

An Orange County Business Journal Special Report

# WOMEN IN BUSINESS AWARDS



UPDATES FROM  
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WINNERS  
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BIOS FOR  
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# 2022 Women in Business Winners: Sustaining Success

■ By KATIE MURAR

Last October, the Business Journal honored five women business leaders from diverse industries at the 28th annual **Women in Business Awards**.

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

Their backgrounds and industries are varied—from the operations lead of Orange County's top jeweler to one of Newport Beach's top specialty hospital executives—but all remained resilient throughout the pandemic and have kept their

respective firms in growth mode during the challenging economic environment that followed.

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

The next Women in Business Awards is scheduled for **Oct. 5** at the **Irvine Marriott**.

**Aimee Weisner**, an independent board member for three public medical companies including Aliso Viejo-based device and drug maker **Glaukos Corp.** (NYSE: GKOS), is the keynote speaker.

Bios for the nominees for the upcoming event begin on page 70.

## Allyson Brooks: Filling Gaps in Women's Healthcare

■ By KAITLIN AQUINO

**Allyson Brooks** is continuing to address the gaps in women's healthcare she witnessed as an obstetrician and gynecologist.

The executive director and chief quality officer at **Hoag Women's Health Institute**—a unit of the Newport Beach hospital that's one of the country's higher-rated women's health systems—recently oversaw the launch of Hoag's **Postpartum+** program, which allows new mothers and their newborns to receive care for six weeks at home.

"Home care for many people feels much better than having to pack up your baby and go into the hospital or into doctors' offices," Brooks told the Business Journal. "And they get extra support, reassurance, education and training, like with breastfeeding and baby care."

The new program also includes access to a phone app **Nona**, which connects women who have questions or are seeking advice during postpartum with Hoag Care Team experts, 24 hours a day, seven days a week. Brooks served as a consultant for the app last year, months



before she was honored at The Business Journal's 28th annual **Women in Business Awards**.

Brooks will soon have another women's

hospital to oversee.

Hoag is spending \$1 billion to expand and upgrade its Irvine campus, which will include specialty care centers for surgical innovation,

cancer, digestive and women's health.

The upcoming women's hospital will be equipped to handle over 5,000 deliveries a year and house a neonatal intensive care unit, a breast care center, gynecologic care suites and physicians' offices.

That will help Hoag keep up with its deliveries, which topped 7,000 in July, a record for the hospital system, Brooks said.

The facilities are expected to be complete by 2026.

Brooks' latest effort to address gaps in women's healthcare is aimed at women ages 45 to 55 undergoing menopause.

"What people are asking me the most for is midlife menopausal support," Brooks said, since much of the focus on women's healthcare is on babies and the geriatric population.

She and her team are currently developing programs and resources to help women in their midlife, menopausal transition. She expects the program to launch during Hoag's fiscal 2023. ■

## Shirin Behzadi: The Company Helper

■ By EMILY SANTIAGO-MOLINA

Former **Home Franchise Concepts** (HFC) executive **Shirin Behzadi** holds a 25-year career as a leader in finance and franchising and now guides fellow entrepreneurs and businesses to grow in their own ventures.

Her career included turning Irvine-based HFC, an owner of popular brands such as **Budget Blinds**, **Tailored Living** and **Concrete Craft**, into the largest home services franchiser in the country.

Behzadi was named chief executive in 2015, after joining the company as chief financial officer, and expanded its core franchise and customer base across the nation. By 2018, the company reported product sales of \$700 million.

Since 2019, Behzadi has worked as an adviser to various chief executives and landed on the board of several companies. She most recently sat on the board of recycling franchise **Junk King** and aided in its sale to **Neighborly** last year. The San Francisco-based company, which removes unwanted items like furniture, appliances and garbage, counts over 150 franchises in 36 states and Canada.



She is also involved in her son's beverage startup **Bomani Cold Buzz** as a business adviser, chairperson and founding investor.

"One of the highlights of the past year was being invited to be a featured beverage at events like Coachella and multiple other venues," Behzadi wrote on her **LinkedIn** profile.

Bomani is currently trying to add 100 new restaurants and bars as official accounts in 99

days, documenting the progress on social media.

"It's been really interesting and fun to be back in the situation where you're establishing and growing the brand," Behzadi said.

Behzadi also continues her involvement with local nonprofits and women's leadership groups. She helps mentor women entrepreneurs globally with the **Cherie Blair Founda-**

**tion for Women**, where she is also a board member.

This year, the organization celebrated reaching a campaign fundraising goal to support over 100,000 women in more than 50 countries.

"This success sets a strong precedent for an ambitious new strategy," she wrote on LinkedIn. "We will be significantly scaling up our work to reach 1 million more women entrepreneurs by 2030, rapidly accelerating progress for women across the world."

In March, Behzadi with **OC United Way** moderated a panel of local Iranian businesswomen – including **Yassmin Sarmadi**, founder and owner of Michelin-starred **Knife Pleat**, and **California State University, Fullerton** professor **Elahe Amani**—to discuss the ongoing women-led human rights protests in Iran and related cultural topics.

She is also a member of the **OC Iranian American Chamber of Commerce**.

"This is a cause being led by Iranian women and Iranian girls, asking for their most fundamental human rights that are risking their lives," Behzadi told the Business Journal last year. ■

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# Jessica Word: Flow of Business Returning as COVID-19 Eases

■ By PETER J. BRENNAN

As the impacts of the pandemic begin to ebb in Orange County, **Jessica Word** has been able to bring back the annual events held by her **Word and Brown General Agency**.

In April, the firm hosted its brokers at a golfing event at **The Resort at Pelican Hill** on the Newport Coast.

"That was a lot of fun," said Word, who became CEO of the insurance brokerage in 2021.

It also held a team-building event for 500 on Catalina Island. Then it held a week of webinars for continuing education where it granted a record number of certificates.

"We continue to grow every year," she told the Business Journal. "We've have brought on several large agencies. We're continuing to grow our market share. It's amazing."

Word started at the age of 7 at the company co-founded in 1985 by her father, **John M. Word III**, and **Edward J. "Rusty" Brown Jr.**

She eventually worked in every department



Jessica Word  
CEO  
Word & Brown Companies

of the Word & Brown General Agency, an Orange-based health insurance agency that has grown to 300 employees. It is the oldest division among the **Word & Brown Family of Companies**, which includes **Choice Ad-**

**ministrators** and **California PX Card**.

The company represents every high-profile carrier available in California and Nevada, including **Aetna**, **Blue Shield of California** and **Kaiser Permanente**. It also provides

access to dental, vision, chiropractic, life, disability, and other ancillary options.

Since she won a Business Journal 28th annual **Women in Business Awards** last year, she's also been recognized with a "Monaco 40 over 40" award, which is given to a select group of entrepreneurs, she said.

In September, she will publish a book about leadership in business called "Survive & Thrive," which is co-authored with **Joe Foster**, the founder of **Reebok**. All the proceeds are for a charity to help a grammar school in Uganda.

She's been invited to speak this October at the Vatican for its first-ever entrepreneur event for women.

"I'm excited and I'm not even Catholic," she quipped.

This year, the company is on target to hit its annual sales goal and is hiring for its seasonal workload at the end of the year.

"We're gearing up for fourth quarter, which is the busiest time of the year for us," Word said. ■

# Tammy Cooper: Technolgent Eyes 2023 Sales Strength

■ By KEVIN COSTELLOE

**Tammy Cooper**, CEO, CFO and chairman of Irvine-based **Technolgent**, expects the information services provider to see approximately 20% growth in 2023 after a somewhat slow start in the first half of the year.

"We struggled the first quarter but then we came back very strong starting in June," Cooper told the Business Journal. "We do the majority of our sales the second half of the year."

Cooper last year picked up two Business Journal awards; in May, she was one of five honorees at the Business Journal's **CFO of the Year Awards**, and in October, she was an honoree of the **Women in Business Awards**.

Cooper became CEO and CFO of the company simultaneously in 2020. Her firm provides edge-to-edge information technology services for Fortune 1000 companies, aiming to help clients outpace the new digital economy by creating IT environments that are "agile, flexible, efficient, transparent and se-



Tammy Cooper  
CEO, CFO, Chairman  
Technolgent

cure," using a variety of hybrid infrastructure, automation, security and data management products.

"We held our own" during the first half of

the year, she said, and is looking forward to the usual pickup in sales in the current half.

"We're working on some very large deals right now that we've been exposed to,"

Cooper said, noting if those deals come through, "we're going to be breaking some big numbers."

Technolgent, located at **100 Spectrum Center Drive** tower, counts 265 employees and over 600 customers, with offices throughout the U.S.

It's hiring, about 20 job openings posted on its website as of last week, including for senior roles in Nashville and Oregon.

The company hasn't made any layoffs despite recent economic uncertainty, and emphasizes the firm has "very, very talented" employees.

Cooper has established a mentoring program for Technolgent employees to help with upward mobility and career development. She's also been active in the **Girl Scouts** for nearly four decades, including roles on the board.

"I am here to break barriers," Cooper said, noting she wants to inspire young women to succeed in their careers. ■

# Idit Ferder: Lugano's Luxe Local Expansion

■ By KATIE MURAR

**Idit Ferder's** mark on **Lugano Diamonds & Jewelry Inc.** is visible at the company's new flagship retail salon and adjacent members club at **Fashion Island**.

Ferder, chief operating officer and co-founder of the high-end jeweler, is responsible for designing the company's upscale retail locations—which now total seven spaces with international expansion on the way—as well as overseeing inventory levels and managing the company's personnel and IT solutions.

Her latest project is **Privé**, an exclusive club and venue space that opened in April for loyal Lugano customers next door to the company's Fashion Island salon and showroom that opened at the end of last year.

Ferder prefers to take a behind-the-scenes role in the business, with her husband and Chief Executive **Moti Ferder** in a more public-facing role. She met Moti during her time serving in the Israeli Army, where he was an officer and she oversaw the assignment of



Idit Ferder  
Co-Founder, COO  
Lugano Diamonds &  
Jewelry

soldiers to units.

"Moti was an officer who arrived at my unit toward the last part of my final service term in 1989," Ferder previously told the Business Journal. "We had shared values, and a shared outlook on life and the things we

wanted to do."

The two got married a few years after Ferder left the army in 1990, at which point she pursued degrees in history and English from **Tel Aviv University** before working for several firms as a mediator.

The two launched Lugano in Israel in 2004 and moved to Orange County with their two children in 2005 to open their first location in Newport Beach.

Idit Ferder made moves to embed herself, and Lugano, in the local community, with heavy involvement with the **Jewish Federation of Orange County**; she later served on the organization's Women's Philanthropy Board.

Today, Lugano supports more than 80 organizations focused on healthcare, education and the arts.

Lugano is the best-performing consumer brand unit under parent **Compass Diversified Holdings** (NYSE: CODI).

Regulatory filings indicate Lugano reported \$201.5 million in 2022 pro-forma sales, a 61% jump from 2021. In the first quarter of this year, it reported revenue of \$64 million, a 36% year-over-year increase.

In July, Lugano signed a lease for its first international location in London. ■



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# Empowering women entrepreneurs

SAM SAPERSTEIN, GLOBAL HEAD OF JPMORGAN CHASE'S WOMEN ON THE MOVE



Ask me what makes a business successful, and I can show you more than a few women who will wow you with all they've been able to accomplish, even when the odds are stacked against them.

Women like South Bronx native Yosara Trujillo, who was about to take the bar exam when she found herself pregnant, single, unemployed, and facing daunting student debt. Trujillo took a risk and invested her last \$200 to rent a yoga studio. That risk paid off. With the help of a \$50,000 Entrepreneurs of Color Fund loan in hand, Trujillo fixed an electrical issue that could have shuttered her business and hired a business manager, so she could focus on growing the company.

Nearly five years later, Trujillo employs 35 instructors who see hundreds of yoga practitioners a day (and is raising a healthy child).

Trujillo is just one example of so many women who have set the bar high and not allowed circumstances to get in the way of achieving success in their careers, businesses and wealth building.

It's those stories that make the work I do each day so meaningful. As global head of JPMorgan Chase's Women on the Move, we work to fuel women's ambitions, advance financial equity, and provide women within and outside the firm with opportunities to succeed in their professional and personal lives.

Women founders receive less than 2% of available venture capital in the U.S. For Black women entrepreneurs, that number is an even sadder 0.35%. The funding flow doesn't match the economic opportunity. Women-owned businesses are growing at double the rate of other businesses, according to the World Bank, and they contribute \$3 trillion to the economy annually.

That's why it's critical that we help connect women entrepreneurs with the resources they need to succeed. The numbers tell us that if they succeed, the entire economy will be better off for it.

Here are some of the specific ways in which we can move the needle on right-sizing this disparity:

- **Greater access to capital:** Helping to provide greater access to capital is critical. Our **Founder Catalyst program** addresses this gap by providing the tools, resources and connections needed to support women entrepreneurs in taking their businesses to the next level. Since the program's launch in 2021 in partnership with Techstars, we have sponsored over 110 founders over five cohorts. In 2023, we expanded the program to support

more women through virtual cohorts. As of year-end 2022, 11 founder Catalyst alumni from our programs have been accepted into a Techstars accelerator.

- **Technical assistance:** Access to capital is only helpful if the business owners have the right knowledge and tools to apply that capital smartly. That's where technical assistance comes in, including networking, expertise and advisory services. Our **Curated Coaching for Entrepreneurs program** provides free small group business coaching. In expert-led group sessions, entrepreneurs discuss their most pressing concerns and together build an action plan for their businesses. Since launching in July 2021, the program has served 3,900 women entrepreneurs and the program continues to scale into 2023.
- **Financial health:** Learning how to manage money is something that must be learned, and it has the potential to significantly alter one's life. Since 2020, we have enabled financial literacy training for over 60,000 women and girls through partnerships with over a dozen widely known nonprofits, women-led businesses and universities, including Girls Inc., Girls Who Invest, IGNITE, Barnard College, Rutgers Center for Women in Business (CWIB), The Women's Network, Women of Color and Capital, among many others.
- **Support when they need it the most:** Sometimes life hands you a lemon. The pandemic demonstrated the incredible hurdles that can come our way, and we know that hit women harder than anyone. In 2022, we launched a **Hardship Fund** to support single mothers at two community colleges in the U.S. In 2022, Women on the Move was able to connect 225 single mothers to small dollar awards through the hardship fund, and in 2023, we launched the Investing in Futures Fund, in partnership with Family Action, to support single parents in the U.K.

Providing pathways to economic stability and wealth building for women employees, customers and community members means ensuring that everyone has equal opportunities to thrive. It's good for business, for the economy and society. It's how we move us all forward, together.

To learn more about our initiative to fuel female ambition and advance financial equality – visit [jpmorganchase.com/WOTM](https://jpmorganchase.com/WOTM), where we share insights from some of the most notable leaders working to secure a gender equitable future in the workplace.

#3

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# City of Hope Orange County's Women Physician-Scientists Lead Pioneering Cancer Research



City of Hope, one of the largest cancer research and treatment organizations in the country, is making groundbreaking discoveries that impact 100 million lives every year. Recently named a top 10 cancer center in the United States for the second consecutive year, City of Hope is home to a team of 600 physicians and more than 1,000 researchers and scientists who only focus on treating and curing cancer.

This diverse group includes renowned women physician-scientists whose work is transforming cancer care and leading to breakthroughs for patients and their families. The following are three examples of the focused research conducted by City of Hope Orange County women physician leaders — essential work providing advanced discoveries and insights that will lead to cancer cures.

## NEW ROBOTIC-ASSISTED SURGERY FOR BREAST CANCER

City of Hope has taken the lead in robotic surgery, with more than 16,000 non-mastectomy robotic procedures having been performed by our surgeons. Jennifer Tseng, M.D., F.A.C.S., Medical Director of Breast Surgery at City of Hope Orange County, is bringing her expertise in complex surgical oncology to a clinical trial evaluating the efficacy of robotic-assisted, single incision mastectomies. The minimally invasive procedure leaves only a small hidden scar on the side of the body.

## ADVANCED IMMUNOTHERAPIES FOR MULTIPLE MYELOMA

Amrita Krishnan, M.D., the executive medical director of hematology at City of Hope Orange County and the director of City of Hope's Judy and Bernard Briskin Center for Multiple Myeloma Research, is currently involved in investigating three promising new bispecific antibodies for use in multiple

myeloma that has come back after treatment or stopped responding to treatment. Bispecific antibodies are uniquely engineered, engaging T cells to target and destroy cancer cells while minimizing side effects. By pinpointing genetic vulnerabilities in cancer cells and harnessing the power of the immune system to attack those cells, bispecific antibody treatment has the potential to defeat multiple myeloma.

## PROMISING DUAL THERAPY FOR LEUKEMIA

At one of 2023's leading cancer conferences, City of Hope's Tanya Siddiqi, M.D., and team presented new findings from a Phase 2 clinical trial testing the combined use of two advanced anti-cancer drugs in patients with chronic lymphocytic leukemia (CLL). They found that continued use of the dual therapy improved the rates of undetectable minimal residual disease in patients who had very few cancer cells in their blood. Siddiqi, a renowned expert in blood cancers, is the medical director of lymphoma at City of Hope Orange County and the director of the CLL program at City of Hope's Toni Stephenson Lymphoma Center. New treatment options that could result from findings like these are greatly needed.

These women physician leaders practice at City of Hope Orange County Lennar Foundation Cancer Center — the most advanced comprehensive cancer in Orange County — where they are part of a team of renowned physician-scientists leading next-level cancer treatment and research.

**City of Hope is where cancer loses and life wins.**  
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Learn more at [CityofHope.org/OC](https://CityofHope.org/OC)

Jennifer Tseng, M.D.,  
Medical Director, Breast Surgery





# MONEY & MEANING

Our relationship with money is often rooted in early experiences. Understanding how our attitudes developed, and having critical conversations, are key to shaping our vision for the future.

The adage “shirtsleeves to shirtsleeves in three generations” portrays a cautionary tale of heirs squandering hard-earned wealth. To avoid this outcome, many wealth creators take a fear-based approach to financial planning that undermines a successful transfer of wealth and values. In fact, new data shows that rigid or overly restrictive estate plans can hinder the ability of future generations to build on past success and even lead to family tension. Behavioral research shows that a more effective approach to equipping rising generations for the responsibilities of protecting and growing wealth focuses on building communication, collaboration and trust within the family.

Avoiding family conflict and ensuring continued success requires wealth creators to be very intentional and deliberate in preparing their families. It is important to purposefully remove the veil of secrecy and have candid conversations about wealth and its meaning within your family.

## MONEY MESSAGES

We have all at some point internalized “money messages” that affect our relationship with wealth. Perhaps you grew up in a family that never discussed money and therefore believe you did not receive any money messages. However, the absence of family conversations about money is a message in itself — usually that discussing finances is impolite, or that money is shameful and to be concealed. But even nonverbal messages can be communicated through the actions and spending patterns of your parents and other role models. What kind of clothes do they wear, homes do they live in, or cars do they drive? As you think about the answers to these questions, what kind of memories and emotions rise to the surface?

People often model their own financial tenets on those of their role models. For example, if your role models were very frugal — they didn’t buy the most expensive car or live in the most expensive home — it is likely that you will be more frugal as well. If your role models lived a lavish lifestyle, it would not be unusual for you to feel you should also. If your role models were visible in their charitable giving, you may emulate that same behavior through your own philanthropic endeavors.

But money messages can also be more circuitous. You may have watched all the effort and time your parents put into creating and sustaining the family business, and your instinct now is to reject your inherited wealth because you did nothing to earn it and therefore do not deserve to use it. These messages — although largely unconscious — do affect how we relate to money and how we interact with the wealth in our everyday lives.

## BRINGING IT BACK TO VALUES

So, for those of us who have internalized negative money messages, how do we internalize more positive conversations that inform a healthy and constructive relationship with money? A common practice is to start by defining the values the family shares and cares about, which will inform the use of the family’s wealth over time.

For example, where a family agrees that generosity is an important value, it would not be unusual to see some of the shared wealth dedicated to philanthropic endeavors. Where a family agrees that education and self-sufficiency are important values, the family may decide that every family member should be able to attend private school and/or attain a college or post-graduate degree. In all the above situations, the meaning of family money is placed in context, and it becomes a means to an end, rather than the end in itself.

Where values are expressly communicated and modeled, the money messages are not as easily garbled or misinterpreted. Conversations are not enough, however — actions do speak louder than words, so it is important for behaviors to reflect the articulated values. A parent who asks a child to be generous in giving and yet does not model the words through his or her own giving sends a mixed message.

## PLANNING WITH PURPOSE

Your financial identity is fluid and subjective. The more you explore your money identity/story and become conscious of the messages you’ve received, the more control you will have to change your money narrative. Focus on open, frequent and positive communication about what money means and doesn’t mean in the family, creating positive money messages that will enhance your and your family’s relationship to money.

After studying the behaviors of thousands of families, Northern Trust has developed a new approach to wealth planning that ensures estate plans reflect the goals and intentions of each unique family. The first step is to articulate your Statement of Wealth Transfer Intent using our downloadable guide, which includes reflective exercises and excerpts pulled from others’ real-life examples. Get started at [northerntrust.com/purpose](https://northerntrust.com/purpose).



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In our years of working in Medicare and Medicare Advantage in Orange County, and across the country, our team has spent countless hours listening to seniors' concerns and their stories. Because of this, we know that each person is unique – in health status, in culture, and in how and where they want to receive care.

That's why the health coverage Alignment Health designed makes choice, value, and compassion a reality. We believe it is possible to age well with:

**VALUE** - From \$0 premium plans to low-cost prescription drug benefits, we know the value will only become more critical as senior communities take on the economic uncertainty that lies ahead.



**CHOICE** – That means being able to choose from a variety of plans catered to your health status, your ethnicity, and your location. That's why Alignment offers numerous plan options, created several plans that cater to cultures from Asian American to Latino, and partnered with the very best provider groups, here in Orange County.

