

# Excellence in ENTREPRENEURSHIP



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# Crowdfunding Misstep Kickstarted Enterprise

Crowdcreate Helps Others Avoid Same Mistakes

By DEIRDRE NEWMAN

Getting kicked off **Kickstarter** provided the kick two Orange County entrepreneurs needed to create their own crowdfunding marketing agency.

A campaign created by **Jeffrey Maganis** and **Ivan Kan** was booted off Kickstarter in 2015 because their company, **So Special Labs LLC**, was raising money on behalf of a project they didn't create.

The entrepreneurs worked with China-based **Shenzhen EnJoYou Electronics Co.** for 10 months to bring its Dot product to market in the U.S. after coming across it at a Hong Kong trade show. Maganis and Kan

billed it as the "World's Smallest Bluetooth Headset."

The Kickstarter campaign raised \$300,000 in less than two days, blowing past the original \$30,000 goal, but it all had to be refunded because the product wasn't So

Kickstarter and **Indiegogo** are the two

primary crowdfunding sites where entrepreneurs raise money for their products, typically providing an early version of the product or some other reward in exchange for cash.

Maganis said the experience led the duo to create their own agency, Los Angeles-based **Crowdcreate LLC**, which creates



Maganis: along with business partner used embarrassing failure to launch business helping others benefit from what he calls the future of business funding

campaigns for entrepreneurs, who take their campaigns to crowdfunding sites. Maganis lives in Irvine, Kan in Los Angeles.

### Learning Curve

Maganis started an earlier business in 2011 in Irvine. **ChargeTech** created cellphone charging stations for businesses, such as **American Airlines**, **Disney** and **Harvard University**.

But he still felt like a rookie. "I didn't know what I was doing," he said. "It was an embarrassing year as an entrepreneur."

He paid \$20,000 to create a 90-second infomercial that "completely flopped," he said.

So he turned to making cold calls instead, to buyers at retailers such as Target, QVC and Best Buy.

"They didn't even respond," he said.

And he pitched to **Tech Coast Angels of Orange County**, one of five regional networks of the largest angel investor group in the country. He was one of the finalists at its Quick Pitch Competition in 2012, but he got no investments.

Then he decided to try crowdfunding to raise money for ChargeTech. He launched his first campaign in 2014 on Indiegogo and soon came to believe that crowdfunding wasn't conducive to business-to-business products.

His campaign fared poorly, reaching only 1% of its \$30,000 goal. So he switched to business-to-consumer products.

His second campaign, also on Indiegogo, was for a credit card-sized phone battery pack. It again raised only 1% of a \$30,000 goal. He attributes the result to a "poorly created" campaign page and video.

"I've since learned how to create an engaging crowdfunding campaign page and video that resonates with backers and the broader audience," he said.

His adversity finally paid off in 2014. He hit pay dirt when ChargeTech, now based in Costa Mesa, raising \$400,000 on Indiegogo after originally setting a \$30,000 goal. The product was called the "World's Smallest Portable Power Outlet," or what Maganis describes as the first portable battery pack with an AC wall plug.

His most recent campaign, which took place last fall, raised 2,675% of its fundraising goal on Indiegogo, taking in more than \$802,000 for **PLUG**, the "World's Most Powerful Battery Pack," a high-capacity battery pack with two AC wall plugs and solar charging capability.

He uses the superlative product names as a marketing play to draw attention to his campaigns but said, "The facts are indeed true."

Maganis extended that campaign on Indiegogo's InDemand platform, which allows companies to keep raising money after the original campaign ends without having to set a fundraising target or meet a deadline.

He said he's raised more than \$1.6 million from his own crowdfunding efforts.

### Their Own Way

Maganis and Kan, a friend from his days at the **University of California-Irvine**, decided to start a marketing agency to create crowdfunding campaigns to be launched on traditional sites, acting on the idea that many engineers who create companies are good at what they do but don't excel at sales and marketing.

Maganis has a degree in economics but

► Crowdcreate 28



Kan: business partner friend of Maganis since college

## OC Entrepreneurship

### FRANCHISING SNAPSHOT

One of the most common forms of entrepreneurship is franchising, which in OC includes locations of many companies based elsewhere, as well as OC-based firms that franchise their systems globally. Business researcher and analyst Inside Prospects Inc. has found at least 2,346 franchise locations here and believes there could be up to about 5,950 such operations—7% of all OC businesses—while the Business Journal has found at least 43 OC-based franchisers developing chains in four categories; see below for 2015 systemwide sales and location counts for the four categories as of 2015, the latest data available.

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Systemwide Sales

**15,110**  
Locations

#### Restaurants

**\$13.2B**    **10,880**

#### Retail

**\$947M**    **1,928**

#### Services

**\$326M**    **723**

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# Pair Leverages Common Interests to Create Brand

Fast Cars, Swank Nightlife  
Product of Hearty Ambition

■ By DEIRDRE NEWMAN

Entrepreneurs, if nothing else, must be resourceful.

Exhibit A: **Sammy Lakhany** and **Ali Hojat**. Both men have a passion for driving exotic cars and figured a lot of others who live in Orange County do, too. So they started borrowing spiffy specimens from friends, rented them out here and there, and split profits with the owners.

The duo now has a fleet of about 20 luxury models at a Costa Mesa showroom called **EnVus Motorsports**, or “envy us.”

Their latest entrepreneurial effort stems from another love: nightlife. The business partners opened **EnVy Lounge** last spring in the former Ten Nightclub space in Newport Beach.

They declined to disclose revenue—both companies are privately held—but they’re bold in their intent that EnVus be acquired.

“The goal is to sell the company in five years for \$20 million,” Lakhany said.

The men say their business mix and approach boils down to a combination of persistence and personal interest in the lifestyle experiences they offer.

## Seed of Ventures

Hojat was working at a **Wells Fargo** branch in Tustin and holding down a job on the side as VIP manager at Ten Nightclub when he met Lakhany, who was a mortgage broker.

Lakhany wanted to open an exotic car rental business. As he planted seeds of the venture, he enlisted Hojat, who at the time was running a vape store, to be his partner.



Spinnin' with envy: Business partners Ali Hojat and Sammy Lakhany pose with several of the exotic cars they rent out at EnVus, including Lakhany's T-Rex, foreground.

They started EnVus with cars Lakhany bought. The first, in 2015, was a 35<sup>th</sup> birthday present to himself: a T-Rex with a price tag of \$60,000. The two-seat, three-wheeled vehicle—half car, half motorcycle—was created by Canada-based **Campagna Corp.**

The duo opened the 2,000-square-foot EnVus in April. They've expanded to serve Los Angeles and San Diego, but without physical spaces. No additional expansions

are planned.

Meanwhile, the former owner of Ten Nightclub, **Vinnie Cappizi**, who also owns the next-door **Ten Asian Bistro**, was looking to lease out the nightclub as Lakhany and Hojat were opening EnVus. Hojat arranged a meeting between Lakhany and Cappizi, and they sealed the deal last February. They invested \$650,000 from friends, family and a business loan to renovate the space,

opening it a few months later in May as EnVy.

Lakhany had tried to open a combination bar and lounge in Santa Ana in 2012 but said he was derailed by red tape after investing \$250,000 from friends and family. He wrote off the loss as part of being an entrepreneur and looked ahead to the next business opportunity.

“I don't regret much in life,” Lakhany  
► *EnV 30*

## Crowdcreate

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says his ups and downs in business taught him a lot about promoting a product.

They launched Crowdcreate in August 2015, using the funds Maganis earned from ChargeTech's 2014 campaign and initial client commissions to fund the agency, Maganis said.

Crowdcreate also helps entrepreneurs with public relations, direct email marketing and social media to promote their crowdfunding campaigns. They based it in Los Angeles—the office is in the WeWork co-working building in the downtown business district—because that's where the majority of content creators, videographers and photographers are, Maganis said.

He calls Crowdcreate a crowdfunding “accelerator.”

“Our big pitch is we usually raise two to three times more funds than if the creator

were doing it on their own,” he said.

Crowdcreate uses tools like Google Analytics to see how much traffic is driven to campaigns by marketing efforts. The agency has created more than 20 campaigns, raising more than \$5 million via crowdfunding, Maganis said.

He said Crowdcreate is different from other marketing agencies because it's completely performance based. It takes a percentage of funds raised, from 15% to 30%, depending on its involvement. Maganis wouldn't disclose the privately held agency's revenue.

## Agency Fan

Brea-based **Aircom Audio Inc.**, whose product is a wireless headphone set with patented “Airflow” audio technology tapped Crowdcreate before putting its campaign on Indiegogo. The campaign was set up with a flexible goal of \$30,000 so that even if the target wasn't met, the company would still receive contributions and donors would get the product. The Aircom team raised more

than \$11,000 in 30 days, Kan said.

“Crowdcreate provided a roadmap to help navigate through the labyrinth of crowdfunding,” President **Ryan Tsui** said via email. “As a first-timer, we thought it was just a, ‘Post it and they will come (technique),’ but after working with Crowdcreate, we learned there is much more to it than that. Beyond helping us get the campaign up and running, they held our hand through the duration of the campaign and helped us generate more exposure and engagements with strategically-timed promotions.”

## Last Laugh

Crowdcreate launched a new Dot bluetooth headset campaign for Shenzhen in 2015, this time on Indiegogo. It redesigned the original campaign to focus on the “pain points raised by the early backers,” Kan said and scored more than \$715,000, or 1,253% of the goal.

“We were extremely thankful for the opportunity to re-launch the campaign with

the manufacturer's continued partnership,” he said.

The Dot will soon be available on Amazon.com, Maganis said.

Crowdcreate's next goal is to live up to its name.

“Crowdfunding is throwing money at an idea,” Maganis said, explaining that his idea of “crowd creating” is getting feedback on an idea, then creating a whole new product.

“Wouldn't it be great if we could Crowdcreate the iPhone 8 together?” he said. “Apple doesn't solicit feedback from their customers. ... You would upload the iPhone 7 to the platform, and people would put up their best ideas, and the crowd would weed them out. And then Apple would come in and say, ‘That's a good idea. Let's go live.’ And now we're in the crowdfunding phase.”

That may not work for an Apple product, but Crowdcreate wants to adapt the concept to new product ideas, along the lines of an online focus group. To that end, the agency is seeking partners, investors and talent. ■

## HOW TO REACH US

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## EnV

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said. “As an entrepreneur, you have to keep looking forward. Forward progression, not regression.”

Playing on the EnV brand was a way to link both businesses, Lakhany said.

“EnVus was first, and it was a play on ‘car envy,’ which a lot of people have,” he said. “Naming the lounge ‘EnVy’ tied into it nicely because it gives it a sense of exclusivity. The luxury lifestyle of fast cars and beautiful women who go to EnVy Lounge is what is envied.”

The men otherwise rely on TV and radio spots to promote the businesses.

### Cherry on Top

EnVus started turning a profit within three months, Lakhany said. Models, in addition to the T-Rex, include a Lamborghini Huracan and a Ferrari Spyder.

The cars rent for various prices. The T-Rex, for example, rents for \$500 a day. The duo changes the colors of the cars every month for variety, using wraps by Santa Ana-based **Fiere Customs**. EnVus is in the process of entering into a partnership with Fiere to house Fiere in EnVus’ building, Lakhany said.

EnVus more recently started selling some of the cars, offering purchase financing.

Lakhany said EnVus differentiates itself from the exotic car-rental competition by offering flexible pricing and high-end service, such as the ability to return cars to the nightclub for the opportunity to experience the partners’ other business.

The high caliber of customer service was an incentive to **Theresa Shoemaker**. She and her daughter, **Samantha**, rented the Lamborghini in August for her other daughter **Katrina**’s 22<sup>nd</sup> birthday.



Nightlife: The other half of the duo’s partnership winds up for a recent night of fun.

“The car was a matte white color, which was beautiful,” she said. “It was fantastic, but dealing with everybody at EnVus really was the cherry on top of the ice cream sundae. We couldn’t have dealt with nicer people. We felt they trusted us.”

### Upscale

EnVy Lounge has been transformed into an elegant nightclub with the feel of a 1920s speakeasy. Private cabanas, replete with gold velvet couches hemmed in by swagged valances of blue and gold, line one side. Chandeliers and embossed tin tiles adorn the ceiling.

Lakhany and Hojat removed a stage at the

back of the 4,000-square-foot lounge to open up the area for dancing. There’s a private outdoor area with couches, heat lamps and a second, smaller bar. The menu is a limited version of Ten Asian Bistro’s offerings.

### In Their Blood

Lakhany and Hojat are partners in both businesses. Lakhany is gradually getting out of the financial sector to focus more on the EnV businesses, he said. The entrepreneur refers to himself as “having a relentless nature with alligator blood.”

“You have to stay organized,” he said. “First, you have to love what you do. If I didn’t, none of this would happen. The high

is sketching your idea and watching it come alive. People ask me all the time, what makes you successful? I want it more than anyone else. I’m willing to work harder and faster and focus [more] than anyone else.”

Lakhany oversees both businesses but spends most of his time managing EnVy Lounge. Hojat manages the day-to-day operations of EnVus.

“The best part about running EnVus ... is the social aspect,” Hojat said. “I love meeting new people and making their car fantasy dreams come true ... It’s really rewarding to be able to make people happy because they get to drive cars that they would otherwise never have an opportunity to drive.” ■

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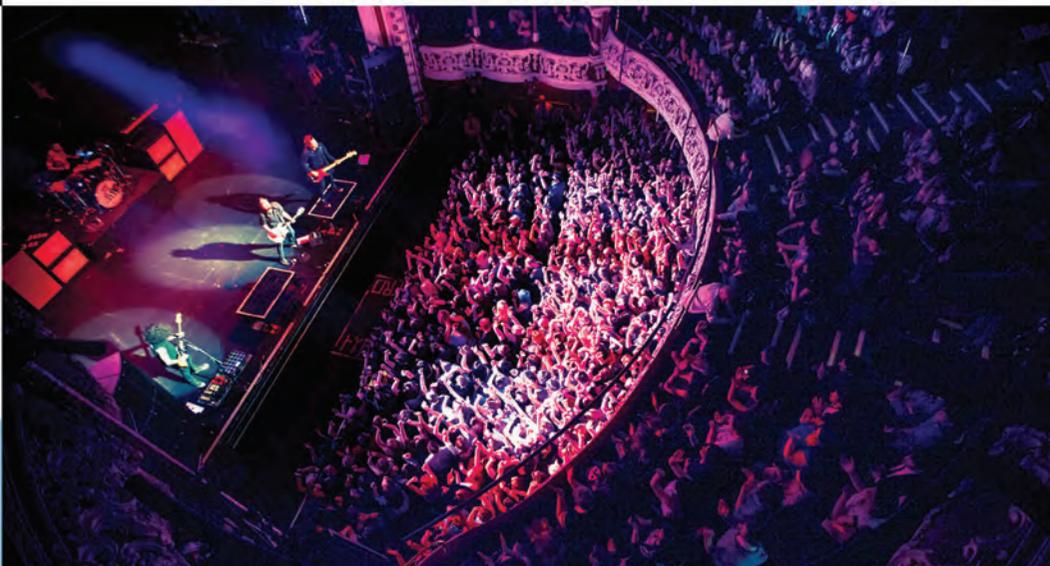


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## If You Sue Facebook, What's the Likelihood You'll Be Allowed to Depose Mark Zuckerberg?

by Jacob C. Gonzales, Shareholder, Weintraub | Tobin

Companies are no strangers to litigation. In California, it is a cost of doing business. Unfortunately, it is not uncommon for litigants to try to gain leverage in a dispute with a corporate party by attempting to depose its high-level executives to harass and embarrass them, and force the company into a quick and aberrant settlement. The strategy employed by a litigant may go like this: (1) put pressure on a company by noticing the deposition of an officer or director, (2) make clear the intent to delve not only into the high-level executive's alleged wrongdoing, but also other points of potential embarrassment, and (3) the company will capitulate and pay a significant settlement to avoid the pain of the deposition. Some refer to this (and similar tactics) as judicial extortion. What, then, can a company and its counsel do to prevent an abusive deposition of a high-level executive?

