KATHERINE COLLINS
PNC BANK

Katherine Collins is a treasury management officer for PNC Bank’s Orange County and Inland Empire market. She consults for and manages a Middle Market and Corporate Banking portfolio, develops treasury proposals for current and prospective clients, conducts an annual assessment of client treasury needs and works with internal partners on client deposit strategies. Collins helps companies drive efficiency in their business by leveraging technology to address challenges faced in corporate treasury. She works with clients to understand their businesses at a micro level to identify ways to optimize working capital and mitigate risk in an ever-changing treasury landscape.

Collins has nearly two decades of experience with a diversified background in retail banking, sales and operations across segments including commercial banking, business banking, life sciences, property management, retail and auto finance. Before joining PNC, she spent over a decade at Wells Fargo where she held multiple roles, ranging from personal banker to treasury management consultant.

Collins leads the bank’s local Women in Business program including engagement and support for women financial decision makers and execution of PNC Project 2578: Accelerating Women’s Financial Equity initiatives, launched after the World Economic Forum’s 2020 Global Gender Gap Report revealed it would take women 257 years to economically catch up to men if progress continued at its current pace. Collins enjoys connecting with women-led businesses and accelerating women’s financial equality as a Certified Women’s Business Advocate.

Collins is a graduate of California State University, Los Angeles where she received a Bachelor of Science in Business Administration with a concentration in Finance and a minor in management. She resides locally with her husband and dog.

ERIKA CONIGLIO
RSM US LLP

As a director with RSM for the past 15 years, Erika Coniglio is passionate about accelerating the growth of Southern California businesses, with an emphasis on C-level relationship management and client satisfaction. She exemplifies the firm’s brand promise, “the power of being understood,” and five key characteristics, “caring, curious, collaborative, courageous, critical thinkers,” by dedicating herself to client advocacy to ensure customer needs are met with a customized tailored approach of the firm’s comprehensive tax, audit and consulting capabilities.

Coniglio focuses on Southern California area businesses, primarily in the technology, life sciences and consumer products industries. She serves on the leadership team for the RSM’s national restaurant industry practice. A key part of her role is leveraging the firm’s vast talent, resources and locations to deliver the best team to every single client engagement. As the largest middle-market professional services firm, RSM has a national presence and global reach, and approximately 80% of Coniglio’s clients have an international presence.

Coniglio is actively involved with local organizations, such as Octane, which aims to create 55,000+ jobs in Southern California’s tech and tech health space by 2030. RSM has been a platinum sponsor of Octane for the last seven years. Coniglio is a member of Octane’s High Tech Awards committee, which interviews and selects program finalists. Additionally, she is involved with the CFO Focus and serves on the membership committee for the Orange County Chapter of Financial Executives International. You can reach Coniglio at erika.coniglio@rmsus.com or (949) 255-6521.

Fatima Arshad is a senior vice-president in Credit Risk Management & Decisioning at Comerica Bank. In her role, she partners with the Private Bank lending teams to deliver customized credit solutions to clients across Southern California and Arizona. Arshad joined Comerica Bank in 2004 and has served in various leadership positions across Credit and Sales. In her prior roles she served in Decisioning for Large Corporate and Healthcare and as a Group Manager, leading a team of Relationship Managers in the Western Region.

She is actively involved in Comerica Bank’s mentoring programs with a focus on fostering the development of minority women in banking. Arshad has also partnered with colleagues in Credit, the Commercial Bank and Human Resources to develop new training materials for Comerica Bank’s proprietary Commercial Bank Development Program, focused on underwriting thoroughness and consistency.

She is an active member of her community and serves as Investment Chair and also as a Board Member for Girls Inc. of Orange County. She has been instrumental in leading the Comerica Bank Women’s Business Symposium of California, now in its 17th year, with proceeds that go directly to supporting Girls Inc. of Orange County.

Arshad received her BBA from Northwood University in Midland, Michigan with degrees in Management and Finance. She resides in Huntington Beach and in her free time, she enjoys golf, traveling, making her friend’s home cooked meals, and is a wine enthusiast.