**COMPASSION** - Our care teams proactively reach out and check in on our members' well-being, asking about missed appointments or prescriptions. They check on other possible issues impacting health, such as California wildfires or extreme heat. We also welcome members to call our 24/7 On-Demand Concierge Care line with questions as specific as coverage details to broader ones that may need to be answered by an after-hours nurse. We call this our Serving Heart culture.

Beyond our personal mission to create a better health care experience for seniors, we operate with hundreds of years of collective experience in the health care space. That's why we:

**USE TECHNOLOGY** to power a “doctor in the family” experience for everyone we serve. Our proprietary technology backbone, called AVA®, allows us to deliver personalized care to all our members and to help identify issues before they become problematic.

**Use our own high-tech, high-touch care model to help treat our members with multiple chronic conditions**, driving down hospitalization and ER admissions.

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We are leaders in modern care, creating senior health solutions by aligning the forces of intelligent technology with a serving heart to deliver expert care and service. We want to provide a real path toward aging well for those 65 and older – regardless of their health and wealth – and more peace of mind for their caregivers.

The goal of Alignment Health's work every day is to ensure that our seniors get the attention, respect, and service they deserve and to help raise expectations of what health care can be. Every day, we serve, and we listen. We're honored to be recognized with this year's Senior Choice Gold Award for Excellence in Medicare Benefits Value and Performance. We are committed to caring for seniors like our family and being trusted advocates for senior health. We are redefining aging.

For more information on Alignment Health please visit [ALIGNMENTHEALTH.COM](https://www.alignmenthealth.com)





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**2023** Women in Business Awards Judge

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*Dawn Maroney*

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## The Benefits of Asset Based Lending

The challenges facing small- and medium-sized companies because of current economic volatility can be difficult to navigate. While some companies lack working capital to build inventories, others are growing and need financing to help spur further growth. For many firms, a solution to these challenges is asset based lending (ABL).

### A Proven Lending Strategy

ABL has long thrived in both good times and bad as a financing solution for companies with large inventories and working capital needs. Asset based financing is directly correlated to the value of a company's assets, which serves as the lender's collateral for the loan. Once regarded as creative financing for troubled companies, private equity and investment banks began using ABL to finance larger leveraged deals.

Asset based loans are well-collateralized, competitively priced vehicles that are effectively used by companies of all sizes for acquisitions, growth, turnarounds or to simply support working capital needs. "Asset based lending has developed into a well-established financing option for companies with varying needs and is particularly useful for manufacturing, retail and distribution businesses that make good use of their assets to structure a flexible credit facility," noted Greg Eck, Managing Director, Asset Based Lending Group Head for Fifth Third Bank.

A key difference between ABL and cash-flow financing is covenant structures that are typically less restrictive and easier to manage. ABL lenders lean on collateral to support their financing exposure, which allows them to be more flexible and patient in most situations.

A key metric for cash-flow financing, Total Debt to EBITDA, can change rapidly when performance declines, making it a significant issue when the lender has tied much of underwriting to that measure. ABL lenders, on the other hand, design a lending package by first analyzing the liquid aspects of a company's asset pool, then formulating a credit facility around advances against collateral.

Many cash-flow lenders provide most of their financing in the form of term loans as opposed to revolving lines of credit, often seeking to minimize revolver sizes. While ABL lenders provide term loans, most specialize in providing and administering revolving lines of credit. Some lenders will provide revolvers in conjunction with a treasury management relationship which makes it efficient for companies to manage various aspects of working capital and cash cycles.

Most loans provided by ABL lenders are collateralized and covered by assets with a perceived lower risk profile, they offer a cheaper alternative to higher-leverage debt packages based purely on cash flow—typically 150 to 200 basis points lower—and come with lower closing fees.

### Better Prepared When Challenges Arise

Many cash flow lenders tend to be more proactive in protecting themselves with a covenant default. ABL lenders are set up to monitor loan exposure on a continuous basis. This allows them to become intimately familiar with working capital cycles of borrowers and are better prepared to react quickly and work with clients when unique challenges arise.

While this may create extra work for a company as they adhere to reporting requirements, stockholders and management see this heightened level of oversight as a valuable supplement to their own financial tracking.

### A Team Approach

ABL, coupled with a tranche of "last out" or subordinated debt, may be a safer approach for many middle-market businesses as opposed to large, cash-flow term loans with one lender. It may offer a lower overall risk profile and support for capital preservation. Being able to turn to a team of lenders with deeper resources also may mitigate risk in executing strategies in a company's future.

The proof of this strategy can be seen in the strong relationships built over the years between ABL lenders and junior debt partners. These relationships offer benefits for all participants:

- Lenders with a history of completing financings together often have legal document templates in place and know each other's processes and work styles. This lowers the risk of lengthy or failed loan execution.
- Junior debt providers gain comfort in knowing an ABL lender is closely



monitoring a borrower's business trends and is more likely to act pragmatically in a crisis.

- Senior lenders appreciate that the junior lender is often proactive with management and ownership and may even hold a board seat or observation rights.
- Lenders with existing relationships provide effective lines of communication, a lack of confusion and rapport with the management team that benefits all.

### M & A Considerations

Middle-market companies across most industries are solely focused on managing through a possible downturn, as are their advisors and lenders, with most growth strategies being reassessed given the uncertain environment. In fact, global M&A was 30% lower in 2022 compared with 2021, according to Bloomberg.

While there are many hard-to-estimate factors that could affect the timing of the economic recovery, the Conference Board said in its March 2023 Global Economic Outlook that it expects growth to slow to 2.3% in 2023.

In an environment roiled by uncertainty, ABL structures may be a more prudent way to finance acquisitions. The equity gap to be filled may not be materially different than a cash flow structure as purchase price and leverage lending multiples pull back in response to volatility created by inflation and the Fed's interest rate hikes.

The distressed buyout market will eventually heat up. Here, there is a role for ABL structures, which always lead with a revolving line of credit. Draws against revolving lines of credit have several under-appreciated features in the absence of scheduled principal amortization and the borrowing base expansion that accompanies growth in sales, which provides added liquidity without a term loan. These features can lower fixed charges, making it easier to meet covenants and free up cash flow to reinvest in a recovering or growing business.

As businesses and their advisors look to the future, ABL may be the answer to solid execution for sound and strategic planning. ABL can be a powerful tool, particularly in capital-intensive industries. The capital structure can be diversified, borrowing capacity can be freed up for other purposes and businesses gain a source of working capital.

To find out more about asset based loans, contact Lisa Westhafer, Senior Vice President, Middle Market Banking for Fifth Third Bank at [Lisa.Westhafer@53.com](mailto:Lisa.Westhafer@53.com) or learn more at [53.com/Commercial](https://53.com/Commercial).



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## Ingram Micro – Supporting a Workplace Where Everyone Thrives

As the business behind the world's leading brands and a global steward with world-class Environmental, Social and Corporate Governance (ESG) practices, Ingram Micro's prominence is complemented by its unwavering dedication to supporting a workplace where everyone thrives. This commitment is upheld by its dedication to diversity, equity, and inclusion (DE&I), where the company encourages its team members to bring their most authentic selves to work, every day.

Every single member of the company's global team — 27,000 and counting — offers unique insights shaped by individual experiences, backgrounds, lifestyle choices, physical traits and more. This diversity fosters the company's innovation and is what ultimately helps make Ingram Micro the organization that it is today.

Ingram Micro's pursuit of advancing its DE&I efforts has been noted by many prominent corporate metrics. This past year, Ingram Micro again received a perfect score on the Human Rights Campaign's Corporate Equality Index. The company was also awarded Great Place to Work Certification in the U.S. and 16 other locations worldwide.

This commitment also extends to championing female leaders in the organization through the company's Women's Leadership Forum Employee Resource Group (ERG). Established in 2018, the group currently encompasses more than 120 Irvine members and is aimed at cultivating a community inclusive of Ingram Micro women and their allies through networking, small-group circles and sponsorship, among other opportunities. Irvine Women's Forum members also benefit from both a

company-sponsored membership to the WIT (Women in Technology) Network — which provides networking opportunities with other women in the technology field and in-person, intimate meetings focused on connection, professional growth, and development.

In addition to its Women's Forum ERG, the company is proud to collaborate with Orange County-based nonprofit, Girls Inc. by way of an in-house externship program. Since the program's inception in 2018, Ingram Micro has mentored a total of 36 externs at its Irvine office. The program has taught local high school girls about technology, personal branding and presentation skills, and has provided its participants with visibility and exposure to Ingram Micro's female leaders.

"Ingram Micro strives to be the most inclusive company — committed to inspiring, connecting and developing female associates across the organization. It is critical that we continue to take the kind of steps necessary to ensure our organization is a place where all of us feel welcome and comfortable being ourselves. We do so because it is the right thing to do and because we know that inclusivity breeds innovation," said Scott Sherman, executive vice president, Human Resources at Ingram Micro.

Ingram Micro is excited about its progress and is committed to ensuring an equitable and welcoming work environment for all. Through its emphasis on DE&I, Ingram Micro continues to drive innovation while nurturing a work environment where every single associate can thrive and realize their full potential.



**SUPPORTING A WORKPLACE  
WHERE EVERYONE THRIVES.**

*Let's shape tomorrow.*

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Moderator Raquel Bone facilitated an engaging conversation about women's financial equality with panelists Debora Wondercheck, founder and chief executive officer of the Costa Mesa-based Arts and Learning Conservatory; Mary Cramer, member of Bowers board of governors, and Beverly Gibson, founder and curator of Ubhle Beads.



Beverly Gibson discusses the unique vision expressed by each artist through the creation of their ndwango, each piece can take more than a year to create.

## PNC Sponsors Beadwork Exhibit in Support of Women's Financial Independence

By Katherine Collins, Women's Business Development Champion,  
PNC Orange County-Inland Empire Market

**Summary:** A common thread unites PNC's Project 257® and Ubhle Beads as the South African beadworkers showcase the artistry that provides them with an income.

The South African women behind Ubhle Beads may be nearly halfway across the world, but the financial independence they are afforded through the sale of their hand sewn paintings in beads is one way this group of women is earning income – an effort that aligns with PNC's Project 257®: Accelerating Women's Financial Equality initiative to help close the economic gender gap.

When the women of Ubhle Beads decided to turn the artistry of their work into a worldwide traveling exhibit, PNC's Orange County-Inland Empire market was there to sponsor its July 1-Aug. 27, 2023, showcase at the Bowers Museum in Santa Ana, California. "Ubhle Women: Beadwork and the Art of Independence" highlighted a contemporary form of bead art, the ndwango (translates as "cloth" or "rag"), created by the women in South Africa's rural KwaZulu community.

Founder and curator Beverly Gibson and artist Ntombephi "Induna" Ntobela established Ubhle, which means "beauty" in South Africa's Xhosa and Zulu languages, in 1999 for women to learn the community tradition of beadwork using Czech glass. In the rural, mountainous community of KwaZulu-Natal province, cattle-raising and corn and sugar crops drive the local economy, and women often are denied opportunities to earn a steady income or obtain a Western education. Ubhle Beads opened an opportunity for the Xhosa and Zulu women to sell the pieces to establish some financial freedom.

Jarrod Ingle, regional president and head of corporate banking for PNC's Orange County-Inland Empire market, says sponsorship of the traveling Ubhle exhibit brings visibility to the importance of moving all forward financially.

"The exhibition is representative of women's ingenuity and the inequity they face around the world and here in our own community," **Ingle says**. "Our team is dedicated to supporting the achievement of women financial decision-makers across the region and will remain diligent in our work to help close the economic gender gap."

### Progress, But Much Work Needed

The bank's PNC-Certified Women's Business Advocates (WBAs) have been providing resources to women financial decision-makers for nearly two decades. In 2021, on Sept. 14, the 257<sup>th</sup> day of the year, PNC launched Project 257®, inspired by the World Economic Forum's 2020 Global Gender Gap Report, which declared that it would take 257 years for women to catch up to men economically. The recently released 2023 report shows improvement: 169 years to reach economic parity at the current rate of progress.

"It's a hopeful sign that nearly a century's worth of progress toward economic equality can be achieved in just a few short years, but 169 years is still too long to wait," **says Beth Marcello, director of Women's Business Development at PNC**. "The new data gives me confidence that closing the gap is within the realm of possibility if everyone works together to increase women's representation in the workforce, income equality and access to credit."

Across the country, the bank continues to look for opportunities to support women. A coast-to-coast network of 5,000 men and women PNC-Certified WBAs are dedicated to supporting the financial success of women, including those who own or lead businesses. Dozens of those WBAs serve the Orange County-Inland Empire market.

The bank makes further impact through partnerships that align with PNC's values and commitment to supporting women, including relationships with the global nonprofit Coralus, which provides 0% interest loans, mentorship and support to women entrepreneurs, and Women Presidents Organization, which provides a peer network to women presidents across the globe. Another example is PNC's annual Women in Business Week, which offers motivating experiences and insights on a variety of topics relevant to women financial decision-makers.

PNC's support for accelerating women's financial equality also shows up through its role as The Official Women's Business Champion for the Angel City Football Club in Los Angeles and the enterprise-wide Women in Motorsports partnership with Chip Ganassi Racing, an internship program that engages a selected group of women college students in on-site learning and career-development experiences in the traditionally male-dominated sport of auto racing.

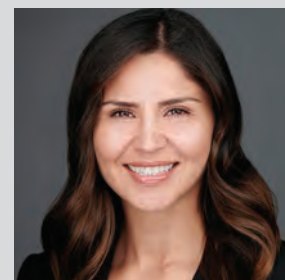
### Moving All Forward in Orange County-Inland Empire

To help launch the Ubhle exhibit last month, local PNC WBAs presented a panel discussion on women and finance that included Ubhle curator Gibson along with community leaders Mary Cramer, member of Bowers board of governors, and Debora Wondercheck, founder and chief executive officer of the Costa Mesa-based Arts and Learning Conservatory. Gibson led a tour of the exhibit following the discussion.

Raquel Bone, managing director for Institutional Asset Management in Southern California, moderated the conversation that touched on everything from establishing the early foundations of financial wellness to the responsibilities of managing childcare while building a successful business or career.

"These kinds of conversations can help lift the veil to reveal the barriers to financial success that women often face," **Bone says**, "and they also serve as a great source of inspiration that can guide women to the many resources in our community that can help accelerate financial equality."

Katherine Collins serves as a treasury management officer, consulting for and managing PNC's Middle Market and Corporate Banking portfolio. She is the Women's Business Development Market Champion for PNC in Orange County-Inland Empire, where she engages and supports women financial decision-makers to accelerate women's financial equality.





# Congratulations Dr. Ramin Baschshi

2023 Women in Business  
Awards Nominee

Dr. Baschshi currently serves as President & CEO of Unlimited Possibilities, formerly known as UCP of Orange County.

Unlimited Possibilities is proud to honor our President & CEO, Dr. Ramin Baschshi for her exceptional leadership and dedication to serving children and families with disabilities across our community!



*"Dr. Baschshi's profound dedication and visionary leadership has propelled Unlimited Possibilities to new heights of growth and progress. It's an honor and privilege to work alongside such an inspiring business leader. I look forward to witnessing her continued accomplishments as she champions inclusivity for Orange County. Congratulations on this well-deserved recognition, Ramin!"*

**Bradley Barlow, Esq.**  
Board Chairman  
Unlimited Possibilities

At Unlimited Possibilities (UP), we are champions and advocates for those we serve, conquering stereotypes, social stigma, and barriers. Through six comprehensive programs, our caregivers, specialists, and therapists empower and challenge every person in our care to look beyond limitations and grow toward a life of independence, joy, and fulfillment.

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# Why now may be the right time to sell your business.



Selling a business is a calculated, and often very personal, decision many owners make. Some consider selling due to the lack of a solid succession plan, an unclear path to continued success or a desire to spend time elsewhere. Regardless of why, the ultimate consideration is often around timing and potential valuation.

While it is true that rising interest rates and uncertainty have slowed middle market deal activity, it has not halted it completely. And although these factors may mean buyers are being more selective, a professionally run, competitive, sale process can result in a compelling valuation, especially for the strongest of businesses.

## When is the best time to sell?

Many owners who considered selling prior to the pandemic reprioritized and decided to maintain the business until the economy felt more stable. With stable markets and borrowing rates leveling out, those same owners are revisiting their plans. And rightly so. Consider these four reasons for selling now:

The policy and legislative environment is favorable for selling. While there is volatility in the market, there is still keen interest from investors in businesses that came out of the pandemic strong, especially in industries that are likely to be key beneficiaries of the Infrastructure Investment and Jobs Act, the CHIPS and Science Act and the Inflation Reduction Act, which together will provide fiscal stimulus to the tune of over \$1.3 trillion toward the goal of building up key growth industries, repairing infrastructure, and encouraging expansion of U.S.<sup>1</sup> based manufacturing.

There is both appetite and scarcity value in the market. The economy may scare some companies away from the market, which puts strong businesses with good fundamentals at an advantage. Both strategic buyers and private equity funds are still looking to deploy capital. Also, despite the trepidation many are feeling about the economy, banks and other lenders are still willing to finance attractive deals. Where there is a lending shortfall, private equity buyers may step up to finance the difference with additional equity, with plans to refinance at a later date.

Many industries are in a good position for a successful transaction. As mentioned, businesses involved in infrastructure and targeted growth industries such as biotechnology green energy, predictive manufacturing, etc. may have a market advantage due to recent legislation, but it's worth considering the broader range of industries that the industrial renaissance covers, as well as other enticing industries for investors. These key industries include those involved in battery technology, electric vehicles, artificial intelligence and robotics, cybersecurity, additive manufacturing, health care, biotech, and green energy.

Certain business models will find greater success in M&A now. While it's important for your business to have strong fundamentals before you consider selling, there are also specific business models appealing to investors in these times. These include companies with recurring revenue or asset-light business models, as they are not as affected by supply chain issues and inflation, as well as companies that can identify and articulate sources of earnings before interest, taxes, depreciation, and amortization (EBITDA) growth.

## What to know if you're selling now

**Transfer and estate tax strategies.** Don't overlook the technical aspects of the transition, such as taxes. Consider the best strategy for preserving your generational wealth through estate planning, especially as some estate tax exclusions are set to expire in 2025.<sup>2</sup>

**Due diligence process.** M&A deals are challenging, and the process of due diligence within a merger or acquisition is especially long and complex. Owners are wary of the economic environment, but so are potential investors and banks, so the process may take longer and be more involved than usual.

**Professional advice.** In the current environment, it's more important than ever to seek professional advice to ensure you receive a fair valuation. A reputable investment banking firm with a track record in your industry can aid you through this delicate process.

**Proper preparation.** Selling your business is one of the biggest processes you'll likely ever undertake. The key word here is process. It's not a one-time, simple event. Proper preparation of both your business and your personal estate planning will set you up for success.

## What to do after the sale

It's worth considering the investment opportunities available to you now that one chapter of your life is complete. Your focus will now shift from creating and managing a business entity to managing the pool of capital those efforts have produced. Interviewing and assembling a team with distinct expertise around your new venture will become your next great undertaking!

The current dislocations in the global economy present opportunities to buy a variety of assets at lower valuations. Structured products, catastrophe bonds, large- mid- and small-cap U.S. stocks and emerging market equities are all places worthy of consideration in building out a diversified portfolio. You can also pace your investments in a way that's comfortable for you through dollar cost averaging and building bond ladders with maturities every few months.

## Taking the step

Contemplating selling your business can lead to a host of emotional, logistical, planning, and financial decisions in the best of economic environments and should not be undertaken without a good deal of introspection. In addition to retaining sound counsel on the legal, tax, financing and estate planning implications, it will be imperative to engage those closest to you who will inevitably be impacted by your choice to "go or stay."

Remember, you're not in it alone. You can partner with a thoughtful team of financial, legal, planning, investment and wealth advisors who will help you build an overarching long-term plan and work with you to implement at the right time for your business.

To learn more about BMO Commercial Bank expertise in Orange County, contact:



**Charlene Davidson**  
Managing Director, BMO Commercial Bank

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## Global regulatory compliance for sustainability right in your backyard

*Contributors: Karin Brand, Senior Director; National Consulting, Alex Kotsopoulos, Partner; Trish Beltran, Manager; Jake Salpeter, Manager; and Beni Tasel, Associate*

### In the past year, North America has seen a surge in environmental, social and governance (ESG) regulatory development.

This activity includes the Securities Exchange Commission's (SEC) proposed rules on climate disclosures and cybersecurity and the proposed Federal Acquisition Regulation concerning the disclosure of greenhouse gas emissions and climate-related financial risk in the U.S., as well as the Office of the Superintendent of Financial Institutions guidelines on climate risk management for federally regulated financial institutions and insurers in Canada.

These developments, however, pale in comparison to the years of regulatory changes and improvements that have occurred in Europe (specifically, the EU) over the last 20 years. The most recent of these developments, arguably the most comprehensive, is the Corporate Sustainability Reporting Directive—a significant update to the Non-Financial Reporting Directive (NFRD) adopted in 2014.

In short, the CSRD will increase the number of covered entities from 11,000 to over 50,000 in the EU and expand disclosure requirements to focus on double materiality—a concept focused on how the social and environmental factors affect a company financially, as well as how the company's operations and strategies affect society and the environment.

### Focusing on North America

The most notable change within the CSRD is the applicability of the regulation to become an international regulatory compliance standard for companies outside of the EU. There are several trigger points that would require non-EU undertakings—as they are referred to in the regulation—to report against the CSRD. The most common trigger to require CSRD reporting is by meeting two of the following three thresholds in the EU:

- A turnover of more than €40 million
- Assets of more than €20 million
- Having more than 250 employees

A few other ways non-EU companies need to comply with CSRD global regulatory compliance reporting mandates are:

- A non-EU undertaking traded on an EU-regulated market
- A non-EU undertaking that operates within the EU and has a group-level turnover of over €150 million in the EU

Compliance dates range from as early as 2025 to 2029, depending on the

category that non-EU undertakings and their subsidiaries fall under. While the NFRD's requirements were generally met by a handful of regulations within North America, the CSRD requirements far exceed any of these requirements (and exceed the expectations of North American stakeholders, for that matter).