California federal and state courts apply the "apex" doctrine to protect high-level executives, also referred to as apex executives, from harassing depositions. In considering whether to allow the deposition of a high-level executive, courts focus on two primary factors: (1) whether the high level executive has unique first-hand, non-repetitive knowledge of facts at issue in the case, and (2) whether the party seeking the deposition has exhausted other less intrusive discovery methods. *Apple Inc. v. Samsung Electronics Co., Ltd.*, 282 F.R.D. 259, 263 (N.D.Cal. 2012); *Mutual Ins. Co. v. Superior Court*, 10 Cal.App.4th 1282, 1289 (1992).

Courts understand that where an opportunity exists to game the system and harass a party it will likely be exploited, and, thus, are careful to protect against it. This was observed in one of the first cases to apply the "apex" doctrine. In 1985, a class of plaintiffs sued for personal injuries from an alleged defective design in the fuel system of the 1975 Dodge van. Plaintiffs' counsel noticed the deposition of Lee Iacocca, then Chairman of the Board of Chrysler Corporation, claiming that statements Iacocca made in his recently published biography demonstrated that he had knowledge relevant to Chrysler's alleged liability and the plaintiffs should be allowed to depose him to explore such knowledge. The court granted Iacocca's motion for protective order preventing his deposition, noting: "the fact remains [Iacocca] is a singularly unique and important individual who can be easily subjected to unwarranted harassment and abuse. He has a right to be protected, and the courts have a duty to recognize his vulnerability." *Mulvey v. Chrysler Corp.*, 106 F.R.D. 364, 366 (D.R.I. 1985).

Some chairman and officers are obvious "apex" executives – such as Iacocca or, say, the late Steve Jobs. *See Affinity Labs of Texas v. Apple, Inc.*, 2011 U.S. Dist. LEXIS 53649 (N.D. Cal. 2011) (court denied plaintiff's attempt to depose Steve Jobs). However, most high level executives are not celebrities. They are not regularly quoted and their companies are not featured in the media. Yet, these less recognizable high-level executives responsible for running smaller to mid-size businesses are just as important to their companies as their high-profile counterparts, and equally vulnerable to harassment. Unfortunately, there is no clear definition of who qualifies for protection as an "apex" executive. Some factors that have been considered are job duties and the potential for business disruption, where the executive falls within the company's executive hierarchy (e.g., how many people report to the executive), and the likelihood of harassment.

The most important factor considered by courts in applying the "apex"

doctrine is whether the high-level executive has personal knowledge of relevant facts. Equally important is whether the information can be obtained through other less burdensome means, such as from a lower level executive or employee. When a CEO or other high-level executive lacks such personal knowledge, courts are inclined to deny their depositions.

However, the "apex" doctrine exists in tension with the otherwise broad allowance for discovery in litigation. *Apple Inc., supra.*, 282 F.R.D. at 263. Although a deposition notice directed at a high-level executive with no personal knowledge of the facts involved should result in the issuance of a protective order denying that executive's deposition – courts are likely to allow some manner of discovery. In the case involving Apple, the court simply denied the deposition of Steve Jobs outright. But, in the matter involving Chrysler, although the court denied the deposition of Iacocca it allowed plaintiffs to propound written interrogatories to him. This is a less intrusive means of discovery of a high-level executive courts have allowed. *See, e.g., Retail Brand Alliance, Inc. v. Factory Mut. Ins. Co.*, 2008 WL 622810, at \*6 (SD NY 2008). Likewise, rather than completely deny the deposition of a high-level executive, a court may limit the length or scope of the deposition to avoid harassment or undue burden. *Apple Inc. v. Samsung Electronics Co., Ltd.*, 282 F.R.D. 259, 265-67 (ND CA 2012) (allowing depositions of high-level officers, but limiting them to 2-3 hours each); *Scott v. Chipotle Mexican Grill, Inc.*, 306 F.R.D. 120, 124 (SD NY 2015) (limiting apex depositions to 4 hours).

From the outset of litigation or potential litigation, a company's counsel must be mindful that higher-level executives are vulnerable to a deposition – particularly as a form of abuse and to gain leverage. Counsel should investigate alternative means for providing an opposing party with potentially relevant information that a high-level executive may possess, and develop a record early on establishing the limits of the high-level executive's involvement, if any, and that such executive has no unique, personal knowledge of the relevant facts. It is important to utilize the "apex" doctrine to protect against harassment of high-level executives.

For more information on this subject, please contact Jacob Gonzales directly at 949.760.0204 or [jgonzales@weintraub.com](mailto:jgonzales@weintraub.com).

### Jacob C. Gonzales

Jacob 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.



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## COURT OF APPEALS RULES AGAINST FRANCHISE TAX BOARD (ANOTHER WIN FOR TAXPAYERS!)

The California Franchise Tax Board ("FTB") started 2017 with a setback as the Court of Appeals held in *Swart Enterprises, Inc. v Franchise Tax Board* that the FTB could not impose California's annual \$800 minimum franchise tax on an out-of-state corporation.

The Court found that because Swart's interest in the LLC was an investment interest and *Swart* had no ability or right to manage the affairs of the LLC, Swart's interest was not comparable to a general partnership interest.

### Background

The FTB stated that because Swart was a member of a California LLC, it was "doing business" in California, and demanded that Swart file a California tax return for the tax year ending June 30, 2010, and pay the \$800 minimum tax, penalties and interest. Swart paid the amounts and filed for a refund. When the refund was denied, Swart brought suit on the grounds that it was not subject to tax under *California Revenue & Taxation Code (R&TC) section 23153*, because it was not "doing business" in California and that the "doing business" standard applied by the FTB is an unconstitutional violation of the due process clauses of the U.S. and California constitutions.

Swart Enterprises, Inc. is a family owned corporation with headquarters in Iowa with no business activities or physical presence in California. Its sole connection to California was a \$50,000 investment it made in January 2007 in Cypress Equipment Fund XII, LLC, a manager-managed California LLC. Swart's investment represented an ownership interest in the fund of approximately 0.2%. The sole manager of the fund was a California corporation, with exclusive and complete authority in the management and control of the fund's business.

### Ruling

Per section 23101, doing business is defined as "actively engaging in any transaction for the purpose of financial or pecuniary gain or profit." However, the only "transaction" Swart entered into was its initial investment made in 2007.

In July 2014, the FTB issued its Legal Ruling 2104-01 that if an LLC doing business in California was classified as a partnership for tax purposes, ALL of its members were also deemed to be doing business in California even if the individual LLC member never stepped foot into California or performed any transactions in California. Contrast that with the situation of a limited partner which in a 1996 decision of *Amman & Schmid Finanz AG*, did not have the right to manage or conduct business of the limited partnership, and



therefore, would not be considered doing business in California merely because of its limited partner interest in a California Limited Partnership.

The Court of Appeals rejected the conclusion of the FTB and, focusing on the language of section 23101 requiring "actively engaging" in a transaction and following the rationale in *Amman & Schmid* concluded that Swart's purely passive investment did not

meet the standard for doing business in California. Among other factors considered by the Court in favor of Swart included the following:

- Swart has no interest in specific assets of the LLC;
- Swart has no liability for the obligations of the LLC;
- Swart has no right to participate in the management or control of the LLC; and
- Swart has no ability to act on behalf of or bind the LLC.

The Court of Appeal filed its decision on January 12 and the FTB may file a petition with the California Supreme Court for review within 40 days of that date. Non-resident taxpayers should discuss the *Swart Enterprises* decision with their tax advisors and consider whether to continue to pay the franchise tax during the pendency of the litigation and/or consider simultaneous protective refund claims of the tax.

### RJI

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### Fernando Jimenez, CPA, MST

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# Young People Create Business Start-Ups at Innovative Summer Camp — Concordia University’s Teen Entrepreneur & Kid Entrepreneur Academies



Business Plan Winning Team (from left) Katherine Wong, Beckman High; Tony Hsu, Woodbridge High; Natasha Takahashi, Woodbridge High and TEA Founder Stephen Christensen

Today’s rapidly changing global economy requires future business leaders who embrace change, foster innovation and think creatively. Businesses need fresh ideas, innovative solutions and visionary leaders who can make them happen. These leaders are entrepreneurs. America’s future is dependent upon the next generation of entrepreneurs, young people with new ideas, big dreams, and the tools and training necessary to realize them.

The purpose of the Teen Entrepreneur and Kid Entrepreneur Academies is to educate, train and empower this next generation of honorable entrepreneurs (TeenPreneurs and KidPreneurs), so that they become difference-makers who lead

productive, profitable and purposeful enterprises; and experience meaningful lives of integrity, serving others and making the world a better place.

Established in 2011, the **Teen Entrepreneur Academy (TEA)** is a hands-on, learn-by-doing, one-week residential business entrepreneurship start-up summer camp for high school students. It is held annually in July at Concordia University Irvine. TEA teaches high school students how to start their own new business, using real-world entrepreneurship, best business practices and the principles of free enterprise. The TeenPreneurs, working in groups of 3 to 4, work as entrepreneurs by preparing start-up business plans for their own real businesses. The



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team with the best start-up business plan wins \$1,500 in the annual business plan competition sponsored by Citi and held the last day of the summer camp academy.

“The Teen Entrepreneur Academy is about helping teenagers succeed in business, education and life,” explained TEA and KEA founder and Concordia’s School of Business dean, Stephen Christensen. “We are developing the entrepreneurial mindset in teens, a mindset of seeing problems as opportunities, looking for innovation, creativity, critical thinking, teamwork and problem-solving skills. This entrepreneurial mindset is key for future job creators and employers.”

The sixth annual TEA will be held July 23-29, 2017. Registration is now open. Participants can sign up online at [www.cui.edu/tea](http://www.cui.edu/tea).

The **Kid Entrepreneur Academy (KEA)** accomplishes these same educational business goals with hands-on curriculum for middle school students, grades 5, 6, 7 and 8. Building on the success of the teen program, the KEA is a summer day camp in July for kids interested in business. The 80 participants also develop the business skills that will make them smart, savvy and successful in all areas of their lives. The third annual KEA will be held from 8 a.m. to 4:30 p.m. on July 24-28. Information and registration can be found at [www.cui.edu/kea](http://www.cui.edu/kea).

Both Academies invite business experts, successful company presidents, entrepreneurs and distinguished business professors to serve as guest speakers. This interaction supplements the lesson plans, providing an extra dimension of real-world learning. Local business leaders are invited to serve as coaches and mentors, assisting students in preparing their business plans. If you are interested in being considered to participate in 2017, please email [stephen.christensen@cui.edu](mailto:stephen.christensen@cui.edu).



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**Keys to Entrepreneurial Success**

by David Krajanowski, Partner, SingerLewak LLP



**DAVID KRAJANOWSKI**

As an advisor to many companies, I leverage the past to push clients to think about their future.

In order to grow, one must look at the challenges. What are some common problems that hinder organic growth?

**Mission** – Clearly understood by management, the "WHY" must inspire as well as set forth the expectations to be achieved.

**Mastery** – Focus on what you are good at! Hire great for everything else.

**Marketing** – What is your differentiator in the marketplace and how can it be leveraged? This must be specific, not general, and clearly hit home with the recipient.

**Multiplier Factor** – Don't plan on 2-7% growth. Add a zero to the end and shoot for 20-70%. What would you have to do to make this happen?

Now is the time to develop strategies and build easily-learned skills. These, not luck, will set your course.

**Talent and Culture** – Get the right people. We have all heard about the right people on the bus in the right seats. What about leveraging the right people to maximize the performance of others? Clear the way to let your stars leverage the Team. One interesting fact is that productivity doubles with an engaged workforce (average engagement in a workforce is 28%). How engaged is your workforce?

**Strategy** – We have all seen the standard matrix with four quadrants (new products, existing products, new markets and existing markets). New products take cash, lots of it (research and development), as do new markets (people and contacts in a new area that understand the new market). Existing products and markets require a completely different strategy.

**Execution** – This is the bottom line, as everything else means nothing without this. How good are you at executing, assessing and adjusting on a daily basis? Is your organization open to transparent accountability so that it can become self-governing with performers, not talkers? Studies have shown that if you reduce the review interval, performance increases. Lastly, does your strategy for constant communication with your customers include the use of social media? If not, it should. Your competition is using it successfully!

**Growth through Acquisition** – How do I find targets if my desire to grow is through acquisition, as opposed to internal growth? Investment bankers are usually thought of when selling a company. However,

many specialize in helping acquirers find targets (so-called "buy-side representation"). What do you look for? What needs to happen in due diligence to find out the real value of a company? What are the pitfalls you have to be careful of? Most often, these pitfalls involve the integration of people, cultures, processes and systems. Operations are typically the main focus, but ignoring integration, the Achilles' heel of acquisitions, can be a painful and costly mistake.

**Financing Growth** – How will you finance growth? Standard lending may be secured, based on the strength of your company. Many times, asset based lending is the answer, as additional growth usually increases the noncash balance sheet accounts such as accounts receivable, inventory and fixed assets. Other financing arrangements may include mezzanine financing where debt can be subordinated and leveraged, though the cost of this source of funding will reflect the added risk a lender takes on. In addition, private equity arrangements may enable an owner(s) to take some money off the table and leverage other people's money to share the risk (but also the upside) especially if growth plans are very dynamic.

The bottom line, or should I say top line, will be the key to a company being successful in the future and differentiating themselves from the pack. Hopefully your plans will include an emphasis in this area.

