

FAMILY-OWNED BUSINESS AWARDS

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The Allen Family Automotive Group



4 Secrets to Success for Family Businesses

by Samir Kaji, Senior Managing Director, First Republic Bank

Running a family business is a point of pride for many families—but it's also a major accomplishment. According to the Family Business Institute, only about 30% of family-owned businesses survive into the second generation, 12% into the third generation and 3% into the fourth generation.¹

There are many reasons that family businesses fail, but a big one is lack of planning. Families that want to build a successful, lasting enterprise need to carefully prepare for the future. So, what are the secrets to success?

1. Formalize the arrangement

A common issue with family-owned businesses is that the owners treat the business too casually and don't institute the same legal agreements and protections common among non-family-owned operations. Whether run by spouses, siblings, or multiple generations, it's critical that the partners clearly lay out the ownership structure, the responsibilities of each owner—and the consequences if one family member doesn't fulfill their end of the agreement.

For example, family owners will generally want to have a partnership or operating agreement. This document can detail everything from each partner's role and responsibilities and expected work schedule to his or her annual salary and dividend payout from the business. A buy-sell agreement can protect the business if one partner wants out or to sell the company.

Having legally binding agreements in place ensures the business won't be derailed by one irresponsible family member or unexpected event, such as divorce or death. It forces family owners to talk through potential prickly situations in advance and take steps to ensure the business stays strong.

2. Choose the right structure

Families also need to make sure they establish the right business structure based on their needs. A limited liability company (LLC) or S corporation can be a good choice for family-owned businesses because they provide liability protection without some of the complicated formalities of establishing a corporation. A business lawyer can consult the business on which structure makes the most sense.

3. Keep business and personal finances strictly apart

Due to their close relations, family-owned business partners may not think



twice about tapping the coffers of the business when they need to borrow money or funneling some of their personal money into the business when they have the cash to spare. But this can lead to serious problems. For one, under an LLC structure, owners are required to keep business and personal finances separate if they want to ensure the LLC's liability protections hold up in court.

But using the business like a piggy bank will surely cause strained relationships between the partners and may compromise the success of the business. Family business partners will want to keep strictly separate personal and business bank accounts, as well as separate accounting and recordkeeping.

4. Separate work time from family time

It's common among family businesses to let business talk spill over into the dinner hour or even at family gatherings. That's usually not a good idea. To maintain positive relations, families need to enjoy family time together without letting the business partnership seep into every hour of the day.

The most successful family business owners designate specific times when talking about the business is forbidden—whether every Sunday or at all holiday gatherings.

Building a family-owned business that can withstand the years, if not the generations, takes some thorough planning and structure. Planning not only helps the business stay strong, but family relations, too.

¹ Family Business Institute, <http://www.familybusinessinstitute.com/index.php/Succession-Planning>

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Helping Family Businesses Grow and Succeed

There is a great deal of commitment involved in successfully running a family-owned enterprise, and the law firm representing the business should be equally passionate about its success. Weintraub Tobin has a long history of helping family businesses grow and succeed.

Some of our clients have opened restaurants, bakeries, printing shops and manufacturing facilities. Others have forged paths in media, agriculture, healthcare and technology. All of them began with a little money, a simple idea and a big dream. While each family-owned business is different, they all face the unique challenge of synthesizing organizational charts with a family tree. They must overcome the difficulties associated with running any sophisticated enterprise, while navigating the often complicated relationships that are distinctly inherent in family-run businesses. All of these issues must be understood, considered and supported.

Our lawyers recognize that what distinguishes family-owned businesses is family. We know that adding family values – pride, loyalty, cohesiveness, trust – makes it a stronger, more resilient enterprise.

We are more than just experienced lawyers; we understand the multifaceted nuances involved in leading a family business and can be there as your seasoned business counselors. Our lawyers work with first-generation businesses to show them how to operate professionally while anticipating and avoiding problems. We also assist in the process of transferring the business to the second and third generations. Most importantly, we pride ourselves in providing creative and dynamic services that help our clients proactively address the legal challenges they face.

The most successful family businesses recognize the many challenges they will face, and they turn for help to professionals who know business and understand families. Weintraub Tobin offers its family business clients access to legal areas their companies need, allowing them to draw upon the experience of the lawyers throughout our firm in areas such as business structuring, finance, federal and state taxation, estate planning, employment law and employee benefits.

Darrell P. White

Darrell P. White is an associate at Weintraub Tobin, working with various practice groups, including litigation and real estate.

Sherry S. Bragg

Sherry S. Bragg is a shareholder in the firm's Litigation Practice and Employment Law Groups, and a member of the firm's Board of Directors. As an AV-rated attorney, Sherry has represented both plaintiffs and defendants in a wide variety of business disputes and tort cases for 29 years.

Jacob C. Gonzales

Jacob C. Gonzales is a shareholder with Weintraub Tobin and a member of the firm's Litigation Practice Group. He is an experienced and respected trial attorney with expertise in a broad variety of complex legal issues.

Gary A. Waldron

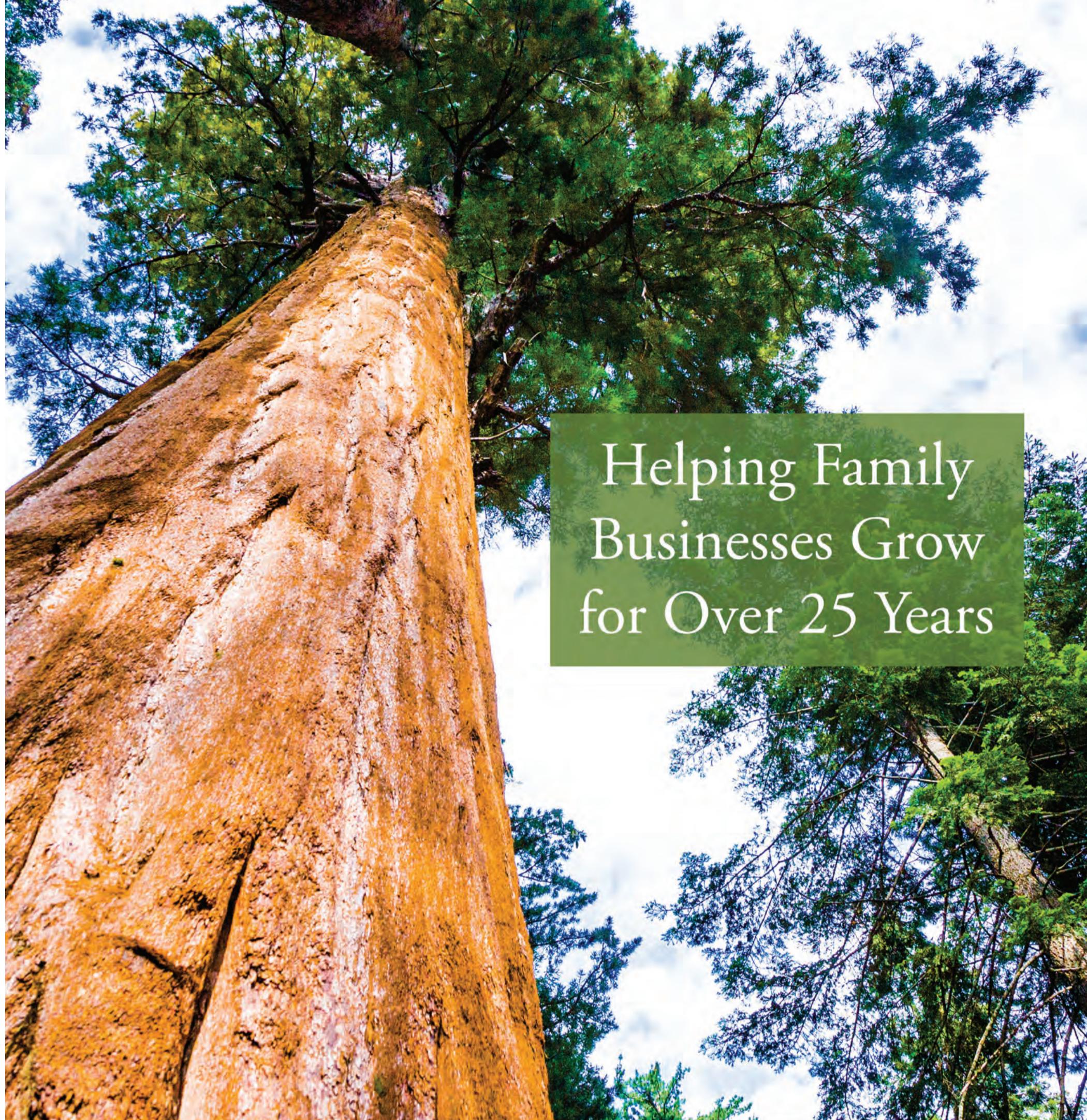
Gary A. Waldron is a shareholder and preeminent trial lawyer who has continually practiced as a trial lawyer since 1979.



About Weintraub Tobin

Weintraub Tobin is a sophisticated provider of legal services, and we have been supporting Orange County businesses since 1998. With offices in Newport Beach, Los Angeles, Sacramento, San Francisco and San Diego, we

are able to provide peerless legal services throughout California. For more information, contact Weintraub Tobin at 23 Corporate Plaza, Suite 200, Newport Beach, CA 92660. Call 949.760.0204 or visit www.weintraub.com.



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Burnham Benefits: Partnering for Healthier Businesses and Stronger Communities

by Kristen Allison, CEO, Burnham Benefits

In 1995, when I acquired the benefits practice of John Burnham & Company and formed Burnham Benefits Insurance Services, it had been an industry mainstay for more than 50 years. Twenty years ago, significantly growing and enhancing a company with that level of visibility and success was a challenge, yet with the support of a consistently exceptional staff, Burnham has defied the odds—year after year—exceeding my own expectations by experiencing continuous growth, even during times of economic downturn. As proprietor of one of the largest female-owned employee benefits insurance brokerage and consulting firms in the western region, I am proud of the trail we have blazed while bringing Burnham from a staff of 13 and revenues of \$2.5 million in 2005 to revenues of \$21.2 million in 2015—an achievement I attribute to strategic partnerships and strong relationships within the industry and my current staff of more than 80 highly skilled industry professionals who manage more than \$1.5 billion in premiums.

Together, we have maintained a clear vision for Burnham's future through a collaborative effort that ensures employees feel healthy, not only in mind and body, but also feel valued and respected. It is as important as the work we do. After all, when people are truly passionate about their work and feel appreciated for what they do, it carries over into every aspect of their lives, not just with clients, vendors and associates. The proof is in our 95% employee retention rate, as well as accolades that have come from inside and outside of the insurance brokerage industry. Burnham Benefits holds national recognition as one of the top 50 large group benefit brokerages in the U.S. in 2014 (*Employee Benefit Advisor*) and has been ranked *Business Insurance's* #1 "Best Place to Work in Insurance" (2013, 2014). It has also been ranked #1 "Best Place to Work" by the *Orange County Business Journal* for four years running. In addition, on behalf of Burnham Benefits, I recently accepted the Founders Award presented by the Association for Corporate Growth, an achievement that belongs to all of our talented team members who consistently deliver outstanding expertise and insight to our clients.

Today, Burnham Benefits Insurance Services is one of the largest employee benefits brokerages in California and among the few to specialize solely in employee benefits consulting and brokerage services. Specialization has allowed our firm to emerge on the cutting edge of major trends in benefits programs, including healthcare reform guidance, cost-containment strategies, wellness programs, legislative and corporate compliance support, underwriting and actuarial services and self-funded plans, which require a sophisticated understanding of funding arrangements. By taking the less traveled path of laser-focused specialization, the company has strengthened its foothold as a market leader and has proven its uncommon ability to successfully meet the complex needs of the private equity marketplace; companies experiencing high-growth and

high-volume expansion; and those planning for mergers or acquisitions.

Working with our colleagues at Burnham Gibson Wealth Advisors Inc., Burnham leverages the robust resources to offer formidable support that is unique to the market. Serving a vital role as expert advisor and advocate for implementing cost-effective strategies, Burnham helps clients meet specific needs and negotiate the lowest costs through a collaborative approach that defines a customized benefits strategy in alignment with client objectives. Wielding the in-depth industry knowledge and Fortune 500 resources of a large firm, yet retaining the flexibility, creativity and consultative service of a boutique, Burnham has emerged as a leading provider of education, strategy and implementation support.

In addition to our renowned research-driven services, which cull from actuarial data and company-specific information, Burnham continuously adopts the latest software with innovative ideas and the most up-to-date online enrollment and administration systems to keep clients lean and nimble. Burnham advisors are also on the forefront of state and federal legislation and healthcare compliance procedures for clients' ultimate peace of mind. This becomes increasingly important in an environment where change is the norm and compliance is crucial. With all the resources a company devotes to benefits programs, it is vital that each employee understand his and her value to the global and holistic perspective of the organization. Burnham Benefits provides the year-round support and communication tools that ensure employees understand and appreciate their benefits—leaving clients free to focus on the heart of their business. With its ideal size, high-touch value-added services and depth of experience, as well as understanding of the larger marketplace in which it operates, Burnham is proud of the company's above-average client retention rate of 97% compared to the industry standard of 85%.