Consequently, it behooves North American companies to start to develop the necessary processes, procedures, controls, data systems, roles and responsibilities, and disclosure documentation to address the requirements of the CSRD as soon as possible. The scope of the CSRD's disclosures will require organizations to take a holistic approach to prepare for compliance, independent assurance and (most importantly) real-world impact as a result of sustainable efforts.

### Where can North American companies start?

Understanding if and when CSRD global compliance regulations will affect your company outside the EU can be challenging and confusing. Leveraging the experience

and resources of an experienced advisor can help you implement a CSRD strategy with a framework that can identify where you may have exposure to the new standard and address any key challenges well before your necessary compliance date.

As the North American regulatory landscape changes, companies that proactively address reporting and compliance gaps aligned to leading industry ESG practices can focus their strategies and operations on driving value from their ESG and global compliance activities rather than feel the burden of increased regulatory requirements.

If you need support or advice when evaluating your CSRD compliance demands, RSM's global compliance and reporting services and ESG advisory services teams can guide you on your journey.

### About RSM US LLP

RSM is the leading provider of professional services to the global middle market. The clients we serve are the engine of global commerce and economic growth, and we are focused on developing leading professionals and services to meet their evolving needs in today's ever-changing business landscape. Our purpose is to instill confidence in a world of change, empowering our clients and people to realize their full potential.

RSM US LLP is the U.S. member of RSM International, a global network of independent assurance, tax and consulting firms with 57,000 people in 120 countries. For more information, visit [rsmus.com](http://rsmus.com).





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## Celebrating 50 Years of Service to Children and Families in Orange County

Right now in Orange County, there are 2,461 children in the child welfare system, and this past year, 1,207 youth “aged out” when they turned 18. These numbers are staggering and are continuing to increase.

For 50 years, Olive Crest has demonstrated an extraordinary record of service. From the first 4 abused girls we helped in 1973, Olive Crest today has grown to serve 5,000 children and families each day.

“Our many innovative programs reflect our conviction that strengthening the family is one of the most powerful ways to help heal children,” said Kerri Dunkelberger, Executive Director of Olive Crest in Orange County.

Take Lily’s story for example.



*When I was in my early teens, **my problems felt so heavy, and I felt like an outsider in my family.** In the hopes of escaping that pain, I ran away. Within 3 months, I was introduced to the life of prostitution and was being trafficked by a pimp who had kidnapped me. Eventually I was able to escape and found Olive Crest.*

*Staff and volunteers surrounded me and stuck with me through the difficult days. They showed me how to create healthy boundaries and celebrated with me in my moments of victory. **For the first time in my life, I felt loved unconditionally.\****

“While we’re proud to have had the privilege of serving over 200,000 children and families like Lily, there’s more work to be done,” said Olive Crest CEO, Donald Verleur. **“With your support, we plan to serve 1.2 million children, youth, and families by 2030. Will you join us in our life-changing mission?”**

For more information, call 800.550.CHILD (2445) or visit [www.olivecrest.org](http://www.olivecrest.org)



**Olive Crest is dedicated to preventing child abuse by strengthening, equipping, and restoring children and families in crisis... One Life at a Time®.**



**\*To watch Lily’s story, visit [www.olivecrest.org/lily](http://www.olivecrest.org/lily)**





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# The Double Whammy

## Why has my business insurance become so expensive and difficult to renew?

Many businesses are experiencing unfavorable insurance renewal premiums and terms. The simple explanation is that hard insurance markets often coincide with difficult economic conditions. Historically, hard and soft insurance market cycles exist for shorter and longer periods of time, respectively.

We are currently in year five of a hard market, so the bad news is that your insurance premiums are not going to be less expensive than last year. However, you can do better by approaching the marketplace in a way that will yield the best possible results.

First, let's look at the insurance marketplace by type of coverage.

### Property and Casualty:

The California commercial property and casualty insurance market is shaped by a number of diverse factors. The state's increasing susceptibility to natural perils such as wildfires and the associated skyrocketing claims costs has compelled insurers to meticulously reassess risk profiles. This has prompted a recalibration of underwriting strategies, with an emphasis on risk mitigation and tailored coverage solutions for businesses operating in high-exposure regions. At the same time, social inflation has driven up the cost of liability claims. The least affected line of coverage for businesses in this market is workers' compensation, which continues to be priced at soft market rates.

### Employee Benefits:

The employee benefits market is being impacted by several factors resulting in higher premiums. Inflation, increased costs for products and services, higher wages for healthcare providers, and more claims due to delayed care during COVID. Additionally, the rise in pharmacy costs driven by more utilization and new, expensive specialty medications is causing premiums to increase and the anticipation of gene therapies hitting the market has the insurance industry concerned. With these factors in play, insurance carriers are signaling that higher increases could be in store for the next few years.

### What You Can Do to Obtain the Best Possible Results

You will not escape inflation in insurance rates, but you can mitigate the trend by (1)

not behaving as if this is a buyer's market (because it's not); and (2) employing "hard market strategies". Our best advice is to make your risk more appealing to underwriters by doing the following:

1. Prepare for your renewal early. Ignoring your broker's request to start early may end up more costly than you realize.
2. Document your compliance with loss control recommendations and demonstrate a willingness to add further controls. Emphasize active safety and quality controls you've implemented. It's imperative to remember that carriers are looking for reasons to decline your renewal.
3. Demonstrate that you understand the insurance industry and are an active, engaged participant in the process.
4. Be open to explore additional options including funding mechanisms for your insurance plans. It's important to work with a knowledgeable broker to successfully navigate the market, manage your risk, and contain costs.



Diana Granillo, CIC, CRM, and Kim Bubnis are 2023 nominees for Women in Business Awards. Granillo is COO and Bubnis is EVP, Benefits Division Leader at SCM (SullivanCurtisMonroe Insurance Services).

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*Kim Bubnis*

“We believe creating a solid and diverse company culture begins with respecting what each person brings to the table. SCM recognizes the profound value of our team members.”

*Diana Granillo*

“Fostering a collaborative and supportive work environment where each individual has opportunities to grow personally and professionally is vitally important to us.”

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## Black/African American Women Are Driving Small Business Growth: How Do We Sustain the Momentum?

By: Manishi Parikh, Wells Fargo Commercial Banking

Today, Black/African American women are driving small business growth and are one of the fastest-growing groups of entrepreneurs in America. Currently there are 2.1 million small businesses owned by Black/African American women in the United States who employ 528,000 business employees and generate \$98.3 billion. In total, Black women represent 14.8% of all women-owned businesses.

To give some perspective, after the 2008 financial crisis, women-owned businesses, in general, had not only recovered but had surpassed average revenue levels from before the crisis to 2008: \$172,000 in 2019 compared to \$151,700 before the crisis. However, this was not the case for Black/African American women-owned businesses, whose average revenue was \$35,600 in 2019 compared to \$40,400 prior to the crisis.

Fast forward to COVID-19, Black women-owned businesses came out stronger after the economic shock of the pandemic, with average revenues for these businesses increasing 32.7% between 2019 and 2023 compared to all women-owned businesses' with a 12.1% rise. And now, Black/African American women business owners have outpaced growth between 2022 and 2023 in terms of employment and revenue compared to all women- and African American/Black men-owned employers.

Whether Black/African American women were starting, stabilizing, or growing businesses, they benefited from government stimulus money, corporate and nonprofit support, and increased focus on closing economic disparities.

It is as important as ever to acknowledge this momentum, while also recognizing the fact that gaps still remain. So how can we continue and build upon this trajectory?

### Creating an ecosystem of support

Capital is the fuel to start and grow businesses. Making more credit options available to diverse business owners can be the difference between a business' survival and its closure. In addition to traditional lending, working with Community Development Financial Institutions (CDFIs) and Minority Depository Institutions (MDIs) can create an ecosystem of support that provides additional avenues to access capital. These institutions specifically work with underserved entrepreneurs including those in low-to-moderate income areas and minority populations.

Supporting these organizations and their mission is at the heart of the creation of Wells Fargo's Open for Business Fund, an industry-leading effort that has donated roughly \$420 million to support nonprofits who serve small businesses; the Small Business Resource Navigator, an online portal helping connect small business owners to potential financing options and technical assistance through CDFIs; the Capital Pathways Workbook, a free resource that helps entrepreneurs map their

capital needs to business goals and objectives; and a \$70 million fund in partnership with Hello Alice to improve access to capital for underserved entrepreneurs.

### Beyond accessing capital

As our work continues toward solving the issue of access to capital, it is also important to highlight the additional challenges outside of (but related to) accessing capital that must be tackled for Black women-owned businesses to continue thriving.

In addition to accessing capital, training, technical support, and long-term resiliency planning are needed to help diverse small business owners find ways to pivot their business models and reimagine their products and services so they can meet the needs of an evolving economy. These actions, coupled with more equitable access to capital can help accelerate the wider business ecosystem and help create numerous pathways and opportunities for success.

### The power in education and mentorship

Lastly, access to financial education, networks and mentorship is key. Research indicates that 48% of Black women do not know where to go for information when starting a business. But many have the desire to build their knowledge and understanding in a range of topics like marketing, accounting, or financial literacy.

The good news is there are many free resources and tools to help women business owners learn more about how to write a business plan, tips for building your network, how to scale your business competitively, and so much more. The U.S. Black Chamber of Commerce and U.S. Small Business Administration are two organizations that offer free programs, coaching, networking and more. Additionally, connecting with mentors is a powerful way for women business owners to share best practices and learn from each other, but it's often hard to know where to find them or initiate those relationships.

A new program between Wells Fargo and the Nasdaq Entrepreneurial Center called Connect to More<sup>SM</sup> is giving women entrepreneurs complimentary support through its signature Milestone Circles program where women get bi-weekly opportunities to work through specific challenges, celebrate milestones, attend workshops, and connect with small business experts and mentors.

### The path forward

As Black/African American women continue taking the lead in business ownership, we all must continue to maintain and support their momentum. Whether it is improving access to capital, technical assistance, long-term resiliency planning, or financial education and mentorship, Black/African American women will continue benefiting from ongoing support to keep their doors open.

*Manishi Parikh is Wells Fargo's Orange County Commercial Banking market executive. She can be reached at Manishi.G.Parikh@wellsfargo.com.*



Parikh





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## A Seismic Shift in the Labor Market

To maintain a competitive position in the market, it will be important to address the market conditions and focus on the forces that impact our modern employment.

The current high demand and low inventory of workers are expected to continue throughout 2023. Even while there are layoffs from mega companies, talent shortages continue and employers are competing with a talent pool that looks much different than it has in history.

With two times as many jobs as there are people to fill them, organizations need to be relevant in the market by making bold choices about pay, flexibility and deciding where and how work gets done.

How your company handles interviews, niche roles, and pay will be key to your ability to keep pace with competitors and stay strong in a market downturn.

### 1. UPDATED INTERVIEW PRACTICES

The modern interviewing process is much more interactive and challenging and is designed to offer employers insight into not only a candidate's skills but also their personality and personal needs. Companies can no longer secure a great candidate with a chat about experience and qualifications.

The goal is to find the best technical and cultural fit and do it as quickly as possible, right? So, the "old school" interview style of Q & A won't do. Candidates are more sophisticated, better educated and more informed than they have ever been. They don't settle for just any job. They are looking for growth potential or a specific path and have a strong interest in seeing out beyond a current role. They have access to information about companies and want to feel connected and purposeful in their jobs. They are a quick study so you will need to be savvy and prepared. Combine the desire for a well-defined career with a demand for work-life balance and you will clearly see that an interview, in many cases, will be the candidate interviewing the company as much as the company interviewing the candidate.

#### HOW DO YOU PREPARE AND CONDUCT A MODERN-DAY INTERVIEW?

**Create a comfortable environment.** Look for appropriate icebreaker questions to put the candidate at ease in the first few moments of the interview. Refraining from asking the candidate to do laborious tasks before the interview like asking them to provide extensive writing samples or undergo testing. The ultimate goal is to make sure that the interviewee leaves feeling positive and optimistic.

**The interview process must be quick.** If the interviewer likes the candidate, they need to move the process along quickly. Also, use video for the initial round of interviews. This will help keep speed with a fast-moving market; it will save time and money.

**Understand your company's value and mission statements.** It will be important to be prepared to explain the company's culture, benefits, key distinctions, or things that stand out. It is the interviewee's job to sell their company.

#### Ask the right questions and have them prepared in advance.

In addition to assessing the skills required to complete the job, interview questions must also give foresight into how a candidate would fit into the company's culture. Here are some questions that will help dig a little deeper and find out about a candidate's qualifications, their work-style, personal preferences, likability, and more.

### 2. NICHE ROLES AND SPECIALTIES

A Niche position is defined as someone with a specific skill-set, narrowed industry, unique degree, or that must be local to a non-populated area. The job market is constantly shifting and the changes are coming faster and faster. Today is very different from prior generations and the market will change even faster as technology advances. Many companies have developed niche roles and responsibilities. A Retained Search vs. a Contingent search works well for these roles.

#### WHAT TO EXPECT WITH NICHE ROLE, SPECIALTIES, or SPECIFIC LOCATION REQUIREMENTS.

- Shift in expectations about the size of the pool of candidates; it may not be as large as it has been in the past.
- Be realistic. With niche roles one and done is likely. If one candidate checks 8 out of 10 boxes, it's important to move forward with that candidate without asking

to see more.

- 7/10 qualifications can be the bullseye.
- A 10/10 candidate; the true bullseye, technically, culturally, location, systems, degree and work history, most likely will not be possible in this market where there is a squeeze on the supply and demand of candidates.

### 3. COMPETITIVE PAY AND INCREASES

Being competitive means an offer is equal or beats the market. Get strategic and up to speed with the market rate. Reach out to us for our 2023 Salary Guide to ensure you are competitively positioned against the competition — as it relates to hiring great talent.

#### PAY PERSPECTIVE ON THE REPLACEMENT OF A LONG-TERM EMPLOYEE.

If a seat has been filled in your company for many years, not only should you evaluate the market pay rate, but also consider the workload. Many employees who have filled a role for 10 or more years have most likely absorbed the job of more than two people over the years and they are grandfathered into a lower pay rate. In this case, reevaluating pay should be considered. Alternatively, getting creative and splitting up the job into two roles allows for a better likelihood of finding two great candidates instead of a needle in a haystack.

### 4. SPEED IN THE MARKET

We are seeing candidates move towards other opportunities when the hiring company has drawn-out decision-making processes or insist on going back and forth with multiple counteroffers. Delayed decisions can cost your company money and make employers vulnerable to competitors.

#### HOW CAN EMPLOYERS PRACTICE BETTER DECISION-MAKING HABITS WHEN HIRING?

- Create a list of five to six traits that are important to the role. As you interview candidates, give each a score on a scale of one to five on each trait.
- Take the emotion out of the process and know when to stop searching and commit to a candidate.
- If you choose not to move forward, it's important to provide honest thoughtful feedback to the recruiter so that they can fine-tune the candidate search and continue to bring you the best possible candidates.
- Delegate the decision-making process. Reduce the number of people it takes to make a decision. Long panel interviews may not be a good use of company time; trusting the front line hiring manager not only helps the hiring process and empowers management.
- Respond quickly. How quickly you respond after an interview is critical to a candidate's first impression of your company and their excitement in your interest in them as potential employee. A delayed response sends a poor message to a candidate and poorly positions your company with a candidate who most likely has other offers.

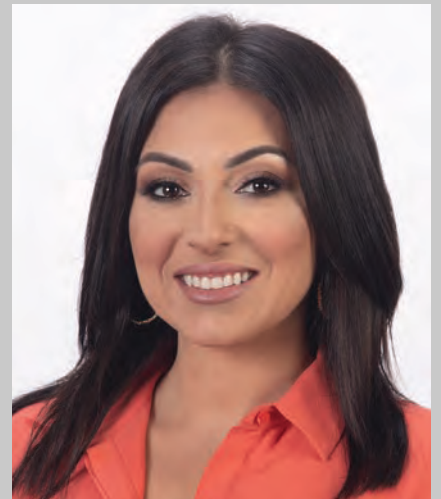
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Innesa leads the success of Boutique Recruiting, with courage, heart, and hustle. Her honors are both local and national as she was named a Forbes Business Council Member, honored as CEO Winner of the Year, named Most Influential Business Leader by the San Diego Business Journal.

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Photo by Edu Carvalho

# The Best Business Bank in California

By Ivo A. Tjan, Chairman & CEO  
CommerceWest Bank

CommerceWest Bank is determined to redefine banking for small and mid-sized businesses in California. Many businesses do not realize they qualify for a customized loan, treasury management product and/or checking account that is tailored made to meet their specific needs. Our Bankers provide flexibility, servicing owners/entrepreneurs and catering to their particular business and individual banking needs. We work to accommodate our clients, rather than force our clients to accommodate to us by providing high-quality, low-stress, and personally tailored banking and financial services. As a full-service business bank, we offer a wide range of commercial banking services, remote deposit solutions, online banking, mobile banking, lines of credit, working capital loans, commercial real estate loans, SBA loans, and treasury management services. By employing a strategically selected team of experienced professionals, we carefully shepherd the assets with which we are entrusted. In the process of doing so, we maximize the financial potential of our clients, ensure the stability of our institution, and deliver on the promise to our clients and employees.

***“All Banks are NOT created equal and bigger is NOT always better.”***

Our forward-thinking approach to business, navigated our company to be named to the **2023 Best 50 List** (an annual ranking of the top 50 U.S and International companies traded on the OTCQX market), and to be awarded the **2022 Top 200 Publicly Traded Banks by American Banker**. One of the first banks in the nation to fund a **PPP loan** and one of the first lenders in the country to be approved to participate in the Main Street Lending Program (MSLP). CommerceWest Bank **saved thousands of jobs** and also ranked as the **#1 Bank in the State of California for MSLP funded loans** (\$390 million).

Selecting the right business bank is a critical decision that can significantly impact the financial health and growth of your company. CommerceWest Bank is a **reliable** and **suitable** banking partner that can offer essential services, tailored solutions and financial expertise to support your business needs. Our fortress balance sheet and business model continue to be sources of economic strength for our entrepreneurs, executives and business owners.

## About the Bank

***“Bank on the Difference”***

It is prudent for businesses to have a long-term banking Partnership that is safe and secure. CommerceWest Bank is FDIC insured and operates with a Fortress Balance Sheet, Strong Liquidity and Strong Capital Ratios that are well above regulatory required levels, while achieving **54 consecutive quarters of profit**.

CommerceWest Bank has a diversified business model that focuses on manufacturers, distributors, wholesalers, service and professional companies. Our reputation and stability are crucial aspects to consider when choosing a bank. **We have a track record of reliability, exemplary client service and a strong financial position to weather economic fluctuations.** The Bank's clients are traditional companies that are the bread and butter for small and midsize businesses in America. **Our company was simply built to last!**

CommerceWest Bank services our clients by providing them advanced and convenient banking tools to free up their time. Our goal is to promote a partnership where we cater to our clients' needs by providing exceptional service, whether it be in person, via phone, zoom, email, online or through mobile banking. We offer a **robust digital banking solution** that can streamline your financial management, save time and enhance efficiency. It is clear this is the future of Banking.

***One of the Safest & Strongest in the Nation***

## About our Culture

Our Bank embodies a culture of Bankers whose only objective is to deliver unparalleled service to the business community. This enables CommerceWest Bank to provide **customized and personally tailored banking services** to businesses



and their owners throughout California. Our bank's foundation is built on trust, reliability and transparency. We take immense pride in **fostering long lasting relationships** with our client and believe in nurturing these bonds through personalized attention, tailored solutions and cutting edge technology.

Our Bankers are experienced market leaders with a **proven history** of advising business owners, entrepreneurs and executives. We have a passion for banking and commitment to being stewards of your funds, which we are entrusted with to build a solid and stable foundation. Businesses and executives trust our knowledge in evaluating their financial service needs and advising them on ways to save time, increase operational efficiencies and **enhance their cash flow** by providing them with the credit facilities and treasury management services they need to help them grow their companies and protect their assets. Our Bankers take a deep approach to understanding financial conditions and trends to create a long-term customized solution.

## Committed to our Community

In 2023, the Bank celebrated 22 years of service. While some Banks are leaving the California marketplace or closing their doors for good in Orange County, CommerceWest Bank remains fully committed to our community. Our company has weathered many financial and banking crisis, while continuing to operate as one of the **safest** and **strongest** banks in the country. Also, worth acknowledging that we grew financially stronger, expanded our market share and continued to support our local communities during those crisis.

We are **committed** to making a difference supporting the community. Our team continues to volunteer and raise tens of thousands of dollars annually for Southern California charitable causes, primarily focusing on children and individuals with disabilities, those experiencing a hardship in their life, and those battling life threatening diseases. As a result, CommerceWest Bank was named a **“Company That Cares”** by the Orange County Business Journal. When you choose our bank, you're also choosing to be a **part of positive change** and progress in the community.

These are exciting times for our company. **Our future is bright.** Our goals are clear. We know that it is more important than ever to be able to count on your **banking partner** and we plan to continue to prove to the business community and entrepreneurs, who the Best Bankers are in California.

## Ivo A. Tjan, Chairman & CEO

Ivo A. Tjan is Chairman, President and CEO of CommerceWest Bank. He was named in the OC500 Directory of Influence by the Orange County Business Journal. The Bank is headquartered in Irvine, California and serves businesses in California. He can be reached at [itjan@cwbk.com](mailto:itjan@cwbk.com) or (949) 474-5278.