*David Krajanowski is Partner at SingerLewak. David's expertise ranges from directing assurance services to advising clients on mergers and acquisitions, succession, financing, strategic planning, and other management issues.*

*He can be reached at dkrajanowski@singerlewak.com*

*To learn more about SingerLewak go to www.singerlewak.com.*



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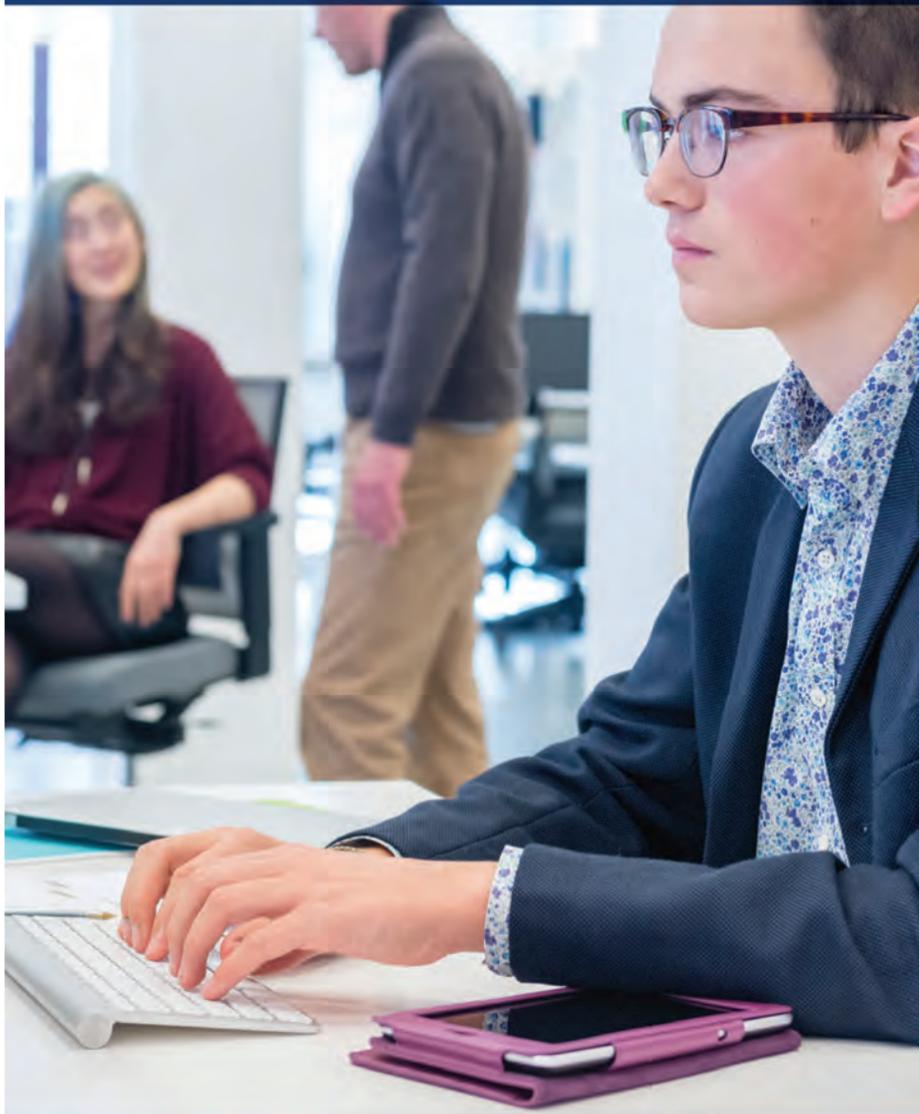
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# Help a future start-up get their start.



## Solving the Succession Puzzle: Tips to a Successful Transition for Your Business

One of the most significant risks to the future of any business is often overlooked: What will happen when the ownership or leadership changes? Unfortunately, many business owners put off succession planning—to the detriment of family, employees, and the business itself. According to the Family Business Institute, only 30% of family businesses pass successfully to the second generation. Still fewer—only 12%—survive to the third generation.

Much can happen without an effective, up-to-date succession plan. One recent example is a company that had an outdated buy-sell agreement when a majority shareholder unexpectedly died. The agreement provided for the deceased shareholder's estate to receive an amount that far exceeded the actual market value of the business, which had declined due to economic conditions. The company did not have sufficient liquidity to pay off the deceased shareholder's estate and it was required to obtain a business loan just to meet the obligation. Unfortunately, this scenario is not rare. According to a recent survey, 50% of business owners claim to have a succession plan, but only 16% have a discussed and documented succession plan in place.<sup>1</sup>



Jason Liu

Ensuring a successful transition for your business is a critical goal for any business owner and one that can be achieved with planning and communication. With the guidance of an experienced wealth strategist, you can begin to identify and clarify your objectives. Once these objectives have been articulated, the next step is to analyze the business' current situation and devise appropriate wealth-transfer strategies as each business structure poses unique tax, operational, and legal issues. A wealth strategist can also assist you in the following ways:

**Conversation from a "30 thousand foot view":** Owners are focused on the day-to-day of running their business. They've rarely ever transferred or sold a business. Wealth strategists regularly work with business owners who've gone through this process, and benefit from hearing the lessons that other owners have learned (some the hard way). The benefit of this accumulation of knowledge can assist business owner clients with taking this view and seeing both the good and the bad of what the owner will go through in their transition process.

**Assessment of Entity Agreements including buy-sells:** Buy-sell agreements and provisions should be reviewed to see if they align with the owners' objectives, making sure that all desired "triggering events" are covered, along with the terms of a buy-out, and whether it is mandatory or a right of first refusal. In addition, it is important to evaluate loan covenants to make sure that any proposed succession planning will not adversely affect any loan covenants for loans that will stay in place after the transition.

**Business Valuation Process:** A wealth strategists can help match business owner clients with valuation experts that can help both value the company with anticipation of a sale, as well as with anticipation of transition to family. The wealth strategist can help the client understand the process and understand what the valuation report really means.

Life is unpredictable. If you're passionate about your business, you should be equally passionate about protecting it in the event of your death or disability. While it may seem overwhelming, when you work with an experienced wealth strategist succession planning doesn't need to be daunting. Put a plan in place, and you can enjoy the peace of mind of knowing your business objectives will be addressed, both now and in the future.

For more information, contact Jason Liu, Union Bank Head of Wealth Planning at [Jason.Liu@unionbank.com](mailto:Jason.Liu@unionbank.com) or visit us at [unionbank.com/theprivatebank](http://unionbank.com/theprivatebank) to learn more about our wealth planning options.

The foregoing article is intended to provide general educational information about business succession planning and is not considered financial or tax advice from Union Bank. Wills, trusts, foundations and wealth planning strategies have legal, tax, accounting and other implications. Clients should consult a legal or tax adviser.

<sup>1</sup> <http://www.pwc.com/gx/en/pwc-family-business-survey/assets/family-business-survey-2014.pdf>



### Teen Entrepreneur Academy July 23-29, 2017

Help support aspiring high school entrepreneurs. Share your expertise and help inspire the next generation as a mentor or judge in the Teen Entrepreneur Academy (TEA) at Concordia University Irvine's School of Business. This one-week residential program offers teenagers real-world, hands-on training in what it takes to start a business. Learn more—visit [www.cui.edu/tea](http://www.cui.edu/tea), or email [stephen.christensen@cui.edu](mailto:stephen.christensen@cui.edu) or call 949.214.3198.



### Citi Business Plan Competition: Friday, July 29





## Entrepreneurship: It's All About Relationships

In a crowded and dynamic marketplace, will you have the ability to break through the noise to connect with your clients and prospects?

### Engage Clients for Better Results

Gaining personal access to clients puts entrepreneurs in a position to succeed. An effective tool used to build these personal relationships is the shared experience of live events. Bonding over shared affinities will allow you to identify key customer issues and discover opportunities that will ultimately further business partnerships.

### Experience Angels Baseball

Opened in 1966 and welcoming more than 3 million attendees annually, Angel Stadium is the preeminent entertainment venue in Orange County. Led by two-time American League MVP Mike Trout and nine-time All-Star Albert Pujols, each game presents an opportunity to see history made.

However, the Angels approach is about more than on-field play. The organization works with clients to provide a fantastic customer experience that creates business opportunities. When discussing



"The team goes out of their way to accommodate our needs and really delivers a first class experience."

**JOHN RATLIFF**  
CEO, Reata Holdings, Inc.

the benefits of her Angel Stadium Suite, Ann Page, Vice President of Client Relations for Priority Workforce mentions "It allows us to get in front of people that we would not have had the opportunity to meet elsewhere."

Appreciation of such experiences leads to tangible business results. John Ratliff, CEO & President of Reata Holdings adds "We know the suite is working when we have customers who go out of their way to do more business with us."

The Angels client-centered approach ultimately drives the customer experience. Ratliff continues: "I give a lot of credit to the Angels because the [team] goes out of their way to accommodate our needs and really deliver a first-class experience. That connection with the [team] really is one of the deciding factors in us continuing to do business with the Angels."

For more information regarding Angels Baseball corporate hospitality and premium experiences, please visit [www.angels.com/premium](http://www.angels.com/premium) or call 877.779.9961.

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# Expanding Opportunities for Women and Business

What type of American businesses combined exceed the GDP of Brazil, Canada and South Korea?

If you answered, "women-owned businesses in the United States," head to the front of the class. More than one-third of privately held businesses in the United States are owned by women, up from 28.8 percent in 2007, according to the U.S. Small Business Administration.

What makes the statistics noteworthy are the unique difficulties faced by female entrepreneurs when launching and running businesses. Besides non-gender-related hurdles of running a business, female business owners face unique challenges, including:

- 1. Funding** — On average, men start their businesses with nearly twice as much capital as women (\$135,000 vs. \$75,000), according to the National Women's Business Council.
- 2. Defying social expectations** — Despite the fact that women-owned new businesses are the fastest-growing of any sector in the nation, according to the SBA, there are still societal expectations — particularly in male-dominated industries — about women in business ownership roles.
- 3. Balancing business and family life** — Female entrepreneurs more than male adjust careers and experience more career interruptions due to family life, according to Pew Research Center data.

Despite challenges, today presents tremendous opportunities for women to start and run a business. Consider the following:

- 1. Rapid growth of women-owned minority businesses** — Fueling growth in women-owned businesses is an uptick in the number of businesses owned by minority women. For instance, from 1997 to 2015, the number of businesses



owned by African-American women grew by 322 percent, the fastest-growing group of entrepreneurs in the United States.

- 2. Considerable networking, development and mentorship opportunities** — Corresponding to rapid growth of women-owned businesses is an increase in the number of organizations dedicated to helping female entrepreneurs network, develop and find appropriate mentors. Since its start in 1989, Professional BusinessWomen of California (PBWC) has grown to more than 35,000 members worldwide.

Additionally, nearly every sizable community in California has business networking and development events specifically for female business owners.

- 3. Great government input and assistance** — A division of the SBA is dedicated to women-owned businesses, offering resources, special financing opportunities and Women's Business Centers (WBCs). There are a dozen different WBCs throughout California. For state assistance in California, the Governor's Office of Business and Economic Development (GO-Biz) helps start-up and ongoing businesses of all types.

Starting and maintaining a business can be challenging for any female entrepreneur. That's why having access to great resources is so important.



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Kevin Kinsey, Netro CEO

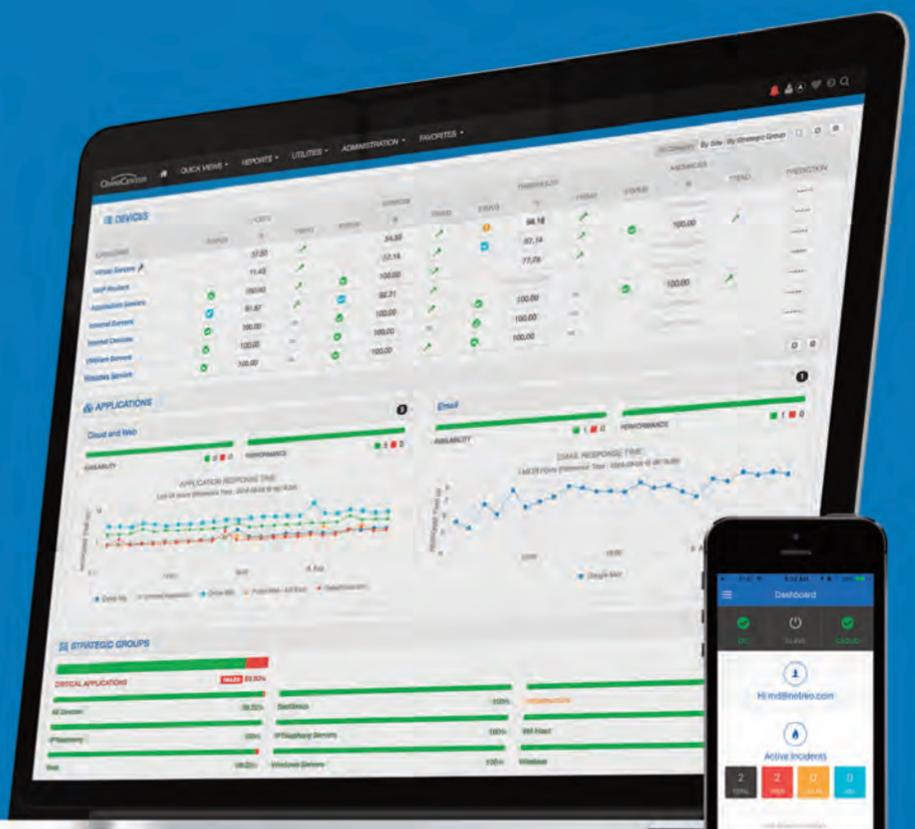
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## 2017 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

**Ad Exchange Group, Irvine***Peter Nguyen, CEO*

Peter Nguyen is the founder and CEO of Ad Exchange Group (AdEx) and brings 15+ years of professional experience in his role. He leads the strategic and financial decisions of the company. AdEx has redefined the digital advertising landscape by serving businesses that are increasingly demanding measurement and verifiable consumer actions as part of their digital advertising budgets. As a performance-based marketing company that drives consumer acquisition and sale of a product, as opposed to only raising awareness, AdEx has achieved \$100 million in annual revenue in just 20 months since its inception in April 2013. AdEx has grown from \$43.6 million in revenue and \$5.3 million in adjusted EBITDA in FY2014 to approximately \$92 million in revenue and \$8.7 million in adjusted EBITDA in FY2016. Last year, AdEx was recognized by *Orange County Business Journal* as being one of the "Best Places to Work" in Orange County and by the American Business Awards for the silver in marketing companies and the gold in the Stevie Awards for Great Employers.



company is highly regarded in the community for its commitment to social responsibility, in particular its longstanding work with Habitat for Humanity of Orange County, where Antis serves on the board of directors and his company has donated every roof installation of every Habitat for Humanity of Orange County home since 2009. A proponent and local thought-leader of corporate social responsibility, which follows the belief model of "doing well by doing good," Antis has partnered with and donated to more than 20 other local nonprofits, including Alzheimer's OC, Ronald McDonald House of Orange County, Boy Scouts of America, Families Forward, Boys & Girls Club, and Pediatric Cancer Research Foundation.

**Advanced ICU Care, Irvine***Lou Silverman, Chairman/CEO*

Under Lou Silverman's leadership, Advanced ICU Care has doubled the number of partner hospitals in just under three years and established itself as the leader in the high acuity telehealth industry. In providing services to nearly 60,000 ICU patients in 22 states during 2016, Advanced ICU Care would stand as one of the nation's 20 largest hospitals in terms of patient volume. The company achieved a 34% reduction in mortality rate, 38% shortened average ICU stay, and consistently delivers 2-6x ROI. Advanced ICU Care is a technology-enabled clinical services company, utilizing state-of-the-art software built to serve multiple hospitals. The company seamlessly integrates its clinical staff across three countries, six time zones and eight tele-care centers on a 24x7 basis to care for patients in the nearly 1,000 beds it monitors nationally. As a company built on the premise of clinicians collaborating with clinicians, the company has achieved a CAGR of approximately 25% since inception and has delivered tangible healthcare reform to its patients and clients.