Burnham is renowned not only for its focus on building strong business relationships, but also for giving back. Active in the Orange County community, our staff has taken on large roles with after school programs and emancipated youth programs such as Insuring the Children, Orangewood Foundation, Mustard Seed Ranch, CASA Youth Shelter and CHOC. Most recently, Burnham joined the ranks of a growing consortium of more than 1,000 Certified B Corps from more than 60 industries throughout the world, working together toward one unifying goal to redefine success in business. As green becomes the new gold, B-Corps are setting a higher standard in the way businesses relate to all of their stakeholders, including their customers, employees, shareholders, suppliers and the communities to which they are connected. It's an honor that only deepens Burnham's commitment to carefully consider the impact of our decisions and how they affect the world around us. For Burnham, conscientious and sustainable growth includes—above all—protecting the environment and improving the quality of life within the communities we serve.

For more information, visit www.burnhambenefits.com. Visit 2211 Michelson Drive, Suite 1200, Irvine, CA 92612 or call 949.833.2983.



Kristen Allison



Burnham Benefits 20th Anniversary Employee Symposium



Burnham Benefits 20th Anniversary Open House: Steve Shultz (CEO, Shultz Steel), Kristen Allison, Tom Reed (CFO, Shultz Steel), Melanie Thomas

Family-Owned Business Winner Allen Family Automotive Group Celebrates Its 69th Anniversary!

The Allen Family Automotive Group in Laguna Niguel is celebrating 69 years of family-owned success in an industry that doesn't often see this kind of success and longevity. Today, Allen Cadillac, Allen GMC and Allen Hyundai are continuing the legacy of the Allen family.

"It's an honor for us to open these doors each day and turn on the lights of a thriving business that was started by my grandfather 69 years ago," says General Manager Cliff Allen. Cliff is a third generation Allen, son of Dennis Allen and grandson of Founder Stanley Allen. Cliff's brothers, Mitch and Scott, and nephew, Cameron, also carry the family torch, lit almost seven decades ago by their founder, Stanley.

"Stores all around us are often changing hands," continues Cliff. "Our stores are different. Here, it's family first. People always tell us they feel the difference when they are here. There is an air of loyalty and professionalism here. Our team is comprised of family and familiar faces, many of whom have been with us for 10, 20 or even 30 years or more."

Allen also sees the same pattern with their customers. "Our customers follow the same trend. We have countless customers that we are serving third and now fourth generations of their families. It feels like a reunion when they visit us for service or a new vehicle."

The Allen family's commitment to sustaining their legacy going forward is showcased in their brand new facilities, unveiled last year. Beautiful, state-of-the-industry automotive centerpieces all designed with the customer in mind. Bright, airy and roomy showrooms display multiple featured models. Service facilities pamper customers while they visit. "I wish my Dad and Grandfather could see these new facilities," says Cliff. "To our family, they are more



Stanley Allen, founder of the Allen Family Automotive Group, surveys the construction of Allen's store in Laguna Beach.

than just new dealerships. They will serve as the foundation for the future of this family business for generations to come."

The historical roots of this family-owned business started in Laguna Beach. Stanley Allen spent 25 years in Laguna Beach raising his family in South Orange County and getting to know the people in the community. His son, Dennis, joined the business and initiated a move to Laguna Niguel. Dennis's vision proved to be a good one, and shortly thereafter, Allen added GMC to its Oldsmobile and Cadillac product lines.

Allen Cadillac is now a "Master Dealer," an honor bestowed upon only the most deserving Cadillac stores nationwide.

The Allen's expanded their family of brands in 2006 with the addition of Hyundai. Now Allen Hyundai is an award-winning Hyundai dealership. The recent roll-out of the highly anticipated 2017 Elantra has kept the forward push going, as well as the growing popularity of the Hyundai Genesis, Sonata and Santa Fe. Hyundai is sweeping up awards and winning over drivers at all levels, and Allen Hyundai is Orange County's Hyundai headquarters.

Community is also very important to the Allen family. "The backbone of our dealership is community involvement," says Cliff. He lists many schools, sports teams and community service organizations the family has supported over the past 69 years. These efforts haven't gone unnoticed. Allen has been named Laguna Niguel's "Outstanding Business of the Year" and adds this honor to many other accolades, including *Orange County Business Journal's* Family-Owned Business Awards.

For more information, contact Jim Loynes Jr. at the Allen Family Automotive Group – 949.485.3700.

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Growth Comes in Various Shapes and Sizes: Three Favorable Tax Benefits for Technology, Manufacturing and Other Businesses

by Javier Ramirez, Specialty Tax Lead Partner, SingerLewak

As a business owner or operator, you understand that business growth comes in different shapes and sizes. A key component of business growth is a sound tax strategy. Every business has a unique tax situation but if you are a company that performs research and development (R&D), understanding the tax rules applicable to R&D is necessary to maximizing the benefits from those activities. Navigating tax laws and regulations through an experienced tax partner can make all the difference in moving forward or falling back. Businesses today face many competitive burdens and challenges, including our country's complex regulatory tax environment. Many changes are occurring now that will help businesses succeed. One of the more recent significant changes for companies engaged in R&D took effect at the end of 2015. Our federal government took steps to assist businesses and business owners by extending a number of federal tax benefits and placing into law new, beneficial provisions which take effect in 2016 and beyond.

When Change Is Good

Since state corporate income tax stems largely from the states' adoption of the Internal Revenue Code (IRC), these federal income tax changes and provisions will impact corporate taxpayers at both the federal and state level. The legislation, officially signed by President Obama into law, was effective December 18, 2015. The signed bill is referred to as "Protecting Americans from the Tax Hikes (PATH) Act of 2015" (Path Act).

One of the more impactful items coming from the Path Act was the modification to the research and development (R&D) credit under IRC Section 41. The Path Act has made the R&D credit *permanent*, beginning in 2016. Among other provisions, the Path Act also retroactively extended existing beneficial provisions related to bonus depreciation, and provides relief for certain taxpayers subject to the alternative minimum tax (AMT).

The R&D Tax Credit

For all companies that perform research and development, the R&D credit is available to provide relief for the extensive costs that companies incur when bringing products or methods to market. Historically, certain companies that incurred R&D costs had difficulty obtaining benefits from the prior R&D credit, as the credit could only be utilized against positive income (i.e. profit). As many companies take several years to turn a profit, the R&D credits they had earned became "trapped" and unusable by the entity (or subsidiary) that generated them. This potential for trapped or unusable credits had caused uncertainty regarding the effectiveness of the R&D credit and potentially impacted decisions on whether to invest in R&D. Without a way to offset the extensive costs of R&D activity, many taxpayers simply could not afford to invest the level of resources required to either establish new, innovative products or to improve existing products.

In order to provide relief for taxpayers with R&D activity, the Path Act provides two separate avenues that qualified taxpayers can take in order to offset their R&D costs. First, the Path Act permits businesses with less than \$50 million in gross receipts to use the credit to offset its AMT. This is significant as historically the R&D tax credit could not be used to reduce tax liability below the taxpayer's AMT. Since the credit could not be used to offset AMT in past years, any unused credit would be required to be carried forward to future tax years. However, with the passing of the Path Act, some corporate taxpayers can now bypass this limitation.

Second, the Path Act permits certain start-up businesses with no current income tax liability to offset payroll taxes with the R&D credit. Effective January 31, 2015, a small business may be able to apply a portion of their R&D credit (up to \$250,000) against payroll tax liability. To be eligible for this option a business must meet certain criteria regarding gross receipts. This is significant for startup businesses, as one of the primary costs incurred is payroll.

Due to the past limitations on the utilization of the R&D credit, many taxpayers who performed qualifying R&D activity may have overlooked credit (or refund) opportunities under the assumption that the available benefit from the credit was either non-existent, or too small to justify establishing internal procedures to perform a proper credit study. Companies that do not understand the broad nature of the activities qualifying for the credit, or the new rules related to the calculation of the credit can miss significant credit and refund opportunities for open tax years.

Bonus Depreciation

The federal bonus depreciation provisions allow companies to increase or accelerate the depreciation of qualified business property. The Path Act not only extends the bonus depreciation provisions, but removes some provisions that previously limited the availability of the deduction. At the federal level, the Path Act retroactively extends the 50 percent bonus depreciation for certain qualified property placed in service over the next five years (i.e., through 2019). The bonus depreciation percentage that is allowed will decrease incrementally through 2019. For example, the 50 percent bonus depreciation continues for 2015, 2016, and 2017, but drops to 40 percent in 2018 and 30 percent in 2019. Beginning in 2016, the Path Act also allows bonus depreciation to be claimed on qualified improvement property regardless of whether the property is subject to a lease, and removes the requirement that an improvement be placed in service more than three years after the building was placed in service.

At the state level, the availability of the bonus depreciation provisions is less clear. Since the bonus depreciation provisions were added to the IRC, they have not been uniformly adopted by the states, and the available benefit for taxpayers will require a state-by-state analysis. Some states have what is known as "rolling conformity" and have already adopted bonus depreciation (without modification). However, taxpayers must determine the state-specific conformity dates to confirm that a given state originally adopted bonus depreciation. Otherwise the bonus depreciation extension will not have any impact at the state level. For states that never adopted federal bonus depreciation (or adopted it with modifications), it is presumed that the bonus depreciation extension under the Path Act will have little or no impact.

AMT Credit in Lieu of Bonus Depreciation

The Path Act retroactively extends through 2019 the election to accelerate some AMT credits in lieu of bonus depreciation and, beginning in 2016, increases the amount of unused AMT credits that may be claimed in lieu of bonus depreciation. As with the bonus depreciation provisions, generally speaking, the states with rolling conformity will incorporate this change. In addition, states that do not conform to federal AMT provisions (or incorporate federal AMT provisions with modifications) would not be impacted by the changes introduced in the Path Act.

If any of these scenarios apply to your business, we are ready to help you navigate the regulations in these areas.

Javier Ramirez

Javier has more than 21 years of experience working exclusively within the state and local tax field, specializing in multistate income tax, credits and incentives, sales and use tax and real and personal property taxes.

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Consulting The Family Enterprise

by Douglas K. Freeman, J.D., LL.M — Executive Vice President, Director of Consulting
Lee Hausner, Ph.D — Senior Vice President, Family Enterprise

We are often asked...“with all my financial success, how do I ensure that my family will remain productive, close, and caring through the years and over the next several generations?”

Financially successful families, like most everyone else, hope that today’s family members and all those generations to follow will be successful, healthy, and content. Wealth should help to make this possible. After all, the members of a wealthy family have all the advantages money can buy – the best education, the best health care, and the best connections.

Unfortunately, yesterday’s wealth is no guarantee of tomorrow’s success. The adage “shirtsleeve to shirtsleeve in three generations” is not unique to America. In Asia, the phrase is “rice paddy to rice paddy” and in the Netherlands it’s “clog to clog.” Yet, contrary to common belief and experience, some families have been able to perpetuate their success for many generations. Their progeny have become new titans in business or assumed leadership in public service, non-profit institutions, the arts and science. Their extended families enjoy each other. Each new generation seems to build on the shoulders of those who preceded them. There’s a name for these special families – “Legacy Families.”

You have been successful in your business life. We suspect that this was no accident. Entrepreneurs don’t start a business and then check in every 20 years to see how things are going. It was likely the result of thoughtful planning, attention to detail, smart and devoted people you hired and upon whom you often relied, and constant adjustments to the changing business realities.

Legacy Families recognize that the many of the principles of a successful family business apply to the business of the family, or what we call the “family enterprise.” Multi-generational success is the result of careful, thoughtful, and methodical efforts by each generation of the family group, a reflection a strategic decision by the early wealth creators that the members of this family will do more than live off either the economics or achievements of others. It’s not a short-term plan, but one which is intended to span the generations.

The Family Enterprise Strategic Plan

The Strategic Plan of the *Legacy Family* focuses on the long-range goals of the family, articulates its core values, establishes the process, policies, and procedures to be followed, and allocates the combined resources of the family, including its human, intellectual, financial, and social capital, to empower and challenge each generation, and to set milestones and benchmarks for the future.

Statement of mission and purpose: Like every successful business, a successful family knows where it wants to go and how success will look like long into the future. Success to a family, of course, may look quite different than success to a business enterprise. It will be measured by other factors besides net earnings or market share, and it will focus on success of the combined family group as well as each member of the family.

Statement of shared goals and values: The Strategic Plan contains a clear expression of the Family’s core values. These values bind the family to each other. They may not all think alike, vote alike, or prefer the same music, art, or poetry. But their core values, which often include respect, trust, integrity, dignity, compassion, curiosity, ethics and morality, to mention but a few, are passed down from parent to child to grandchild.