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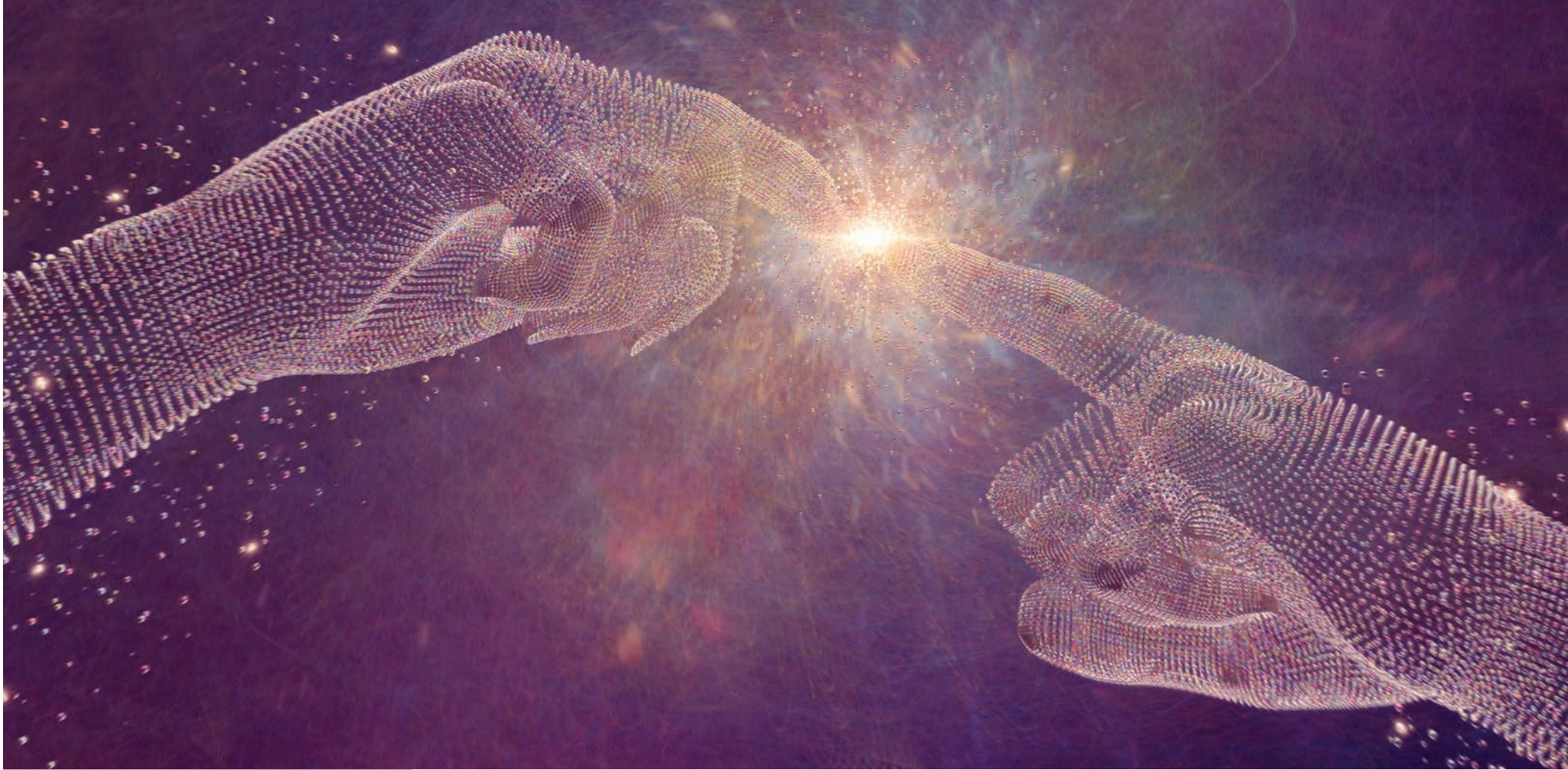
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# Help for advanced stomach cancer

## Innovative clinical trial seeks better patient outcomes

UCI Health surgical oncologist Maheswari Senthil, MD  
Photo by Karen Tapia

Stomach cancer is the fourth leading cause of cancer deaths worldwide because it usually isn't detected until it is in advanced stages. Among the most concerning is stomach cancer that has spread into the abdominal cavity and lining, or peritoneum.

Once cancer cells have invaded the peritoneum, the survival rate is only four to six months. Moreover, the incidence of gastric cancer is on the rise among adults under 50, especially Hispanics.

Surgical oncologist Dr. Maheswari Senthil, a specialist in advanced abdominal cancers and director of the UCI Health Chao Family Comprehensive Cancer Center's Peritoneal Malignancy Program, is determined to change those statistics with a novel clinical trial.

"We are seeing an alarming increase in metastatic cancers, particularly gastric carcinomatosis in younger adults," she says. "They need a fighting chance against this aggressive cancer."

### Boosting chemotherapy's effectiveness

The current standard of care is intravenous (IV) chemotherapy, but studies show this regimen slows the cancer's spread for about six months, then tumors usually start to grow again.

Evidence suggests that this treatment alone is insufficient because the peritoneal membrane reduces the drugs' ability to penetrate the abdominal cavity.

Infusing higher doses of chemotherapy directly into the abdominal area after IV treatment may be more effective, says Senthil, who also serves as medical director of the UCI School of Medicine's Center for Clinical Research.

To improve patients' options, she has teamed up with UCI Health medical oncologist Dr. Farshid Dayyani, a leading expert in gastrointestinal cancers and medical director of the cancer center's Stern Center for Cancer Clinical Trials and Research.

Together, they have launched STOPGAP, a phase 2 clinical trial that takes a three-pronged approach to treating gastric carcinomatosis.

Participants start with three months of standard IV chemotherapy. Next, over a period of at least three months, a chemotherapy agent is infused directly into the peritoneum by way of a port implanted into the abdominal tissue.

Selected patients then undergo cytoreduction surgery to remove all visible signs of cancer from the abdominal cavity. The area is immediately bathed with a heated chemotherapy solution for about 90 minutes to kill any remaining microscopic cancer cells, a procedure called hyperthermic intraperitoneal chemotherapy (HIPEC).

After surgery, most patients receive monthly immunotherapy infusions to further reduce the risk of cancer recurrence.

### Seeking better outcomes

STOPGAP is the only U.S. trial to use all three treatment modes for advanced gastric cancer. The goal is to demonstrate that this combination therapy is safe and improves patient survival rates. So far, seven patients are enrolled in the trial, which is actively recruiting up to 35 patients.

"Stage IV cancers can have very good outcomes with this type of care if you have the right team," says Senthil, noting that UCI Health, home to the only National Cancer Institute-designated comprehensive center in Orange County, is one of the few in Southern California with the necessary level of expertise in all three treatment modes.

The study, one of more than 300 active cancer clinical trials at UCI Health, is funded in part by seed money from the UCI Anti-Cancer Challenge, the cancer center's annual ride, run, walk fundraising event, which will take place on Oct. 7 at the Irvine campus.

"The current standard of care for advanced gastric cancer is mainly palliative," Senthil says. "We believe this approach will give these patients much better outcomes and longevity."

**UCI Health**

[ucihealth.org/clinicaltrials](https://ucihealth.org/clinicaltrials)

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“I never saw myself doing anything else.”

- Kelsie Whitmore

#### CSUF ALUMNA CHANGING THE GAME

Many professional baseball players launched their careers at Cal State Fullerton. Kelsie Whitmore is no exception. The former Titan softball standout made history when she became the first woman to play in the Atlantic League, one of four Major League Baseball partner leagues. The Class of 2020 and 2022 grad was empowered by her CSUF coaches, teammates, and professional development opportunities. “Their support helped me open up about my hopes for the future.”

Kelsie and Alexis are just two examples of graduates who experienced Cal State Fullerton’s commitment to advancing student success. This empowered them to pursue their passions and career paths.

From admissions through commencement, CSUF works to empower all Titan students to reach their fullest potential.

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“She believed in me. She looked at me, heard my life story, saw my academic history, and said, ‘You made it to CSUF... you can be a doctor’”

- Alexis Ruiz

#### FUTURE PEDIATRICIAN EXCEEDS HER OWN EXPECTATIONS

Alexis Ruiz always knew she would graduate from college, but she never imagined she could attend medical school. It was the words of an assistant dean at Cal State Fullerton that ultimately changed the first-generation college student’s path for the better. “You made it to CSUF. If you can make it here, you can be a doctor.” Empowered by the support that she received, Ruiz graduated with a bachelor’s degree in Childhood Adolescence and Development. Ruiz plans to pursue her goal of becoming a doctor in pediatric oncology.







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Discover how UCI Graduate Division is your key to access great graduate student talent.

“At Phonexa, we've globally grown our performance marketing software to a staff of over 200 partly due to recent graduates who are bringing new solutions to old problems. Schools like UCI who support entrepreneurial educational experiences are imperative to the workforce integration and professional development of students, as well enabling a talent pipeline to help further companies who are leading the charge with innovative solutions in their respective industries.”



Lilit Davtyan | Chief Executive Officer, Phonexa



Pictured is Lilit Davtyan, CEO of Phonexa

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"UCI Graduate Division's professional development luncheons allowed me to network with professionals I otherwise never would have been able to meet. I now hold an internship at Holman Capital because of the last one I attended."



Ella Dodor | UCI Computer Engineering PhD candidate



Gillian Hayes has served as UCI's Vice Provost for Graduate Education since 2019. She also has significant experience working in industry, previously serving as CEO for her start up company (AVIAA) of over 2,000 people.

# Let us serve as your hiring concierge

*When your company hires a UC Irvine graduate student, you're getting someone ready to take your business to the next level.*

*You have the opportunity, and we have the talent.*

After spending nearly two decades as a faculty member at UCI and serving as the university's Vice Provost for Graduate Education over the last four, I can confidently say there is no better return on investment than an investment in a graduate scholar. At UCI, our mission is not only to prepare our students to change the world via the next scientific breakthrough, but also to equip our scholars with the skills to be bold, confident leaders in today's ever changing world.

Through communication workshops and professional development opportunities, we make sure a UCI graduate student is the perfect candidate for your next job opening.

UCI Graduate Division has a bold, new approach to enhance graduate student and postdoctoral scholar workforce readiness. The **Accelerate to Industry™ (A2i)** program allows your company to provide our students with "real world" insights, equipping them with the skills to successfully navigate and thrive in the corporate world. Your participation will enhance student development as well as establish a pipeline of exceptional future leaders.

A2i coupled with **Career Explorations**, our web-based hiring portal, helps create the perfect professional match for student and employer.

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## Maximize both your employees' and your time

Businesses are run more efficiently when employers and employees can minimize time spent on administrative tasks and have more time to do their job. Manual tasks that could be automated not only waste time but also drain your financial resources. No more collecting paper receipts or chasing employees for expense reports. Embrace the simplicity of Finfare's on-the-go receipt tracking and automated expense reports. Let us handle the organization, so you can focus on what truly matters – your valuable time.

## Empower employees to spend responsibly yet freely

You can foster a culture of accountability and trust with your employees starting with how employee expenses are managed. With Finfare, each team member receives customized spending limits and budgets. Additionally, you as the employer or business owner can view employee expenses in real time and gain valuable insights in your dashboard overlooking your financials.

## Long Term Value

Finfare was crafted with simplicity in mind, catering to users of all positions and ages. Our goal is to eliminate the intimidation factor often associated with complex expense platforms and technology. Amidst all your other business responsibilities, we offer a straightforward yet effective expense management solution.

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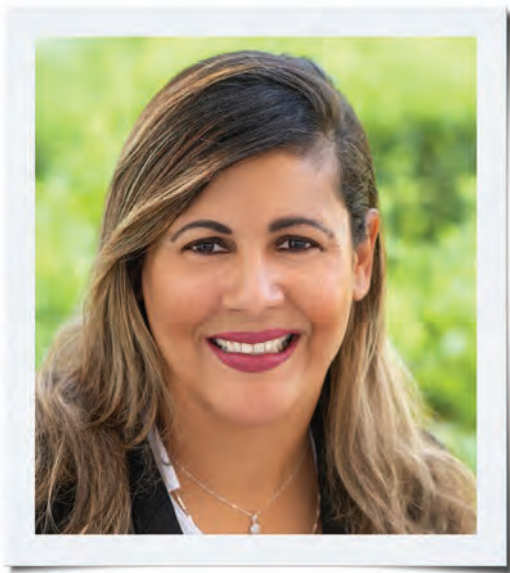
# Local Women Setting the Bar High with Corporate Social Responsibility



Influential in their fields and inspirational in their commitment to making a difference in our community, local professional women are stepping up to address Orange County's most critical needs. Through their partnerships with Orange County United Way and passion for improving lives for those in need, these change makers are creating a profound impact while supporting United Way's community-focused work to ensure underserved students succeed, struggling OC families gain financial security, and our homeless neighbors find a place to call home.

## Elevating Company Culture

As Senior Vice President of Quality at Edwards Lifesciences, Linnette Torres has been instrumental in energizing her company's philanthropic spirit and utilizing a partnership with United Way to amplify Edwards's culture of giving.



**“At Edwards, we believe it is important to inspire all of our employees to engage and volunteer as we challenge ourselves to increase our community impact each year. I value our partnership with United Way because its initiatives are so focused on principles that we, as an organization, align with.”**

*—Linnette Torres, Edwards Lifesciences*

Through its long-time partnership with United Way, Edwards furthered its community impact by adopting Washington Elementary School in Santa Ana. The school-based Impact Hub provides students and families from low-income districts with crucial support, resources, and programming.

Linnette is instrumental in expanding Edwards's reach into the community. Last year, she led a committee of 30+ employees for an impactful, hands-on, and fun employee-led giving campaign. The outcome? Edwards and its Foundation raised more than \$1 million to support the community.

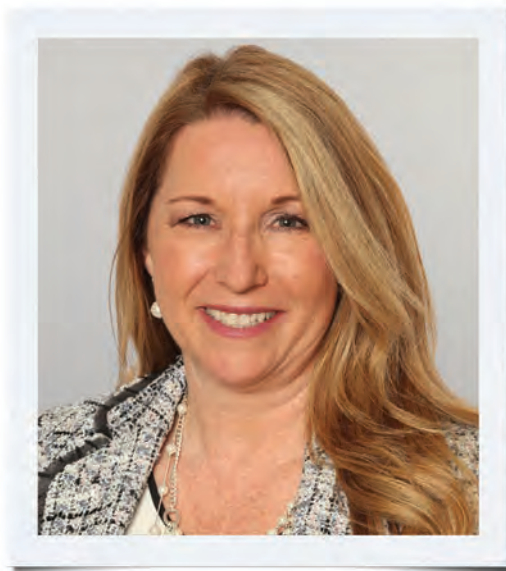
## Empowering Employee Engagement and Fostering Fulfillment in the Workplace

A true trailblazer in her company and community, Amy Mathieson, President of the California market at FirstService Residential, is a compassionate leader who consistently inspires, rallies, and empowers her associates and colleagues to give back. Her astute leadership and forward-thinking prompted her to expand her company's giving opportunities so that employees could make an impact in the communities where they live and work. This approach increased employee engagement, resulting in a surpassed fundraising goal and a 30% increase from the previous year's campaign.

**“Corporate social responsibility is doing the right thing to give back in a broader way. Every year, our associates tell us that culture is the number one reason that they love working for FirstService Residential—and a big reason for that is because of the philanthropic work that we do with United Way.”**

*—Amy Mathieson, FirstService Residential*

With 6 years on United Way's Corporate Cabinet and a newly appointed Board member, Amy leads by example and exemplifies her personal passion for philanthropy with a hands-on approach.



## Building Impactful Relationships

A skilled entrepreneur, energetic community leader, and distinguished philanthropist, Shirin Behzadi, CEO of Shirin Behzadi, LLC and last year's winner of Orange County Business Journal's Women In Business Award, possesses a strong desire to make a strategic and profound impact.

As an active member in several of United Way's affinity groups as well as a Board member, Shirin leverages her network to connect with like-minded individuals and organizations to break barriers and create more opportunities for our underserved communities.



**“The more involved I became with United Way, the more I saw how great people can come together and use so much talent, energy, and experience to create fundamentally sound programs for people in our community.”**

*—Shirin Behzadi, Shirin Behzadi, LLC*

Shirin puts her dedication to philanthropy into action as the chair of Orange County United Way's Alexis de Tocqueville Society, whose 2022 fall fundraiser raised over half a million dollars. This year's event, themed *“It's Showtime!”*, will spotlight esteemed local philanthropists and raise money to help provide programs and resources to underserved families and children in our community. Learn more about *“It's Showtime!”* by visiting [ocuw.to/showtime](https://ocuw.to/showtime).

Here are just a few of the benefits Orange County United Way can offer you:



Network with professional and inspiring local women



Introduce exciting and impactful employee engagement opportunities to your company



Make a difference in your community

To learn how Orange County United Way can support your Corporate Social Responsibility efforts or to join our Women United affinity group, contact Angely A. Vallarta, Corporate Engagement Director, at [AngelyV@UnitedWayOC.org](mailto:AngelyV@UnitedWayOC.org) or 949.263.6117.



ORANGE COUNTY UNITED WAY

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## CREATE CONNECTIONS & EMPOWER CHANGE IN ORANGE COUNTY

Help drive lasting change in Orange County by joining Women United, a diverse group of 350+ local women who actively engage in philanthropy, volunteerism, and advocacy.

Expand your network, enjoy special members-only events, and know that your contributions support Orange County United Way's mission to ensure our students succeed, our struggling families gain financial security, and our homeless neighbors find a place to call home.



### LEARN MORE ABOUT WOMEN UNITED

To learn more about Women United, contact Jessica Garrity  
Associate Director, Development, Orange County United Way  
[JessicaG@UnitedWayOC.org](mailto:JessicaG@UnitedWayOC.org) | 949.263.6123

◀ Scan the QR code or enter the URL [ocuw.to/women-united](https://ocuw.to/women-united)

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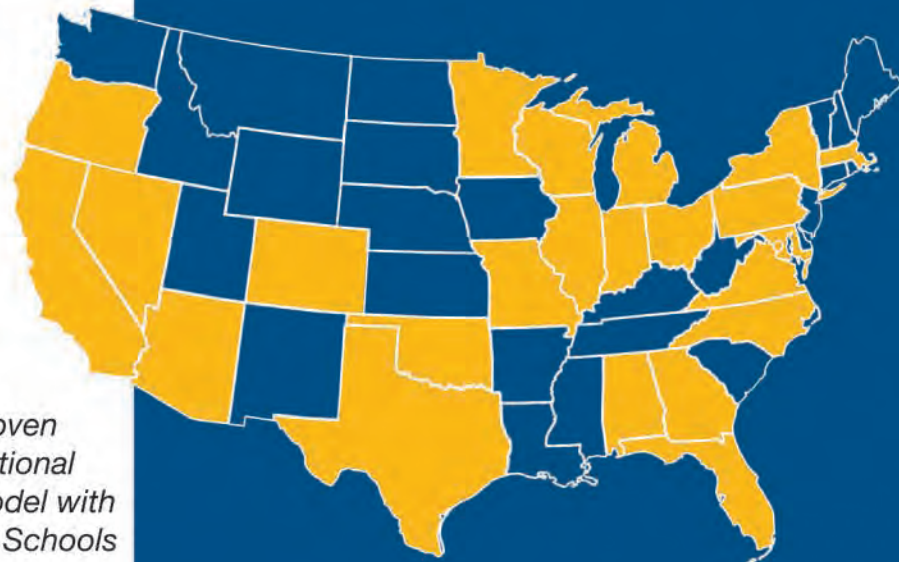


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# DEI is Not a Buzz Word at FRB

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# CRACKING THE CODE:

## UNDERSTANDING THE PROFOUND INFLUENCE OF STORYTELLING IN THE COURTROOM

By Paul Nelson, Esq

If you ever have the privilege of serving on a jury, the judge is likely to begin the trial by advising you to adjust your expectations. "This isn't going to be like *Perry Mason* or *Boston Legal* or *The Good Wife*," the judge might say. "This trial is likely to move slowly. There will be no grand speeches, no surprise confessions on the witness stand. This is a court of law, not a TV series set."

On one hand, this judge will have a point. Television and motion pictures are designed for entertainment, not the administration of justice. Also, in drama, time is compressed. Dialogue is snappy. Conflict is maximized. Legal niceties can be discarded cavalierly for the sake of dramatic convenience. And above all, any good TV or movie trial requires a surprise twist or unexpected reveal, something that almost never happens in real life.

On the other hand, it would be a mistake to completely dismiss the notion that a trial is *not* theater. The principles of drama—character, narrative, conflict, theme, catharsis—often do play a significant role in how a matter is decided. In fact, an age-old legal maxim tells us: "In a trial, the side with the best story wins."

This adage is particularly true in divorce law. Divorces, by their nature, pit two individuals against each other in a high-stakes contest. At play is the disposition of community property, the determination of separate property, as well as the establishment of any long-term financial responsibilities (e.g., alimony, child support) one party may owe the other.

Even when the divorcing spouse claims they are seeking an "equitable" arrangement, the fact is, any such contest likely will have its winners and its losers, and each party wants to be on the winning side. How well the divorce attorneys manage to convey their clients' cases through narrative, presentation, and the generation of empathy will go a long way in determining the final settlement the judge decrees.

So, what does a good attorney do to plead a divorce matter? And how can you pick the best attorney for yourself, should you ever need one? What follows are the elements successful divorce counsel use to tell a winning story:

### Just the Facts, Ma'am

The hero of the TV cop drama *Dragnet* was

Joe Friday, a laconic, by-the-book detective who wanted "just the facts" of any case he was investigating. A good divorce lawyer will be similarly diligent, not only taking the time to collect the objective particulars relevant to your marriage and its dissolution but also confirming their legitimacy. When you go to court, you similarly want your evidence to be rock-solid. The last thing you need is the opposing counsel casting doubt on your evidence or, worse yet, revealing key parts of your case to be exaggeration or fabrication.