**Apriem Advisors, Irvine***Harmon Kong, Chief Wealth Manager/Founding Principal*

Harmon Kong co-founded Apriem Advisors (previously Iwamoto Kong Wealth Management Group) with Mark Iwamoto, MBA, in 1998 with a vision of creating a family environment where wealth managers work with clients to pursue their own unique version of wealth, happiness and purpose. Under Kong's leadership, the Irvine-based independent, registered investment advisory firm has more than \$500 million in assets under management and works with more than 350 families across Southern California. The firm has seen a 20% year-over-year gain in assets under management, achieved without M&A activity. True to its Latin-based namesake, Apriem (meaning: to the highest degree), the firm strives to provide clients with the highest degree of service while handling all facets of their finances, helping them reach financial security and freedom. Apriem also specializes in the emerging class of female investors, offering Women of Wisdom (WOW) educational events for Orange County's high-net-worth population. Another important segment for Apriem's growth is the oil and gas sector, known as its Refinery Retiree Practice. Apriem is also part of the Charles Schwab Advisor Network (SAN).

**Austin Taylor Inc., Irvine***Ron Viggiano, President*

With more than 29 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 area. Austin Taylor has been featured on many television pieces, including ABC's *Extreme Makeover*, Fine Living Channel, and Wealth TV. The company has also been profiled in *OC Register*, *OC Business Journal* and *944 Magazine*.

**AIVITA Biomedical, Irvine***Dr. Hans Keirstead, CEO*

Dr. Hans Keirstead founded AIVITA Biomedical Inc. and serves as chairman and CEO. Keirstead is a stem cell expert and serial entrepreneur who has led therapy development for late stage cancers, immune disorders, motor neuron diseases, spinal cord injury and retinal diseases. AIVITA Biomedical, a therapeutic development company focused on regenerative and curative medicines, recently announced that the U.S. Food and Drug Administration approved the company's Investigational New Drug application to begin a Phase II clinical study. The study will investigate the efficacy of AIVITA's novel immunotherapy in patients with ovarian cancer, an indication with a high unmet medical need. AIVITA has signed an agreement with a renowned hospital to conduct a Phase II clinical trial. AIVITA has also launched PROVOQUE™ Facial Serum, a patented stem-cell-derived formula that helps address the visible signs of skin aging.

**B. toffee LLC, Newport Beach***Betsy Thagard, Founder*

Since B. toffee's inception in 2009, the treat has caused quite a stir in the candy confection world. With a dedicated following and growing customer base, Betsy Thagard has turned her passion into a profitable business. Solely by word of mouth, B. toffee has experienced consistent growth since the company was founded and is on track to continue the growth in 2017. Sales in 2016 continue to surpass years previous, with a 40% overall increase from 2015. An award-winning handcrafted toffee, B. toffee's "crunchy perfection of sweetness" offers the ultimate indulgence. Thagard spent years of experimenting to create the perfect toffee. B. toffee received top gold honors for "Top Toffee" and "Best Packaging" by the Taste Awards in San Francisco, and has also been awarded the "Official Toffee" at the Golden Foodie Awards. B. toffee can be found in many high-end specialty markets both locally and nationwide, including Dean & Deluca; Whole Foods; Bristol Farms; and at several luxury resorts, like Bacara Resort & Spa in Santa Barbara.

**All Green Electronics Recycling, Tustin***Arman Sadeghi, CEO*

Arman Sadeghi is a serial entrepreneur who has started a number of successful companies in the last 20 years. He is most widely known as founder and CEO of All Green Electronics Recycling, which was recently named the 366th fastest-growing company in the U.S. by *Inc. magazine*. He is also currently the principal and CEO of Titanium Success Inc., a peak performance and coaching company, which was started only one year ago, but has seen incredible exponential growth. Being a presenter at a TEDX Conference gave him a taste of life as a public speaker. He is now known as one of the top keynote speakers for corporate markets that want their executives to holistically live with maximum efficiency and achieve more results. Sadeghi teaches skills in the three key areas of business/entrepreneurship, finance, fitness and relationships to create change not in months or years, but in a matter of hours. All Green Electronics Recycling is a global leader in secure e-waste recycling, hard drive destruction, IT asset disposition, remarketing, computer equipment refurbishing and asset recovery.

**Bagxi, Rancho Santa Margarita***Ben Farr, CEO/Founder*

It all started out of a deep and longing love for backpacks. In 2005, Bagxi Founder Ben Farr realized he needed something more than a simple pocket on his back to manage his way through Chicago and his college journey. Farr figured that if he was going to cover so much real estate on his body with a backpack, he wanted it to be functional and fashionable. Over the next decade, Farr would discover the beautiful world of backpacks. He eventually realized that it was a lot of work to find a bag that fit his own personality. Thus, the idea for Bagxi was born – a vision to provide the best selection of independent backpacks on the web, so people could find one that expressed their individuality. Bagxi now offers a

**Antis Roofing & Waterproofing, Irvine***Charles Antis, Founder/CEO*

Antis Roofing & Waterproofing was founded in 1989 by Charles Antis. From the beginning, Antis has worked exclusively in the HOA and multi-tenant family housing market in Orange, Los Angeles and San Bernardino counties, providing roofing, decking and maintenance solutions for more than 1,000 communities. The



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wide variety of backpacks from mostly independent designers to give customers the best selection possible.

**Bel-Air Machining, Santa Ana**

*Ali Ossaily, President/Owner*

Ali Ossaily has more than tripled the revenue of not one, but two companies since 2006. After emigrating from Lebanon in 1998 and taking an entry-level job as a machinist at an Orange County manufacturing company, Ossaily worked his way up to director of operations in just eight years. Over the next eight years, Ossaily directed the company on an entirely new path, raising revenues from \$3 million to more than \$10 million. He then set out on his own, purchasing Bel-Air Machining at the end of 2014. Once again, he took the company in a new direction and, in just two short years, tripled revenue. Creating a family atmosphere, getting every single employee to believe in the importance of Bel-Air's work, and never saying "no" to a tough job has become the key to the company's success under Ossaily's leadership. Bel-Air Machining is a full-service custom manufacturer offering comprehensive services to the medical, aerospace, automotive, military defense, and other industrial and technology-related industries.

**Below Invoice, Laguna Hills**

*Cole McKeon, President/CEO*

Below Invoice Founder and President Cole McKeon is shaking up the automotive industry by changing the way people shop for cars. His independent automotive brokerage has helped thousands of customers save tens of thousands of dollars on new vehicles. He founded the company in Jan. 2014 with the mission of revolutionizing the car buying experience from start to finish. From everyday cars to exotics, Below Invoice provides its customers with a true concierge experience by streamlining every step of the vehicle acquisition process – including locating, negotiating, financing and delivering the vehicle. Whether the vehicle is in California or New York, McKeon's established relationships with premier dealerships across the nation allow him to secure any car, in any state. His company's competitive pricing and no-hassle experience has attracted customers from across the nation. A true concierge experience, Below Invoice customers have the luxury of never setting foot in the dealership. In 2016, Below Invoice expanded into the exotic automotive market and grew to offer a variety of aftermarket services, including window tinting, powder coating and paint protection products.

**Beyond Fifteen Communications Inc., Newport Beach**

*Lauren Ellermeyer, Co-Founder/President*

Lauren Ellermeyer is more than an accomplished public relations specialist. She's a forward-thinking entrepreneur with a passion for all things business, with a priority on steering growth and success for her clients. Ellermeyer, who sits on some of Orange County's most prominent boards, including Tech Coast Venture Network and American Family Housing, is no stranger to today's evolving marketplace and its impact on optimistic startups and mega corporations. From high tech to higher education, Ellermeyer's wide range of expertise and relationships across multiple verticals keeps her steps ahead of her clients' immediate and future needs – no matter their size. Prior to co-founding Beyond Fifteen Communications, Ellermeyer owned and operated BCN Events, and also served as an account manager at an Orange County-based agency where she built client brand recognition through national media exposure. Due in large part to Ellermeyer's leadership, Beyond Fifteen Communications ranked as #11 on the *Orange County Business Journal's* "Public Relations Firms List" in the annual Book of Lists.

**Bioniz Therapeutics Inc., Irvine**

*Nazli Azimi, Founder/President/CEO*

Drug development is a formidable endeavor, taking approximately 10 years and costing about \$1 billion to commercialize a drug. Many people would shrink away from such a daunting task, but for Dr. Nazli Azimi, there was no other option but just to do that. Azimi was a recognized scientist at the prestigious National Institutes of Health when she and a colleague discovered a novel, paradigm-shifting technology to develop therapeutic drugs that cost less, are more efficacious and have less toxicity. When asked why she left her comfortable academic job to become a bio-pharma entrepreneur, Azimi replied that she was compelled to do so knowing the significant impact this technology would have on people's lives. Azimi founded Bioniz Therapeutics, a biopharmaceutical company in 2010, in a small laboratory in Lake Forest.

**BioNutritional Research Group Inc., Irvine**

*Kevin Lawrence, CEO/President/Chairman of the Board of Directors*

Kevin Lawrence founded BioNutritional Research Group (BNRG) in 1996. With

more than a decade spent formulating sports nutrition products, Lawrence put his advanced knowledge of protein nutrition to the ultimate test when he faced the life shattering dilemma of a critically ill son. When his son was unable to digest the proteins in infant formula, Lawrence designed a hydrolyzed whey formula that became the solution to his son's condition. In the process, a light bulb went off about the potential for a product that would be beneficial for others as well, thus BNRG was formed. Recognizing the value of this protein supplement, Lawrence personally invested his time and money to develop this product for mass consumption. This hydrolyzed whey formula employed to restore the health of his son is found in every Power Crunch product today. Power Crunch, the Einstein of Protein, includes an innovative line of protein bars, powders and ready-to-drink shakes that eliminates the guesswork in healthy eating. The company's exponential success is founded on its cutting-edge protein technology.

**Bonakdar Institute, Corona del Mar**

*Monica Bonakdar, MD, Physician/Owner*

As a physician, Monica Bonakdar's goal is to be an early adopter and an expert of new and safe technologies in the aesthetic arena, and to provide clients ongoing correction, maintenance and preventative aesthetic treatments. Through dedicating her entire practice to cosmetic dermatology and letting go of general medicine and general dermatology, the depth of Bonakdar's experience surpasses many of her colleagues. Bonakdar does approximately 40,000 units of Botox and 1,000 syringes of fillers every year. She has also developed an exclusive non-invasive face lifting and neck lifting filler technique, called AmpliPhi, with results unlike any other treatment. Bonakdar's success is due to her unrelenting determination and drive to achieve her goals; she has never let society's expectations of a woman from a third world country dictate what she settles for.

**Brower, Miller & Cole, Newport Beach**

*Judy Brower Fancher, CEO*

Judy Brower Fancher has led Brower, Miller & Cole, one of Orange County's top national public relations, content and marketing firms, to excellence through more than two decades. With offices in Newport Beach, Los Angeles and Brooklyn, NY, Brower, Miller & Cole is recognized throughout the country for its smart approach, excellent implementation and outstanding client service. As a result, the firm maintains a majority of its client relationships for a decade and more. Brower, Miller & Cole specializes in commercial real estate, finance and healthcare. Beyond her work in building the firm, Fancher serves as a vice chair for the Urban Land Institute Council; has been a president of the Orange County Press Club; and a guest lecturer for UC Irvine, CSUF and Concordia.

**Business Communications Solutions, Irvine**

*Sunny Rajab, CEO*

Sunny Rajab's career trajectory has been anything but devoid of difficulties. From the beginning, she has had the odds stacked against her. Rajab, a young woman barely out of high school, started a business in a predominately male industry. Fast forward to today, and her steadfast nature has led her to be the CEO of one of Orange County's top VOIP and IT service providers, Business Communications Solutions (BCS). Her experience, passion and natural inclination to business has helped BCS become recognized at the forefront of the industry. Providing businesses with a singular place to find all of their technology and communication needs was the founding principle behind Rajab's vision for BCS. Her ability to strategically adopt innovative technology to suit the evolving needs of BCS's client base, while concurrently practicing lean fiscal decision-making, has secured the company's year-over-year increases. Through Rajab's humility and dedication to life-long learning, she has amassed a multitude of professional awards and achievements.

**CGS Business Solutions, Mission Viejo**

*Nick Chavis, Managing Principal*

Nick Chavis is managing principal and founder of CGS Business Solutions, a IT professional services company. CGS specializes in information security, software development, infrastructure and engineering. The company is celebrating its seventh year anniversary and its fourth year on the *Orange County Business Journal's* "Fastest-Growing Companies List." Chavis, a member of the North Carolina Lumbee Indian Tribe, is a certified minority business owner specializing in IT business solutions and consulting services. For the last 19 years, he has been serving some of Orange County's largest corporations. He is also a guest lecturer at his alma mater, California State University Fullerton, where he has advised both undergrad and graduate business students on being an entrepreneur and career growth strategies.



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**ChromaDex, Irvine**

*Frank Jaksch, Founder/CEO*

Frank L. Jaksch Jr. co-founded ChromaDex® Inc. in 1999, brought the company public in 2008, listed the company on NASDAQ in April 2016 and serves as CEO. Under his leadership, ChromaDex has focused on developing a comprehensive natural products chemistry business, expanded into international markets and built an impressive roster of Fortune 500 customers. ChromaDex (NASDAQ: CDXC) has grown into a multifaceted company providing the natural product fine chemicals, analytical testing services and unique platform of novel ingredient technologies for the nutritional supplement, food, beverage, cosmetic and pharmaceutical industries.



acts as a partner with many years of experience managing a large plastic surgery office, allowing deep conversations with surgeons that were quite different than what they were used to. The firm's growth has come from the marked contrast between this approach and its competitors with very little front- or back-office knowledge. Harvey recently finished a term on the board of directors for the Irvine Chamber, where he was received the first back-to-back "Ambassador of the Year" award in the Chamber's history. Cosmetic Funnels is also proud to support Operation Homefront and does pro bono work for StartOut.

**Corent Technology, Aliso Viejo**

*Feyzi Fatehi, CEO*

Feyzi Fatehi is a technology visionary, inventor, innovator and entrepreneur. As a Silicon Valley veteran, he is a pioneer in the SaaS and Cloud industry, and serves as the CEO of Corent Technology – the recipient of the "Outstanding Cloud and SaaS Platform Award" and the cover story of *Cloud Tech Insights* Jan. 2017 issue, recognizing the top 10 Cloud Management Solutions. Corent Technology provides a software platform for software as a service (SaaS) transformation and service delivery. Fatehi has studied at Cambridge, Princeton, UT Austin and UCLA, and has given talks at Harvard Business School, Wharton, Stanford, as well as at industry events around the globe. As an avid supporter of education, he serves as an advisor to the UCLA Anderson School of Management, UCI Henry Samueli School of Engineering Leadership Council, and Beall Center for Innovation and Entrepreneurship.



**CrowdStrike, Irvine**

*George Kurtz, Co-Founder/CEO*

George Kurtz is an internationally recognized security expert, author, entrepreneur and speaker. He has more than 22 years of experience in the security space, including extensive experience driving revenue growth and scaling small and large organizations. His entrepreneurial background and ability to commercialize nascent technologies has enabled him to drive innovation throughout his career by identifying market trends and correlating them with customer feedback, resulting in rapid growth for the businesses he has run. He is the co-founder and CEO of CrowdStrike, one of the fastest-growing and most reputable brands in the security industry. In just five years, Kurtz has taken the company from inception to becoming the first and last line of defense for the world's leading businesses and public sector organizations. Its technology is deployed in 176 countries, it registers triple-digit growth every year, and in 2016 it gained international acclaim for its groundbreaking involvement in the most consequential cyber breach case of all time – the Russian hack into the DNC.