Lee Hausner and Doug Freeman

Allocation of capital: The Strategic Plan establishes priorities in the effective utilization of the individual and combined resources of its members. Financial capital is intended to empower and create opportunity for future generations. The structure is designed to discourage indolence and dependence, and to reward hard work, initiative, and self reliance. The Family’s intellectual capital is marshaled to encourage the pursuit of knowledge, through formal education, personal mentoring, and training of the younger generations. The human capital is directed to effective parenting, open communication, and resolving the Family’s inevitable challenges within and among the generations. The social capital is set aside to support and promote the collective and individual philanthropy of the Family, and to perpetuate many of its most precious values, including compassion, generosity, and gratitude.

Governance and leadership: As in any effective plan, the *Legacy Family’s* Strategic Plan defines its governance system, leadership criteria and opportunity, and succession. It

grants authority with appropriate responsibility, and assures accountability and communication. It sets reasonable expectations for those charged with the task of guiding the extended Family, as well as for those who may benefit from the combined resources of the Family.

Communication system: If there is a single factor that differentiates a *Legacy Family* from a failed financial family it is the success of its communication system. Different generations will have different levels of achievement and prominence, but each generation seems to get along and work well together, supporting each other and enjoying their relative success. Problems seem either never to happen or to be resolved quickly. But it’s not that there are no problems with individual members or within the nuclear or extended family groups. It’s that the problems get identified and resolved without lasting injury through open and honest communication.

“Would you tell me, please, which way I ought to go from here?” asked Alice. “That depends a good deal on where you want to go,” said the cat. “I don’t care where,” said Alice. “Then it doesn’t matter which way you go,” said the cat.”
- Lewis Carroll, *Alice’s Adventures in Wonderland*

At First Foundation, we are concerned not just with the tax and economic consequences of wealth planning, but with the impact of that planning on the lives of those for whom the wealth was intended to benefit.

Doug Freeman, J.D., LL.M Executive Vice President, Director of Consulting

Mr. Freeman provides strategic planning and organizational management advice for business, nonprofit, foundation, and family clients. His experience includes consulting with 300 family foundations, support organizations and public charities throughout the United States. From 2005 through 2008, he was recognized by *Worth* magazine as among the 100 top attorneys in the United States. He is the founder of National Philanthropy Day, proclaimed by Congress and celebrated throughout the United States since 1986. Mr. Freeman is the author of three books and over 30 articles and treatises. For more information, please contact Mr. Freeman at 949.732.6270 or dfreeman@ff-inc.com.



About First Foundation

First Foundation is an Orange County-based financial institution that fosters clients’ wealth and well-being through a comprehensive platform of investment management, wealth planning, consulting, insurance, trust, and banking services. The company was founded in 1990 and has offices in California, Nevada, and Hawaii, with headquarters in Irvine, California. For more information, please visit www.ff-inc.com.

Should You Treat a Partner as an Employee?

by Susan Levinstein, CPA, Partner, HMWC CPAs & Business Advisors

In today's competitive environment, offering employees an equity interest in your business can be a powerful tool for attracting, retaining and motivating quality talent. If your business is organized as a partnership, however, there are some tax traps you should avoid.

Once an employee becomes a partner, the IRS takes the position that you can no longer treat him or her as an employee for tax purposes. This has several significant tax implications, however.

Employment Taxes

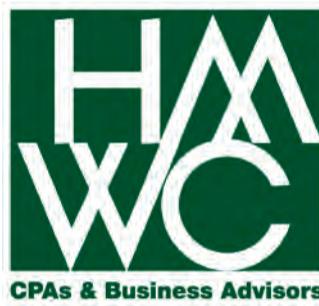
Employees pay half of the Social Security and Medicare taxes on their wages through withholdings from their paychecks. The employer pays the other half. Partners, on the other hand, are treated as being self-employed — they pay the full amount of "self-employment" taxes through quarterly estimates.

Often, when employees receive partnership interests, the partnership continues to treat them as employees for tax purposes, withholding employment taxes from their wages and paying the employer's share. The problem with this practice is that, because a partner is responsible for the full amount of employment taxes, the partnership's payment of a portion of those taxes will likely be treated as a guaranteed payment to the partner. That payment would then be included in income and trigger *additional* employment taxes. Any employment taxes *not* paid by the partnership on a partner's behalf are the partner's responsibility.

Treating a partner as an employee can also result in overpayment of employment taxes. Suppose your partnership pays half of a partner's employment taxes and the partner also has other self-employment activities — for example, interests in other partnerships or sole proprietorships. If those activities generate losses, the losses will offset the partner's earnings from your partnership, reducing or even eliminating self-employment taxes.

Unvested Profits Interests

Partnerships sometimes grant unvested profits interests to employees or other service providers. Generally, these interests aren't taxable until they vest. But if



Susan Levinstein

certain conditions are met, a safe harbor allows recipients to elect to pay the tax when the interest is granted rather than when it vests. Because profits interests often have low or zero value when granted, the election produces significant tax savings.

One of the conditions is that the partnership treat the recipient as the owner of the partnership interest for tax purposes from the grant date forward. But if you continue to treat recipients as employees for employment tax purposes, you'll likely disqualify them from the safe harbor.

Employee Benefits

Partners and employees are treated differently for purposes of many benefit plans. For example, employees are entitled to exclude the value of certain employer-provided health, welfare and fringe benefits from income, while partners must include the value in their income (although they may be entitled to a self-employed health insurance deduction). And partners are prohibited from participating in a cafeteria plan.

Moreover, continuing to treat a partner as an employee for benefits purposes may trigger unwanted tax consequences or even disqualify a cafeteria plan.

Plan Carefully

If your business is contemplating offering partnership interests to your employees, consider the tax implications and potential impact on your benefit plans. Also, consider techniques that allow you to continue treating partners as employees for employment tax purposes. For example, you might create a tiered partnership structure and offer employees of a lower-tier partnership interests in an upper-tier partnership. Because employees aren't partners in the partnership that employs them, many of the problems discussed above will be avoided.

Susan Levinstein, CPA, is a partner with HMWC CPAs & Business Advisors (www.hmwc CPA.com) in Tustin. She heads the firm's Women-Owned Business practice and the Complete Financial Office Solutions department. Susan can be contacted at 714.505.9000.

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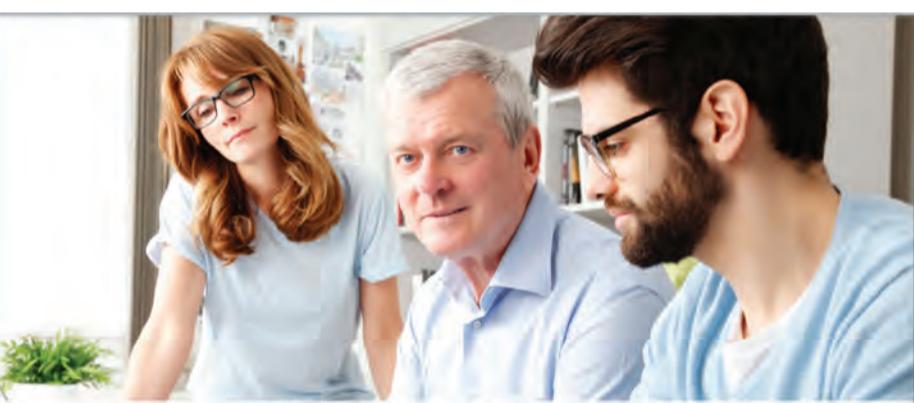


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Will Your Family Business Survive the Next Generation?

by Edward J. Lieber, CPA, ELLS CPAs & Business Advisors

Most successful family-owned businesses are started by talented entrepreneurial-minded individuals. These individuals grow with their businesses and learn many valuable lessons along the way. When they try to fit others into their shoes, they find it to be a tough fit! The second generation may not have the same talents or passion to be successful. Often, they have desires to step out of the family business and into other fields.

Below you will find some key reasons why second generation business owners fail:

► **Indifference** – Caring about the company leads to success. If the second generation doesn't care about the company and is indifferent about whether it succeeds or not, you may as well throw in the towel.

► **Knowledge** – Just because the business is turned over to the second generation doesn't necessarily mean they are knowledgeable about the company. It's crucial that the necessary steps have been taken to educate the new owner with the company business model.

► **Networking** – The new owner needs to follow in the business founders footsteps. The new owner's lack of networking will lead to failure. He/she needs to take the time to get to know all the customers, employees and referral sources.

► **Succession Plan** – When the business founders put off their succession planning they are setting up the new owner for failure. A proper business succession plan (i.e. training your successor) cuts down family discord and it allows the founder to determine the best successor for the business.

What necessary steps can businesses take to avoid these traps that can destroy family businesses?

► Second generation business owners must insist on proper training. It's important to expose them to the company at an early age. No special accommodations should be made. Families are now requiring any child who wants to be involved with the business to earn a university degree and gain experience outside the family business.

► Often times, the family grows more quickly than the business. The business isn't large enough to employ every family member. It is crucial that family businesses ensure only committed and qualified relatives are allowed to join the firm.

► It's also important that the new ownership specialize in a different sector of the business (marketing, operations, finance). This way, the next generation gain cross-functional specialties that are imperative to the success of the company.

Consider these steps to make sure your business continues to success with the next generation.

For more information, call ELLS CPAs & Business Advisors at 714.569.1000.



Edward J. Lieber

About ELLS CPAs & Business Advisors
ELLS CPAs & Business Advisors, founded in 1968, is among the largest mid-sized CPA firms in Orange County. ELLS CPAs provides accounting, audit and assurance, tax and business advisory services to closely held businesses and their owners. In addition to traditional accounting and tax services, ELLS CPAs offers pension audits, cost segregation studies, international tax services, enterprise zones tax credits and estate and trust services. For over 45 years, ELLS has been serving manufacturing, real estate, healthcare industries in Southern California. For more information, please visit www.ellscpas.com.

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What every family business needs to know

by Ed Hart, Director, Cal State Fullerton Center for Family Business

We congratulate every family business nominated for the prestigious OCBJ Family-Owned Business Awards, and we applaud those of you honored this year. You are the backbone of our economy, and we thank you from the bottom of our hearts for what you do and for the difference that you each make.

From the oldest existing family business founded in 500 AD in Osaka, Japan, to the family business that ordered their first business cards this morning, the dynamics of running a family-owned company are rewarding and challenging.

Just as we have our own unique DNA, so, too, does each family business have its own story.

In my work as the director of the Center for Family Business at Cal State Fullerton's Mihaylo College of Business and Economics, I have the privilege of working with families who own businesses all over Southern California. Nearly 60 such families come to our monthly events, meet in cross-organizational small groups with their peers; and work with one another on a regular basis, sharing their stories, their successes and the struggles that they face.

I have the unique opportunity to listen to these family business stories, and it is humbling and challenging to play a role in bringing experts and resources to these families.

Running a successful business...any business, is tough. Having a harmonious family is also tough. So running a successful, harmonious, family business is tough times two ... or probably more!

At the center, we have been working closely with family businesses since 1995. Our mission is to educate families and their business leaders in ways to grow their business, protect its legacy for generations to come, and to maintain harmony in the family.

In our workshops, we bring in experts on topics that every family business faces, including succession planning, conflict resolution, leadership and next generation development, communication, and a wide variety of other topics. We meet in a safe, trusting environment, where everyone feels open to share, listen and learn from one another.

We have five exclusive service providers. These service providers are:

- ▶ Bowermaster and Associates, a full service insurance broker
- ▶ City National Bank
- ▶ RSM, the accounting firm formerly known as McGladrey
- ▶ The Rainier Group, our wealth management partner
- ▶ Shulman Hodges & Bastian LLP, our legal partner

Each of these amazing organizations has been selected to partner with us because they have a way of serving as trusted advisors to their clients and to the members of our center. The renewal is annual and must be mutual. Our members love that these organizations are represented by the same individuals, month after month and year after year. They develop trusting relationships with one another, and these service providers – like the center itself – are there to support the family businesses at the center.



As you can see in the ad that we have in this issue, we host an annual Family Business Hall of Fame event. In our first two years, we have honored eight outstanding local family businesses, and also recently honored our center founders Dave and Judy Harman with a lifetime achievement award.

In 2015, we inducted Cascade Pump Co., Hill Brothers Chemical, Hydraflow, and States Logistics, as our inaugural Hall of Fame class. Los Angeles Lakers President and Owner Jeanie Buss was our keynote speaker, and we filled the East Wing of the Richard Nixon Library.

Earlier this year, our 2016 Hall of Fame class was inducted. In addition to the Lifetime Achievement Award given to the Harmans, we honored Advance Beauty College, Earth Friendly Products, Gaviña Gourmet Coffee, and Pinner Construction Co. Our first nine inductees were selected for their dedication to community, honoring their founder's vision, their ability to successfully thrive through transition after transition, and their passion for education.