### The Hero's Journey

In his book, *The Hero with a Thousand Faces*, literature professor Joseph Campbell famously created a template for storytelling he dubbed "The Hero's Journey." Drawing on everything from Greek mythology to Shakespearean drama, Campbell's "monomyth" has served as the basis for films ranging from *Star Wars* to *The Lion King* to *The Hunger Games*.

Similarly, when preparing to argue your case, a good divorce lawyer will take those facts we just discussed and arrange them in a way that tells an equally compelling tale—with you as the hero. Like any good protagonist, you may at times appear flawed, vulnerable, and even capable of poor decisions. Yet in the end, your counsel will portray you as the person most deserving of a positive outcome.

### Workshopping

Unlike movies and TV shows, Broadway plays, whether dramas or musicals, usually go through an arduous process called "workshopping" before opening night. Beginning with a simple script, the writer, director, and cast, working as a team, will manage to put the show together. Bit by bit, scene by scene, this dedicated group will identify what works, discarding what doesn't, continuously polishing the production—often with live audience feedback—until they have what they believe is a winning product.

A good divorce attorney works in much the same way. Starting with your story as you present it, they will edit your narrative, role-play with you, coach you, and even help you rephrase testimony so it is as compelling and sympathetic as possible, all while staying within the boundaries of truth. In this sense, your



attorney is akin to a movie director or symphony conductor, coordinating the presentation of elements so emotions rise and fall in a rhythm designed to elicit the best possible effect.

### Reading the Room

Any live performer knows the importance of "reading the room," that is, being sensitive to the tenor and mood of the audience. Consider a courtroom as a theater with an audience of one: the judge. As a litigant, you want the judge to like you. To sympathize with you. To be on your side.

Invariably, this requires you to be humble, courteous, respectful, and most of all, truthful. (Most judges have spent years on the bench and possess heightened B.S. detectors. They can easily sniff out people who are evasive, hostile, snide, or prone to exaggeration and fabrication.)

They also don't like whiners, complainers, smart alecks, or those given to angry outbursts. A good divorce attorney will therefore advise you how to comport yourself in court and even how to control powerful negative impulses (those damning traits the opposing counsel will try to get you to express).

In my 22 years of litigating divorce cases, I have grown to understand the power of a strong narrative to our most important audience—the judge. The right story must be carefully constructed and executed for this individual to evoke the right response: a positive outcome for the protagonist.

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## The Women Behind Prego

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

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

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Congratulations to Erin and all the 2023 Women in Business Honorees — thank you for your commitment to GFiber and Orange County!



**Erin O'Neill Schultz**  
Regional General Manager - West, GFiber



## Healthcare Staffing in the Age of Telemedicine

The idea of doctors making house calls (that is, coming to your home to provide medical care) seems like a thing of the past. However, the recent surge in telemedicine, which was a response to the COVID-19 pandemic that began in 2020, has put a modern spin on the concept. Telemedicine, in which health care professionals consult with patients via computer or smartphone is now firmly planted as part of the future of health care.

At Marquee Staffing, we always stay on top of changes in the healthcare field, so let's take a look at what telemedicine looks like now, how it's likely to affect the future of healthcare, and how it relates to your staffing needs.

### The Growth of Telemedicine

Telemedicine surged significantly in 2020 as medical professionals tried to find ways to provide healthcare amidst a global pandemic. From March to June 2020, telemedicine interactions skyrocketed an astonishing 766%. While that initial spike began to ebb as the immediate healthcare crisis subsided and as vaccinations allowed people to see their doctors in person again, telemedicine has clearly taken hold in a more permanent way. By the end of 2021, telemedicine represented about 17% of all medical insurance claims.

Regulatory changes regarding reimbursable codes and a significant investment in telehealth technologies support this growth in telemedicine. Both patient and healthcare provider attitudes have changed to be more accepting of telemedicine, even though most patients prefer in-person care when it's available.

### The Benefits of Telemedicine

Telemedicine allows patients to have much greater access to their healthcare providers, especially when combined with at-home medical devices and monitoring. On-demand telemedicine, particularly when used for urgent care needs, can decrease costs while scaling access, thanks to the decreased burden on healthcare infrastructure and facilities. As a result, many commercial insurers, notably Blue Cross Blue Shield, are ramping up their support for telemedicine services.

Telemedicine also opens new doors for patients in more remote or rural locations. Thanks to telemedicine, these consumers may be able to work with medical specialists, such as neurologists, infectious disease specialists, and psychiatrists, who might otherwise have been completely inaccessible. Many younger patients also greatly appreciate the flexibility that telemedicine provides, since the technology makes routine care (and even some urgent care) incredibly convenient. Those with chronic conditions also benefit from the increased ease of access to their healthcare providers from the decreased exposure to infectious diseases that are unavoidable when using in-person healthcare.

### Who's Using Telemedicine Now?

The use of telemedicine has settled down now that the pandemic is no longer in a crisis stage, with certain types of physicians leaning into its use. Among the most common types of healthcare providers relying on telemedicine are:

- Psychiatrists
- Substance use disorder specialists
- Endocrinologists
- Rheumatologists
- Gastroenterologists
- Neurologists
- ENT specialists
- Pulmonary medicine specialists
- Cardiologists
- Nephrologists

Among the medical professionals least likely to use telemedicine are dermatologists, optometrists, and surgeons. While consumers in rural and remote areas are among those most helped by the advent of telemedicine, many of them, however, do not have the digital access needed for these services. Patients with disabilities and those of lower economic status may also have difficulties with access.

### The Future of Telemedicine

Favorable responses on the part of medical consumers, improved regulatory access, and continued investment into telemedicine all bode well for the technology's future. We expect access to continue to improve, especially in care and mental health. This is a great benefit to the regions of the country that are experiencing provider shortages, which are especially dire in the behavioral health categories.

As the population ages, those in greater need of regular healthcare are going to be more tech-savvy, so they're likely to turn to new technological tools to access the care they need. Anticipated shortages of healthcare providers are also likely to drive more patients to telemedicine options. Ongoing studies will help determine the effect of telemedicine on patient-doctor rapport and trust, and healthcare providers may seek out training in how to establish relationships across a screen. On the technological side, expect to see continued improvements in the areas of reception and internet connections.

As telemedicine continues to grow and adapt, the staffing needs related to it will also be in flux. At Marquee Staffing, we pay constant attention to these shifts in healthcare technology, the better to find appropriate, skilled, and reliable professionals to meet the need of healthcare providers.

### Meet Marquee Healthcare's New Recruiting Expert

As telemedicine continues to expand, Marquee Staffing's Healthcare division is ready to help you find the specialists you need to navigate this new frontier of healthcare. Key to our expansion and efforts in this new world is our new recruiter, Mackenzie Starkey, BSN, RN.



Mackenzie Starkey's deep experience as a Registered Nurse stands her in good stead as she joins Marquee Staffing as a Healthcare Recruiter. She also draws on her academic background to stay at the forefront of changes in the healthcare industry, with a Bachelor of Health Science and a Bachelor of Science in Nursing degree, both earned from the University of Missouri-Columbia. She spent 5 years working in inpatient and outpatient settings as a pediatric nurse, so she understands the importance that the right staffing can make to the most vulnerable of patients and those least able to advocate for themselves.

In 2023, Mackenzie made a couple of big career moves as she transitioned away from in-person nursing, driven by a desire to help other healthcare professionals connect to their ideal career paths. Her commitment to helping medical professionals achieve growth and success and to matching them with the right opportunities led her to relocate from Chicago to Orange County, California — where we at Marquee Staffing were fortunate enough to bring her on board. We look forward to watching the healthcare organizations and professionals we work with thrive thanks to Mackenzie's skills and devotion.

At Marquee Staffing, we specialize in connecting healthcare professionals to the clinical, allied health, and administrative jobs that best suit their skills and desire for advancement. We help healthcare organizations fill critical vacancies speedily by connecting them to the right people for the jobs they need to fill. We understand the local healthcare marketplace here in Orange County, and we keep a close eye on the changing needs of the healthcare industry to make sure you always stay up to date. Contact us today to see how we can help you with your staffing needs.

We welcome you to contact Marquee Staffing Healthcare Division to inquire about our tailored solutions for your internal placements or new Healthcare job opportunities.

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## CONGRATULATIONS MARICELA RIOS-FAUST

*2023 Women in Business  
Awards Nominee*

Maricela serves as the CEO of  
Human Options.



**WE ARE COMMITTED TO A FUTURE IN WHICH EVERY PERSON AND FAMILY IN ORANGE COUNTY EXPERIENCES SAFE, HEALTHY RELATIONSHIPS AND LIVES FREE OF FEAR.**

Maricela Rios-Faust is a leader in preventing and ending relationship violence through her work as CEO of nonprofit Human Options, one of the most comprehensive relationship violence service providers in Orange County, and her leadership on partnerships and collaboratives aimed at ending the cycle of violence. As CEO, Maricela Rios-Faust brings strong strategic leadership, nonprofit management, and fundraising skills to her multifaceted role at Human Options. Maricela's leadership has led to Human Options budget growth from \$4.5 million to \$7 million and doubling its presence in high need communities, increasing access to needed resources to survivors. She oversees the fiscal and programmatic direction, as well as its emergency shelter and 24-hour crisis hotline, transitional housing programs, community-based services (10 resource centers), a prevention education program and all administrative and fundraising functions. Maricela has become a sought-after source of knowledge about domestic and relationship violence.



# Providing Integrated Housing and Healthcare For Women Experiencing Homelessness

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

Over the past four years, we have seen an increase in vulnerable women referred to our programs, especially senior women and women fleeing domestic violence. As a community, we need to invest in the health and safety of women experiencing homelessness who face unique challenges and barriers. We provide comprehensive services to meet their complex housing and healthcare needs.

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

California accounts for 30% of the nation's homelessness population. According to the California Statewide Study of People Experiencing Homelessness, the state's homeless population is aging.

Lack of affordable housing and access to healthcare services are barriers for women and families. The lack of affordable housing and the high cost of living, including rent, transportation, and childcare in Orange County, means families are vulnerable to homelessness.

In Illumination Foundation's programs:

- The number of females served in our programs has almost doubled in the last four years.
- The number of senior women in our programs has tripled in the last four years.
- The number of women fleeing domestic violence in our programs has more than doubled in the last four years.



*"Since coming into Illumination Foundation's care, I've been given a house to live in, clothes, and taken to my medical appointments. They really take care of me." —Lena*

These numbers and trends demonstrate just how much work still needs to be done. The impact on homelessness on women is distinct. In order to disrupt the cycle of homelessness we need to recognize and prioritize the specific housing and healthcare needs of women.

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

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

You can make an impact today as an advocate, partner, donor, or volunteer. Join Illumination Foundation in our mission to disrupt the cycle of homelessness. **For more information, go to [www.ifhomeless.org](http://www.ifhomeless.org).**



## Disrupting the Cycle of Homelessness Through Housing and Healthcare

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



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

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



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## 2023 Women in Business Award Nominees

### Melissa Aills, Vice President of Supply Chain

*Juice It Up!, Newport Beach*

Celebrating her 20th work anniversary in 2023, Melissa Aills is the vice president of Supply Chain at the leading smoothie and juice chain Juice It Up! Throughout the past two decades at Juice It Up!, Aills has spearheaded the development of the brand's supply chain department and has established strong, valuable relationships with suppliers that continue to propel the brand forward in meeting business objectives. Her countless contributions and achievements have helped to reinforce Juice It Up!'s commitment to flavor and functionality, and they have assisted in cementing the brand's reputation as an innovator of lesser-known ingredients. When Aills arrived at Juice It Up! in 2003, the brand was a small, growing franchise with fewer than 15 locations. Today, Juice It Up! has more than 100 locations open or in various stages of development, and the popular brand continues to garner well-deserved industry recognition and acclaim.



### Marsie Alford, Founding Board Member

*Genesis Bank, Newport Beach*

Marsie Alford is a seasoned professional with more than 25 years of accounting and finance experience. Her impressive career has been marked by significant accomplishments, demonstrating her expertise and leadership. Throughout her career, Alford has served as an accounting and finance consultant, providing valuable advice and guidance to a diverse range of businesses. From manufacturing and healthcare to e-commerce, real estate, aerospace, retail, investment, legal, and non-profit organizations, Alford's expertise has benefited companies with annual revenues ranging from \$5 million to \$15 billion. Her keen financial insights and strategic acumen have helped these businesses navigate complex financial landscapes and achieve their goals. Alford's journey in the finance field began in 1992 when she started her career as an accountant and financial analyst for a top Fortune 500 company. Over the years, she expanded her expertise and became a financial advisor for various nonprofit organizations throughout Orange County.



### Jessica Aliotti, Wealth Management Advisor

*Northwestern Mutual, Irvine*

Jessica Aliotti joined Northwestern Mutual as a financial advisor in 2014, and currently runs her practice in Orange County. Her greatest professional achievements can be measured by the impact she has on her clients' lives and financial security. She works with her clients at every stage of life, helping them to understand both their needs and their potential. Her specialty is in working with sales executives, tech professionals, and women in law to find the solutions that work best for their unique needs. Aliotti received her B.A. in Communication with a minor in Kinesiology, cum laude, from St. Mary's College of California. In 2016 & 2018, Aliotti was recognized as the #1 ranked Northwestern Mutual advisor as compared to her peers in the Western Region of the United States. She was #2 in 2017 & 2019, and was ranked #7, nationally, in 2018. In fiscal year 2021 - 2022, Aliotti achieved the coveted Northwestern Mutual FORUM recognition, which represents approximately the top 5% of advisors in the country.



### Corinne Andersonschoepe, Chief Brand Officer

*Fluidmaster, San Juan Capistrano*

Corinne Andersonschoepe's career trajectory and contributions to the higher levels of the organization have skyrocketed within her 13 years at Fluidmaster. She started her career at Fluidmaster in a rotational program in the finance department with most of her time being spent with FP & A. She then moved into marketing, where she successfully launched the Perfect Fit tank lever line, which was the fastest new product development project completed at the company over the past decade and is now a \$4 million line. From there, she became responsible for the strategic brand direction globally. Recently she was just named chief brand officer which gives her responsibility and oversight of marketing activities and product launches globally, international business development, innovation and R & D, North America sales, and she now leads the company in long term business strategy. She is also actively promoting a culture of collaboration and innovation. On top of all of that, she also sits on the board of Fluidmaster.



### Kate Romano Armado, SVP, Business Development Officer

*Enterprise Bank & Trust, San Juan Capistrano*

As senior vice president, business development officer at Enterprise Bank & Trust, Kate Armado facilitates day-to-day bank operations as it relates to sales, new business efforts and her team's contributions to the bank's growth strategy. A California native, she is passionate about helping her community succeed and sees firsthand the tangible effect that financial success has on businesses and owners, and their families and communities. During her time at Enterprise, Armado has played an integral role in expanding the bank's footprint in Orange County. She consistently demonstrates a commitment to the community by creating and overseeing numerous collaborative campaigns to generate new relationships. Her hands-on approach to client service has generated an impressive pipeline of new and prospective business for the bank.



### Claire Arora, VP, Head of Customer Success

*Green Street, Newport Beach*

Claire Arora is a vice president at Green Street where she leads the global Customer Success team. Under Arora's leadership, the newly formed team has led over 5,500 client trainings and handled more than 14,000 user inquiries. The team's client satisfaction score is 4.97 out of 5, equating to 99% satisfaction, signaling the clear and unique value customer success brings to



Green Street's clients. Arora has been instrumental in defining how Green Street engages with users throughout our go-to-market process by helping coordinate the firm's commercial efforts on multiple product launches, including a successful overhaul and revamp of our innovative client web portal. In addition to her achievements on the customer success team, Arora holds a key leadership position on Green Street's Diversity, Equity, and Inclusion Council. She has organized several events for the firm over the past three years in pursuit of creating a more diverse, equitable, and inclusive workplace.

### Dawn Austin, Senior Fiduciary Officer

*Northern Trust, Newport Beach*

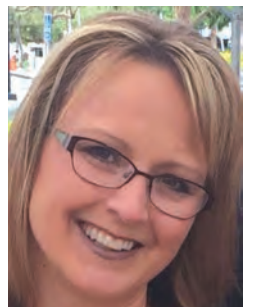
Dawn Austin is a vice president and is the senior fiduciary officer for the Orange County market. Dawn Meyer Austin is responsible for overseeing all aspects of the Orange County's fiduciary practice, including oversight of all trust relationships, management and mitigation of fiduciary risk, review of all new trust business, and oversight of all court-related matters including administrative petitions and fiduciary litigation. Austin also works with select Wealth Management clients and their advisors to develop integrated tax and estate plans and wealth management strategies.



### Catherine Bair, VP of Operations

*HomeLife Brands, Anaheim*

Catherine Bair was one of the first employees at HomeLife Brands seven+ years ago. She started managing a single support role and has since grown to manage 20+ employees across two divisions. Her people skills and business acumen are world class and she supports, grows and invests in her people yielding a virtually zero turnover rate in her departments. Bair is a people developer by nature and has been investing and growing herself and her teams. She has become our lead in key company culture initiatives including Gallup Strength Finder among others. In addition she champions a culture of giving back and involved in our company programs which have to date donated close to \$5 million dollars to charities.



### Ramin Baschshi, President & CEO

*Unlimited Possibilities - UP, formerly UCP of Orange County, Santa Ana*

Dr. Ramin Baschshi, M.D., is an unwavering advocate for child welfare and inclusion. As the president & CEO of Unlimited Possibilities (formerly UCP of Orange County) since 2018, Dr. Baschshi has driven remarkable growth and achievements. Her leadership has tripled the organization's finances, diversified its leadership, developed innovative programs, facilitated a successful facility relocation, and executed an impactful rebranding effort. Despite the challenges of COVID-19, Dr. Baschshi's resolute stance kept the organization operational, retained all staff, and doubled its service capacity in 2021. Under her guidance, Unlimited Possibilities has thrived, creating a more inclusive environment for the Orange County community. Dr. Baschshi's visionary leadership and exceptional accomplishments make her an invaluable asset to Unlimited Possibilities and a true champion for the Orange County community.



### Shari Battle, Senior Vice President, Market Executive, Orange County

*Bank of America, Newport Beach*

Shari Battle is a bank veteran of over 20 years, beginning her career as a financial center manager and currently serving as market executive of Bank of America Orange County. She is responsible for managing employee engagement and coordinating all the company's lines of business to best serve the county's banking and financial needs, as well as building community-based partnerships and deploying the bank's philanthropic capital. Battle oversees more than \$2 million annually to invest into Orange County nonprofits to help individuals, families and communities overcome barriers to success. Battle drives connectivity for 2,000 local employees to internal resources and to boost employee satisfaction, retention, and professional advancement. For example, she established the bank's local women employee network that is now 675 members strong and oversees a joint employee network collaboration aimed at driving inclusion and community engagement.



### Jennifer Bauer, Founder

*Institute for Nature Centered Coaching LLC, Huntington Beach*

Supporting individuals navigating major life changes, grief journeys, healing trauma, and physical healing. Helping people find profound peace, joy and freedom in their lives. Contributing to the collective spiritual expansion and awakening. Training Nature Centered Coaches around the globe to continue to ripple out healing in the world. Living in reciprocity with nature to heal the planet. Collaborating with other lightworkers to assist in raising the vibration of the planet and its inhabitants. Supporting the mission of Free Rein Foundation in rescuing horses and utilizing them in Equine-Assisted Services. Volunteering time, skills and knowledge to assist Free Rein Foundation's growth.



### Sandra Beaver, Chief Financial Officer

*Evolus, Newport Beach*

Sandra Beaver is the chief financial officer at Evolus helping to drive the rapid growth of Evolus' total net revenue in 2022 to \$149 million, a 49% increase over full-year net revenues in 2021. Notably, Beaver led the charge resulting in a 23% increase in Q1 2023 vs Q1 2022, positioning the company for continued growth and success into 2023 and beyond. Most recently, she led the



# A woman's work is unstoppable

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



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## 2023 Women in Business Award Nominees

company through its first licensing deal agreement to broaden the injectables portfolio beyond the current flagship neurotoxin product, a competitor in the \$2.2 billion U.S. neurotoxin market, and into the \$1.6 billion U.S. dermal fillers market.

### LaSharnda Beckwith, President & CEO

*Lutheran Social Services of Southern California, Orange*  
In just three years as chief of Lutheran Social Services of Southern California (LSSSC), Dr. LaSharnda Beckwith has worked collaboratively with LSSSC's board in achieving both organizational goals, establishing financial sustainability and realized its mission-aligned programmatic growth to best serve the community. Additionally, Dr. Beckwith has established and assembled one of the most diversified staff and boards of directors in the agency's history.



### Mary Behrens, CEO, President & CFO

*National Equestrian Centers Inc. dba Huntington Central Park Equestrian Center, Huntington Beach*  
Mary Behrens purchased the Huntington Central Park Equestrian Center 37 years ago and has ensured that Surf City is also Horse City. HCPEC is situated on 25 acres of beautiful parkland just two miles from the beach. Home to 400 horses, with multiple trainers and arenas, annual horse shows in several disciplines, a wedding venue, and more than 150 acres of public trails, HCPEC of Southern California's premier equestrian facilities. Her annual Summer Classic Horse Show raised over \$1 million for the Huntington Beach Art Center, and she was instrumental in the creation of Red Bucket Equine Rescue, originally housed at HCPEC, and the Free Rein Foundation, which is based at HCPEC. She also created a home for the Therapeutic Riding Center of Huntington Beach and the Huntington Beach Mounted Unit. She's rescued countless horses and dogs and ensures HCPEC is a favorite place for the entire community.