**Cosmetic Funnels, Laguna Niguel**

*Scott Harvey, President*

Scott Harvey spun off Cosmetic Funnels, a marketing company focused on the plastic surgery industry, in 2015. Its parent company was founded in 2008, growing slowly but steadily through the years. Harvey finally started to practice what he preached to clients with the new agency – a ruthless focus on one area of specialty. For clients, Cosmetic Funnels



**Cytellix, Aliso Viejo**

*Martha Daniel, Founder/President/CEO*

Recognizing the global risks associated with an increasing networked world, Martha Daniel confidently leveraged her respected company, Information Management Resources Inc. (IMRI), in supporting \$300+ million in data center operations with 4 million users and 2,800 applications to establish IMRI's innovative cyber security division: Cytellix. Cytellix has the only solution in the industry that can detect known and "unknown" threats in any enterprise environment, while providing



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complete network visibility and system compatibility. It analyzes the traffic and behavior of millions of IP addresses for organizations of every size in a wide range of data-rich industries including government, manufacturing, finance, banking, law, higher education and healthcare – with a focus on small- and mid-size businesses. With solutions that have protected more than 7 million devices thus far, Cytellix provides small- and mid-size businesses with best-in-class, real-time network scanning technology. This step is an unprecedented move that will now offer many businesses and organizations access to the kind of high-level cyber security that only Daniel and her team of dedicated professionals can provide.

**DBaC Inc., Newport Beach**

*John Curci, President*

DBaC Inc. is a general contractor with an exclusive focus on commercial interiors. The company was founded in 1991 with three goals in mind: to develop and maintain the trust of clients, to deliver a final product that goes beyond clients' expectations and to finish every job within budget and on time. DBaC Inc. has been an industry leader for decades and has worked with some of the largest landlords and tenants in Orange County. As president, John Curci is most proud of the team culture he has created at DBaC and the loyalty it instills. By the end of 2017 – out of the company's 30 employees – 10 have been with the company for 20 years or longer; and of the remaining 20 employees, another eight have been with DBaC for more than a decade. DBaC has been nominated six times for the prestigious CREW "Tenant Improvement of the Year" award and has garnered other industry accolades.

**Devise Interactive, Santa Ana**

*Dalip Jaggi, Principal*

Dalip Jaggi has been recognized as a young entrepreneur who is always looking to do more and do better. At the age of 25, he is the founder of the digital marketing agency, Devise Interactive, and hosting company, Hostannual.com. He is also the director of technology for one of Orange County's hottest startups, Eva Smart Shower – a smart shower that will help you save water while you shower. Away from his different ventures, Jaggi stays very active in his community. He founded and is the co-executive chair at a local nonprofit, Forge54, a 54-hour hackathon weekend to give a marketing makeover for a nonprofit in need. Recently, Devise Interactive has accepted clients such as, Logitech, AT&T, Pirelli, Tapatio and many more.

**Dr. Marissa Inc., Seal Beach**

*Dr. Marissa Pei, CEO*

Dr. Marissa Pei is a media personality on radio and TV with a message of hope and happiness. Her successful talk radio show, *Take My Advice, I'm Not Using It: Get Balanced with Dr. Marissa* has more than 250,000 listeners in 100+ countries in under five years, and is already syndicated on CNBC News Radio and iHeart Radio. Guests have included best-selling author Marianne Williamson; MaryAnn from Gilligan's Island; Laila Ali, daughter of Muhammed Ali; Gloria Allred; and Fran Drescher. Pei's show is a cross between NPR, *Entertainment Tonight* and PBS. Her work in companies as an executive coach and strategic planning consultant continue the positive message of how to bring companies back to more joy and less stress.

**Enterprise Counsel Group, Irvine**

*David Robinson, Founder/President/Senior Shareholder*

Enterprise Counsel Group (ECG) was incorporated in 1999, but it was truly "born" several years later when David Robinson left Jones Day and started the business that later would become known as ECG. Through superior service and rapid adoption of technological advances, ECG has since grown to be the law firm of choice for discerning consumers of high-end legal services. ECG represents a wide array of clients, including other attorneys, law firms, judges, doctors, hospitals, medical groups, corporate CEOs, real estate developers, manufacturers, medical device and aerospace businesses, cities and other governmental agencies, etc. ECG offers representation in the courtroom and boardroom, including a wide array of transactional, regulatory, appellate and estate planning services. ECG also offers "scalable" cost-effective solutions for many specialty services, including tax advice, complex merger and acquisition negotiations, and governmental relations.

**Ever-Pretty, Irvine**

*Anna Shi, CEO*

Ever-Pretty is a retailer for prom, resort, party dresses and more. Anna Shi built her own factory in China to control and improve the quality of her products, while offering more affordable prices. After seven years of doing business internationally, Shi expanded Ever-Pretty to the United States in 2011, and continues to provide high-quality, affordable



dresses for every occasion worldwide. In 2012, Shi earned a spot on Alibaba's "Top 10 Global Net Entrepreneurs List."

**Franklin Data, Newport Beach**

*Matthew Blake, President/CEO*

Under Matthew Blake's leadership, Franklin Data has attracted and assisted some of the largest companies in the world on some of the most notorious headline investigations involving sensitive and high-stakes corporate data. Blake's clients include Fortune 500 companies, leading law firms and small to medium businesses. Blake founded the company in 2000 and has grown it to more than 12 offices in the U.S. Over the past few years, Blake has focused on cybersecurity and launched a monthly managed cybersecurity offering – an affordable way to help small to medium businesses contend with the digital risks of a breach, ransomware and network attacks. He has designed the managed security service to remedy an attack or breach within 15 seconds.

**Full-Blown Events, Anaheim**

*Dave Judy, CEO*

*Peter Twill, COO*

Full-Blown Events (FBE) is a full-service creative and production group. The company provides innovative and cost-effective solutions to clients who value the power of live events. FBE Founders Peter Twill and Dave Judy bring more than 40 years of combined experience in production management and technical implementation to every project, with experience that spans across such industries as automotive, music and entertainment, pharmaceuticals and real estate. Judy began his career more than 25 years ago as a broadcast cameraman and cinematographer and quickly moved into producing commercials, broadcast television and music videos through his own production company. After numerous Telly, ACE, Communicator Awards, and an Emmy nomination, Judy turned his attention to corporate events. Twill grew up fascinated by the edit systems and cameras sold by his father's video equipment company. With technology in the blood, Twill has continued to stay on the cutting-edge of video design and integration.

**GlobeChat, San Juan Capistrano**

*Kevin Strom, CEO*

Founder Kevin Strom has traveled to 60 countries and has always been frustrated with the barriers and limitations of communication. In the age of constant advancements in technology, no solution existed to easily and effectively break the language barrier. In May 2011, he diagrammed the concept of what would become GlobeChat as a means to remove the language barrier, allowing people to instantly connect with anyone, anywhere the world. GlobeChat enables people to communicate with others anywhere in the world with video, photos, text, voice-to-text and audio files on Android, Apple and Windows mobile devices, as well as tablets, laptops and desktops. The platform translates languages real-time within private one-to-one, private group, as well as public chat environments – allowing for seamless interaction. Each person receives messages in their native language regardless of the language of the sender. GlobeChat is now in 130 countries with 33% user growth monthly.

**good culture LLC, Irvine**

*Jesse Merrill, Co-Founder/CEO*

Jesse Merrill is the co-founder and CEO of good culture. Merrill had a vision to bring excitement back to the stagnant cottage cheese category. He believed that cottage cheese was an overlooked superfood that ticked all the right boxes in terms of what today's consumer is looking for in a healthy snack. Merrill made it his mission to develop a super-premium, thicker/creamier, cottage cheese product that disrupted the category with flavor, packaging, texture and ingredient innovation. good culture was launched in Aug. 2015 into 55 Whole Foods Market stores and 230 Sprouts stores. Consumer response to the product has been fantastic and good culture can now be found in more than 1,500 stores nationwide. Revenues are also up over 10 times versus the prior year. good culture partnered with General Mills in March 2016 and has aggressive plans to expand distribution in 2017 and beyond.

**Guaranteed Rate, Irvine**

*Ben Anderson, Branch Manager/VP of Mortgage Lending*

Guaranteed Rate is the eighth largest retail mortgage lender in the U.S. due to the company's low rates, innovative technology, unparalleled processing and unmatched support. Licensed in all 50 states, Guaranteed Rate is rated A+ with the Better Business Bureau, has a 96% customer satisfaction rating and funded \$12.4 billion in home loans in 2014 alone. Ben



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Anderson has 11 years of mortgage lending experience and has been a nationally verified top originator year after year. According to Scotsman Guide, Anderson was ranked #21 nationally in mortgage lending volume in 2012, #10 in 2013 and #17 in 2014. Anderson's total closed sales for both home purchase and refinances exceed more than \$750 million over the past four years with more than 1,800 closed mortgages.

**H. Hendy Associates, Newport Beach**

*Heidi Hendy, Founding Principal*

Recognizing the opportunity in an emerging industry, Heidi Hendy, CID, LEED AP launched H. Hendy Associates in 1979 to drive innovation in the field of interior architecture and planning. Her entrepreneurship is founded in her love of art, architecture and business, and knowledge that design influences human behavior in the workspace. With 38 years of experience in Orange County, Hendy is a leader enhancing industry standards for design and planning. H. Hendy Associates' roster of Orange County workplaces includes: TRI Pointe Group, Monster Energy, Squar Milner, Goodman Birtcher, Mark IV, Yokohama Tires Corp., Kawasaki and OluKai. With this caliber of clientele in a county recognized nationwide as a leader in real estate, Hendy is a force driving innovation and productivity through workplace design. As a result, her company has been recognized as one of the best places to work multiple times. Hendy's passion reaches even further as she strives to grow and empower her staff and industry up-and-comers, sharing best practices and knowledge while inspiring enthusiasm for the craft in others.



**Healthcare Talent and Workforce Solutions Group, Foothill Ranch**

*Pamela Jung, CEO*

Pamela Jung created Workforce Solutions Group (WSG) in 2001 with a primary focus on direct hire placement across all business sectors. A few years later, in response to the high demand for healthcare employees, she created HealthCare (HCT) as a separate brand dedicated exclusively to the healthcare market. HCT operates as its own entity under the WSG group of companies. Jung's story has been filled with challenges ranging from workforce reductions and revenue loss; to successes, such as making a fastest-growing company list; to personal triumphs of creating a scholarship. Healthcare Talent and Workforce Solutions Group experienced tremendous growth from 2001 to 2007. Then, the economy took a downturn. Jung cut operating expenses, re-organized loans with banks and was forced to survive on a cash-only basis. In order to turn the company around, Jung focused primarily in the healthcare market as she felt it was recession proof. Her strategy worked as the company has grown to over \$30.5 million with 60+ employees and offices in OC, LA and Northern California.



**Hughes Marino, Irvine**

*Tucker Hughes, Managing Director*

Tucker Hughes is managing director of Hughes Marino, a nationally recognized California-based commercial real estate company that exclusively represents corporate tenants and buyers in lease and purchase transactions. Hughes leads the firm's Orange County and Los Angeles offices and is a key member of the brokerage team, advising clients throughout the region on real estate strategies to help them achieve their corporate objectives. After fast-tracking four years of his education and graduating from University of San Diego magna cum laude with a Bachelor of Business Administration at the age of 19, Hughes then went on to be the youngest ever graduate of University of San Diego's respected Master of Science in Real Estate program, which he finished at the age of 20. When Hughes received his broker's license, he was one of the youngest ever licensed in the state of California. Having been featured in publications such as *Entrepreneur*, *Business Insider* and *Fortune*, Hughes has become a go-to expert for executives evaluating all kinds of real estate opportunities and challenges.



**Idea Hall, Costa Mesa**

*Rebecca Hall, CEO*

Rebecca Hall is a proven trailblazer. In 2003, she founded a hybrid PR/marketing agency at a time when each discipline of the marketing mix was highly siloed. This vision for an integrated agency proved to be the catalyst for the cutting-edge force that Idea Hall is today. Hall also demonstrated unwavering leadership as she shepherded her agency – built on commercial real estate and financial services clientele – through one of toughest economies in recent history with the 2008 Great Recession. She remains one of the first female heads of an agency, and perhaps the most successful female marketing and PR entrepreneur in Orange County. She attributes her success to staying three steps ahead of the industry, the CRE category, and boardroom demographics. Today, Idea Hall is one of the fastest-growing and sought-after integrated marketing agencies in Orange County, ranked #2 by the *Orange County Business Journal's* "Best PR Firms List"



in 2015 and 2016. Idea Hall's clients include Irvine Co., Visit Anaheim, Swinerton, Bixby Land, StorQuest, Buchanan Street Partners, R.D. Olson and more.

**Illuminate Education, Irvine**

*Lane Rankin, Founder/CEO/President*

Lane Rankin is driven by his passion for helping students and educators who use his products. While Illuminate Education has flourished, Rankin's definition of success is not about the bottom line. Rather, success is helping all clients get as much as they can from the products so that the company truly can change the world. This requires a goal of never losing a client – Illuminate has maintained a 99.3% client retention rate. Illuminate Education is an education technology (EdTech) company unlike any that the world has ever seen. Using "Big Data" and the unique merging of platforms, the company is able to help educators and administrators make sound, data-based decisions that enhance education and improve student-teacher experiences. Rankin's innovative approach to disrupt the American education system has been enormously successful. With 49 million students in the nation, he already has 5 million kids in 38 states in the Illuminate Education pipeline. Recent awards for the company include 2016 "Top Work Places - Orange County, Mid-Sized Companies" and the 2016 "CODiE Award - Best K-20 Data Solution."



**Inspired Art Wine, Costa Mesa**

*Karen Nguyen, Founder/CEO*

Inspired Art Wine opened its doors on Feb. 18, 2016, and in that time, the art studio wine bar has consistently gained five-star reviews from customers and corporations on Yelp, TripAdvisor and Google Business. With ticket sales seeing double-digit growth month after month, Inspired Art Wine's corporate clients include Google, Starbucks, Hyundai, Deloitte, Ernst and Young, and Starwood Hotels among others. Karen Nguyen's leadership extends beyond closing deals with corporations. One of the core principles at the company is to instill a sense of community service, which led to the partnerships with nonprofits such as Segerstrom Center for the Arts, UC Irvine, Rooster's Foundation and ASPCA. Through the "Paint for Cause" initiative, Nguyen donates proceeds of private events to nonprofits such as the Operation Gift a Smile, the Abalone Project and the Rooster's Foundation.



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## 2017 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

**Janeane Bernstein, Irvine***Janeane Bernstein, Host/Producer*

Janeane Bernstein is a writer, freelance reporter, producer and host of *Get the FUNK Out!*, a weekly show on KUCI 88.9, located on UC Irvine's campus. Her radio show features stories of inspiration and change, and how people deal with the crazy "funks" of life. She has interviewed hundreds of locals guests, as well as guests who call in nationally and internationally. She has been featured in *OC Family*, *Coast Magazine*, *Forbes.com*, *OC Register* and other local publications. Before she started her current public affairs show, she hosted and produced a music show called, *Momz Rock the House*. She loves interviewing guests who inspire her, as well as her listeners. Bernstein has also produced and hosted numerous events throughout Orange County and Los Angeles.