Our third annual Family Business Hall of Fame event will take place in the spring of 2017, and will once again be held at the Nixon Library. Nominations will open up in the fall, and our class of 2017 will be selected by our previous nine inductees.

In a recent conversation with Ms. Buss from the Lakers, she said, "The Lakers are a brand known around the world but, in actuality, we are just a family business with many of the same issues as other family firms. What I didn't know until recently is that the majority of American businesses are family-owned. And no matter the size, or industry, or name recognition, family businesses face many of the same challenges."

In our 2016 induction ceremony, Tony Simmons, the fifth generation CEO of McIlhenny Co., the makers of Tabasco Sauce, dazzled the crowd with stories of the growth of the company and how it has stayed true to the original Tabasco recipe, even after 148 years in business! In 2018, the McIlhenny Co. will celebrate 150 years in business and 200 years of living on Avery Island, Louisiana — the company's headquarters and manufacturing plant.

At the Center for Family Business, protecting your legacy by building something that will last for generations is what we are all about. Some companies are built to be sold, and we honor and respect that, as well. We have resources to assist you in that area. However, if it is important to you to be one of the few who makes that smooth handoff (only 30% successfully transition from generation one to generation two), then I encourage you to pick up your phone or email me at edhart@fullerton.edu. We are a resource that exists to assist you in making your family and your business stronger. Also, your \$3,000 membership fee is tax deductible.

Your family is our business. Our success is measured in two words: your success.

We invite you to visit the Center for Family Business website at www.csuffamilybusiness.com, or to call us at 657.278.7431.



CSUF Mihaylo College of Business and Economics Dean Dr. Anil Puri, Los Angeles Lakers President and Owner Jeanie Buss, and CSUF Center for Family Business Director Ed Hart, at 2015 Family Business Hall of Fame Event.



Tony Simmons, fifth generation CEO of McIlhenny Co., Louisiana-based inventor and maker of Tabasco Sauce, speaks to the 2016 Family Business Hall of Fame crowd.

KEEPING THE FAMILY BUSINESS IN BUSINESS

By Kittridge Chamberlain, EVP & Chief Banking Officer, Pacific Mercantile Bank



Many of the world's largest companies started as, and remain, family-owned enterprises. Family businesses generate a significant portion of the U.S. GDP. On top of the challenges that all other companies deal with, they need to survive transitions to subsequent generations, melding family with "outsiders" to run the business, and perhaps some drama. If you're a family business owner or want to be, we recommend that you keep the following principles in mind.

Our experience in working with family businesses over the years has shown that applying these principles can help you avoid pitfalls and create a lasting legacy.

Let Family Members Opt for the Business

When you hire from outside the family, you look for skills, cultural fit, and a genuine interest in what your company does. If your children, siblings, or in-laws aren't drawn to the business, let them go where their passions take them. Everyone will be happier and more productive, and your dreams of success for your child just might come true somewhere else. On the flip side, avoid being the employer of last resort for your family. No one wants to celebrate the holidays with an incompetent relative who just bungled a key customer relationship.

Encourage the Next Generation to Get Outside Experience First

Even if it's in a different industry, working somewhere else affords real-world perspective and professional development. Then the family member can join the business better prepared to appreciate it and add value. Doug Homet, a business consultant and former CFO of CALPLY, says, "While it isn't absolutely necessary, family members who come in with experience are generally more engaged and successful. They bring ideas and skills that they might not otherwise have developed." Either way, once they're on board, treat them as bona fide members of the team.

Recognize When to Hire from Outside the Family

If you're serious about building a successful company,

always keep sight of the "business" part of "family business." Do your level best to have the right people in the right places. Homet recalls a successful company led by three talented brothers. "As the business grew, they agreed that they needed a new CEO to guide the company. They also saw that none of them was the right person for the job, so they went outside. It was the right decision, and the company has done extremely well because of it."

Blood is Thicker than Water, But Keep It from Getting Too Thick

Finding and retaining talented employees is critical. They can tell when decisions are made for family first and the business second. If they see that poor performance is OK for certain people, or that promotions are based on relationship rather than merit, they'll move on to a company that offers a career path for achievers and a culture of performance. In the end, it's your business. Within reason, you can run it the way you choose. But if you want to keep good people who aren't family members, run it like you mean it.

Building an enterprise that blends business and family takes wisdom and foresight. It can also be profoundly rewarding. Done right, it elevates everyone involved.

At Pacific Mercantile Bank, we specialize in helping companies succeed.

Call today to discuss how we can be your partner for success.
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Kittridge Chamberlain is EVP and Chief Banking Officer at Pacific Mercantile Bank. With over 30 years of experience in sales, relationship management, and risk management, she is responsible for commercial banking activities in the Bank's seven regional offices as well as the Bank's marketing programs. Prior to joining Pacific Mercantile Bank, Kittridge was a consultant to banks and other capital providers. Previously, she was a Senior Credit Officer and Senior Relationship Manager at Silicon Valley Bank. Kittridge also held positions at Tokai Bank of California, First Interstate Bank of California, and Bank of America. To explore how Pacific Mercantile Bank could be the right banking partner for you, email kchamberlain@pmbank.com.



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Working in a Gold Mine ... Life in a Family Business

by David R. Misch, CEO, Community Bank

Community Bank has "partnered" with family-owned businesses for more than 70 years. In fact, the Bank itself is a family-owned business! As a result, Community Bank knows the positives and negatives successive generations encounter when they enter into the family business. Below are just a few of these.



David R. Misch

- On the positive side, working in the family business:
1. Provides the opportunity to pass on the business from generation to generation, and can be deeply rewarding and motivating.
 2. Successful family-run businesses usually have a solid cultural foundation. Having family work in the business enables that company culture to continue.
 3. Can provide the best business education. Who better to learn an industry and a management skillset from, than a successful person who we know very well and who knows us very well?

- On the challenging side:
1. It can be difficult for progeny, who are often viewed as "entitled," to gain the respect from the business's employees.
 2. Filling the founder's shoes can be very, very difficult.
 3. If there is more than one child, deciding which one to place in what role, evaluating performance of one child versus another, and deciding who will be the successor can be extremely difficult and trying on family relationships.

The smartest business owners are aware of the opportunities and difficulties associated with "passing the baton." They consult with other business owners, with their banks, with their other trusted advisors and seek wise counsel on these issues. They also have a plan, which is communicated and constructed in conjunction with key family members, to transfer management of the company from one generation to the next. And finally, and perhaps the hardest thing for the founding entrepreneur to do, is to know when to start stepping away and letting the next generation begin to lead the family business.

Being involved in the family business can present difficulties for both the founder and the family. But done right and with proper planning and communication, it is a challenge worth tackling from both a financial perspective and familial perspective and can create a lasting legacy for all to be proud of.

For more information, contact David R. Misch, CEO, at 626.577.1700.

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Ace Montessori Preschool, Irvine

*Dr. Seema Choudhary, Doctor
Dharmendra Pal, Administrator*

In 2007, Ace Montessori (formally Funtime) Founder Dr. Seema Choudhary moved from Boston to teach at the University of California, Irvine. Having children in preschool, Seema saw room for improvement in what could be taught to children at this level. Her pursuit of excellence in education led her to gain further training in Early Childhood Education and the Montessori methodology. Ace Montessori Preschool was founded on the desire to create a better learning environment for kids when they are most capable. After seeing the success of the Irvine location, Seema and her team opened another campus in Lake Forest, and are still expanding. Ace Montessori students are always performing at the Irvine Global Village Festival; as well as at Memorial Day, Fourth of July, Veterans Day and Winter Wonderland activities with various cities. The students also held a fundraiser for the Nepal earthquake victims at Soka University Performing Arts Center.



AirEL, Irvine

*Michael Shipman, President
Kimberly Shipman, Marketing Assistant
Paula Bentley, Marketing Assistant*

AirEL Illuminated and Thermal Identification was formed in November 2013 by inventor Michael Shipman. Michael developed an identification system for law enforcement, military, marine, airport and emergency vehicles. The system allows ground and aerial crews to establish quick identification of specific vehicles through illuminated and thermal alphanumeric characters. This is vital in military situations or dangerous criminal engagements that require quick identification.



All Green Electronics Recycling, Tustin

*Arman Sadeghi, Chief Executive
Officer/Founder/Principal
Sidney Sadeghi, Esq., In-House Counsel
Manijeh Honarkar, Office Manager*

Arman Sadeghi has created and propagated an environmentally friendly business, and in doing so, has minimized electronic waste throughout the state of California and beyond. Under Arman's direction, All Green Electronics Recycling provides e-waste solutions to corporations, government entities, and large and small businesses. Arman founded All Green in 2008 after watching an episode of *60 Minutes* on global e-waste pollution. Through his leadership, Arman has revolutionized the e-waste management industry and has helped All Green earn a place on the *Inc.* 500 Fastest-Growing Companies List. He also devotes time to speak at industry conferences, discussing and educating individuals and companies on the benefits of responsible e-waste recycling and the practice of data security.



Anaheim White House, Anaheim

*Bruno Serato, Chef/Owner/Proprietor
Sylvano Ibay, General Manager
Katie Ibay, Wedding Coordinator*

The Anaheim White House has been owned and operated by the Serato Family since its inception in 1987. Bruno Serato, who traveled to America from Italy with just \$200 in his pocket, came here with a dream to be a restaurateur. With the support of his family, and after many years as a dishwasher, busser and waiter, Bruno opened the Anaheim White House – bringing the city the finest Italian Steak House. Anaheim White House has received coveted distinctions such as the International Five Star Diamond Award from the American Academy of Hospitality Sciences and top rankings in the Zagat Dining Guide. With his mother, Caterina Lunardi, he also founded Caterina's Club, a nonprofit organization dedicated to making sure the region's most vulnerable population – its children – receive a hot meal before they are tucked into bed each evening. Through Caterina's Club, Bruno has served more than 1 million meals to date.



Antis Roofing & Waterproofing, Irvine

*Charles Antis, President/Founder
Aaron Antis, Director of Sales & Marketing
Dawn Antis, Marketing & Communications
Associate*

Charles Antis began his career in the roofing industry after moving to Southern California from Oregon. In his first year as a young entrepreneur, he responded to a call from a single mother with seven children who was concerned about her leaking roof. Upon walking in the front door, Charles was overwhelmed by the strong smell of mildew. As he stood there unable to avoid breathing in the toxic air, the youngest daughter grabbed his hand to proudly show off her home. When she led him into her bedroom, Charles witnessed a sight he would never forget: four mattresses with moldy bedding. That weekend, he and volunteers provided a free roof for the family, a generous gesture which eventually led Antis Roofing and Waterproofing to Habitat for Humanity of Orange County, where it has donated a roof installation for every single build in Orange County since 2009 – \$500,000 worth of installations.



Antonello, Nello Cucina, Quattro Café, Santa Ana

*Antonio Cagnolo, Owner/Chef
Fiorella Cagnolo, Culinary Advisor*

Antonio Cagnolo moved to California in 1975 and developed a thorough understanding of the U.S. restaurant industry before opening Antonello Ristorante in 1979. Highly rated in the Zagat Guide for several years, Antonello Ristorante has earned a sterling reputation for having served luminaries the world over including presidents, foreign dignitaries, movie stars, entertainers, industrialists and other leaders.

Antonio is a multiple winner of the Golden Scepter Award and Circle of Fame Awards, two of the most prestigious honors a restaurateur can receive. In addition to Antonello, Antonio also owns Nello Cucina and Quattro Café. In the community, Antonio's devotion and time-honored commitment to charitable concerns have been recognized numerous times. This year for the first time, Antonello will host the I Padri di Antonello Charity Golf Classic. Guests will enjoy a beautiful day of golf, dinner, entertainment and the joy that comes with supporting worthwhile charities.



Austin Taylor Inc., Irvine

*Ron Viggiano, President
Chris Viggiano, Clothier*

With more than 30 years of experience, Ron Viggiano has become the area's premier clothier 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, he has built a loyal following of successful business leaders and athletes in Orange County. 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*, the Fine Living Channel and Wealth TV. Ron is active in many charitable organizations including Working Wardrobes, Boys and Girls Club, Human Options, Project Hope America and Habitat for Humanity among others.



Babette's, Newport Coast

*Barbara Layton, Owner/Restaurateur
Zach Layton, Executive Chef*

With an extensive history in the restaurant industry, Barbara Layton is known by many to harness the boldness and passion needed to successfully operate a business. Barbara is the owner of both Babette's East Hampton and Babette's Newport Beach – running the business with her son, Zach Layton. Opened in June 1995, Babette's East Hampton began from a dream and evolved out of sheer desire.