### Vanessa Benavides, CEO & Founder: GO RN, StaffGRIT; COO & Co-Founder: Haute Legs

*GO RN, StaffGRIT, Haute Legs, Santa Ana*  
Vanessa Benavides, the founder and CEO of healthcare startup, Go RN, and native to Orange County is a beacon of innovation and empowerment. Her 20+ years in healthcare ranges from entrepreneurship to patient care, as Benavides is a registered nurse. Her multidisciplinary background in nursing plus her keen sense of curiosity lead her to Magnet, a healthcare innovation incubator through St. Joseph's Hospital. Thus, GoRN was born in 2016 as technology "for nurses designed by nurses". GoRN has exponentially grown 350% from staffing two shifts per day pre-pandemic to 700+ shifts per day in 2021 with the use of our dynamic platform. Their technology grew to being utilized across Southern California to support COVID emergency response, homeless crisis management, and nationally with opportunities in acute, non-acute, and travel. The platform has simplified staffing, scheduling, and compliance. Benavides knew the revolutionary technology could impact other industries, as well. Thus StaffGrit was born in 2021.



### Letitia Berbaum, COO & Partner

*The Zandbergen Group, Laguna Beach*  
Letitia Berbaum is paving the way for future generations of female wealth advisors. As partner and COO of The Zandbergen Group, Berbaum specializes in "True Wealth" strategies, wealth management, asset transfer strategies for high-net-worth individuals and multi-generational families, and full-service strategic planning for business owners - from those seeking an entrepreneurial framework to those exploring an exit plan. Berbaum has been recognized as an Orange County Five-Star Wealth Manager for seven consecutive years. She has earned the Accredited Investment Fiduciary® (AIF®) designation, CEPA, and holds a Series 66 securities registration, as well as Long Term Care Insurance and Life Insurance licenses. Additionally, Berbaum's expertise has been featured by Forbes Business Council, and she is a part of the Brea Chamber of Commerce Women in Leadership Council. She was also recognized as a "Women of Achievement" by Senator Bob Archuleta's office for her outstanding contributions to the community.



### Pooja Bhalla, Chief Executive Officer

*Illumination Foundation, Santa Ana*  
Dr. Pooja Bhalla is the chief executive officer of Illumination Foundation, an Orange County, California-based organization whose mission is to disrupt the cycle of homelessness. Under her leadership, Illumination Foundation has become a recognized and innovative leader in healthcare services for those experiencing homelessness. Bhalla joined Illumination Foundation in 2017 as Chief Operating Officer. In 2021, she was promoted to the role of executive director of Healthcare Services, where she focused on the complex issue of health equity in order to improve quality outcomes and reduce health disparities. She became the organization's Co-CEO in July 2022, and was promoted to CEO in May 2023. As CEO, Bhalla oversaw revenue of \$49.4 million in FY 2022-23, leading Illumination Foundation's integrated system of housing and healthcare through which the organization provides targeted, comprehensive services to persons experiencing homelessness in order to increase their long-term health and housing stability.



### Amanda Billett, Owner & Founder

*Concierge On The Coast LLC, Irvine*  
Amanda Billett is the founder of Concierge on the Coast, which offers as-needed personalized concierge services for busy professionals in Newport Beach, Irvine & surrounding areas.



During the time spent volunteering at her three daughters' schools, she saw the need to support professionals who were juggling the demands of home, careers & family. As a result, Concierge on the Coast was born. Today, after five years in business, Billett has loyal clients who benefit from her approachable personality, high level of service, attention to detail & professionalism. Taking everyday responsibilities off her clients' minds, allows them to focus on their own entrepreneurial interests, demanding careers while having personal time. She specializes in running errands, household & 2nd home management & assisting during busy periods of their lives.

### Laurie Blanton, Chief Accounting Officer

*HireRight, Irvine*

Laurie Blanton joined HireRight in April 2020 to support the Company's goals of going public, expanding internationally and improving efficiencies. Blanton played a key role in taking the Company public in October 2021 on a significantly compressed timeline, navigating the multi-year public company audit process, and building a strong global accounting and SEC reporting team. While working on the IPO, Blanton was a key stakeholder in the Company's conversion to a new ERP system, which was completed in January 2022. Blanton continues to support key company initiatives by implementing automation in the back office accounting processes.



### Lynne Bolduc, Partner

*FitzGerald Kreditor Bolduc Risbrough LLP, Irvine*

Over the past three decades, Lynne Bolduc has established herself as one of the premier corporate and securities lawyers on the West Coast. She has structured and implemented billions of dollars' worth of business and financing transactions, and has represented both domestic and international clients in complex transactions across multiple industries. She specializes in crafting creative financing solutions for companies wanting to raise money, go public, sell, or acquire other companies. Not only has she earned the trust of her clients and the respect of her peers, Bolduc is also a frequent speaker and expert witness on business and securities law issues, has published numerous articles, and was recognized as a Southern California Rising Star Attorney by Los Angeles Magazine and Southern California Super Lawyers three years in a row. Bolduc also serves as an Independent Director on corporate Boards.



### Janice Brady, VP, Accounting & Finance

*Miguel's Restaurants, Corona*

Miguel's California Mexican Cocina was founded in 1973 by Mike and Mary Vasquez in Corona, California. In 1975 the couple opened a fast-food restaurant and named it Miguel's Jr., which was an immediate success. Janice Brady joined Miguel's Restaurants in 2012 as Controller and was promoted to VP of Accounting & Finance in 2020. She is an integral part of the leadership team, not only overseeing accounting and finance, but also IT. Janice is involved with all strategic business decisions, site selection, systems implementations, and automation. Since joining Miguel's, the Company has nearly doubled in size. Today, Miguel's Restaurants operates 21 Miguel's Jr. locations and one full-service restaurant with two additional Miguel's Jr. locations opening in 2023.



### Ruth Brajevich, Vice President, Strategic Initiatives

*Ware Malcomb, Irvine*

Ruth Brajevich is vice president, Strategic Initiatives for Ware Malcomb, an international design firm with 28 offices located across the Americas. An excellent strategist, gifted communicator, innovative thinker, Brajevich has been a trailblazer at the firm. She was the first woman promoted to principal and has been part of Ware Malcomb's Executive Team since 2004. Currently a member of the firm's Advisory Board, Brajevich has played a key role in the company's transformation from a regional firm to a global Inc 5000 Fastest Growing Company and Zweig Best Firm to Work for. Her focus and strategic approach to the business is backed up by a depth of knowledge and experience in strategy, marketing, communications, innovation, culture, learning and people development. Brajevich leads Leadership Development, Internal Communications, Knowledge Management, Learning & Development and Strategic Planning. Some notable accomplishments include launching the firm's DEI initiative, Leadership Development program, Executive Coaching program, Mentoring program, Continuous Improvement program, and Wellness initiative. Brajevich serves on the Komen Orange County Leadership Council. A 15-time marathoner and breast cancer survivor, she has championed cancer awareness and research fundraising for both Pediatric Cancer Research Foundation and the Susan G. Komen Foundation since 2012.



### Alexandra Bravo, Senior Vice President, Region Executive, Consumer Bank

*Bank of America, Anaheim*

Alex Bravo is Bank of America's preferred bank region executive for Orange County and the South Bay, overseeing nearly 130 financial centers (nearly 100 with various bilingual specialists) with more than 1,100 employees. Bravo has maintained the #1 deposit share amongst competitors, earning \$46.3 billion in client deposits and serving 1.2 million households. Under her leadership, both households and deposits have grown year over year and continue trending upward. She is focused on delivering a local community bank experience with consistent quality client experience, managing risk, and responsible growth for customers and the bank. She is active in the community and inside the bank as an employee network leader in groups such as the company's Disability Action Network for Southern California. She joined Bank of America in 2013 and has held several roles; she began her banking career as a teller at Sanwa Bank in 1998, as a college student immediately after high school.



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get there.



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Managing Director, BMO Commercial Bank

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✉ [charlene.davidson@bmo.com](mailto:charlene.davidson@bmo.com)

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## 2023 Women in Business Award Nominees

### Lisa Brown, Controller

*Original Sprout, San Clemente*

Lisa Brown has been with Original Sprout for over eight years. She started as a consultant in 2015 and played a substantial role in the sale of Original Sprout in 2017. In 2018 the company asked her to be a full time permanent employee making her the Controller and HR Manager. Brown also participates in multiple other areas within the organization. She is the opposite of a "Not My Job Mentality". She will review blogs/marketing material, attend marketing events and trade shows, review and add crucial data to contracts, organize and facilitate company functions, warehousing, inventory control, etc. While her plate is full at all times, she always has a pleasant and helpful attitude.



### Kira Bruno, CEO

*FORTIS Resource Partners, Inc., Irvine*

Kira Bruno is founder and CEO of FORTIS Resource Partners (FORTIS). Based in Irvine, California, FORTIS is a woman-owned executive search and professional staffing firm that helps clients attract, recruit, and retain top talent in accounting, finance, and human resources. At its core, the company exists to provide businesses with a stronger foundation, a brick-by-brick process that aligns a candidate's skills and personality with the right workplace culture, resulting in a more effective workforce. Bruno founded FORTIS under the premise of serving others, which is reflected in both the company's values and the life Bruno herself leads. Specifically, the FORTIS mission embodies her personal ideals of building trust, positively impacting others, and providing the highest level of service to the professional and non-profit communities. Her role as an executive woman business owner has been made easier through her 30+ year career that has encompassed great success in building companies and strong relationships, leading and developing others in industry as well as coaching and mentoring. Each week she can be found working directly with Orange County company executives and family-run enterprises to help them achieve the strategic hiring goals of their organizations.



### Kim Bubnis, Executive Vice President & Employee Benefits Division Leader

*SullivanCurtisMonroe Insurance Services LLC, Irvine*

Kim Bubnis is executive vice president and employee benefits division leader at SCM, and a member of the ownership group. She plays a pivotal role in the agency's overall growth strategy and its pursuit of exceeding client expectations, and is also responsible for a key revenue growth initiative. Bubnis leads the strategy and day-to-day operations of SCM's employee benefits division, having made major contributions to its success while at the forefront of managing key accounts. Bubnis has also taken the lead in training, development, and process improvements, and has focused on driving communication and culture across all company divisions. Bubnis' leadership skills, energy and cooperative spirit epitomize the SCM culture (#OneSCM), and have significantly contributed to the SCM's awards for Best Places to Work in Orange County (OCBJ) and Best Places to Work in Insurance (Business Insurance).



### Lauri Burns, CEO, Founder

*The Teen Project, Rancho Santa Margarita*

Lauri Burns has saved countless lives and continues to save lives and change the future for generations to come. Burns has made it her business, her personal mission, to change the world by redeeming broken pasts, providing hope and wholeness, changing

transforming and empowering them through her non-profit organization, The Teen Project. Determined to change history, in 2007, Burns launched The Teen Project nonprofit. Over the next 16 years, Lauri raised \$70 million in contract, grants, and donations, and set up rehabilitation sites throughout Southern California. Today, The Teen Project has over 100 full time employees, (therapists, nurses, and counselors) and 156 beds throughout Southern California for girls in need. Under the umbrella of The Teen Project, Burns launched Vera's Sanctuary in Orange County, in 2018. Vera's Sanctuary is the first drug treatment site dedicated for victims of human trafficking. Currently, Vera's Sanctuary provides 24 beds to young women over the age of 18, including those who are pregnant, or those with infants. Additionally, it is the only six-bed drug treatment center for foster youth (adolescents) in Orange County.



### Jamie Lyn Byerlee, Owner

*Events by Jamie Lyn, Laguna Hills*

Jamie Lyn Byerlee is an event planner with 23 years of experience in the industry, who brought her bespoke style and southern charm to Southern California eight years ago. Her client-centered approach has been instrumental in propelling her success in the region, regardless of whether the event is a wedding, baby shower, celebration of life, milestone event or corporate gathering. Byerlee's goal is to make each event a reflection of her client's personality, bringing their vision to life, and creating an unforgettable experience. Her dedication to providing exceptional service and attention to detail has made her a sought-after event planner in SoCal. Byerlee's 23 years of experience, southern charm, and bespoke style are the perfect combination to ensure her clients have the best possible event experience.



### Cathrine Castaldi, Partner

*Brown Rudnick LLP, Irvine*

Cathrine Castaldi is a partner and practice group leader of Brown Rudnick's Bankruptcy & Corporate Restructuring group. She concentrates her practice in the areas of bankruptcy, insolvency, reorganization and commercial litigation. Castaldi has represented Chapter 11 debtors, equity security holders, secured and unsecured creditors, trustees and committees in connection with bankruptcy cases, foreclosure actions, adversary proceedings, and



related commercial litigation. Her experience in Chapter 11 cases involves representation of debtors from the inception of the case to matters involving plan confirmation and related issues, DIP financing arrangements, cash collateral disputes, valuation issues and litigation. Castaldi also represents individuals and middle market businesses in litigation matters incident to bankruptcy or out-of-court restructuring, including fraudulent conveyance and preference litigation.

### Zara Cerni, Aesthetic Director & Operations Officer

*Physicians Center for Renewal & Forever Ageless Inc., Newport Beach*

Over 20 years ago, Zara Cerni, Dr. Michael Cerni, and Dr. Joe Cerni founded Forever Ageless Inc, and Physicians Center For Renewal. Zara Cerni is currently COO and they have a staff of 34, including 10 Providers ( Nurses and Doctors), two aestheticians, and one Body Sculpting provider. Currently, with over 5,000 patients, they are a top 10 national account with Allergan. Cerni just negotiated the purchase of a 15,000-square-foot Newport Beach building to house their growing medical-wellness practice. As a certified aesthetic consultant, it is Cerni's vision to provide wellness and lifestyle modifications, combined with cutting edge aesthetic procedures to optimize appearance. A significant part of her outreach includes lecturing with Dr. Michael Cerni, providing the latest breakthrough trends in aesthetics and wellness. Cerni's mantra is "There is no finish line". Zara has been a past Orange County Business Journal nominee for both Women in Business and Family Owned Business. Additionally, she has been featured in Newport Beach Lifestyle Magazine, Orange County Magazine, Coto de Caza Magazine, Ladera Ranch Magazine.



### Patricia Chikuturudzi, President & Founder

*Shebaz Inc dba Healthy At Home Caregivers, Dana Point*

Founder Patricia Chikuturudzi has worked for more than two decades as a Registered Nurse in Orange County hospitals such as St. Joseph Hospital, Saddleback Hospital, and Mission Hospital. An unprecedented shift in her life, leaving the fully supported staff in the hospital to help individuals in their homes was not easy, but necessary and fulfilling. After Chikuturudzi lost her mother to cancer in 2006, she discovered that there was a severe lack of communication among the five doctors on her mother's case. These miscommunications in her mother's plan of care resulted in duplication of medications and procedures as well as poor follow-up on results. These fatal errors in treatment resulted in medication toxicity, leading to a painful, premature death. After her mother's death, this cause became very personal to Chikuturudzi. She says, "We can't just look the other way. As nurses, we are knowledgeable about the complex healthcare system. It's time to help and give back." She started Healthy At Home to serve the need in Home. This was started without any funding to close to a million dollars of revenue/ year in nine years.



### Crystal Cook, Executive Director, Foundation

*Mountain View Services, Newport Beach*

Crystal Cook was hired by MVS Inc. to manage their donor advisory fund; MVS Foundation. 2023 goals are to create a budget, best practices, and help build this fund into a 501c3, as the charitable arm of MVS. Eric, president/CEO, "he hired Crystal Cook, because he couldn't think of a better person to partner with to develop his Foundation. In 29 years of working with charitable organizations, as a Board Member and volunteer, Crystal is by far one of the best nonprofit leaders I have ever met." Eric shared that Crystal showed him how professionals work in the nonprofit field, through her compassion for others, follow up, and professionalism. Since Cook's onboarding, she has partnered beyond measures, partnered with marketing to modernize our brand, designed the MVS Foundation logo, coaching their new Customer Relationship Manger to help mentor her with sales techniques and the newly created social media calendar, and assisted with an email/CRM migration, Outlook and Microsoft Teams training, and more. She brings decades of experience dealing with KPI's, scorecards, performance indicators, and moreover, organization.



### Cindy Couyoumjian, Founder & CEO

*Cinergy Financial, Tustin*

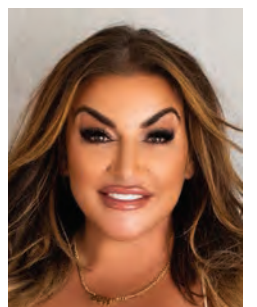
Cindy Couyoumjian is one of those rare once-in-a-generation innovators who is passionate about financial literacy. Couyoumjian is not only a financial advisor, she is a best-selling author, financial literacy advocate, lecturer, and an innovator in the financial industry. She spent years developing her flexible and customizable multi-asset investment methodology known as the REALM Strategy. In addition to being a best-selling author, Couyoumjian has appeared on her own radio shows, television shows, and given numerous lectures. Couyoumjian was the winner of the 2022 Bronze "Stevie Awards" in two categories: "Woman of the Year in Accounting and Finance" and "Female Thought Leader of the Year in Business."



### Alicia Cox, Founder & CEO

*Prikt Restaurant Group, Huntington Beach*

Alicia Cox, founder and CEO of Prikt Restaurant Group, is known for recreating the way people recreate along California's vibrant coastline. Her innovation and drive led her to open multiple restaurant concepts, and she's even released her own wine label, but it's safe to say she has found her niche in creating elevated seaside recreational experiences for beachgoers. It all started with her historic Bolsa Chica State Beach concessions launching, which includes SeaLegs at the Beach, a sought-after entertainment destination for live music, comedy, and dining right on the sand. Additionally, she signed a first-of-its-kind agreement with California State Parks for concessions along Huntington State Beach, including local favorites Huntington Beach House and Sahara's Sandbar & Pizza. She's won various awards, including Sacramento's Small Business of the Year, Entrepreneur of the Year by the Huntington Beach Chamber of Commerce and a Woman of Influence by the Greater Irvine Chamber.







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## 2023 Women in Business Award Nominees

### Gloria Jetter Crockett, President & CEO

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

When Gloria Jetter Crockett joined Make-A-Wish Orange County and the Inland Empire in September 2019, little did she know her biggest obstacle as CEO would be leading the organization to create life-changing wishes for children with critical illness during a worldwide pandemic. With over 25 years' experience in non-profits, Crockett's leadership empowered the organization to safely grant over 800 local wishes to critically ill children safely through the pandemic and during times of record inflation. Knowing wishes are proven to create hope and inspiration for children to fight their critical illnesses, Crockett guided and motivated staff, over 350 volunteers, and donors to make sure that no child waits to experience the power of a wish. After all, a wish is hope-filled and life-changing for a child and their family.



### Gina Cunningham, Executive Director

*HomeAid Orange County, Tustin*

Gina Cunningham began her career at HomeAid Orange County in early 1997 with nothing more than the desire to help the underserved in our community and a decade of experience in administrative operations. Leveraging her background in construction, and strength in building relationships, Cunningham was hired by the founding director of HomeAid as the executive assistant. Her hard work and dedication paid off and she quickly rose to become HomeAid's Chief Development Officer. In this role, Cunningham raised millions of dollars to support HomeAid's mission, and influenced people and companies to become deeply involved in ending homelessness. In October of 2019, Cunningham was enthusiastically chosen to lead HomeAid Orange County as the executive director. Her adaptability and high-capacity leadership style have helped propel her to the forefront of women leaders in the building industry, where she continues to make an impact and lead the way for others.



### Kristin Daher, Founder & CEO

*Powerhouse+Co., Santa Ana*

Kristin Daher is the founder and CEO of Powerhouse+Co. Since establishing the agency in 2015, Daher has continued to advance its award-winning standing as one of Orange County's premier, female-led firms. Beyond her role in growing the agency's client roster and developing its expansive service menu, she has fostered a transformative culture defined by creativity, development and achievement. Powerhouse offers an upbeat, innovative, high-energy workplace where brainstorming yields equal parts productivity and laughs, unique personalities are always welcome, and collaboration is ubiquitous. Daher ensures the agency remains united by the common goal of providing the absolute best for clients and the same for all who work there. Her insightful growth measures, including the strategic reimagining of Powerhouse's approach to PR, influencer and social media programs, have led to new hires, a diversified client list and endless possibilities for future success. Additionally, Daher's authentic leadership efforts, integrity and generosity are obvious to all who know her. These personal qualities and professional attributes are highly visible to the external organizations she serves and are apparent inside the company she founded.



### Marcella De Anda, Vendor Relations Manager & Business Manager

*Taqueria De Anda, Fullerton*

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



### Jackie Dean, Co-Founder, CCO

*Dean&Co., Cypress*

Jackie Dean is the co-founder & head of Creative of Dean&Co., with over 15 years of experience in graphic design, advertising and marketing. Dean founded the company in 2021 where she brought her expertise in leading creative teams to fruition ultimately growing a team of 12 within an eight month time period. She continues to push the boundaries of design while being a trusted leader, helpful mentor and successful business owner. Dean has worked with some of the largest names in the sports, technology, entertainment and healthcare industries, including EA Sports, NFL, Los Angeles Rams, Los Angeles Chargers, SoFi Stadium, HID, Blue Cross Blue Shield of Rhode Island, Los Angeles Lakers, Anaheim Ducks, ABC7 and Hulu. Prior to starting Dean&Co., Dean was creative director for Code Four, an event's & creative agency. Dean managed the creative department where they made experiential designs, designed & printed building-scale printing and designed custom-fabricated photo ops.



### Carol DeNembo, Vice President of Marketing

*Mountain Mike's Pizza, LLC Newport Beach*

Carol DeNembo is vice president of marketing for Mountain Mike's Pizza, a leading family-style pizza chain known for its legendary crispy, curly pepperoni and mountain-sized pizzas. When the brand was acquired in 2017, and operations moved from Northern California to Newport Beach, DeNembo was hired to round out the impressive

leadership team. Today, she leads systemwide marketing initiatives and oversees new franchise development strategy, providing vision and direction as Mountain Mike's continues its thoughtful expansion throughout the West. DeNembo has made huge strides to fuel and sustain growth by modernizing the 45-year legacy brand as it expands throughout the West. She has spearheaded the launch of a new mobile app and innovative loyalty program, secured brand partnerships with Los Angeles Angels Baseball and Sacramento Kings Basketball, and led Mountain Mike's through several new state entrances, ensuring Mountain Mike's continues to rise within the highly competitive pizza segment.