**Joseph Co. International Inc., Irvine***Mitchell J. Joseph, CEO/Chairman*

Mitchell J. Joseph is the founder of the Joseph Co. International, and is the fourth generation of the Joseph family in the beverage industry, dating back to 1921 with the bottling and distribution of Dad's Old Fashion Root Beer and Squirt. Educated at Ohio State and Youngstown State University, Joseph has spent the last 25 years pioneering the Chill-Can® project. Joseph's expertise in sales, marketing, public relations, licensing and finance have led to the Joseph Co. International being recognized globally for the technological advancement behind the self-chilling beverage can. Residually, many non self-chilling products and packaging solutions that exist in the market today came as a result of the research and development completed by Joseph and the team of engineers at the Joseph Co. International.

**Kush Bottles, Santa Ana***Nicholas Kovacevich, Co-Founder/CEO*

Nick Kovacevich founded and has grown Kush Bottles into the nation's largest and most-respected distributor of specific medical packaging, supplies and accessories. Kush Bottles is an *INC. 5000* fastest-growing company, and has been featured in numerous media stories, including in the *Los Angeles Times*, *OC Register*, *CNBC* and *TheStreet.com*. Kush Bottles recently made the transition from a privately held to a publicly traded company, and is now fully reporting to the SEC. In addition to leading the company to record-breaking revenues and successfully making the transition from a privately held to a publicly traded company, Kovacevich also spearheaded the custom packaging initiative, which allows customers to turn their packaging into marketing pieces. Kovacevich also moved a significant portion of manufacturing from China back to the U.S. and saw to it that the company's core products are manufactured in accordance with Title 16 of the Code of Federal Regulations Part 1700 of the Poison Prevention Packaging Act.

**LensGen, Irvine***Ramgopal Rao, CEO*

Ramgopal Rao is the investor, founder and CEO of LensGen Inc., a startup medical device company that is developing a novel accommodating intraocular lens for presbyopia. He is also leading 2C Tech Corp., a nanotechnology-based device for the treatment of macular degeneration and retinitis pigmentosa. He was also COO and director of Vitreoretinal Technologies Inc., a venture-funded ophthalmic pharmaceutical company that developed a drug for diabetic retinopathy. Rao co-developed an innovative corneal implant device for presbyopia and co-founded AcuFocus Inc. Prior to that, Rao founded Tomey Technology Inc., the company that pioneered the corneal topography imaging technology that is now a standard of care in ophthalmology.

**Lugano Diamonds, Newport Beach***Moti Ferder, CEO/Design Director*

Master craftsman and jewelry visionary, Moti Ferder, is not only the CEO and design director at Lugano Diamonds, but also an incredibly influential person, given his extensive charitable efforts in Orange County. Lugano Diamonds has two Orange County locations in Newport Beach and at Montage Laguna Beach. Ferder's impeccable talent, combined with his strong community ties, generous heart and passion for philanthropy, have helped establish Lugano Diamonds as one of the finest jewelers in the world. He supports a variety of nonprofit and local causes by creating signature Lugano Diamonds' designs and donating magnificent jewelry pieces, which are then used to raise substantial funds for the organizations they are donated to. Additionally, Lugano Diamonds underwrites many local and national events.

**LulyBoo LLC, Lake Forest***Pazit Ben-Ezri, Founder/CEO*

Pazit Ben-Ezri is an Israeli-born visionary whose story embodies the American Dream. Determined to achieve her business goals and give her family the best opportunity to succeed, Ben-Ezri eventually settled in Orange County. In 2006, after giving birth to her second child, Ben-Ezri realized the only place he would sleep was in the comfort of his own crib. This was frustrating for Ben-Ezri, who was active in her community and enjoyed spending time with her family outside of the house. After failing to find an answer to her son's sleeping issues, Ben-Ezri rolled up her sleeves and created a solution of her own. The final product was her signature LulyBoo baby lounge; a versatile, portable solution that mimics the comfort and feeling of the womb for baby, while seamlessly and in one click, transforming into a backpack. That lounge started Ben-Ezri's company, LulyBoo, which now sells baby travel products all around the world.

**Madison Alexander PR, Tustin***Daniel Chmielewski, Principal*

A creative and experienced high-technology public relations and marketing communications professional, Daniel Chmielewski is one of a shrinking number of industry professionals with actual newsroom experience, having worked as a radio news director and anchor with stations in New York, and as a freelance newspaper reporter and magazine contributor. Newsroom experience is one of the things that set Chmielewski — and Madison Alexander PR — apart from the competition. With more than 25 years of experience, Chmielewski has spent most his career working in IT security, enterprise networking, IT software, and Internet platform technologies at large corporations such as 3Com and Data General, and working on large accounts at agencies with clients such as Lotus Development, Mitsubishi Mobile Computing and Legent. In addition, Chmielewski has worked with startups like Gradient Technologies and Moss Software, and held senior management positions with technology firms in New York, Boston and Southern California.

**Managed Direct Response, Irvine***Pat Mercuri, Founder/President*

Pat Mercuri is a veteran of the direct marketing industry in Orange County with more than 20 years of experience. Mercuri is recognized within the industry for his expertise in direct response, having introduced a number of innovative marketing programs for the mortgage, solar, automotive and retail services industries. Mercuri's desire to create a company that was different and better, combined with fulfilling broader social responsibilities, has led to unprecedented growth. During his career, Mercuri has mailed 100+ million lead-generating marketing materials. Mercuri begins his working day at 3 a.m. and doesn't stop until everything for the day is done. During the last 20 years, Mercuri has grown his companies through three recessions and emerged as a leader in the industry.

**Million Dollar Tan, Huntington Beach***Lindsay Dickhout, CEO/Founder*

Million Dollar Tan (MDT) was founded by Lindsay Dickhout exclusively for spa professionals. Within the first year, 100 salons and spas offered MDT professional spray tanning services, and by 2009, that number had grown to more than 2,000 locations in 10 countries. Dickhout soon expanded the business further to offer a full line of retail sunless tanning products available directly to the consumer. Million Dollar Tan is currently sold in 10,000+ locations worldwide, and can be found in major retailers such as Nordstrom and Planet Beauty. The brand debuted on QVC.com in 2016 and Dickhout's first on-air slot is planned for early this year. 2016 was also a year of growth for Million Dollar Tan internationally, with the addition of two new major retailers overseas. Million Dollar Tan's projected revenue for 2017 is over \$10 million.

**Mobile Dental USA, Newport Beach***Charles Zahedi, Clinical Director/Board Member*

In 2008, Dr. Charles Zahedi created the first mobile surgical service for dental offices in the U.S. Mobile Dental USA is designed to provide a full range of dental services outside of a traditional dental office. In 2013, he was honored by the California Assisted Living Association by being the first dentist invited to present at an annual meeting. His presentation was on the dangers of neglecting the oral health of older adults. Since 2011, Zahedi has also spent hundreds of hours helping homeless veterans and visiting nursing homes to prevent abuse of older adults. Through Mobile Dental USA, Zahedi also brings mobile on-site dental services to corporate employees. Google and Snapchat are among the many corporations that



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use Mobile Dental USA. In addition, Zahedi teaches part-time at UCLA, and was an associate professor at Loma Linda University Department of Advanced Periodontics and Implant Surgery.

**Mom & Tot OC, Irvine**

*Dawn Antis, CEO/Founder*

Dawn Antis launched Mom & Tot OC out of necessity. There are a handful of mommy and me groups for newborns in Orange County, but Mom & Tot OC is the first and only group to cater to moms with toddlers. Since starting in Feb. 2015, with five moms in the first session, the class size has tripled. Mom & Tot OC is recognized by *OC Family* and the *Orange County Register* as a local resource that helps connect parents living in Orange County. Antis holds the classes in her home for a safe and relaxed environment. Each week, a local expert is brought in to educate the moms on CPR, car seat safety, toddler swimming, nutrition, holistic health, sleep, marriage, family, relationships, photography, music, literature and more. There are also crafts and sing-a-long songs for the toddlers. Antis arranges play dates at local parks and zoos and mom's night out events for current and past members of Mom & Tot OC once a month.

**Money360, Ladera Ranch**

*Evan Gentry, CEO/Founder*

Money360, one of the nation's leading marketplace lenders for commercial real estate, is the latest in a long line of successful companies founded by Evan Gentry, a serial entrepreneur and longtime community volunteer. Gentry founded the company in response to a need to replace pre-recession banking models with less costly, more efficient lending models for commercial real estate financing. Today, Money360 is experiencing exponential growth, recently opened new regional divisions throughout the United States, and anticipates 2017 to be a banner year – coming in on the heels of a record-breaking month of \$35.6 million in loans closed in December. The company has been featured in national trade publications and offers cutting-edge thought leadership in the marketplace lending arena. Some of Gentry's other successful ventures include MoneyLine Lending Services (featured in *Inc.* magazine's "Inc. 500," a report that ranks America's fastest-growing private companies), and G8 Capital, which to date has completed and successfully managed more than 65 portfolio acquisitions across 40 Managed Funds, representing more than \$500 million in principal balance or real estate value.

**Montage Legal Group, Irvine**

*Erin Giglia, Co-Owner/Founder*

*Laurie Rowen, Co-Owner/Founder*

Montage Legal Group uses a unique business model to give law firms access to a network of freelance attorneys who handle temporary or contract legal work remotely on an hourly or project basis. Montage handles administrative and billing tasks, allowing its law firm clients and freelance lawyers to focus on legal projects. Whether a law firm needs law and motion work, depositions, business documents, court appearances or document review – or needs expertise in a specialty practice – law firms can turn to Montage to find the exact type of freelance lawyer they need. Montage's network of freelance attorneys is the top of the "contract attorney market," with impressive credentials from top law schools and prestigious law firms. Founders Laurie Rowen and Erin Giglia have been recognized by various media outlets nationwide for their efforts to create an effective alternative legal practice model. They are frequent speakers on topics involving women in law, freelance law, applicable ethical rules and alternative practice.

**Netreo Inc., Irvine**

*Kevin Kinsey, CEO*

Kevin Kinsey's first job out of college was with AT&T, selling PBX phone systems and he innovated a better way to sell the product – as a result he was in the top 2% of salespeople for the entire six years he was there. After leaving AT&T, Kinsey went to work for a start-up systems integrator as a salesperson. Kinsey eventually was promoted to sales management and ultimately VP of Sales. After a Fortune-500 company bought the company, Kinsey was asked to run the entire organization for the remainder of an agreed-upon, two-year earn-out period. During that time period, Kinsey and his partners deployed a number of best-of-breed monitoring and network management tools in order to support their customers. At the close of this two-year period, Kinsey and his partners went on to form Netreo, a premier provider of IT management solutions for enterprise business. Today, Netreo employs 21 workers and conducts business in numerous countries around the globe. Clients include Wells Fargo, AON and Broadcom, and client retention is 96.5%.

**New Contours | A Male FACE, Newport Beach**

*Walton J. Montegut, MD, Plastic & Reconstructive Surgeon*

Dr. Walton J. Montegut is one of few surgeons who specialize in facial procedures for women as well as men. Upon completing his education and residency, Montegut trained with three of the top surgical facelift and fat transfer pioneers. As a result of his extensive training and experience, Montegut is now considered a leading expert in fat transfer during a facelift, thus providing more natural, younger looking results. He has also been named a 2016 "Top Doctor" on RealSelf, based on the strength of his credentials, patient results and expertise. Montegut is among only 10% of RealSelf doctors to achieve this honor.

**New Day Psychotherapy Group, Brea**

*Estelle Toby Goldstein, MD, Board Certified Psychiatrist*

Estelle Toby Goldstein, MD has established herself in male-dominated fields starting with neurosurgery in the early 1980s, and continuing through leading drug research in the 1990s and into entrepreneurship in the 2000s. Her private research has won prizes with major companies such as Westinghouse, and contracts with companies such as Eli Lilly. Goldstein joined New Day Psychotherapy Group in 2016 – bringing more than 35 years of medical experience in the fields of general and orthopedic surgery, neurological surgery and psychiatry. Goldstein's practice is known for her passion for solving the hard problems for patients who have not been able to find answers, and in some cases, a correct diagnosis. Her methods include standard, as well as complementary and alternative treatments. She studied in Boston, France, Canada and is a veteran of the U.S. Army Medical Corps. She has also written extensively for newspapers and the internet, published two books and is a prolific blogger on health issues.

**New Horizons Learning Group, Anaheim**

*Kevin Landry, CEO*

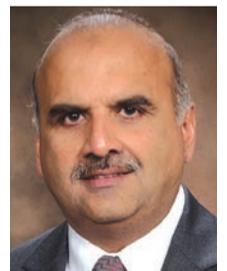
New Horizons Learning Group (NHLG) is one of the fastest-growing companies in Orange County and the nation. After acquiring four new campus locations in the last 18 months, the company now provides education and training in 10 unique markets. For the past two years, NHLG has been listed as one of the *INC. 5000* fastest-growing private companies. Instructors hold some of the highest certifications in their fields, making NHLG a top IT training company nine years in a row.

Additionally, CEO Kevin Landry initiated a program giving employees two paid days of work to participate in charitable activities or community events. Due to these types of initiatives and the culture that Landry has established at the company, NHLG has been on the *Orange County Business Journal's* "Best Places to Work List" six years running. Landry has expanded New Horizons Learning Group's footprint through revenue, physical expansion and employee growth.

**Nisum, Brea**

*Imtiaz Mohammady, CEO*

Imtiaz Mohammady is the founder and CEO of Nisum Technologies Inc., a leading retail IT consulting firm, specializing in omni-channel enablement and fulfillment systems. Through his personal leadership style, deep commitment to client service and 25+ years of retail industry expertise, Mohammady has led Nisum from an entrepreneurial venture in the early 2000s to a firm of 1,000 people spanning three continents. In his role as CEO, Mohammady works closely with C-suite executives at the biggest retailers in the world, helping them modernize business and technology for future growth. Nisum recently announced significant gains in the areas of customer acquisition, employee growth and service innovation in 2016. Nisum's wide portfolio of offerings support Fortune 500 companies in developing, implementing and optimizing their omni-channel strategies to better connect with customers across multiple platforms.

**OCTANe, Aliso Viejo**

*Bill Carpou, President/CEO*

Bill Carpou has held several positions at key organizations including operating partner for the Blackstone Group. His current role as chief executive of OCTANe has been where Carpou has leveraged a career of experiences to enable the high-tech and med-tech industries to grow in Orange County. OCTANe is a networking organization for Orange County's information technology and biomedical industries. OCTANe has supported company formation, capital requirements and the growth of more than 225 companies, while creating 7,000+ jobs for the local economy. This contribution, in addition to the forward-looking forecast OCTANe is providing, will enable job growth of 22,000 by 2025, along with an economic impact that would create more than \$1.2 billion of additional payroll for Orange County.



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Previously, Carpou has held various senior-level positions with companies such as Profit Recovery Partners LLC, RGIS, IKON Office Solutions and Merrill Lynch.

**Osmond Marketing, San Clemente**

*Dr. Amy Osmond Cook, CEO*

Dr. Amy Osmond Cook received her Ph.D. from the University of Utah in communication. She is the CEO of Osmond Marketing; founder of the Divorce Support Center; and a health/wellness columnist for the *Orange County Register*, *Daily Herald*, *Family Share* and *Cupid's Pulse*. Cook has worked as an instructor at Arizona State University, Brigham Young University and the University of Utah intermittently for the past 15 years. Osmond Marketing is a woman-owned, full-service content marketing organization specifically designed to meet the needs of small businesses and healthcare companies. The firm'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 2016 and is on track to experience the same levels of growth this year. Cook has also been featured in publications such as *People* and *USA Today*, and on television shows such as *Good Morning America*.