The mother and son team pride themselves in serving delicious, clean food in a beautiful space, making each and every meal an event. Twenty years later, Babette's Newport Beach opened on the Newport Coast, proudly earning the title as one of the most strikingly health-conscious dining concepts in Orange County.



Balloonzilla, Irvine

*Marla Borokoff, Chief Executive Officer
Bryan Borokoff Chief Financial Officer/Chief
Operating Officer
Jacob Borokoff, Staff
Noah Borokoff, Chief Cleaner Upper*

Balloonzilla provides balloon decoration for parties and events, including balloon bouquets, balloon delivery, balloon arches and helium tank rentals in the Orange County area. Founded in 2004, the company has endured many challenges. Bryan and Marla Borokoff and their sons have survived the recession, and the company suffered a massive fire in 2013 that threatened its survival, but the family persisted and came back stronger than ever. In October 2015, Balloonzilla moved out of the Borokoff's garage with two employees and into a new Skypark shop. Since the move, the company has experienced up to a 45% growth from last year and continues to increase its staff. The family's goal is to expand to five Balloonzilla locations in Southern California in five years. Balloonzilla donates balloons for many community events and volunteers to help with many others. The Borokoffs are active members in the Association of Bridal Consultants Orange County and National Association of Women Business Owners.



Boxfli, Costa Mesa

*Jayne Flinn, Co-Founder
Mike Flinn, Co-Founder
Nikki Flinn, Part-Time Boxfli Team Member
Jordan Murrel, Part-Time Boxfli Team Member*

Jayne Flinn, owner of Flinn West Real Estate, and husband Mike Flinn, president of Scope Packaging, were brainstorming for new business ideas one night at the height of the recession. The couple sought to create a better shipping experience – one that would make everything from gift giving and shipping to mailbox rentals and notary services, not only convenient, but a fun experience. Boxfli was born – boasting colorful, eco-friendly cardboard boxes designed in-house in an array of sizes. The boxes are available in modern, traditional and holiday designs featuring a full spectrum of colors that feels more like art than a shipping box. With originality at its core, Boxfli aims to take the chore and hassle out of shipping and make it less boring with no brown. With Boxfli, gift giving and shipping packages becomes a hip and creative experience, with no need for gift wrapping, and limited only by a customer's imagination.



Weintraub Tobin proudly supports the Orange County Business Journal and the Family Owned Business Honorees.

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- Real Estate Transactions
- Intellectual Property
- Tax and Bankruptcy
- Probate and Trust Administration

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Sherry Bragg | Jacob Gonzales | Gary Waldron | Darrell White



FAMILY-OWNED BUSINESS AWARD NOMINEES

Cafe Tu Tu Tango, Orange

Jim Hall, Owner/Chief Executive Officer
Heather Hall, Owner/Chief Financial Officer
Kevin Hall, Manager
Joseph Curto, Investor/Partner
Deborah Curto, Investor/Partner
Tim Applen, Investor
Linda Applen, Investor
Jamson, Hudson and Greyson Hall, Proprietors in Training



Cafe Tu Tu Tango was established in 1998 and acquired by Jim and Heather Hall in 2008. Jim and Heather leveraged everything to make this investment. Utilizing Jim's 25+ years of experience in the hospitality industry, the husband and wife team have survived the recession, and are now poised for growth. Currently, they employ 60 people, with several of those employees having been with the restaurant since day one of their purchase. The restaurant serves Spanish American tapas with an international flair, it also features a full bar with sangria, mojitos and margaritas. Any given day, local artists can be found creating and selling their masterpieces on location. Cafe Tu Tu Tango has hosted more than 1.25 million people since the Halls purchased the restaurant.

Centaurus Financial Inc., Anaheim

Ron King, Chairman/Chief Executive Officer
Charice King, SVP, Corporate Fulfillment
Westley King, President/Chief Marketing Officer
Paul King, EVP/General Counsel/Director of Alternative Investments



Centaurus was founded in Orange County in 1992 as a family-run operation. Frank L. King (Ret. Sergeant Major USMC) was one of the founding owners and J. Ronald King (Ron King), his son, became the president at that time. With more than \$135 million in revenue and over \$2 billion in assets under management, Centaurus ranks as the 37th largest independent broker/dealer in the country, and the largest independent broker/dealer headquartered in Orange County. Centaurus was founded with a singular focus – to provide unparalleled service, support, technology and education to independent financial advisors in the securities industry. Three years after its formation, Ron and his partners purchased the shares of Centaurus's parent company from his father in order to pursue his vision to build a leading independent broker-dealer with professional branch offices across the nation. The company believes that the family culture of the firm has contributed to its ability to retain talented employees who, in many cases, have been with the firm for 15 years or more.

Century 21 Discovery, Fullerton

Joe Lins, President
Stephanie Goedel, Chief Operating Officer
Suzy Lins, Communications Director



Century 21 Discovery is a full-service real estate firm established in 1986 and co-owned by Joe Lins. Joe is a licensed REALTOR® with 37 years of experience in the real estate industry. He joined his business partner, John Shipley, in 1996. The company has remained consistent and has weathered industry downturns and the Great Recession. Today, the business is run by Joe along with his wife, Suzy Lins, and his daughter, Stephanie Goedel. Century 21 Discovery received the highly coveted Century 21 Art Bartlett 2100 Cup for 2014. This award is presented to a company that demonstrates the highest level of leadership, customer service and professionalism. It has been awarded only 14 times in the history of the 44-year-old Century 21® brand. The firm also sponsors and participates in numerous community events, some of which include, the annual Donate Life Run Walk, Love Fullerton community project, Fullerton Mayor's Prayer Breakfast and the St. Jude "Walk Among the Stars" fashion show.

clubDetox, Laguna Niguel

Lenka Koloma, President
Rod Schaeffer, Vice President of Operations



clubDetox was born out of a desperate need to find health and energy, when busy mom Lenka Koloma was juggling a demanding career, business, family and kids. clubDetox is a revolutionary facility aimed to provide people the ability to harness their own natural healing powers. clubDetox aims not to fix symptoms, but rather to treat and prevent the root cause of sickness and fatigue: a toxic body. Lenka envisions a future where doctors prescribe detox programs and proper nutrition in the place of medications. With the help of clubDetox, customers can see just how easy it is to be healthy, fit and full of energy.

Cruise Plastic Surgery, Newport Beach

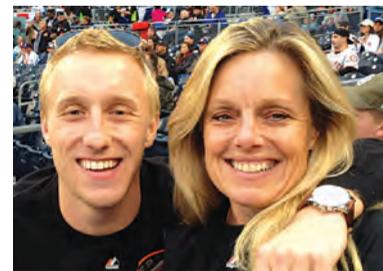
Dr. Joseph T. Cruise, Plastic Surgeon/Founder
Jola Cruise, Cruise Plastic Surgery Manager



An international leader in plastic surgery and aesthetic enhancement, Dr. Joseph T. Cruise has earned an award-winning reputation for his distinguished results and exceptional patient care. As a board-certified plastic surgeon with advanced technical training, Dr. Cruise specializes in breast and chest procedures. Recognized as a leading industry expert for gynecomastia – a common disorder of the endocrine system in which there is a non-cancerous increase in the size of male breast tissue – which affects more than 65% of men, Dr. Cruise performs more than 250 gynecomastia procedures per year. His innovative techniques and comprehensive approach to treating this common condition have opened the door for a global perspective shift on how to recognize and effectively treat patients who endure the physical, as well as psychological effects. His practice is located across from Fashion Island and has become a destination of choice for men and women across the globe who desire discerning results, privacy and the gold standard in patient care.

Destination Sitters LLC, Laguna Beach

Yvonne Wonder, Founder/Managing Director
Alex Wonder, Executive Assistant



Destination Sitters is the premier hotel babysitting and event childcare referral service in Los Angeles, Orange County, San Diego, San Francisco, Silicon Valley/San Jose, Santa Barbara, the Palm Springs area, Las Vegas and other destinations. Destination Sitters is used by more than 600 of the finest California hotels, convention centers, wedding and event planners. The company was founded by Yvonne Wonder and caters to women who are travelling with their children and want the best childcare. Since there are no state standards or licensing requirements for temporary childcare, Destination Sitters has created the strictest requirements in the industry for its sitters, all of whom are fully screened and vetted.

DirtySexyHappiness Hospitality Group, Costa Mesa

Marin Howarth Von Blom, Owner
Noah Von Blom, Chef/Owner



Marin Howarth Von Blom possesses tremendous experience in the restaurant industry. Marin and her husband, Noah Von Blom began to conceptualize restaurant concepts, the first of which, Shuck Oyster Bar, they opened in August 2012 in Costa Mesa. With the rave reviews and accolades pouring in, they opened their next concept, ARC. After only being open for six weeks, ARC was referred to as one of the "most important restaurants to open in America this decade" by renowned food and travel journalist, Brad A. Johnson. In spring 2016, the DirtySexyHappiness Hospitality Group is set to expand with the additions of Restaurant Marin and The Guild. Restaurant Marin is a Southern California concept serving breakfast, lunch, dinner and dessert from 7 am to midnight daily. At The Guild restaurant, simplicity is the ultimate sophistication. The restaurant, which shares walls with sister concepts ARC and Marin, will present a more exclusive, reservation-only dinner experience, complete with classic butler service until 2 am daily.

Eden Industries Inc., Irvine

Tom Rodberg, President
Jon Rodberg, Vice President
Luana Rodberg, Chief Financial Officer
Larry Rodberg, Vice President of Operations
Lauren Rodberg, Accounting
Scott Rodberg, Quality Assurance Specialist



Eden Outsource is a more than 30-year-old, full-service custom packaging, outsource assembly and distribution company. The firm's services address the needs of both industrial and retail manufacturers. Eden's services offer customers the ability to fully integrate all supply chain needs from procurement, quality control and assembly, to the warehousing and distribution of finished goods. Manufacturers benefit through increased production capacity, speed to the marketplace, flexibility and overall reductions in cost. Eden's packaging work has been represented at such retailers as Lowe's, Home Depot, Costco, Sam's, BJ's, Best Buy, Office Depot, Target, Wal-Mart and numerous auto parts stores.

Floral Creations by Enzo, Costa Mesa

Enzo DeVita, Owner
Linda DeVita, Secretary



Vincenzo "Enzo" DeVita is a third-generation designer in the family's flower business. The family originally started the Ikebana Flower Shop in 1955 in Naples, Italy. In 1975, the DeVitas moved to Rome and started another successful location called, The DeVita Flower Shop. Enzo came to the United States in 1987 with little money and very limited English. In 1999, Enzo opened Floral Creations. Since then, he has coordinated special events and weddings for Orange County's most prestigious businesses including, The St. Regis, The Ritz Carlton, Pelican Hill Resort, The Montage, The Hilton Waterfront, The Balboa Bay Club, Orange County Performing Arts Center, Pacific Symphony, Disneyland Entertainment and South Coast Plaza. His innovative designs are recognized and admired for their uniqueness and beauty. All the while, his wife Linda is by his side making sure the administrative duties of the business are attended to so he can be free to create and grow the company.

Galardi Group Inc., Irvine

Cindy Galardi Culpepper, Chairperson/Chief Executive Officer
J.R. Galardi, Director of Administration



In 1961, Wienerschnitzel founder, John Galardi built an American brand representative of a time when life was simpler, a brand that holds a special place in the hearts of so many families across the country. The company has grown from a single location to the world's largest hot dog chain, operating 330 locations and selling more than 120 million hot dogs annually. Cindy Galardi Culpepper, John's ex-wife, assumed the helm as CEO when John passed away in 2013. By her side is their son, J.R. Galardi, who formed the Visionary division of the marketing department and is now the company's Director of Administration. For the first time in many years, the company is growing once again under the leadership of Cindy and J.R. Together, they have taken great strides to expand the iconic brand's customer base to include a younger generation using a variety of tactics, from strategic partnerships, digital campaigns and a refreshed brand image while remaining true to the company's 55-year legacy.

FAMILY-OWNED BUSINESS AWARD NOMINEES

Georgia's Restaurant, Anaheim

*Gretchen Shoemaker, Chairwoman of the Board
Marlon Machado, Chief Executive Officer/Operator
Nika Shoemaker-Machado, Community Relations Manager*



Gretchen and George Shoemaker shared her dream of opening a restaurant. Eventually, they started a small catering business out of their kitchen, but after George passed, Gretchen closed up her catering business and retired from her job — there was no way she could open a restaurant without his presence at her side. That dream was passed on to her middle daughter, Nika Shoemaker-Machado and her husband, Marlon Machado. When they decided to open their own business, Gretchen was ready to make her dream become a reality. In 2014, after a year of research and training, the family opened Georgia's Restaurant in the Anaheim Packing District. Today, they serve soul food dishes based on family recipes. Within a short time, Georgia's catering grew to include clients such as the city of Anaheim and Vans. The restaurant's daily foot traffic average is between 125 to 200 guests, Monday through Thursday, and between 400 to 500 guests, Friday through Sunday. Notable regulars of Georgia's Restaurant include Anaheim Mayor Tom Tait.