### Zeena Dhalla, CEO & Founder

*VerticAlign Posture & Ergonomics, Ladera Ranch*

Zeena Dhalla mastered the "pivot" after the 2020 lockdown to move her corporate education series on Posture and Ergonomics to a virtual format. That year she tripled her part-time business transitioning to a full-time Posture and Ergonomics specialist for teams at Google, Microsoft, and many other local and global teams. Since then, Dhalla has continued to educate hundreds of employees each week on the benefits of good posture and the life-changing benefits of a posture exercise program at the workstation.



### Elise Diaz, Financial Advisor

*Northwestern Mutual, Irvine*

Elise Diaz is a financial planner with expertise in tax efficiency, risk management, retirement planning, investment strategy, and wealth preservation & distribution. Diaz works with clients across many different industries but specializes in working with breadwinning women, tech professionals, and women in sales or who own businesses. Diaz first started her career in the financial services industry as the chief of staff for Northwestern Mutual Irvine. Today Diaz and her team work with clients in an end-to-end planning experience driven by the client's goals and desired financial outcomes. She sees financial empowerment as a key component to her work, and helps clients, especially women, build confidence in their financial lives and futures, enabling them to stress less and live more.



### Deborah Dickson, Managing Member

*Smith Dickson Certified Public Accountants, LLP, Irvine*

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



### Samantha Dorey, Partner

*Everett Dorey LLP, Irvine*

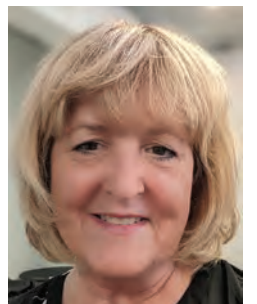
Samantha Dorey is a founding partner of Everett Dorey LLP, a full-service civil litigation firm that represents multi-national corporations, non-profits, cities, public agencies, and school districts in all aspects of litigation. She specializes in complex civil litigation with an emphasis in catastrophic injury, public entity defense, employment law, mass tort, asbestos litigation, and environmental law. She also regularly advises clients on non-litigated matters, including development of risk management protocols and procedures related to property management and environmental issues. As a leading litigation firm in California routinely retained as trial counsel in complex and challenging cases throughout the state, Ms. Dorey has shaped a firm of exceptionally talented litigators with diverse cultural and personal backgrounds, with particular focus on creating an environment that empowers female attorneys. Additionally, Ms. Dorey has authored numerous articles published in the Orange County Lawyer, served on boards for the Public Law Center and Orange County Lavender Bar Association, spoke as a panelist for various professional presentations, and taught courses as an adjunct professor at Chapman University.



### Cathi Douglas, President

*Cathi Douglas Communications Inc. Tustin*

Cathi Douglas founded her company after serving in various leadership roles in public relations, publications, and high education, including as founding editor of Titan, Cal State Fullerton's award-winning magazine and public relations director at Chapman University. Her clients are in the higher education, health care, and publications industries. A longtime mentor, Douglas has helped steer the careers of many successful PR and journalism professionals. She has served as president of the Orange County chapters of both the Public Relations Society of America and the International Association of Business Communicators and has been honored with PRSA's highest honor, the Distinguished Service Award. She's a member of the Cal State Fullerton School of Communications Alumni Wall of Fame.





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## 2023 Women in Business Award Nominees

### Laureen Driscoll, Chief Executive, Providence South Providence South Division, Irvine

With an extensive background in health care administration, and as a registered nurse, Laureen Driscoll brings well-balanced expertise to the 17 Providence California hospitals she oversees. Prior to her current role as chief executive for Providence South Division, Driscoll served as the chief executive for Providence's Northern California region. She also has served as president of Washington-based Tacoma General and Allenmore hospitals and president of MultiCare Deaconess Hospital. Prior to MultiCare, Driscoll served as chief operating officer for Providence Swedish Cherry Hill Campus in Seattle. Throughout her career as a nurse and administrator, Driscoll's passion for improving patient care has never wavered. "The patient is at the end of every decision I make," she says. This dedication drives her extraordinary ability to foster internal collaboration, build strong relationships with community partners, and drive innovation across the Providence South Division to meet the ever-evolving health needs of California communities.



### Jennifer Dudley, Managing Director & Senior Vice President IHP Capital Partners, Newport Beach

Jennifer Dudley is a highly skilled and passionate residential real estate investment professional who leads by example through her exceptional performance and strong and supportive team mentality that inspires all around her to succeed to the best of their ability. As the head of IHP Capital Partners' investor reporting and finance department, Dudley plays a key role in IHP maintaining its reputation as the industry gold standard in single-family residential real estate investment. IHP is a nationally recognized private equity firm that has built a strong track record based on experience, expertise, and long-term partnerships with institutional investors and industry leaders. With 24 years of experience in finance, including 19 years dedicated to real estate development, Dudley is a reliable and hardworking professional who consistently delivers high-quality work. Her attention to detail and thorough understanding of complex financial models, processes and concepts have earned her a reputation as a trusted and reliable team member and leader in her field. Her exceptional dedication and sharp acumen have earned Dudley the respect and admiration of her colleagues, peers, and partners.



### Kara Duffy, Owner & Founder

*Kara Duffy Coaching & Consulting; Powerful Ladies, Costa Mesa*  
Through KDCC, Kara Duffy has helped over 100 businesses and business owners create and design businesses that truly align to their goals and priorities allowing them to have more success, more freedom, more purpose and impact. Duffy has taken clients from low six figure side hustle to full time entrepreneur generating millions of dollars per year. She has helped them build teams, drive new sales, and layer in giving practices into their daily operations. Her methodology is clarity, strategy, then thrive and that's what she truly gives people, the ability to build a business they love and change their lives. Through Powerful Ladies, Duffy hosts the Powerful Ladies Podcast featuring over 250 women and growing, their businesses and their stories to show others that anything is possible. Her Powerful Conversations About America series brings impacted and expert women to the table to discuss critical issues of today from racism, women in the workplace, environmental issues and even the Iranian revolution. Duffy and team then take this conversation based inspiration around the world in Workshops and in-person events to bring together women who are committed to making a positive impact and seeking the tools and communities to bring their visions to life.



### Alison Edwards, CEO Groundswell, Santa Ana

Alison Edwards serves as chief executive officer of Groundswell (formerly the OC Human Relations Council), a Santa Ana-based nonprofit dedicated to bringing diverse people together to build a more equitable future. The fundamental framework of Groundswell's Community Building, Mediation, and BRIDGES programs are empowerment strategies rooted in grassroots organizing, diverse leadership development, and creative conflict resolution. The organization addresses prejudice, discrimination and conflict through collaborative and inclusive efforts, which is the key to developing successful leaders. Edwards has been involved with the organization for over 25 years serving in various roles including program director for the BRIDGES program and then deputy director of the organization before becoming CEO.



### Angela & Mariam El Haj, Restaurant Founders & Owners

*Calaca Mamas Cantina, Anaheim*  
Calaca Mamas was founded by sisters Angela & Mariam El Haj, who are second-generation restaurateurs in Southern California, with franchises in iHop and Dave's Hot Chicken. Calaca Mamas is uniquely theirs - the first concept the sisters built from the ground up - and pays homage to their Mexican culture and the Day of the Dead celebration. They pride themselves on serving homemade food that supports local growers and farmers, and sources clean, non-GMO, and organic ingredients.



### Victoria Elder, Owner & Lead Publicist Victori Solutions, Irvine

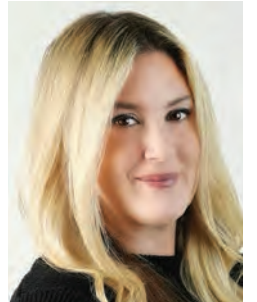
Victoria (Tori) Elder started her own business when she was just 26-years-old. She seamlessly runs client relations and a very successful PR firm, but Elder succeeds in doing so much more than her title. Generating millions of impressions, and national



news attention, while bringing unique solutions to the companies she works with. Her personality and drive to start this company from the ground up is the greatest achievement anyone could accomplish. Through her visionary thinking and proactive approach, she has played a pivotal role in driving her client's successes and fostering a culture of excellence not just for her company, but all the companies and media people she works with.

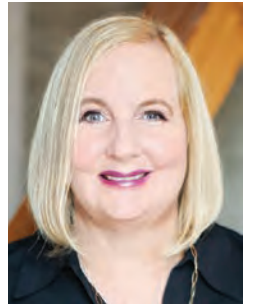
### Lauren Ellermeyer, Co-Founder & President Beyond Fifteen Communications Inc., Irvine

Lauren Ellermeyer is the co-founder and president of Beyond Fifteen Communications, a full-service PR and marketing agency that has built a reputation for going above and beyond typical industry standards to deliver an unprecedented level of media and market attention for its clientele. With its implementation of entrepreneurial ideas linked with results-driven strategies, Beyond Fifteen has redefined the typical agency/client relationship. Ellermeyer brings an innovative business style, instinctive eye for new talent and public relations and social media expertise, which has helped grow Beyond Fifteen from startup to nationally acclaimed powerhouse. The agency now has team members spanning the U.S. and serves business-to-business and business-to-consumer brands across healthcare, technology, consumer package goods, energy, education and more.



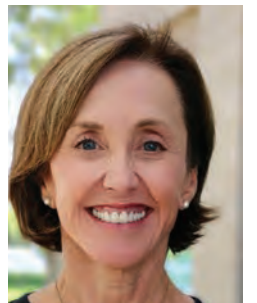
### Leslie Espiritu, Associate Principal, Human Resources Ware Malcomb, Irvine

Joining Ware Malcomb in 2013, Leslie Espiritu now serves as the associate principal and brings over 20 years' of experience and a passion for people. At Ware Malcomb, Espiritu is responsible for the oversight of both human resources and recruiting teams. She partners with both Tobin Sloane, CFO/EVP and Ruth Brajevich, vice president, strategic initiatives to drive essential Human Resource functions and spearhead people initiatives. Throughout her time at Ware Malcomb, the firm has seen exponential growth and Leslie's leadership has been instrumental. "Leslie's leadership in HR and recruiting has helped us build and retain an exceptional team," said Tobin Sloane, CFO/EVP for Ware Malcomb. She has helped aid this growth by continuously working to improve processes and achieve greater workflow efficiencies.



### Kathleen Freed, Co-Founder & Principal Cornerstone Communications, Irvine

Kathleen Freed co-founded Cornerstone Communications in 2010 after spending more than 20 years working in senior advisory roles in the public and private sectors, including Irvine Company, the County of Orange, and the County Executive Office. At Cornerstone, she has proven success in designing and managing multifaceted communications campaigns that includes strategic communications, media relations, internal communications, brand management, community relations, event planning, and interactive marketing. Freed epitomizes what Cornerstone is known for, offering the perfect marriage of media and PR savvy to clients from an array of industries including real estate, nonprofit, education, government, and transportation. All her work is designed to position the organization's overall brand identity, build public awareness and generate support for the organization's overall goals, as well as enhance the community relationship and build coalitions.



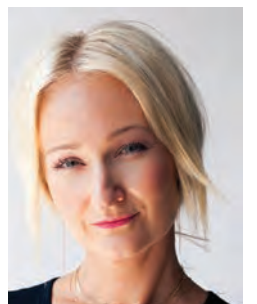
### Jennifer Friend, CEO

*Project Hope Alliance, Costa Mesa*  
Jennifer Friend, J.D. is chief executive officer of Project Hope Alliance (PHA), a nonprofit organization dedicated to ending the cycle of homelessness using a long-term, site-based model of providing whole-person care for children and youth experiencing homelessness in Orange County. When Friend became CEO in 2013 after serving on PHA's Board of Directors for many years, the organization supported one school and 65 students. Under her leadership, PHA now serves more than 350 children and youth attending 43 schools across Orange County. PHA has built a nationally recognized model for ending the cycle of youth homelessness and has achieved a high school graduation rate for its students more than 20% above the national average. Under Orange County's veil of affluence are the faces of nearly 30,000 children and youth who experience homelessness and 120,000 children who live in poverty. They say goodnight from motels, shelters, and couches. They are forced to focus on where they will sleep instead of what they will learn. Tragically, their educations and futures suffer. Years ago, Jennifer Friend was one of those faces. For decades she silenced her past as an Orange County motel kid, but in the spring of 2013, she left her job as a corporate attorney to share her story, speak hope and conversation about childhood homelessness, and lead PHA as CEO.



### Mandy Fry, President & Partner Z Supply LLC, Costa Mesa

As president and partner of Z SUPPLY, Mandy Fry has overseen tremendous growth in all areas of the company. From adding new divisions—Z SUPPLY Eyewear and Z Active—to leading the continued growth of shopB2Z, the proprietary business-to-business platform designed to bridge the gap between traditional wholesale order entry systems, providing a specialized, curated shopping experience for over 2,000 retailers, Fry continues to lead in innovation in the apparel industry. This year, she introduced Z SUPPLY Shop Collective, a dedicated shop-in-shop experience for everything Z SUPPLY, located within boutique retailers. To date, Z SUPPLY has built Shop Collectives in six boutiques across the country with more to follow in 2024. Always looking for ways to expand offerings to the Z SUPPLY customer, Fry teamed up with lifestyle brands ALOHA Collection and Slowtide





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## 2023 Women in Business Award Nominees

on a collaborative resort collection called The Cabo Dream Collab, a beach loving capsule collection of accessories. The capsule was a customer favorite this summer and Mandy is working with the design teams to offer more collaborations in 2024. The Z SUPPLY Foundation continues to be a priority for Fry. Since its launch in 2021, the Foundation has raised \$600,000 through its initiatives. With a majority of those funds, Z SUPPLY has created 30 college scholarships for students in the fields of art, design and marketing at Otis College of Art & Design, California State University, Long Beach and the California College of Arts.

### Monica Garrett, Founder & CEO

*Margaux Agency LLC, Long Beach*

The Margaux Agency isn't Monica Garrett's first creation. Actually, it currently forms the third stroke of the trifocal lens with which she looks at this world! Her passion for her work, an eye for detail, and a deep understanding of marketing are the secrets to the success of her agency. Garrett understands the fleeting nature of any approach dominating her field at any given moment. Staying relevant for her thus means adopting that approach but giving it her own unique twist. Passionately, she believes branding is at the forefront of everyone's minds. Companies, businesses, and even entrepreneurs are making use of branding in some way or another. The need for a branded identity must occupy the key position in the strategy for success. The agency has made it its mission to always be a trailblazer when it comes to technological advancements in its field. Their branding approach starts with discovering its story, and what it provides to its customers, and then focuses on what makes it unique. The final product is designed to display that unique brand identity to the max.



### Shelley Geiler, Owner

*OC Polo Club SoCal Self Storage, Newport Beach*

Successful entrepreneur, attorney, philanthropist Shelley Geiler is known for thriving in her multifaceted leadership roles. She is partner in her family's real estate development firm as well as the operating partner of multiple SoCal Self Storage properties. After 30 years of developing OC Polo Club, Geiler and her father purchased an old horse ranch in Silverado Canyon, with the sole purpose of making it the forever home of OC Polo Club. Focusing on sustainability, family ambiance, event venue potential and a unique polo viewing experience. The result is a marriage of a polo sanctuary with the elements of a venue that can be transformed into a space comfortable for large groups. As she continues the culmination of her family legacy, she is most thankful to share the love of horses and polo with her two daughters and father.



### Corynne Gordon, Vice President of Marketing

*Shopoff Realty Investments, Irvine*

Corynne Gordon joined Shopoff Realty Investments in 2017 as the marketing manager and now serves as the vice president of marketing, overseeing all marketing efforts and shaping Shopoff's image and voice both internally and externally. She has spearheaded the overall brand development for the firm, including all company real estate projects and investment funds; messaging; corporate and property videos; newsletters; website; and public relations strategy and execution for Shopoff Realty Investments and its affiliated companies. She also coordinates events, including employee gatherings; due diligence meetings; industry panels; virtual webinars; and she is currently developing new events and programs for top tier financial advisors, while also working to further build the marketing team. Additionally, she has developed the firm's social media strategy, strengthening their online presence and consistently works to elevate the company's presence.



### Ashley Graham, Founder

*The Conscious Publicist, LLC, Laguna Niguel*

Ashley Graham is the founder of The Conscious Publicist, a public relations firm that helps purpose-driven brands share their stories and methodologies with the world. Graham has always had a passion for writing, communication, and storytelling, and after working at traditional PR agencies and in in-house director roles, she wanted to do something more meaningful with her career. In 2016, Graham decided to start her entrepreneurial journey that focused on helping conscious brands share their messages of mindful leadership, social impact, and purpose. The Conscious Publicist has since become a leading PR firm in the industry, helping its clients share their stories in an authentic, engaging, and impactful way to succeed in today's competitive media landscape. Graham is known for her authentic and transparent communication approach and ability to connect with people from all walks of life. In addition to running The Conscious Publicist, Graham is also a writer and speaker and frequently contributes to various publications, podcasts, and blogs, advocating for purpose-driven brands and a way of living, all through the transformative power of storytelling.



### Diana Granillo, CIC, CRM, Chief Operating Officer

*SullivanCurtisMonroe Insurance Services LLC, Irvine*

Bringing a broad depth of insurance knowledge and more than 30 years' industry experience, Diana Granillo joined SCM in 2019 as executive vice president and Property & Casualty Leader. In 2021 she became chief operating officer and is now a member of SCM's ownership group. Granillo is instrumental to the agency's growth goals, having led the reorganization of the property & casualty commercial lines and personal lines divisions, and playing a vital role in SCM's continuous pursuit to exceed expectations of clients and carrier partners. Backed by a proven track record in agency operations and acquisitions of various complexities, she created an acquisition marketing platform that has added tremendous value to SCM. She also modernized several systems, processes and administrative functions throughout the



company. Beyond her role as an agency leader, Granillo has helped mentor and develop new producers.

### Sue Grant, Founder/Volunteer CEO

*The Literacy Project, Newport Beach*

Sue Grant, as the founder of The Literacy Project, has achieved remarkable success in the fight against illiteracy. Under her leadership, The Literacy Project offers a highly effective 30-hour literacy program to struggling second-grade students at no cost. This program stands out for its exceptional merit, providing fun and socially interactive learning experiences that foster collaboration among students. By teaching the fundamental principles of phonics through auditory, visual, and tactile modalities, the program ensures comprehensive learning. Aligned with approved classroom curriculum and supported by strategic pre- and post-testing, the program has demonstrated significant measurable growth in essential areas such as phonics, word decoding, word identification, English fluency, and reading skills. Sue Grant's dedication to literacy and her commitment to empowering young learners make her a true champion in the field. Sue Grant curated an impactful career within the nonprofit industry. Founding The Literacy Project, the organization has served 10,500 underserved students from low-income families. Under her leadership, she helped raise over \$4.8 million to provide a reading program at "no cost" to both the child and school within three states. The nonprofit's 30-hour program significantly changes a child's ability to read, averaging skill increases from 76% to 129%. The agency has donated \$1.92 million worth of reading games to 47,250 family members, promoting family literacy. Grant has invested heart and knowledge as a dedicated mentor to over 50 interns (Chapman University, CSUF, and UCI).



### Deborah Gubernick, Intellectual Property Partner

*Snell & Wilmer, Costa Mesa*

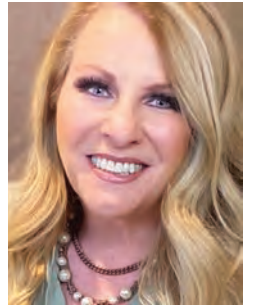
Deborah Gubernick is an intellectual property partner at Snell & Wilmer, a full-service business law firm with more than 450 attorneys practicing in 16 locations throughout the U.S. and in Mexico. She helps small and large clients protect and defend their brands and business in the U.S. and abroad. Gubernick has litigated cases in state and federal courts and has handled over 100 matters before the Trademark Trial and Appeal Board. She routinely litigates trademark, copyright, and trade secret cases, as well as cases involving false advertising, breach of contract, unfair competition, and more. Gubernick has negotiated assignments, settlements, trademark co-existence agreements and licenses involving household brand names, high-end retailers, famous clothing brands, national sports leagues, and more. She has provided IP diligence support on multi-million dollar and billion-dollar transactions and routinely provides strategic counseling and assistance for her clients' global trademark portfolios.



### Kaaren Hall, CEO

*uDirect IRA Services, LLC, Irvine*

Kaaren Hall is a passionate entrepreneur, national speaker, and CEO. With a background in finance and real estate, Hall has successfully built multiple businesses from the ground up and has worked with thousands of investors to help them reach their goals and financial success.



### Rebecca Hall, President & CEO

*Idea Hall, Costa Mesa*

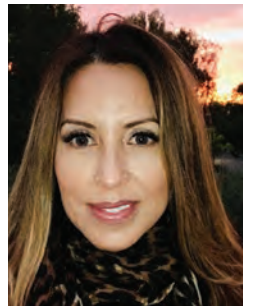
Celebrating 20 years in business this year, Idea Hall is a nationally recognized creative communications agency committed to championing good both at home in Orange County & beyond through an integrated marketing model that brings marketing, branding, public relations and advertising services together under one roof. Rebecca Hall and her team have worked with some of OC's most established commercial real estate businesses, as well as non-profits taking on some of the county's biggest issues - including workforce development and mental health. The agency has also attracted top local talent through its strong corporate culture where people come first. Over the past two decades, Hall has earned the reputation of being one of the first and most successful female entrepreneurs in the county. She attributes her success to staying ahead, constantly innovating and maintaining strong relationships.