**PeopleG2, Brea**

*Chris Dyer, CEO/Founder*

Chris Dyer founded PeopleG2 in 2001 with a singular goal — to redefine the background checking industry and make his vision for excellence in human capital due diligence services a reality. In 2008, at the height of the recession, Dyer took his company virtual and continued to make profitable margins, and has grown the company's revenue stream annually. Dyer has grown his company from a small, family-run business to a successful background check firm that is known and recognized nationwide. The company has also been recognized as one of the "Best Places to Work" in Orange County by the *OC Register* and the *Orange County Business Journal*. In the community, he has been involved with Working Wardrobes; leads HR book clubs in both Orange County and Los Angeles County; and as a former youth sports coach, makes donations to youth sports annually.

**Performance Strategies Inc., Santa Ana**

*Will Robertson, Founder/CEO*

*Jay McDowell, President*

Performance Strategies Inc. (PSI) creates training courseware, online universities and marketing campaigns for small to medium-sized companies. Included are webinars, seminars, social media projects, workshops and video/audio productions. Performance Strategies Inc. was founded in 1985 by CEO Will Robertson. Some of PSI's accomplishments include video, audio and printed courseware for more than 3,000 telecom retail outlets, as well as local and long distance carriers, satellite service providers and long haul fiber optic systems. In addition, other business sectors that have been supported with consulting projects include banking, finance, insurance, transportation, energy, software, medical and pharmaceuticals. Performance Strategies has consulted to 45 of the Fortune 100 since 1990. The company has worked with every Bell Operating company in the U.S. and several similar enterprises in Europe, Asia and South America.

**Philly's Best Cheesesteaks, Irvine**

*Andrea Levey, Co-Founder*

*Bob Levey, Co-Founder*

In 2017, Philly's Best is celebrating 25 years of serving the most authentic Philly Cheesesteaks and Hoagies 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 TastyTake® offerings. A unique Philly brand and concept, Philly's Best has grown to 21 locations throughout Southern California.

**Pinnacle Consulting Group, Irvine**

*Donald Garcia, Owner/President*

With a successful financial service industry career spanning 30 years, Donald Garcia is recognized as a business leader throughout Orange County. He has

developed unique processes and designs, and implements financial strategies for affluent business owners, highly compensated executives and those who have inherited wealth, as well as providing retirement solutions. Nationally, Garcia was appointed by President George W. Bush to the international commission of the Woodrow Wilson International Center for Scholars, where he served as chairman of the Finance and Audit Committee. On a state level, he accepted an appointment by the Governor of California to serve on the board of the \$30 billion State Compensation Insurance Fund, where he served on the Investment Committee. Pinnacle Consulting Group is a financial planning firm with a track record of helping to meet clients' objectives and life goals.

**Posh Tech LLC, Laguna Hills**

*Adam Badawy, Owner*

Adam Badawy grew up in Egypt during a time of the great political upheaval. After a visit to family friends in England at the age of 15, he did not want to go back. It was there that Badawy was able to master the English language and gain his independence. Life continued on for Badawy in Orange County, where he opened a successful fine jewelry business. During 2008, Badawy lost much of his wealth due to the economy and his retail business closed. He got back onto his feet and started selling at swap meets. Traveling from hotel to hotel, Badawy noticed that the hotels never had enough outlets to charge electronics. With this revelation, Badawy sketched a prototype doodle on a napkin, and after two years of refinements, the doodle design is now his current project, Connect CHARLIE. 12-in-1 CHARLIE safely charges all electronics with three plugs and nine USB ports. CHARLIE also features an LED nightlight and is small enough to fit into the palm on your hand.

**Powerhouse Public Relations LLC, Santa Ana**

*Kristin Daher, President/Founder*

In just one year since purchasing Morgan Marketing & Public Relations, and rebranding the firm as Powerhouse Public Relations, Kristin Daher has not only made a name for herself in the Orange County PR community but has officially put her company on the map as a premier national PR firm specializing in the restaurant chain, franchise and retail industries. A creative agency providing a wide range of media relations, communications strategy and social media services, Powerhouse PR's client roster includes Del Taco, Pieology Pizzeria, Juice It Up!, Boudin SF, Brio Tuscan Grille, Hawaiian Host, Mauna Loa and Philly's Best. Since first opening Powerhouse's doors in Santa Ana in 2016, Daher has built and nurtured a successful business for her employees, but has also expanded Powerhouse's line of services while continuing to secure phenomenal media coverage for her clients. Powerhouse continues to grow and diversify with new clients, as well as partner with new vendors to offer value-added benefits and comprehensive, cutting-edge services.

**Prego Ristorante, Irvine**

*Ruth Bedi, Owner*

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. Bedi 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.

**Pure Water Technology Inc., Placentia**

*George Squires, CEO*

In 2006, George Squires started Pure Water Technology Inc. with his savings and a second loan from his house, less than \$200,000. The business started because he realized current bottled water coolers were antiquated technology and high-quality filtration drinking systems provide better quality water that is better for our environment, safety and health. He also noticed people were becoming more aware of the quality of water they were consuming and that businesses were looking for ways to reduce costs. At the start of the business, Squires hired one employee and had two independent contractors. Currently, Pure Water Technology Inc. has grown to 25 employees and generates more than \$4 million in annual revenue. For 2017, the company plans to add up to 10 employees and has projected revenue of \$5.5 million. Pure Water Technology Inc. has 6,500+ placements and provides water for many Fortune 500 companies. Pure Water Technology Inc. is on the cutting-edge of technology by using patented ozone-cleaning systems,



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microprocessors for quality monitoring, and special reverse osmosis components that help save water.

**QuestSoft, Laguna Hills**

*Leonard Ryan, President/Founder*

QuestSoft is a leading provider of comprehensive compliance software and services for the banking, credit union and mortgage lending industries. The firm is recognized in the industry as having the best customer service and quality software. The company's software protects clients from fines, penalties and lawsuits and ensures ethical lending, while saving 90% of the time associated with compliance with the regulations covered. Three quarters of QuestSoft employees have been working for the company for more than five years, and QuestSoft has a 93% service renewal rate in an industry with high turnover. Since the company's founding in 1995, Leonard Ryan continues to oversee strategic planning and the day-to-day operations for the company, including business and software development, interface partners, sales and pricing. Ryan has been associated with the mortgage industry for more than 30 years, including co-owning a mortgage company, developing loan origination software and since 1995, becoming a major compliance software leader.

**Rance's Chicago Pizza, Costa Mesa**

*Aaron Tofani, Co-Founder/CEO*

While visiting Chicago, Executive Chef and Founder Rance Ruiz discovered and fell in love with Chicago stuffed pizza. Unfortunately, there were no restaurants in Orange County able to satisfy his craving for Chicago stuffed pizza, so Ruiz decided to create his own. He made his very first pizza pie in his parents' kitchen at the age of 18. After years of improving his recipes and searching relentlessly for the finest ingredients, he became well-known for his delicious pizzas. In 2012, Ruiz opened Rance's Chicago Pizza with childhood friend, Aaron Tofani. Named "Best Pizza in OC" at the 2016 Golden Foodie Awards, Rance's Chicago Pizza distinguishes itself from the competition by using all fresh ingredients with everything, including dressings, made from scratch daily. In 2017, Rance's will open two new locations – one in Long Beach and another near the USC campus.

**Salas O'Brien LLC, Santa Ana**

*Darin Anderson, CEO*

Darin Anderson has been described as "one passionate, energetic dude." Anderson bought the Salas O'Brien in 2006. Salas O'Brien is an employee-owned facility planning, design, construction management and commissioning firm with offices across the United States. Armed with an ardent focus on the positive and an abundance of determination, Anderson listens to his team carefully, leads through encouragement and by example, committing 100% to every task. Under his leadership, Salas O'Brien has grown 1400% from \$5 million in revenue and 30 people to \$70 million in revenue and 300 people. In addition, Salas O'Brien has retained 98% of employee shareholders since 2007 and retention of all team members each year has exceeded 94%.

**Sapphire Laguna, Laguna Beach**

*Chef Azmin Ghahreman, Owner/Executive Chef*

Chef Azmin Ghahreman is a citizen of the world. Born in Iran and educated in Geneva, Switzerland, he attended the California Culinary Academy in San Francisco, with concentration in French Cuisine. Ghahreman has served as the executive chef at international five-star resorts, has recently partnered with Crystal Cruises, and through the years, has created several of his own highly successful culinary-inspired businesses. His passion for advancing the quality of food has led him to help other restaurateurs and culinary concepts develop and perfect the art of creating world-class establishments including destination resorts, cruise ships, country club restaurants and other fine dining businesses. Ghahreman's international-oriented cooking styles and avid interest in utilizing the best ingredients available distinguish him on the culinary map. His talent and extensive experiences have given him the prestigious opportunity to cook for more than 40 world leaders.

**Saunders Property Co./London Coin Galleries, Newport Beach**

*John Saunders, President*

During the past 17 years, John Saunders has become one of Orange County's largest and most successful commercial real estate owners through the application of proactive management. He is the owner/operator of over 5 million square feet of commercial real estate, including 4,000+ residential units, primarily in Orange County. He has personally opened and closed more than 200 escrows, and has arranged and negotiated well over \$2 billion in

commercial real estate loans of all types. Saunders's real estate success is based on his experiences building one of the country's largest coin dealing firms, London Coin Galleries. He is one of the largest North American ancient coin dealers, as well as being a major dealer in domestic coins. Saunders began buying and selling coins at the age of 13. During the 1970s, he was the assistant treasurer at American Express Bank, one of the youngest officers appointed to the firm.

**Seegmiller Law Firm & West Alliance, Newport Beach**

*West Seegmiller, Attorney*

Former California State Pro-Tem Judge and attorney West Seegmiller has more than 30 years of experience practicing personal injury law. He has earned a reputation for being a straight shooter and a zealous advocate for his injured clients. Seegmiller and his team have handled thousands of cases, resulting in settlements and verdicts of more than \$150 million. With this experience, Seegmiller has the knowledge, ability and confidence to stand up to the most powerful corporations, insurance companies and government agencies – and he has taken all of these entities on for the sake of his clients.

**SetSchedule, Irvine**

*Roy Dekel, CEO*

SetSchedule puts realtors in front of clients by scheduling in-person appointments. Unlike other real estate referral services, SetSchedule qualifies all appointments and schedules actual face-to-face prospect meetings for its members. This process ensures that real estate agents receive the largest return on their investment in the least amount of time. Roy Dekel has managed billions in real estate and finance portfolios, and now serves as the CEO of SetSchedule. As a Young Global Leader, advising local and international companies, Dekel is currently focused on bringing the concepts of technology to the real estate and insurance industries, with several technology patents pending. Today, Dekel has led SetSchedule to 1,500+ current members and millions in sales revenue in just three years. In 2017, he will launch SetSchedule's patented CRM and online applications, set to revolutionize the way the realtors conduct business.

**SKYCO Skylights, Costa Mesa**

*Ryan Marshall, CEO*

The SKYCO Skylights team provides more than 150 years of combined technical expertise in the design, engineering and manufacturing of custom skylights, industrial unit skylights, UL listed smoke vents, roof access hatches, turnkey photovoltaic skylight systems (BIPV) and tubular skylights. SKYCO Skylights technical team utilized their vast experience in the skylight marketplace to develop new and innovative daylighting solutions, as well as focusing on enhancing and improving existing technology to provide higher-performing products at economical prices. The SKYCO Skylights team performed an in-depth study on the issues surrounding fall-protection for unit skylights. A result of this study is the Illuminator unit skylight, which has passed an 800-pound impact load. OSHA requires a 200-pound impact load, but the goal for SKYCO Skylights was to exceed that. Not only has the company achieved that goal, it also offers a certified third-party test report to document this exceptional performance.

**Smart Levels Media, Irvine**

*Joey Hinojosa, Founder/Owner*

Founded by industry leader Joey Hinojosa in 2000 as a traditional graphic design company, Smart Levels Media has experienced explosive growth through his visionary leadership. Recognizing the inefficiencies and lackluster quality of printing houses which his designs were sent to be printed at, Hinojosa made the decision to reposition Smart Levels Media as a full-service graphics, marketing and printing firm, handling the complete process from conceptualization to fulfillment. The solutions available through the evolution of the company now provide a dynamic finished product that does justice to the innovative graphic design. Located in a state-of-the-art industrial warehouse, Smart Levels Media handles print and promotional materials from conceptualization to realization for an expansive array of brands ranging from startups to nationally recognized corporations. Their latest service addition includes Branded Environment build-outs for office, retail and community spaces – custom designed and installed for each client.



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**Software Anywhere, San Juan Capistrano***Jeffrey Scott, CEO/Platform Architect*

Jeff Scott has been building innovative tech startups in Orange County since 1995. Software Anywhere, Scott's for-profit, mission-driven software company, is proving that companies can incorporate extreme giving models, while still achieving for-profit goals. Scott leads the company as the CEO and lead technical architect developing applications on the Salesforce.com platform. Inspired by the Salesforce foundation, Scott and his team spend over 33% of their time working on community projects including a cutting-edge high-school technology internship program that extends to a full college scholarship for students who stay on full-time with his companies. Last December marked the 10-year anniversary of giving and in August, his team of 10 full-time employees achieved their most significant milestone of providing over \$10 million of sustainable community impact since the program started in 2007. Looking ahead, the next evolution is being defined with a focus on solving the 10 largest challenges that nonprofit organizations face, including the first goal of providing software applications at no cost built exclusively on the Salesforce.com platform.



and Newport Harbor High School's Student Mentor Program.

**Sullivan & Associates, Huntington Beach***Barbara Sullivan, President*

Barbara Sullivan founded Sullivan & Associates in 1999 with a vision of supporting early stage medical companies in their quests to elevate the quality of patient care. Sullivan & Associates is an award-winning strategic medical communications agency with a long history of implementing successful public relations, marketing, professional and consumer education, clinical publishing, and issue management programs on behalf of healthcare clients. Sullivan also has supported the development of public relations professionals in a variety of ways. She taught upper-division public relations courses at California State University, Long Beach, for about 18 years. In this role, she contributed to the development of the PR curriculum at CSULB and mentored dozens of students over the years. Her agency also developed an internship program that has helped to further the education and success of young public relations professionals—hiring many of them along the way. She also has actively supported a range of industry and community organizations, from the Healthcare Businesswomen's Association and UCI Healthcare MBA Program to the Orange County Performing Arts Center.

**Sparkhouse, Santa Ana***Torrey Tayenaka, Founder*

Sparkhouse is a video production and marketing studio. Fusing expertise in the art of filmmaking with an intuitive grasp of the digital world, the company creates branded films and commercials with bold storytelling, cinematic production value and exciting innovation. Torrey Tayenaka has run and grown Sparkhouse for more than 12 years. While running Sparkhouse, Tayenaka has gathered clients including USAA, Metlife, Jacuzzi, GMC and many more. Outside of Sparkhouse, Tayenaka has helped launch a mosquito repellent patch company — Kite Patch — helping to reduce mosquito-borne diseases in Africa. He also invented and launched EvaDrop, a smart shower that helps users save water while still maintaining an enjoyable shower experience. Tayenaka is also the president of Forge 54, a nonprofit event that provides more than \$500,000 of pro bono services to other local nonprofits in need.