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Kaaren Hall  
UDIRECT IRA SERVICES  
Despite being in the midst of a recession and mortgage market collapse, Kaaren Hall founded and made a resounding success of uDirect IRA Services. She discovered a strategic way to put her 20+ years in mortgage banking, real estate and property management to use. The solution was an untapped market for both her skills and for investors—self-directed IRAs. Through uDirect IRA, she has guided tens of thousands of Americans through the process of diversifying their investments using self-directed IRAs.  
She says, “Financial literacy is not taught in schools, but our future depends on understanding it. Only about 4% of U.S. investors have a self-directed IRA. Why? Because most investors and many advisors simply aren’t aware of it.”  
For those raising capital, Self-Directed IRAs represent a way to tap into $30 trillion in retirement savings. “Alternative assets” is fast-growing asset class and asset sponsors all take great pride in helping guide their small to mid-size business clients to reach their financial goals. Her ability to understand her client’s unique needs has formed a proven track record of delivering mutually beneficial financing and banking solutions for all parties she partners with. Outside of the bank, Hunter continues to improve our communities by being a leader on several local boards. She takes an active interest in youth development and social responsibility; her commitment to these interests is bolstered by her involvement with the Los Altos Family YMCA, where she has served for eight-plus years in many capacities as a member of the Board, including Board Chair for three years.  
Hunter recently joined the Long Beach Rotary Club as she is interested in being a role model for those with a similar background, showing children of immigrants, particularly girls and young women, that, like her, they too can become successful professionals and contributing members of their communities.  
Enterprise, thanks you Maria, for your leadership and dedication. With you as part of the team, you help make our clients and our communities better.

We’re not waiting for change.  
We’re working for it.  
According to the World Economic Forum’s 2020 Global Gender Gap Report, it will still take another 257 years for women to catch up to men economically.  
That’s not fast enough for us.  
With Project 257th, we’re harnessing the power of our resources to help close the economic gender gap. So that everyone has a chance to move forward financially.

To learn how we can help you move forward financially, contact:  
Katherine Collins  
Corporate & Institutional Banking  
Treasury Management  
katherine.collins@pnc.com  
Valerie Wijaya  
Commercial Real Estate Banking  
valerie.wijaya@pnc.com  
Diana Leyva  
Organizational Financial Wellness  
diana.barragan@pnc.com  
pnc.com/women

Kaaren Hall  
UDIRECT IRA SERVICES  
Kaaren Hall is the Southern California Assurance and Advisory Regional Leader in SingerLewak LLP.  
She started her career with SingerLewak in 2002. As part of the Firm’s in-house training program, Lawson has conducted numerous seminars on accounting, auditing, and related subjects and serves on various committees within the Firm and heads up the Firm’s Irvine recruiting and marketing efforts. Lawson takes pride in consulting within the Firm and heads up the Firm’s Irvine recruiting and marketing efforts. Lawson takes pride in consulting with her clients in diverse sectors on efficient solutions such as tax compliance and advisory, IPOs, assurance and growth advisory. She is an active member of ACG OC, FEI and other local organizations. Lawson can be reached at klawson@singerlewak.com or at (949) 261-8600 or via LinkedIn @KathyLawson.
Diana Leyva is a relationship manager for PNC Bank’s Organizational Financial Wellness team in the Orange County and Inland Empire market. In her role, Leyva develops and maintains meaningful relationships with human resources decision-makers and customizes programs that provide employees of corporate and commercial clients with sound advice and services including HSA plans, personal banking tools, budgeting resources, credit tips, student debt solutions and retirement plans.

Leyva’s experience includes 15 years in the financial services industry, ranging from Private Wealth Management at JP Morgan Chase to business-to-business marketing at other financial institutions. Leyva is lauded by management and her contemporaries for the professionalism, experience, attitude, leadership and expertise skills that she brings to her role.

As a career banker, Leyva attributes her professional success to the cultivation of client relationships and optimizing professional partnerships. Leyva is passionate about making a significant impact that will help improve the financial lives of others, fulfilling PNC’s mission to move all financial lives forward financially.

She currently lives in Orange County with her two children and her dog.

Cecilia Sanudo is a director in SingerLewak LLP’s Assurance and Advisory practice based in our Irvine office. Sanudo is a Certified Public Accountant with more than 14 years’ experience in public accounting. Sanudo’s clients are primarily private companies from start up to a billion dollars in revenue in a variety of industries that include manufacturing and distribution, professional services, technology, transportation and logistics and nonprofit organizations. Sanudo also has transaction experience including corporate restructurings, mergers and acquisitions and previously worked significantly with public initial offerings.

She started her career with SingerLewak in 2008 and is a member of the AICPA and CalCPA. Aside from her daily client service responsibilities, Sanudo is an active member of the Firm’s recruiting efforts, in-house training program and is a member of various professional organizations such as ACG OC. Outside work, Sanudo loves to spend time with family, traveling and mentoring first generation college students. Sanudo can be reached at csesudo@singerlewak.com or at (949) 261-8600 or via LinkedIn @CeciliaSanudo.

Barbara Watson recently joined BDO USA as an audit director in the firm’s BDO Orange County office and specializes in serving real estate, hospitality and construction clients. She has over 13 years’ experience serving a variety of public and private clients, with an emphasis on real estate funds, REITs, homebuilding, and engineering and construction companies. She also has significant experience with financing transactions, M&A activities, real estate investment valuation, fund structures and purchase price allocations.

