in compact content management systems to deliver information to the $595 billion dollar event, conference and tradeshow industry. His innovations not only make sense but reduce monetary costs and environmental costs. At the same time, Mullin has innovated and patented other products including an oral irrigation system that will aid millions in the recovery from oral surgery. Mullin has other patents pending in the area of wireless networking, retail management, and sustainable products.

WMBC, Lake Forest
Scott Coles, President/Wealth Advisor
Pioneering the evolution of wealth management since the early 2000s, Scott Coles is the founder of WMBC. As a trusted advisor for both clientele and industry professionals, Coles has earned nearly 40 years of experience which serves as a dynamic platform for himself and his team to draw solutions and opportunities from. Coles is a Charter Financial Consultant (ChFC), Chartered Life Underwriter (CLU), and Specialist in Complex Estate and Tax Planning. He is also the founder of Colwin Financial Insurance Services, Inc and the former radio show host of "You and Your Money", 640AM. Bringing the human element to the forefront of each and every decision, Coles recognized the need for human centric wealth planning that brings comprehensive value to the lives of those he serves. With a dedicated interest in each person and their respective goals, Coles is able to advise and strategize synergistic steps to get each person to the place of financial freedom they desire.

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