Grove Body Shop, Garden Grove

*Tony Lombardi, Owner/Operator
Emma Lombardi, Bookkeeper
Ken Lombardi, Office Manager*



Owned and operated by Tony and Emma Lombardi, Grove Body Shop is a staple of the community. The Lombardis purchased their body shop from another family-owned business in 1976. At the time, the company operated out of a modest 4,500-square-foot building. By 1996, the husband and wife team expanded the shop to its current 13,500-square-foot space — the remodeled state-of-the-art facility has since won the Community Spotlight Award from City Council. With the help of their son Ken, the Lombardis transformed the company into one of the most-respected body shops for expert collision repair in Orange and Los Angeles counties. Today, the city of Garden Grove uses the shop for repairing police cars. Farmers & Merchants Bank also uses the shop to service company vehicles.

Happy Photos, Costa Mesa

*Xuong Do, Owner
Marge Lin, Chief Financial Officer*



Award-winning photographer Xuong Do and the staff at Happy Photos strive to provide clients with the best in customer service. Xuong has photographed more than 1,000 events and charity functions for more than 13 years with organizations like Harvesters of OC, CASA, Girls Inc., Costa Mesa Chamber of Commerce, Huntington Beach Chamber of Commerce and many others. Xuong has also photographed people and places all over the world from California to Florida, and all over Asia. Creating wonderful memories for families has always been a passionate commitment for Xuong and his family, knowing that when they came to America as immigrants, they had to leave all their photos and memories behind.

Hollencrest Capital Management, Newport Beach

*Greg Pellizzon, Managing Director
Peter Pellizzon, Managing Director*



Hollencrest Capital Management was started in 1999 by Greg Pellizzon, his brother Peter Pellizzon and Rob Wolford. These three remain the managing directors of the firm 17 years later. During that time, they have grown the company into one of the largest independently owned Registered Investment Advisory firms in Southern California, with close to \$2 billion in assets under management. Hollencrest focuses on providing comprehensive wealth management services to high net worth families, the majority of whom operate closely held or family-owned businesses. Families hire Hollencrest when they realize that the highest and best use of their time is running the businesses that

created their wealth, and that they are better served by having professionals manage their wealth. Hollencrest has succeeded in building a loyal base of clients by always putting their interests first, providing them with the high caliber of service that they have come to expect.

HomeDeliveryLink Inc., San Juan Capistrano

*Robert Fleisher, Chairman/President/Chief Executive Officer
Anna Jane Fleisher, Corporate Secretary
Robert (Rob) Fleisher, Vice President, IT & Business Development
Betsy (Fleisher) Heckmann, Director, Claims Processing
David Heckmann, Vice President, Operations, West*

HomeDeliveryLink Inc. was started by Robert Fleisher after spending more than 30 years in the trucking industry. Robert emigrated to the U.S. in 1950 from Germany with his mother and father. Robert and his team grew HomeDeliveryLink from zero sales in 1997 to more than \$110 million in sales in 2015. Through a combination of more than 1,100 employees, contract motor carrier employees and consultants, the company provides superior residential deliveries for a number of national and regional retailers. The company brokers the home deliveries of furniture and appliances through a contract delivery staff for the nation's leading retailers such as Macy's, Sears, Restoration Hardware, La-Z-Boy, Ashley, Conn's and General Electric. Regional retailers include Mor Furniture for Less, Living Spaces and others. HomeDeliveryLink currently has 43 delivery operations centers nationwide and delivers in 30 states from coast to coast and border to border.



Il Dolce Pizzeria, Costa Mesa

*Roberto Bignes, Executive Chef/Owner
Fernanda Bignes, Co-Owner
Andres Bignes, Bartender*



Roberto and Fernanda Bignes moved to the United States from Argentina in the hopes of capturing their own little piece of the American Dream. They opened Il Dolce Pizzeria in 2010 and since then, the restaurant has become a staple in the community of Costa Mesa for the past six years. At its opening, Il Dolce Pizzeria was met with wide acclaim from both restaurant critics and locals alike, so much so that it received the Golden Foodie Award in 2012 for Orange County's Best Pizza. To this day, the pizzeria takes pride in its variety of authentically, delicious Italian food and the heart of its restaurant: the Bignes family. Executive Chef Roberto Bignes runs the establishment with the help of his wife, Fernanda, and son, Andres.

INKnBURN, Costa Mesa

*Megan Tsuyuki, Co-Owner/President
Rob Tsuyuki, Chief Executive Officer
Eric Wong, Printing Manager*



Megan and Rob Tsuyuki founded INKnBURN in 2008 with a vision of creating wearable art on athletic apparel. They came into the business with almost no experience in the apparel industry, just passion and a concept. Because of this, they started with an art-centered approach and everything else developed around that. INKnBURN makes limited edition runs of its designs — being a small company and choosing innovation over mass production. All of the company's products are hand-crafted in a warehouse in Orange County. The art is applied by hand to each panel of white performance fabric before sewing. INKnBURN uses a process of heat and pressure that allows the art to stain the fibers of the fabric, so the art does not fade, crack or peel. Perfecting the process took eight years to develop, tune and refine until they had their first profitable year in 2015. The art they choose has meaning designed to empower and inspire athletes to push for new personal bests.

Juliette Kitchen and Bar, Newport Beach

*Hyun-Sook "Juliette" Chung, Owner
John Hughes, Owner*

Juliette Chung is a restaurant industry veteran. Juliette, along with her husband, John Hughes owned and operated The Filling Station in Old Towne Orange for 12 years. The sought-after

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FAMILY-OWNED BUSINESS AWARD NOMINEES

pastries and pies were all made by Juliette herself, as she doubled as the restaurant's pastry chef until the restaurant was sold in 2010. Juliette Kitchen and Bar in Newport Beach opened in 2012. The casual-fine dining restaurant serves modern European small plates with Asian influences. Juliette's farm-to-table cuisine is reflected in the rustic, yet elegant decor. From the crystal chandeliers, industrial wall lamps, vintage artwork and bar top made of recycled wine barrels; Juliette designed the restaurant from top to bottom. Keeping it a family affair, daughter Erica was the head pastry chef for multiple years and continues to help with new culinary creations from Northern California.



Katie B Cosmetics, Irvine

Katie Bayliss, Co-Founder/Chief Executive Officer
Shaun Bayliss, Co-Founder/Chief Operating Officer

Katie and Shaun Bayliss founded Katie B Cosmetics (KBC) in 2006. Combining their passion for makeup and law, they set out to revolutionize the cosmetics industry. Their mission was to advocate for the beauty industry by developing innovative, on-trend products that are safer and have more natural, beneficial, skin-loving ingredients. Their products are free of or have fewer artificial ingredients and toxic chemicals. Under Katie's vision, the company has harnessed the power of social media, digital marketing and multi-channel distribution to profitable success. KBC has grown from a bedroom out of Katie's parents' home to a large warehouse and distribution center in Irvine. Today, products ship worldwide to more than 20 countries. Also passionate about social responsibility, KBC has a strong charitable focus and created the Makeup Your Dreams program. KBC empowers the local community by mentoring young female entrepreneurs, local high school students, working professionals and mothers alike. The company has contributed to numerous causes in the local community, including the Mommy and Me Cancer Foundation, Include Autism and Kalah-A Conference to End Human Trafficking.



Kunzman Associates Inc., Orange

Carl Ballard, Principal
William Kunzman, Principal
Robert Kunzman, Associate Principal
Katherine Ballard, Office Manager
Roma Stromberg, Senior Associate
Chris Pylant, Associate
Katie Wilson, Senior Associate
Ian Gallagher, Associate



Kunzman Associates Inc. is a traffic engineering and transportation planning firm. The company started out by providing services for transportation planning/traffic engineering, parking, expert witness and peer reviews. Over the past five years, the firm has branched out with its environmental services to include noise/vibration studies and air quality/global climate change/health risk assessments. The firm has highly qualified personnel with experience throughout Southern California at the regional, local and individual project level. The experience of the firm's personnel for new planned communities, as well as established areas, provides the special skills necessary for determining imaginative, practical and meaningful solutions. The firm was established in 1976 by William Kunzman, P.E., and since then has completed more than 5,000 studies for 1,000+ different clients. This year, the company is celebrating 40 years in business.

Leaf Communications Consulting LLC, San Clemente

Dan Leaf, President
Lisa Leaf, Vice President

Dan and Lisa Leaf started Leaf Communication Consulting LLC, DVBE in 2013 to continue to support his customer base who regularly requested he get back into the business. Leaf Communications Consulting is a professional services organization specializing in project management, construction management and engineering services for Distributed Antenna Systems (DAS) and small cell installations. In 2004, Dan also founded and was the CEO of Leaf Communications Services, which he grew organically – resulting into an \$80 million national company. He continued as CEO until the company's eventual sale in 2011. Leaf Communication Consulting's impressive growth is highly attributable to its satisfied customers across the West Coast, of which include clients in the commercial space, as well as the major cellular operators as the company continues to build out DAS, small cell and backbone infrastructure.



Meathead Movers, Santa Ana

Aaron Steed, Chief Executive Officer
Evan Steed, Co-Founder
Erin Steed, Chief Strategy Officer

In 1997, Aaron and Evan Steed helped a friend's parent move, and started doing more moving jobs as a way to earn money around their high school sports and academic schedules. The brothers' vision of young and energetic student athletes delivering a unique customer service experience kept them striving to start a full-fledged business. Soon, their enterprise was fielding as many moving jobs as they could possibly handle and Meathead Movers Inc. became a full-time occupation for both brothers. Now, the largest independent moving company in California, Meathead Movers is the go-to student athlete movers for anyone looking for high-quality services from clean-cut guys. Outside of the great work they do for their customers, they also donate free moving services to victims of domestic violence fleeing abusive situations.



New American Funding, Tustin

Rick Arvielo, Chief Executive Officer
Patricia Arvielo, President
Tom Briggs, Branch Manager
Rob Briggs, Branch Manager
Jim Golay, Building Management
Marcia Gregorio, Senior Loan Officer



New American Funding is a mortgage banker that was founded in 2003 by Rick and Patty Arvielo. The company is licensed in multiple states across the nation, funds more than \$900 million in home loans every month and maintains a servicing profile of more than \$13 billion. New American Funding currently has 122 retail branches and 2,000+ employees nationwide. The husband and wife team remain active in the housing industry and community. Rick Arvielo sits on the Residential Board of Governors for the Mortgage Bankers Association in Washington, D.C. and Patty is fulfilling her passion of helping underserved borrowers by sitting on the affordable lending panels for Fannie Mae, HUD and Freddie Mac, as well as the MBA Diversity and Inclusion Committee. Patty is also member of the Corporate Board of Governors for The National Association of Hispanic Real Estate Professionals and is on the executive board of Big Brothers Big Sisters Orange County. Patty formed Latino Focus, a group dedicated to enhancing the quality of the lending experience for Hispanic consumers through service and education.

New Method Wellness, San Juan Capistrano

Susie Hopson-Blum, Owner/Founder/Director of Admissions
Ed Blum, Chief Executive Officer/Owner/Founder
Bing Crosby, Chief Financial Officer/Owner
DeAnna M. Jordan, Clinical Director/Owner
Tracy McKenzie, Special Projects Coordinator
Brook McKenzie, Outreach Coordinator



Susie Hopson-Blum is an owner and founder of New Method Wellness and currently serves as the director of admissions. Having been in recovery for more than 25 years, Susie has been an active and vital member in the recovery community ever since she went to treatment in 1988. Susie's experience managing and directing a behavioral health treatment facility began in 2006 when she opened a sober living house, Sober Pacific Living. As clients continued to come in the door with a passion for treatment and recovery, she used her professional expertise and personal experience to create New Method Wellness, a substance abuse treatment center that takes a holistic approach to recovery. Susie and her husband founded New Method Wellness with an additional husband and wife duo, Bing Crosby and DeAnna Jordan Crosby, joining as board members in 2011. Over the past 10 years, New Method Wellness has grown its California rehabilitation center exponentially, providing the opportunity for thousands of individuals suffering from substance abuse and addiction to receive the help they need to start truly living.

Next Advanced Medicine, Irvine

Candice Hall, Founder/Owner/Chief of Staff
Ryan Hall, Secretary
Jordan Hall, Patient Care Coordinator



By the time Candice Hall was just 28 years old, she had been diagnosed with three autoimmune disorders. Through her own extensive study of human biology and medical research, she was able to push those disorders into remission through the use of functional medicine. It was during that time she realized her desire to share her wealth of information with other people suffering from similar diseases. Candice opened Next Advanced Medicine in 2006 and began treating patients suffering from autoimmunity, such as thyroid disease. She began working with people diagnosed with Type 2 diabetes as well, creating highly customized treatment plans centered around a functional health care model. Since opening her Irvine office, hundreds of Type 2 diabetes patients have experienced a reversal of their disease. To accomplish Candice's mission toward changing the face of diabetes throughout the world, she has enlisted the help of both her husband, Ryan, and her nephew, Jordan, as they assist in growing the Next Advanced Medicine practice through secretarial duties and patient-care coordination respectively.