Watson has dealt with a variety of complex accounting issues, such as fair value of real estate investments, real estate purchase price allocations, business combinations and purchase accounting, stock-based compensation, debt and equity offerings, consolidation matters and revenue recognition. Watson and her Orange County BDO teammates offer a sophisticated array of assurance, tax and advisory services, as well as the resources and capabilities of BDO’s global organization.

She was drawn to BDO by the firm’s core purpose of helping people thrive every day and its commitment to working with, for and in the service of its people, clients and communities. Watson prides herself on being a professional problem solver and joined a culture that also values understanding the experiences of its professionals, listening to their challenges and ideas, and putting thought into action to deliver exceptional client service. Watson earned a bachelor’s degree in economics-accounting from Claremont McKenna College and a master’s degree in accounting from the University of Virginia. Watson is a CPA licensed in California and a member of the AICPA.

Kara Trebs is the EVP, chief human capital officer at Sunwest Bank. Ms. Trebs joined the bank in early 2016 and held positions as AVP, Corporate Recruiter, and SVP, Director of Human Capital. Over the past 15 years, she has had a variety of HR roles within the retail and financial services industries for companies such as Nordstrom and Boot Barn. Ms. Trebs has had an instrumental hand in the exponential growth of Sunwest Bank. Her unique skillset allowed her to leverage her HR experience to build the bank’s new competitive Health Savings Account platform SellicareHSA.

Trebs’ progressive approach to leadership focuses on the empty chair philosophy and believes management is more effective when engaging with their team within their own environment. Trebs serves as a mentor and coach to the executive team at Sunwest and finds this role her most gratifying.

Outside of her work with Sunwest Bank, Ms. Trebs has served on various boards and non-profits such as Tilly’s Life Center, OC Rescue Mission, National Human Resources Association, and as a California State University system mentor. Trebs graduated from the University of Phoenix with a Bachelor of Science in Business Administration and a Human Resources Management Certification and is currently enrolled in Pacific Coast Banking School.

Check out how Sunwest Bank, a $2.5 billion regional business bank founded in Tustin, Calif., helps entrepreneurs thrive at https://sunwestbank.com. You can also find her work on SellicareHSA located here https://sellicare.com.
JULY 17, 2023

WOMEN IN FINANCE

Jeanette Zika, partner, Audit Services, is a first-choice advisor at RSM US LLP (RSM), the U.S. member of RSM International and the leading provider of professional services to the middle market. She has over fourteen years of experience serving public and privately held middle-market companies.

Zika works closely with business owners, CFOs and controllers to assist with audit and accounting issues. She has extensive experience advising on complex accounting matters, including business combinations, revenue recognition, equity transactions, complex internal control structures and other reporting matters.

Zika focuses on Southern California businesses predominantly in the industrials and life science industries. Additionally, she leads the Family First employee networking group for RSM Orange County and is committed to providing an inclusive community, including her support and help to other female professionals in balancing career and family life. You can reach Zika at jeanette.zika@rsmus.com or (949) 255-6611.

Crystal Li is a partner at UHY LLP with more than 15 years of diversified experience in public accounting, with a concentration in IPOs, Special Purpose Acquisition Companies (SPACs), reverse-mergers, and financial due diligence. She additionally serves as a leader of UHY’s China Group, which closely works with U.S. and Asian companies to encourage international growth between the continents.

As a leader of the firm’s SPAC and IPO practice, Li supports companies on all sides of the public market, including international firms seeking entrance to the U.S. market. Her work with SPACs regularly results in deals in excess of $100 million, although Li has completed an international de-SPAC transaction in excess of $1 billion. Last year, she led a traditional IPO engagement for a local Southern California based company, which was listed on Nasdaq within six months. She serves as a technical resource to UHY International and collaborates with other firms to complete international and cross-border due diligence engagements.

In addition to serving as the Irvine office’s lead partner, Li co-manages the Beijing office established by UHY’s U.S. operations. She has grown both offices from the ground, both now boasting a rapidly expanding workforce with a client base to match.

Li is an advocate for the Chinese American community and involves herself in the Chinese American CPA Association. Li always welcomes opportunities to share her extensive knowledge, and she regularly collaborates with other community professionals to provide information on hot topics and answer questions from businesses that help them grow.

Enterprise Bank & Trust is Proud to Empower Women in Finance

Enterprise joins all the companies in Orange County that are honoring women in banking and finance. Together, we are not only making meaningful change for our companies but also for the communities that we serve. To all those being honored, thank you for making Orange County better.

Together, there’s no stopping you.
enterprisebank.com