**Teen Entrepreneur Academy, Irvine***Stephen Christensen; Dean, School of Business; Founder, Teen Entrepreneur Academy, Kid Entrepreneur Academy & American Entrepreneur Academy*

Founder of three entrepreneur academies, Stephen Christensen teaches young people the principles of entrepreneurship, instilling the entrepreneurial mindset to the next generation of global business leaders. He lives out his life mission: To serve as an entrepreneurship catalyst, personally committed to educating, training and empowering values-based entrepreneurs and intrapreneurs of any age, for success in business and life. While Business School Dean at Concordia University Irvine, he significantly expands his mission every July by conducting entrepreneurship summer camp academies: Teen Entrepreneur Academy founded in 2012 for high school students living on the campus and Kid Entrepreneur Academy, a day-camp founded in 2014 for grades 5, 6, 7 and 8. More than 500 students have participated in the two programs from across the U.S. (10 states) and several countries (France, Luxembourg, China, Canada, Vietnam, Singapore, Brazil) learning the principles of free enterprise, the entrepreneurial mindset, self-responsibility and how to start their own business.

**Sports 1 Marketing, Irvine***David Meltzer, CEO*

Sports 1 Marketing was founded in 2010, and has since grown into a sports and entertainment marketing powerhouse, involved at global events of all types and sizes. Sports 1 Marketing (S1M) has experienced rapid growth thanks to the efforts of its executive team. S1M made this year's *INC. 5000* list and was named by *Entrepreneur* as one of the "Top Businesses in America" for 2016, coming in at #20 on the list. S1M has been recognized locally as well, winning one of the 2016 "Best of Irvine" awards for Business Management Consultants. This marked the third year being recognized, leading to S1M to be inducted into the Irvine Business Hall of Fame. CEO David Meltzer co-founded S1M with Hall of Fame Quarterback Warren Moon. Meltzer oversees all day-to-day operations at the firm, where his relationship capital and situational knowledge has been crucial in delivering his clients' marketing and endorsement potential, enabling him to secure diverse business opportunities for all his clients and partners.

**The 12, Irvine***Josh Boyd, CEO/Founder*

The 12's results-driven Afterburn Group Training philosophy has positioned the brand as a leader in the fitness industry. Afterburn Group Training classes target specific muscle groups daily, providing clients of every shape, size and ability with a focused workout that reveals irrefutable results. Utilizing a scientific approach, producing maximum results, The 12's Afterburn Group Training will soon be available in many cities across Southern California and the continental U.S. through the leadership of CEO Josh Boyd. With two locations currently in Irvine and Costa Mesa, and a third in Huntington Beach that is scheduled to open in April 2017, Boyd and Team 12 are excited to see 12Nation grow. From 90 members in 2013 to 7,000+ active members to date, the results each member achieves keeps them coming back for more. Cultivating a community that is unparalleled to other fitness studios, The 12 also offers highly personalized Afterburn Nutrition Coaching.

**STA Jets, Santa Ana***Kurt Belcher, President/Owner*

STAJets is one of the nation's leading private charter, aircraft sales, and management and maintenance brands, led by industry innovator Kurt Belcher. With headquarters based at John Wayne Airport, 2017 marks an incredible milestone for the brand, which now has a fleet of 23 private jets and seven distinct locations across the country. The STAJets team encompasses some of the most seasoned pilots and flight crew in the industry with unsurpassed experience in travel worldwide. Offering an in-demand membership program, with benefits exclusive to STAJets, the premier aviation brand has become the charter choice of executives, families, celebrity talent and entertainment groups across the U.S.

**The Hydration Room, Newport Beach***Dr. Brett Florie, Founder/President*

Gone are the days of having to go to the emergency room to receive basic IV therapy thanks to The Hydration Room and Dr. Brett Florie. The Hydration Room is the new alternative: no wait, no outstanding medical bills, just effective and efficient IV and injection therapies administered in a relaxing medi-spa environment. Whether you're suffering from a cold or flu, battling a migraine, experiencing jet lag, seeking relief from sore muscles or chronic pain, waking up from a long night of over indulgence, or just low in energy, IV fluid hydration and injection therapy is the quickest way to improve symptoms. IV hydrating therapies are quick — often under 30 minutes — depending on hydration status and needs. Injection therapy is also quick and administered in a private room by physicians or nursing staff. In under two years, The Hydration Room has opened three clinics in Orange County and has helped more than 5,500 patients since its founding.

**Sterling Public Relations, Corona del Mar***Paula Steurer, Founder/President*

Celebrating its ninth anniversary, Sterling Public Relations specializes in comprehensive public relations, marketing and branding services for companies targeting luxury lifestyle clientele. Founded in 2008 by media maven and strategist Paula Steurer, the company proudly represents some of the most elite brands in Orange County. Client industries include, but are not limited to real estate, fitness, health and wellness, automotive, fashion, hospitality, aviation, as well as salons and day spas. An active member of the Orange County community, Steurer is a dedicated member of several professional development and philanthropic organizations, including CASA

**The OC Nest, Irvine***Stacy Borroto, Owner*

Founded in 2011, The OC Nest is a unique real estate company that offers flat fees

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for buyers who find their home online. Given the changing real estate landscape and home buyers' increasing use of technology to find homes online, The OC Nest allows buyers to "buy smart" by paying a small flat fee to The OC Nest, and pocketing the difference. Given high home prices in Orange County, buyers can save tens of thousands of dollars off a standard commission, and still have an experienced broker protect their interests during the purchase of their home. Owned and operated by Stacy Borroto, a broker with over a decade of experience, The OC Nest gives buyers the skill of an experienced broker, but with the personal touch of a friend whose goal is to find all families their perfect "nest."



**The Ranch at Laguna Beach, Laguna Beach**

*Mark Christy, Owner*

Mark Christy was in charge of conceptualizing, planning and overseeing the three-year renovation and re-branding of The Ranch at Laguna Beach, an iconic 87-acre resort property, including a 97-room hotel, restaurant, banquet facilities and golf course. Christy was able to garner overwhelming local support for the project, including unanimous endorsement from all planning commissioners and council members, in addition to rallying thousands of petitioners, hundreds of residents and dozens of local environmental icons to support the project at Coastal Commission hearings. Christy took what was a dilapidated half-century-old motel that had been slated for demolition and re-envisioned it into a world-class resort property. The resort has been featured in numerous local, regional and national publications, including *The Robb Report* and *Forbes*.



**Tom Ferry - Your Coach, Irvine**

*Tom Ferry, Founder/CEO*

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. Ferry 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, Ferry is ranked as the #1 coach in the real estate industry by Swanepoel Power 200. Based on an employee survey through WorkplaceDynamics, Tom Ferry has been voted one of the top 125 places to work in Orange County and ranks #2,088 on the 2016 *INC. 5000* list with a three-year growth of 178%.



**Trade American Card Corp., Irvine**

*Mike Ames, Founder*

Since 1970, the Ames family has owned and operated Trade American Card Corp. (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 company's main office near John Wayne Airport. TAC is the longest continuously running barter services network in the U.S. 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/CEO*

Ed Horton's patented growing technology and innovative approach to farming has placed Urban Produce at the forefront of sustainable agriculture. A pioneer in Controlled Environmental Agriculture, Horton has created a system that grows 16 acres of organic produce on just 1/8 an acre. His system even creates its own water through atmospheric water generation. Specializing in organic leafy greens, the 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 his 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, Horton plans to build sustainable growing units around the world.



**West of 5 Studios, San Clemente**

*Jamie Welsh, Managing Partner/Head of Marketing & Operations*

West of 5 Studios (WO5) is home to a team of forward-thinking creatives, partners and producers. From designing innovative websites or in-store retail displays, WO5 takes clients from ideation to execution, and is the bridge in retail from brand to build. With a focus on leading with design and brand-centric thinking, WO5 has

core expertise in retail marketing, manufacturing, trade show environments, brand marketing, strategy and implementation, and customer experience. Jamie Welsh, with her Co-Founder Shaun Busby, are an unlikely millennial and Gen X pairing of thought leaders, with an entrepreneurial spirit that work exceptionally well in unison. Welsh's experience in marketing, coupled with Busby's expertise in display design, provide for unique perspective in their industry. WO5 has experience in marketing attention-grabbing retail experiences for national and international brands. Founded in 2015, the company has a small team based in San Clemente, but is growing quickly with a new presence in both China and New York.



**Winery Restaurant & Wine Bar, Tustin**

*JC Clow, Founding Partner*

*Yvon Goetz, Executive Chef/Partner*  
*William Lewis, Sommelier/Managing Partner*

Over the past 25 years, The Winery Restaurant & Wine Bar Founding Partner JC Clow has earned an exemplary reputation in the culinary industry. It is under his guidance and leadership that The Winery Restaurant has been dubbed Orange County's "unprecedented culinary genius." Clow's main objective was to offer exquisite cuisine and fine wines in a variety of sophisticated settings, which led to the opening of his own multi-faceted dining establishment in Tustin in 2007, followed by a waterfront location in Newport Beach in 2014 and a third location is set to open in La Jolla in Fall 2017. Internationally renowned Chef Yvon Goetz joined The Winery Restaurant & Wine Bar as executive chef and partner. Goetz develops and oversees a cutting-edge menu featuring contemporary California regional cuisine with a focus on specialties and ingredients found in California's vast Wine Country. William Lewis is the managing partner of the restaurant, and currently focuses his attention on the Tustin location. A Level II Certified Sommelier with The Court of Master Sommeliers, Lewis oversees wine menu development and maintenance of a multi-million dollar wine program.



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# ORANGE COUNTY BUSINESS JOURNAL



## Congratulations to the 2017 Nominees!

**Ad Exchange Group** - Peter Nguyen  
**Advanced ICU Care** - Lou Silverman  
**AIVITA Biomedical** - Dr. Hans Keirstead  
**All Green Electronics Recycling** - Arman Sadeghi  
**Antis Roofing & Waterproofing** - Charles Antis  
**Apriem Advisors** - Harmon Kong  
**Austin Taylor Inc.** - Ron Viggiano  
**B. toffee LLC** - Betsy Thagard  
**Bagxi** - Ben Farr  
**Bel-Air Machining** - Ali Ossaily  
**Below Invoice** - Cole McKeon  
**Beyond Fifteen Communications Inc.** - Lauren Ellermeyer  
**Bioniz Therapeutics Inc.** - Nazli Azimi  
**BioNutritional Research Group Inc.** - Kevin Lawrence  
**Bonakdar Institute** - Monica Bonakdar, MD  
**Brower, Miller & Cole** - Judy Brower Fancher  
**Business Communications Solutions** - Sunny Rajab  
**CGS Business Solutions** - Nick Chavis  
**ChromaDex** - Frank Jaksch  
**Corent Technology** - Feyzi Fatehi  
**Cosmetic Funnels** - Scott Harvey  
**CrowdStrike** - George Kurtz  
**Cytellix** - Martha Daniel  
**DBaC Inc.** - John Curci  
**Devise Interactive** - Dalip Jaggi  
**Dr. Marissa Inc.** - Dr. Marissa Pei  
**Enterprise Counsel Group** - David Robinson  
**Ever-Pretty** - Anna Shi  
**Franklin Data** - Matthew Blake  
**Full-Blown Events** - Dave Judy  
**Full-Blown Events** - Peter Twill  
**GlobeChat** - Kevin Strom  
**good culture LLC** - Jesse Merrill  
**Guaranteed Rate** - Ben Anderson  
**H. Hendy Associates** - Heidi Hendy  
**Healthcare Talent and Workforce Solutions** - Pamela Jung  
**Hughes Marino** - Tucker Hughes  
**Idea Hall** - Rebecca Hall  
**Illuminate Education** - Lane Rankin  
**Inspired Art Wine** - Karen Nguyen  
**Janeane Bernstein** - Janeane Bernstein  
**Joseph Co. International Inc.** - Mitchell J. Joseph  
**Kush Bottles** - Nicholas Kovacevich  
**LensGen** - Ramgopal Rao  
**Lugano Diamonds** - Moti Ferder  
**LulyBoo LLC** - Pazit Ben-Ezri  
**Madison Alexander PR** - Daniel Chmielewski  
**Managed Direct Response** - Pat Mercuri  
**Million Dollar Tan** - Lindsay Dickhout

**Mobile Dental USA** - Charles Zahedi  
**Mom & Tot OC** - Dawn Antis  
**Money360** - Evan Gentry  
**Montage Legal Group** - Erin Giglia  
**Montage Legal Group** - Laurie Rowen  
**Netreo Inc.** - Kevin Kinsey  
**New Contours | A Male FACE** - Walton J. Montegut, MD  
**New Day Psychotherapy Group** - Estelle Toby Goldstein, MD  
**New Horizons Learning Group** - Kevin Landry  
**Nisum** - Imtiaz Mohammady  
**OCTANe** - Bill Carpou  
**Osmond Marketing** - Dr. Amy Osmond Cook  
**PeopleG2** - Chris Dyer  
**Performance Strategies Inc.** - Will Robertson  
**Performance Strategies Inc.** - Jay McDowell  
**Philly's Best Cheesesteaks** - Andrea Levey  
**Philly's Best Cheesesteaks** - Bob Levey  
**Pinnacle Consulting Group** - Don Garcia  
**Posh Tech LLC** - Adam Badawy  
**Powerhouse Public Relations LLC** - Kristin Daher  
**Prego Ristorante** - Ruth Bedi  
**Pure Water Technology Inc.** - George Squires  
**QuestSoft** - Leonard Ryan  
**Rance's Chicago Pizza** - Aaron Tofani  
**Salas O'Brien LLC** - Darin Anderson  
**Sapphire Laguna** - Chef Azmin Ghahreman  
**Saunders Property Co./London Coin Galleries** - John Saunders  
**Seegmiller Law Firm and West Alliance** - West Seegmiller  
**SetSchedule** - Roy Dekel  
**SKYCO Skylights** - Ryan Marshall  
**Smart Levels Media** - Joey Hinojosa  
**Software Anywhere** - Jeffrey Scott  
**Sparkhouse** - Torrey Tayenaka  
**Sports 1 Marketing** - David Meltzer  
**STA Jets** - Kurt Belcher  
**Sterling Public Relations** - Paula Steurer  
**Sullivan & Associates** - Barbara Sullivan  
**Teen Entrepreneur Academy** - Stephen Christensen  
**The 12** - Josh Boyd  
**The Hydration Room** - Dr. Brett Florie  
**The OC Nest** - Stacy Borroto  
**The Ranch at Laguna Beach** - Mark Christy  
**Tom Ferry - Your Coach** - Tom Ferry  
**Trade American Card Corp.** - Michael Ames  
**Urban Produce** - Ed Horton  
**West of 5 Studios** - Jamie Welsh  
**Winery Restaurant & Wine Bar** - JC Clow  
**Winery Restaurant & Wine Bar** - Yvon Goetz  
**Winery Restaurant & Wine Bar** - William Lewis



### Keynote Speaker

*Newth Morris*

Founder and Former President of **Telogis**

Head of Strategy for Connected Car for **Verizon**

### Luncheon & Awards Program

March 8, 2017

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

Hotel Irvine Jamboree Center

Tickets: \* \$160

Table of Ten: \$1500

### Reservation Information

Visit [www.ocbj.com/bizevents](http://www.ocbj.com/bizevents) or

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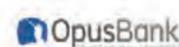
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\*Tickets are non-refundable. Ticket price includes self-parking and a 1-year subscription to the Orange County Business Journal (\$30 allocated to the subscription). New subscribers only. Current subscribers may gift the subscription to a colleague.