NiN Healthcare, Newport Beach

Bobby Shah, Co-Founder/President/CEO
Hira Shah, Chief Executive Officer of NiN Sourcing Inc.



Need it Now (NiN) Healthcare is the fastest and easiest platform for healthcare professionals to discover and purchase innovative, medical technology. NiN Healthcare is the first single-platform medical device and service marketplace on the web – designed from the ground up to centralize and standardize medical device and service data. Bobby Shah co-founded NiN Healthcare based on challenges in obtaining health care devices and information in real time. NiN Healthcare brings the largest network of buyers and sellers together in one place. From discovery to acquisition, this platform allows for faster, better and easier clinical decision-making. The company recently won the Most Fundable Award at the Tech Coast Angels' Celebration of Entrepreneurship.

Orange County Shredding, Lake Forest

Donnie Kennedy, Founder/President/Owner
Diana Johnson Kennedy, Assistant to Owner/Marketing



Since 1999, Southern California Shredding and Recycling (SCS) – a division of Orange County Shredding – has been protecting the rights and privacy of customers through its mobile document destruction services. Over the years, the company has developed lasting client relationships throughout Southern California by emphasizing two key elements: security and customer service. Donnie G. Kennedy founded the company after recognizing the growing need for on-demand, secure data destruction. As a former officer of law enforcement, he guides the business using the same exacting standards of confidentiality and security. To ensure high standards, Orange County

FAMILY-OWNED BUSINESS AWARD NOMINEES

Shredding and Recycling receives certification each year from the National Association of Information and Destruction, which promotes best practices and ethics among member companies.

Osmond Marketing, San Clemente
Dr. Amy Osmond Cook, Chief Executive Officer
Jeff Cook, Chief Financial Officer
Michelle Osmond, Director of Finance/HR
Madalyn Osmond, Writer
Jason Osmond, Director of Public Relations
Emily Woll, Director of Operations



Osmond Marketing, started in 2012 by Dr. Amy Osmond Cook, is a woman-owned, full-service content marketing organization specifically designed to meet the needs of small businesses and healthcare companies. Osmond Marketing's innovative model allows companies to operate on retainer, but with the oversight to have all contracted hours available for their perusal at all times. With unsurpassed quality and customer service, Osmond Marketing experienced 148% growth in 2015 and is on track to experience the same levels of growth this year.

Philly's Best, Irvine
Bob Levey, Co-Founder
Andrea Levey, Co-Founder



Philly's Best Cheesesteaks, Southern California's destination for authentic Philly Cheesesteaks and Hoagies, is celebrating 24 years of true Philly flavor in Southern California. The company was started by native Philadelphians and husband and wife team, Bob and Andrea Levey, who wanted to bring the flavors of Philadelphia to their new home of Southern California. In 1992, they opened their first Philly's Best location in Fountain Valley. The company's authentic flavors start with proprietary recipes, along with ingredients and products direct from Philadelphia, including Amoroso® rolls, Wise® Chips, Taylor® Pork Roll, Frank's® Soda, Pennsylvania Dutch Birch Beer® and numerous TastyKake® offerings. A unique Philly brand and concept, Philly's Best has grown to 21 locations throughout Southern California.

Pieology Pizzeria, Rancho Santa Margarita
Carl Chang, Chief Executive Officer/Founder
Diana Chang, Co-Founder
Michael Chang, Pieology Franchisee/Investor

Pieology Pizzeria was founded by Carl Chang and his wife, Diana, in 2011 and has become a frontrunner in the fast, casual custom pizza segment, evolving from a simple idea to turn America's most crave-able food into an affordable and interactive dining experience. As a leader and key player in this incredibly competitive category, Pieology is receiving national attention and rave reviews from media and consumers alike. Last year, Technomic named Pieology the fastest-growing chain in terms of both sales and unit growth; Pieology was the very first fast-casual customized pizza chain to make this coveted list. Carl and Diana started the company as something they could share with their family and four daughters for many years to come. Today, Carl's brother, Michael, owns two SoCal Pieology locations and, believing in his brother's vision for the company, has also been an investor since day one. With a steady and sustainable growth plan in motion, Pieology has more than 90 restaurants open nationwide and currently has commitments for more than 600 restaurants.



Portola Coffee Lab, Costa Mesa
Christa Duggan, Owner/CEO
Jeff Dugan, Owner



Jeff Duggan first opened Portola Handcrafted Coffee Roasters in 2009. Using a very small batch roaster, Jeff worked feverishly to keep the pantries and hoppers full in many homes and food establishments throughout Orange County, but roasting meticulously sourced coffee beans and serving them ultra-fresh was not enough. He found that far too many great beans were destroyed at the hands of poor equipment, flawed technique and coffee service dispensers. With a focus on quality ingredients, brewing science and freshness – all still relatively uncommon in the industry – Jeff and his wife, Christa, created Portola Coffee Lab in 2011. The goal was to create a quality-centric coffeehouse that re-focused on the most important ingredient – coffee. Within a year of bringing a never-before-seen concept and style of coffee to Orange County, Portola Coffee Lab began creating a distinct brand that revolves around producing an artisanal culinary product, craft coffee. By 2016, Jeff and Christa will own and operate six locations within Orange County.

Prego Ristorante, Irvine
Ruth Bedi, Owner
Tony Bedi, Owner
Devin Bedi, General Manager
Brittany Bedi, Operator of Finance



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FAMILY-OWNED BUSINESS AWARD NOMINEES

Ruth Bedi, along with her husband, Tony, took ownership of Irvine's Prego Ristorante in an effort to return it to its original status as a top restaurant in Orange County. After taking ownership, she remodeled and refurbished the entire space, from replacing the floors and changing the upholstery, to adding a sports bar and new restrooms. Ruth graduated from Colorado State University (CSU) and completed a graduate program at the University of San Diego. While at CSU, she attended La Varenne, the famed cooking school in Paris, France during a semester abroad. While there, she had the opportunity to learn cooking techniques and have lunch with Julia Child.



Professional Plastics Inc., Fullerton

David Kietzke, *President/Chief Executive Officer*
Michael Kietzke, *Executive Vice President*
Chris Kietzke, *Vice President, Marketing*
Brent Kietzke, *Southern California Business Manager*
Jeremy Kietzke, *Corporate Safety & Security Manager/Regional Operations Manager*
Kathryn Kietzke, *Shareholder*
Deanna Kietzke, *Shareholder*
Nicole Kietzke, *Sales*
Daniel Kietzke, *Northern California Purchasing*
Richard Kietzke, *Sales*



Professional Plastics is a leading supplier of plastic sheets, plastic rods, plastic tubing and plastic films with a massive inventory of high-performance plastic materials. From the organization's launch in October 1984, David Kietzke, along with his father, Larry, and brother, Mike, actively managed the company while also focusing on building sales revenue. A 100% family-owned-and-operated company, Professional Plastics now boasts 19 worldwide distribution centers spanning from its corporate headquarters in Fullerton to Buffalo, New York, and two locations in Asia. Today, Professional Plastics and its subsidiaries employ more than 300 people in 19 locations worldwide, and have a combined annual turnover exceeding \$125 million. The company has established distribution ties with industry leaders such as, Quadrant EPP, Evonik-Cyro, Rochling, Norplex-Micarta, Saint Gobain, Simona, Sheffield Plastics, Vycom and Corning Macor.

R.A. Industries LLC/Markall Inc., Santa Ana

Robin Follman-Otta, *Chief Executive Officer/Chief Operating Officer*
Robert J. Follman, *Owner/President/ Chief Executive Officer, R.A. Industries LLC; Chairman of the Board, Markall Inc.*
Carole A. Follman, *Owner/Executive Vice President/Board Director, R.A. Industries*
Jack Follman, *Executive Vice President, Engineering Services, Markall Inc. & R.A. Industries LLC*



Markall Inc., along with its manufacturing arm, R.A. Industries LLC, are family-owned, full-service engineering and manufacturing completion centers. For three generations, spanning more than 60 years, the companies have been led by the Follman family – Robert J. Follman and his wife, Carole, and their children, Jack Follman and Robin Follman-Otta. With decades of manufacturing experience gained in his father's machine shop, Robert Follman purchased R.A. Industries from his former partner, and carried on the family craft. They have since expanded their businesses to include (among many others) Markall Inc., the sales and distribution arm of R.A. Industries LLC; and Katmai Lodge, a premier fishing lodge in Alaska. Today, Markall and R.A. Industries serve the aerospace and defense, energy, entertainment (animatronics) and medical industries. The team is most proud of its 100% on-time delivery and 99.85% (five-year average) quality ratings. Today, the companies occupy a 70,000-square-foot campus in Santa Ana that incorporates on-site specialized manufacturing facilities and the international repair center. The company also has a presence in Houston, TX, New Orleans, LA and Anchorage, AK.



R.J. Noble Co., Orange

Michael Carver, *President/Owner*
Brenda Carver, *President, STM Trucking Co.*
KaSondra Carver, *Sales & Marketing*
Austin Carver, *Sales Manager/Operations Manager*

R.J. Noble Co.'s owners have always placed great emphasis on family, starting in 1950 with the Noble family, then in 1965 with the Cleary family, and now with numerous members of the Carver family – spanning multiple generations – currently owning and working for the company. The Carvers have owned R.J. Noble Co. since 1999. R.J. Noble Co. has been one of the leading general contractors and producers of asphalt in Southern California for more than 65 years. R.J. Noble operates two plants and two crushing plants in Southern California, enabling it to service a wide area with multiple types of materials including asphalt, rubberized asphalt, recycled aggregate base and sand. Environmentally conscious, R.J. Noble's facilities utilize recycled asphalt product, which also lowers material production costs. In addition, the Orange facility recently went through a major renovation which increased production up to 500 tons of asphalt per hour and made the plant more environmentally friendly. R.J. Noble completes hundreds of contracts each year. Recently completed projects included Tustin Ranch Road/Barranca/Armstrong and Warner – three contracts estimated at \$52 million.

Redwitz Business Solutions, Irvine

Robert Redwitz, *Owner*
Claudia Redwitz, *Manager*
Rob Redwitz, *Chief Financial Officer/Supervisor*
Ellen Dorse, *Chief Executive Officer, The GDR Group Inc.*

In 1973, Robert Redwitz received his license to practice as a CPA. From 1970 to 1975, he held multiple positions within two CPA firms in the Southern California area. In 1975, he formed Robert R. Redwitz & Co., an Accounting & Consulting Corp. in Irvine. In 1997, Robert formed The GDR Group Inc. to specialize in IT system installations, hardware, software and managed support. In 2000, he co-formed The Diamond Group to specialize in business to government relations consulting. In 2003, Robert formed Redwitz Wealth Management Group Inc. specializing in personal financial planning and financial asset management. In 2006, he formed Learning Communication LLC – specializing in HR training and training support educational products. Collectively, the five companies are known as Redwitz Business Solutions. As a CPA, Robert has extensive experience in real estate development and home building; general and subcontractor construction companies; manufacturing and distribution companies; management and consulting industries of varying specialties; HR training companies; and nonprofits, with a special emphasis on schools.



Restaurant Business Inc., La Habra

Ron Salisbury, *President*
Brendon Salisbury, *Chief Financial Officer*
Rand Salisbury, *Executive Coordinator*
Creed Salisbury, *Chef/Owner Cat and the Custard Cup*
Eryn Salisbury, *General Manager*
Maggie Salisbury, *Restaurant Manager*
Cheyenne Moore, *Restaurant Manager*
Clint Salisbury, *Waiter*
Caleb Salisbury, *Cook*



Founded in 1923 in Los Angeles by Ron Salisbury's grandparents, Alejandro and Rosa Borquez, El Cholo is one of the oldest restaurants in Southern California. In 1962, Ron Salisbury opened a second El Cholo in La Habra, bringing El Cholo food and hospitality to Orange County. Over time, El Cholo has grown to six restaurants with three located in Orange County. In addition, the parent company, Restaurant Business Inc. (RBI), also owns The Cannery Seafood of the Pacific in Newport Beach. RBI truly is a family business, both in the fact that it is still owned by the original founding family, as well as the family of employees, many of whom have been with the company 30-50 years. Despite working for 61 years in the restaurant business, Ron Salisbury still works everyday trying to make each restaurant better so he can pass on his grandparents' legacy that he has stewarded for more than half a century.



Roadway Ads, Newport Beach

Michael Danova, *Vice President*
Marco Danova, *Chief Executive Officer*
Mario Danova, *Senior Logistics/Vice President*

Roadway Ads was established in 2012 with the goal of providing an affordable form of advertising for everyone. The company's client list includes Cirque du Soleil Kurios, Guitar Show at the OC Events Center, Cavalia Odysseo and many more. Roadway Ads is the number one mobile LED provider on the West Coast, and is constantly engineering upgrades to keep the company's fleet of trucks at the highest standards in technology innovation. Roadway Ads helps clients achieve greater return, efficiency and comfort in their campaigns – all at a much lower cost than competitors. Being the pioneers in the digital mobile billboard industry, Roadway Ads has provided a way for companies of all sizes, from "mom-and-pop" shops to large corporations, an affordable form of advertising. After its first year in business, the firm saw a 70% repeat in business.



Schroeder Management Co., Newport Beach

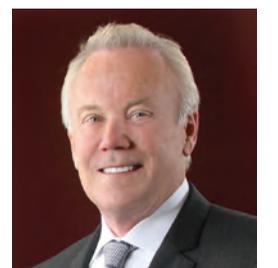
Ernest Schroeder, *Chief Executive Officer/President*
Donna Schroeder, *Co-Founder*
Paul Schroeder, *Chief Financial Officer*

Since its beginning in 1975, the Schroeder Management Co. has been a leader in the professional management of apartment communities in Orange and Los Angeles counties. Currently, the company has approximately 2,800 apartment units valued at more than \$500 million under management. Striving for excellence and professionalism in every aspect of the management business, the Schroeder Management team has consistently maintained the highest level of service and integrity for more than four decades. The company has been recognized for numerous awards in the industry, including the prestigious AMO Award, as well as the Fair Housing Awards. In the community, Ernest and Donna Schroeder are on boards for Orange County United Way and The Pacific Symphony.

Seegmiller Law Firm, Newport Beach

West Seegmiller, *Owner*
Sunny Seegmiller, *Legal Assistant*

Former California State Pro-Tem Judge and Attorney West Seegmiller has earned a sterling reputation for seeking justice for all – including the underdog, the powerless, the disenfranchised and those who otherwise have nowhere else to turn. His courtroom opponents during his 30+ year career have included such titans as Coca Cola, Southern California Edison and Rockwell International. Justice requires that an attorney invest his time, energy, experience and thoroughness so that no stone is left unturned. By adopting that philosophy, West says clients enjoy the best outcome, whether that means the case is litigated in the courtroom or a settlement is reached pre-trial. West has even built an actual courtroom in his law offices, where he hires mock "juries" to hear his cases pre-trial, gaining their feedback and



FAMILY-OWNED BUSINESS AWARD NOMINEES

insight. He then shapes his arguments, so that when he tries the case in front of an actual jury, little is left to chance.

Shak Cinema, Newport Coast

Ray Shak, Founder
Pooneh Shak, Co-Founder

Entrepreneur Ray Shak founded Shak Cinema in 2015. Offering next-level property and lifestyle videography for the real estate, automotive, hospitality, entertainment and aviation industries, Shak Cinema also works with corporations to produce their various videography needs, including commercials and documentaries. Utilizing the latest advancements, including premium equipment and dynamic editing abilities, Shak Cinema's full-service production team has earned a reputation of excellence for its distinctive work. In less than one calendar year, Ray and his team at Shak Cinema have become the largest and most sought-after real estate videography company within Orange County. They now produce the premier property videos for a vast array of realtors at major real estate brokerages, including HOM Sotheby's, Keller Williams, Surterre Properties, Coldwell Banker and RE/Max. Dedicated to producing the highest caliber cinematography, as well as still shots, Shak Cinema is committed to ensuring each company's story is told through powerful visuals.



Skyco Skylights, Costa Mesa

Ryan Marshall, Chief Executive Officer
Robert Marshall, President
Debra Marshall, Secretary

Wanting to secure a future for himself; his father, Robert; and his brother; Ryan Marshall set out to conquer the skylight world. Started in 2014, Skyco creates innovative skylight designs for a full range of industrial and commercial applications. With Ryan's ambitions and visions and Robert's experience and connections in the industry, they knew they could take over the competition. Today, Skyco is doing well thanks to all of Ryan's hard efforts. The company has grown exponentially, with \$120,000 in sales in 2014 to \$4.5 million in 2015 and an expected \$10+ million in sales in 2016. In the beginning, Ryan did everything – from sales to estimating to helping manufacturing when deadlines needed to be met.



Slyde Handboards, San Clemente

Steve Watts, Co-Founder/Owner
Angela Watts, Co-Founder/Owner
Joyce Ferendo, Distribution Manager

Steve and Angela Watts, founders of Slyde Handboards, faced an intimidating task for any entrepreneur: how to create a market for bodysurfing handboards – a product most people have never heard of, and for a sport they know nothing about. Few people know about handboarding because it has been a niche within surfing since the early '90s. A big break for Slyde Handboards came after its appearance on *Shark Tank*. As a result of their pitch, celebrity investor Mark Cuban and actor Ashton Kutcher invested a combined \$200,000 in the company – each taking an 11% ownership in return. Today, the company has two other full-time employees, and projects 2016 revenue will be about \$1 million – up from last year's revenue of \$180,000.



Smile Wide, Irvine

Dr. Kevin Badii, President/Chief Executive Officer
Dr. Bonnie Badii, Dentist

Smile Wide has grown from a single office dental practice with two employees to more than 20 locations across Southern California, 150 employees, and 50 dentists and dental specialists. Smile Wide's vision is to create a family-centered dental practice focused on providing excellent care, professional service and the ultimate experience in oral healthcare. Smile Wide was formed through the merger of its two co-founders' dental practices. Dr. Kevin Badii had eight successful orthodontic practices and Dr. Harvey Lee had a successful pediatric dental practice that they merged in January 2014. Over the last 12 months, Dr. Badii and Dr. Lee have opened 12 more dental offices, which encompass all the primary care, preventative care, specialties and sub-specialties recognized by the American Dental Association. Smile Wide was most recently recognized by *Orange County Business Journal* as being the #14 fastest-growing, medium-sized business in OC.



Surf City Christian Child Development Preschool, Huntington Beach

Tami Hopkins, Director
Donald Hopkins, Chief Financial Officer

Surf City Christian Child Development Preschool was formed in 2005 by husband and wife team Donald and Tami Hopkins. After graduating from Arizona State University, Tami Hopkins acquired a teaching credential and taught elementary school for five years. She then started an early learning preschool program in her home and developed it for five years. This program continued to grow when Don and Tami had the opportunity in 2005 to purchase an existing dilapidated and closed down preschool facility. They spent more than a year fixing up the property and opened in 2006. Today, Don is a full-time paramedic firefighter for Long Beach in addition to serving as the CFO for Surf City Christian Preschool. The school now serves more than 150 families. Due to the success and demand for placement at their preschool, they are currently in the expansion process to construct an additional 2,800-square-foot building, new playground and a parking lot on their existing site, which will allow them to accommodate an additional 60 students a day.



Tom Ferry - Your Coach, Irvine

Tom Ferry, Chief Executive Officer/Co-Founder
Kathy Ferry, Co-Founder
Steve Belmonte, President
Patrick Ferry, Coach
Joe Belmonte, Sales Manager
Anthony Belmonte, Coaching Sales Representative



Growing up surrounded by the teachings of Zig Ziglar, Brian Tracy and Mike Vance, Tom Ferry learned very early in the life the importance of personal and professional development. Tom worked with his father, Mike Ferry, learning the business of real estate coaching and quickly developed a passion for creating a better real estate experience for both agents and consumers. Today, Tom is ranked as the number one coach in the real estate industry by Swanepoel Power 200, and one of the industry's most influential people by Inman News. Through his live events, one-on-one coaching and popular YouTube show, the *#TomFerryShow*, Tom influences real estate professionals all over the world to achieve their business and life goals. A *New York Times* bestselling author, Tom is an entrepreneur who is passionate about creating a better real estate experience for all.

Total Apps Inc., Aliso Viejo

Rey Pasinli, Executive Director
Linda Pasinli, President

Total Apps was founded in 2007 by Rey Pasinli, Jason Taylor and Linda Pasinli. Total Apps provides custom-tailored solutions for merchant processing needs (credit and debit card, ACH, high-risk merchants, gift cards and more). The three founders worked to build up clientele, including businesses that have gone from \$0 in processing to more than \$1 billion in processing annually. For more than a decade, the principals of Total Apps have worked closely with their clients to minimize risk and increase profits on an average of 10-30%. The company has built valuable tools in the payments space – specifically in social media. *#Twt2Pay* was introduced in 2014 and allows users to transact in the Twitter platform with the use of hashtags. Video Checkout is another tool created by the company and introduced in 2015. The service allows users to transact inside of a video without being sent outside to a separate landing page. The company has been recognized by *Orange County Business Journal*, *OC Metro*, Deloitte and has been ranked in *Inc.* 5000.



Trade American Card Inc., Irvine

Michael Ames, Chief Executive Officer
Katheryn Picquille, President
Kim Ames, Vice President

Since 1970, the Ames family has owned and operated Trade American Card Inc. (TAC) – a barter services company. Since the company opened, more than 5,700 businesses have joined TAC as trade network members. Today, Michael Ames's two daughters continue to run the business from the main office near John Wayne Airport. TAC is the longest continuously running barter services network in the USA. TAC enjoys support from every professional sector including law, accounting, medical, optometry, dental and professional education. Trade American Card is active in 33 chambers of commerce, several professional associations and supports many nonprofit organizations.



Urban Produce, Irvine

Ed Horton, President/Chief Executive Officer
Rosie Horton, Vice President of Administration
Danielle Horton, Director of Marketing
Edwin Horton Jr., Grower

Since its inception in 2013, Urban Produce's patented growing technology and innovative approach to farming has placed them at the forefront of sustainable agriculture. A pioneer in Controlled Environmental Agriculture, Urban Produce efficiently grows 16 acres of organic produce on just 1/8 an acre. Specializing in organic leafy greens, their patented High Density Vertical Growing System allows them to use 90% less water than traditional farms producing similar yields. Urban Produce's proven proprietary technology can change the global agricultural landscape by giving people living in urban communities, food deserts, and extreme climates access to fresh, locally grown, and nutritionally dense produce. With its patented technology and global vision, Urban Produce has received numerous accolades and was named one of the industry's leading innovators by *USA Today*. On a mission to globalize local produce, Urban Produce plans to build its sustainable growing units around the world.



Wendt Landscape Services Inc., Rancho Santa Margarita

Richard Wendt, President
Sandra Wendt, Secretary/Treasurer
Shawn Wendt, Vice President

Dick Wendt founded Wendt Landscaping Services Inc. in 1980, following a three-year partnership with another firm. Dick started by servicing local HOAs in the area, gaining more contracts over the years. Wendt Landscaping Services now has 42 employees including Dick's son, Shawn Wendt, who joined the company in 1990. Today, Shawn runs the company with the same values of faith, humility and perseverance that his father founded the company on in the '80s. The company continues to support the community by sponsoring Crean Lutheran High School's annual golf tournament, Concordia University and Irvine Christ College.



ORANGE COUNTY BUSINESS JOURNAL presents

The 17th Annual



Congratulations 2016 Nominees!

Ace Montessori Preschool	Georgia's Restaurant	Portola Coffee Lab
AirEL	Grove Body Shop	Prego Ristorante
All Green Electronics Recycling	Happy Photos	Professional Plastics Inc.
Anaheim White House	Hollencrest Capital Management	R.J. Noble Co.
Antis Roofing & Waterproofing	HomeDeliveryLink Inc.	R.A. Industries LLC/Markall Inc.
Antonello, Nello Cucina, Quattro Cafe	Il Dolce Pizzeria	Redwitz Business Solutions
Austin Taylor Inc.	INKnBURN	Restaurant Business Inc.
Babette's	Juliette Kitchen and Bar	Roadway Ads
Balloonzilla	Katie B Cosmetics	Schroeder Management Co.
Boxfli	Kunzman Associates Inc.	Seegmiller Law Firm
Cafe Tu Tu Tango	Leaf Communications Consulting LLC	Shak Cinema
Centaurus Financial Inc.	Meathead Movers	Skyco Skylights
Century 21 Discovery	New American Funding	Slyde Handboards
clubDetox	New Method Wellness	Smile Wide
Cruise Plastic Surgery	Next Advanced Medicine	Surf City Christian Preschool
Destination Sitters LLC	NiN Healthcare	Tom Ferry - Your Coach
DirtySexyHappiness Hospitality Group	Orange County Shredding	Total Apps Inc.
Eden Industries Inc.	Osmond Marketing	Trade American Card Inc.
Floral Creations by Enzo	Philly's Best	Urban Produce
Galardi Group Inc.	Pieology Pizzeria	Wendt Landscape Services Inc.



2016 Keynote Speakers

Alexis Schulze
Co-Founder & Chief Visionary Officer
Steve Schulze
Co-Founder & Chief Executive Officer



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