### Nicole Hall, Coordinator & Designer

*Solidus, Newport Beach*

Nicole Hall is part of the Solidus founding team and a construction industry expert. SOLIDUS is a game changer for construction subcontractors seeking funding for the first time, Retention loans with no personal guarantees and Procurement funding loans with little to no fee. Hall is a partner in the firm and coordinates all business development events, promotions and networking opportunities. Hall and the expert SOLIDUS team are revolutionizing the lending industry by offering construction loans by construction people.



### Caterina Hall-Richards, Chief Operating Officer

*Bracken's Kitchen, Garden Grove*

Caterina Hall-Richards is chief operations officer at Bracken's Kitchen, a 501c-3 nonprofit fighting food insecurity in Orange County. She manages a comprehensive array of services and programs overseeing all day-to-day operations with a staff of 24 and 460 volunteers. She works closely with Founder/Culinary Director Bill Bracken to ensure all programs grow successfully while attending to the needs of their agency partners. Hall-Richards is instrumental in the development of programs, promotional initiatives, grant writing, and community relations.





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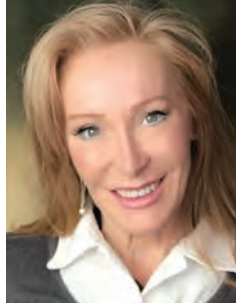
## 2023 Women in Business Award Nominees

She also assists the operations and fundraising teams in the planning, organization, and execution of public and private fundraising initiatives. Hall-Richards was a volunteer in the kitchen for two years before accepting the operations director role in 2018.

### Debbie Hansen, Founder & CEO

*The Flora May Foundation, San Clemente*

Debbie Hansen and The Flora May Foundation, an all-female nonprofit organization, have achieved significant recognition for their outstanding work. In 2023 The Flora May Foundation was recognized through the American Business Awards Gold Stevie for "Outstanding Nonprofit", for its exceptional contributions and impact in the nonprofit sector. This award acknowledges their dedication and effectiveness in addressing critical social issues. Hansen herself received the 2022 Silver Stevie for "Woman of the Year". In 2023 she was awarded the Bronze Stevie for "Thought Leader of the Year". The award recognizes her exceptional leadership, vision, and commitment to making a positive difference in the lives of others.



### Katherine Hatcher, Business Performance Advisor

*Insperty, Brea*

Reached goal of 1st year Presidents Club in sales achievements. Pinnacle trip winner! Completed and obtained University of Houston's Certified Business Performance Advisor certification.



### Heather Heleloa, Director of Marketing

*Big Air USA, Ladera Ranch*

As a k anaka maoli and first in her family born in the continental United States, Heather Heleloa is also a first-generation college graduate. Earning a Bachelor of Arts degree in Communications from Cal State Fullerton and a Master of Science degree in Hospitality & Tourism from the University of Southern California, she was among the less than 1% of USC graduates to earn the Order of Ar ete student recognition award. In her current role at Big Air USA, an industry-leading operator for indoor adventure parks, Heleloa is the director of marketing and responsible for the development and oversight of strategic marketing initiatives to support corporate and franchise growth nationwide. She honors her Native Hawaiian heritage as Secretary of 'Ahahui o Lili'uokalani Hawaiian Civic Club and creator of Heleloa.com, a directory of Pacific Islander news, events, businesses and people throughout Southern California.



### Susan Heller, Managing Shareholder

*Greenberg Traurig LLP, Irvine*

Co-managing shareholder of Greenberg Traurig's Orange County office, global co-chair of the firm's Trademarks & Brand Management Practice, and past co-chair of the global Women's Initiative, Susan L. Heller provides pivotal leadership and forward thinking vision. She is a game-changer in the trademark and brand management, enforcement and monetization space, widely recognized by her peers and the industry as an exceptional legal practitioner, a strategic thought leader, and the architect of innovative legal frameworks and strategies. In the world of large global trademark portfolio management, when the stakes are high, and critical brands are at risk, Fortune 500 companies, high net-worth individuals, and A-list entertainment and sport celebrities rely on Heller for her strategic and creative out-of-the-box thinking and counsel. Heller is one of the "go-to" legal experts for clients facing significant challenges to the value and expansion of their most important brands.



### Shannon Hennessy, CEO

*The Habit Burger Grill, Irvine*

Shannon Hennessy is the chief executive officer of The Habit Burger Grill Division, reporting directly to the Yum! Brands CEO. In this role, Hennessy aims to break the "craft ceiling" and make The Habit the global powerhouse brand in the better-burger category through an ambitious agenda to scale its unmatched cook-to-order magic, modernize the experience for off-premise dining and achieve industry-leading margins. Hennessy previously served as president of The Habit Burger Grill Division, leading advancements for the brand by strengthening the business model via margin improvement and digital sales growth. She first joined Yum! in 2020 as the chief financial officer of KFC Global Division, where she was responsible for leading the global finance function and ensuring continued growth and profitability of the KFC business. She also oversaw the brand's financial planning, supply chain management and strategy functions.



### Maryanne Hibner, Chief Creative Officer, President

*Hibner Design Group, San Clemente*

Maryanne Hibner started Hibner Design Group, an award-winning, full-service multifamily interior design firm, in 2012 to help developers create spaces that tell a story. Hibner's mission is to strategically approach each project to create layered spaces that are rich in texture, function, and identity. Hibner takes pride in our Four Seasons-like approach to exceptional customer service, and is known for our responsiveness, ability to think like owners and developers, and ability to create spaces that evoke positive emotion. Hibner and her team bring the expertise, knowledge, professionalism, and systematic approach of an in-house interior design function, with the creativity, vision, relationships, and resourcefulness of a boutique interior design firm.



### Madelynn Hirneise, Chief Executive Officer

*Families Forward, Irvine*

Madelynn Hirneise has been with Families Forward for over a decade, holding positions

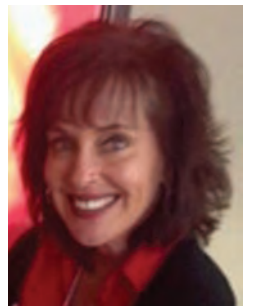
as a housing resource specialist and senior director of the organization before taking the helm as CEO in 2019. During her tenure with the organization, she's been instrumental in designing, developing, and implementing Families Forward's strategic housing acquisition and partnership programs, and has overseen many areas of the nonprofit including its housing program, prevention and diversion, career services, and community resources. Under her direction, Families Forward has seen a 211% increase in their housing acquisitions and partnerships and a 203% increase in families served while maintaining a reputation in the community as leaders in quality care. Tackling the pervasive issue of homelessness for families with children, Families Forward improved the lives of more than 13,000 people in 2022. Hirneise strives to see an Orange County where every family has a home and the opportunity to thrive.



### Kathy Hogan, President

*Primary Freight Services, Buena Park*

Kathy Hogan is known as the company integrator. Hogan's role encompasses the management and direction of the senior level of the company, from operations, to accounting, to IT, and HR in all office locations. Hogan is a well-rounded executive who exhibits the business knowledge, operational skills, and can communicate and motivate staff from all levels of the company. She is intuitive, has tremendous insight and the ability to clearly communicate and identify issues, problems, and solutions. Hogan is the "boots on the ground" implementor. The company, as well as the CEO, would be lost without her ability to get things moving, committing action to words, and being the sounding board of reason on all management decisions. Hogan lends her expertise and is consulted by all levels in the company, recognizing her insightful ability that few others have, in our organization. Hogan's contributions is tremendous, and the success of the company would not be possible without her.



### Krista Hollinger, Chief Operating Officer

*Planned Parenthood of Orange and San Bernardino Counties, Anaheim*

Krista Hollinger joined Planned Parenthood of Orange and San Bernardino Counties (PPOSBC) as chief operating officer in December 2021. One of her first goals was to prepare PPOSBC to absorb an influx of out-of-state patients seeking abortions in California, as multiple states passed laws severely restricting or outlawing abortion-starting with Texas in September 2021. As predicted, many others followed after the Supreme Court overturned Roe v. Wade in June 2022. Hollinger built PPOSBC's Abortion Aid program from the ground up. The program, which is unlike any other in the country, helps out-of-state patients forced to travel to California for abortions book appointments, make transportation arrangements, find accommodations, pay for meals, and handle any other logistical needs associated with their procedure. Under Hollinger's leadership, PPOSBC has now provided abortions for more than 450 out-of-state patients since June 2022 while continuing to expand capacity to provide quality healthcare for local patients.



### Terri Hovdestad, SVP Transaction Management

*Shopoff Realty Investments, Irvine*

Terri Hovdestad has been an invaluable member of Shopoff's real estate team for 16 years. Throughout her tenure, she has made significant contributions, such as establishing a structured system for asset/entity ownership and overseeing its management. Notably, Hovdestad successfully closed the complex Castilian project, marking the most intricate transaction in the company's history. She also led the company's most productive closing month, with 12 deals finalized in December 2020. Additionally, Hovdestad played a pivotal role in securing the largest construction loan and subsequent sale of an asset (I-10 Logistics Center) in the company's history. Furthermore, she demonstrated exceptional management skills by facilitating the closing of a substantial sandwich master lease on allotted tribal land in Cathedral City. This involved extensive research, education of partners and lenders on tribal land ownership, and serving as the main liaison with Shopoff's diverse legal team.



### Jessica Hubbard, CEO

*Casa Youth Shelter, Los Alamitos*

Since stepping into the role of CEO in January 2023, Jessica Hubbard has hit the ground running for Casa Youth Shelter, the only emergency temporary shelter for children between Culver City and Huntington Beach. In just six months, she has already made a significant impact - including breaking organization fundraising records and launching clinical care programming in two new school districts. An expert in youth development and education, whose credentials include a law school degree and tenure as the chief program officer of Girls Inc. of Orange County, Hubbard also leveraged her diverse skill set to kick-start a strategic planning process and organization restructuring that has put Casa Youth Shelter on a path to not only continue providing critical short-term residential care, but also dramatically expand its existing counseling and therapeutic mental health services for every adolescent in crisis throughout the region.



### Stacy Hubbard, Principal & Managing Director, Orange County

*Marsh McLennan Agency, Aliso Viejo*

Stacy Hubbard has been in the insurance industry for over 25 years. She currently serves as a principal and managing director for Marsh & McLennan (MMA)'s Orange County location. She serves as an advocate, manager, and leader for both the sales





# Providence Congratulates Laureen Driscoll

ON HER WOMEN IN BUSINESS  
AWARD NOMINATION

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**Laureen Driscoll**

*Chief Executive, Providence South*

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Congratulations, Laureen, on your Women in Business Award nomination, and thank you for serving the needs of our caregivers, patients and community by always delivering on the Providence Promise — *Know me, care for me, ease my way.*

[Providence.org](https://www.providence.org)

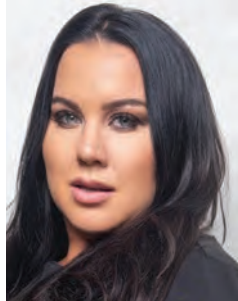
## 2023 Women in Business Award Nominees

and account management teams with regards to associate needs, best practices, and resources. Additionally, Hubbard is responsible for budgets, staffing, sales, and retention. Since joining MMA in 2011, Hubbard has been one of the key drivers behind the Orange County location's reputation for excellence in service.

### Amber Johnson, Owner & Founder

*Facial Lounge, Costa Mesa*

Amber Johnson's achievements at Facial Lounge are nothing short of remarkable. As a visionary entrepreneur, she not only recognized the importance of clean, vegan, and cruelty-free skincare products before they were even a trend but also managed to create effective formulations that outshone anything available on the market. Her dedication to offering ethical and sustainable options set her apart in the industry. Johnson's hard work and commitment to excellence have not gone unnoticed. The recognition bestowed upon her by esteemed publications speaks volumes about her success. The LA Times nominating her spa as the best day spa is a testament to the exceptional experiences she provides to her customers. Additionally, winning the prestigious title of best vegan skincare from Global Vegan for her skincare line further solidifies Johnson's expertise and dedication to cruelty-free beauty. Amber Johnson's journey is an inspiration to aspiring entrepreneurs, single parents, and advocates of ethical skincare. Her accomplishments at Facial Lounge are a testament to her passion, resilience, and ability to make a positive impact in the beauty industry while staying true to her values.



### Jennifer Johnson, Owner

*Law Office of Jennifer R. Johnson, Irvine*

Jennifer R. Johnson has dedicated her life to helping others. She was raised in North Dakota and South Dakota. The daughter of a pastor, Johnson's firm focuses on the representation of individuals injured due to the negligence of others. Johnson earned a Bachelor's Degree in Psychology with a minor in Music Education from Evangel College in Springfield, Missouri. She then attended nursing school at Mesa Community College in Arizona after which she became a Registered Nurse. Thereafter, Johnson attended law school at the University of Arizona College of Law in Tucson, Arizona. During law school, Johnson worked as a nurse in intensive care units. After law school, she relocated to California where she has practiced law ever since. Johnson spent the first eight years of her career representing doctors and hospitals in medical malpractice cases. She then joined a Plaintiffs' firm where she worked on both medical malpractice and mass tort cases. Johnson is AV Preeminent rated by Martindale Hubbell. In 2020, the Orange County Trial Lawyers Association presented Johnson with their Top Gun Award for an eight figure settlement she obtained and in 2020, she was recognized as the OCTLA Member of the Year award for her work mentoring law students.



### Ronnetta Johnson, CEO

*Waymakers, Irvine*

Ronnetta Johnson is a dedicated nonprofit professional with more than 35 years of leadership experience. She joined Waymakers in 1995, holding several key positions before her appointment to CEO in 2015. Waymakers fits well with Johnson's dedication to service as it provides interventions that can lead to happier and healthier lives for vulnerable children, individuals and families by working with those impacted by difficult circumstances, mental health or the criminal actions of others. Started in 1972 as a pilot project out of University of California, Irvine, Waymakers' initial focus was to provide diversion counseling for delinquent youths and their families. Under Johnson's dedicated leadership, the agency has grown to become the primary provider of crime victim services in Orange County. Last year the agency celebrated its 50th year with a budget of over \$30 million, more than 350 staff and hundreds of volunteers, who serve over 100,000 individuals each year.



### Meghana Joshi, Senior Project Manager

*Little Diversified Architectural Consulting, Inc. Newport Beach*

Meghana Joshi is an award-winning architect with over twenty years of experience in the AEC industry. As a senior associate at Little, she has significantly impacted revenue and business development through client commitment. She actively participates in professional organizations like AIA, ULI and NOMA. Within AIAOC, she founded/ chaired Women in Architecture and EDI+J Committee, amplifying voices of minority architects. As the director of Project Pipeline at NOMA, she worked towards increasing opportunities for minority architects. Joshi's contributions have been honored by AIA with "Associate Award", "Presidential Citation" (2018) & "Service Award" (2019). She is a featured diverse designer on "Say It Loud" (2019, 2023) and "Not Now, But Right now" (2021) exhibits. She is the recipient of "Service Provider" award by CREW and a "Construction Idol" Nominee by New York Build. Joshi is also treasurer of AIAOC's Executive Board and a member of ULI's Local Product Council.



### Manna Kadar, Founder & CEO

*Manna Kadar Beauty Inc., Irvine*

Manna Kadar is the self-made, self-funded minority mom-preneur behind the fast-growing Manna Kadar Beauty family of brands, including Manna Kadar Cosmetics, Beauty and the Bump, Goddess by Manna Kadar, Haute Dog Luxury Pet Products, Mason Man Skincare, and Manna Kadar Luxe Bath and Body. She is the creator of the "7 Minute Face," a three-step, award-winning Beauty Simplified System that moms on-the-go all over are implementing.



### Shawn Kato, Partner

*Baker Tilly, Irvine*

In November 2020, Squar Milner merged into Baker Tilly US, LLP, a top 10 international accounting firm where Shawn Kato currently serves as a tax partner in the Irvine office.

Kato has spent nearly 30 years working in Orange County in tax and accounting services. Her experience spans across a variety of industries including technology, manufacturing and consumer products for publicly traded and privately held companies, with expertise specifically in corporate tax. Kato's career started at PricewaterhouseCoopers (PwC) after graduating from the University of California, Los Angeles with a degree in business economics. After spending several years working in-house for tax departments within a few large multi-national companies, she returned to public accounting in 2009 with Squar Milner LLP, a regional accounting firm headquartered in Orange County.



### Adrienne Kessler, CEO

*Speech and Language Development Center, Buena Park*

CEO Adrienne Kessler joined Buena Park's Speech and Language Development Center in 2016, revitalizing and expanding the center's 60-year legacy. Under her leadership, the center now provides innovative education and therapies for individuals with disabilities and special needs at all life stages, including adults through an adult day program. Kessler opened an office in Temecula to address the urgent need for disability services in the area. She also forged partnerships with USC, NYU, Chapman, UCI, and CSUF, conducting original research and serving as a training site for future clinicians. Additionally, Kessler influences special education policy as a board member for the California Association of Private Special Education Services, collaborating with the California Department of Education and State Legislature. Through her strategic initiatives, Kessler has positioned the center as a trailblazer in special education, making a profound impact locally and statewide.



### Robin King, Corporate Relations Director

*The Shea Center, San Juan Capistrano*

Robin King brings 25+ years of business development, marketing, and sales experience to The Shea Center. As a seasoned executive in the for-profit world, she combines her knowledge of cause marketing, event sponsorship sales & passion for building relationships, with her desire to engage organizations in corporate social responsibility to broaden the footprint of corporate support at The Shea Center. She along with her incredible development team engage board members, passionate committee members along with companies throughout Southern California to raise over \$5 million dollars annually. King has been responsible for over \$25 million dollars in advertising and marketing campaigns spanning decades. Representing hundreds of radio stations, locally and nationally for American Airlines, PepsiCo, P&G, Georgia Pacific, Wells Fargo Bank, The San Francisco 49ers and the San Jose Sharks to name a few. With that said, she has never allowed her success to get in the way of what is truly important to her clients, colleagues, sponsors, and donors. It is most important that she leads by example to elevate corporate culture and engage in a high level of emotional intelligence. Her keen ability to bring people together, make connections, and have a network of truly amazing business leaders and past colleagues comes naturally to King. Her relentless commitment to inclusivity, fairness, and opportunities for all people is what drew her to The Shea Center and continues to drive her each and every day.



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

*Blank Rome LLP, Irvine*

Sharon R. Klein is a recognized leader in privacy and data security law, as well as in her Orange County and professional communities. Sharon is a Blank Rome partner; chair of her firm's Privacy, Security & Data Protection practice; and managing partner of its Orange County office. Cybersecurity risk, and legislation aimed at curbing it, are rapidly evolving globally. Approximately 37 percent of global organizations were the victim of a ransomware attack in 2021. Klein ensures that her business clients minimize their risks and comply with a myriad of regulations while leveraging the growing value of data. Since joining Blank Rome in 2021, she has led and expanded the firm's Privacy, Security & Data Protection practice, adding both attorneys and services. The national, 40+-attorney group helps companies strategically prioritize digital assets, navigate nuanced privacy rules, and protect information from malicious cyberattacks, breaches, and other threats in the daily headlines.



### Irene Klepp, CFO

*Los Angeles Sports & Entertainment Commission, Los Angeles*

Ms. Klepp joined LASEC in July 2020 to lead the non-profit's finance and risk management duties as the host committee for Super Bowl LVI in Los Angeles (February 2022). Ms. Klepp created the office of the CFO, recruited an accounting team and worked closely with the Board and management to develop oversight functions for treasury, risk assurance and budgeting for Super Bowl LVI and community programs. Ms. Klepp also managed the finance, treasury and risk management duties of the College Football Playoff National Championship Game held in Los Angeles in January 2023. In addition to her work on marquee sporting events, Ms. Klepp works closely with the LASEC team to engage small businesses and promote career development for students and professionals interested in a career in sports.



### Lee Ann Kline, President & Founder

*STEM Advantage, Huntington Beach*

Lee Ann Kline began her career as a programmer at IBM. As a Mathematics and Computer Science major and first-generation college student, she was keenly aware of the lack of women in her field and the need for role models and mentors. As her career progressed and she became a consultant at EY, she observed



# ST. JOHN

## CONGRATULATIONS CHRISTINA ZABAT-FRAN

St. John and LANVIN Group congratulate  
Christina Zabat-Fran on her  
2023 Orange County Business Journal  
Women in Business Awards nomination

St. John, headquartered in Irvine, is one of the great American fashion houses. Founded in 1962, the brand has evolved from a simple knit dress to a collection of understated designs with timeless elegance, unsurpassed quality and craftsmanship sold across the world.

St. John welcomed Christina Zabat-Fran to the team nearly thirteen years ago. Raised in Orange County, Christina earned her bachelor's degree at UC Irvine before graduating in UC Irvine School of Law's inaugural class. After years in public affairs, one fortuitous cold call to St. John opened the door to her current career. From a Legal Analyst to General Counsel and Corporate Secretary, Christina has confidently led St. John through many phases. In moving the brand from traditional retail to an omnichannel model, Christina personally foresaw the need for this evolution and was integral in preparing the business for digital success. More recently, Christina led LANVIN Group in a public offering, joining the St. John executive team at the New York Stock Exchange to ring the opening bell.



*"We may be wearing more sneakers and fewer suits these days, but remember: working hard and believing in yourself never goes out of style."  
-Christina Zabat-Fran*

Christina is a dynamic leader having stepped beyond her role at St. John to host fashion shows and even appear in a marketing campaign. Christina is the incoming President of the Orange County Bar Association, the second largest chapter in the state, as well as a board member for several nonprofit organizations. Her strength, grace, and success inspires and empowers us and we are honored to recognize Christina Zabat-Fran amidst this meaningful honor.



## 2023 Women in Business Award Nominees

firsthand the lack of gender and racial diversity in technology organizations she served. See something. Do something. Inspired to create change, Kline envisioned a holistic program to help women and underserved communities interested in science, technology, engineering, and math (STEM) and leveraged her network to create STEM Advantage in 2012. Honors include EY Better Begins With You global winner for Strengthening Our Communities, Certificate of Congressional Recognition for STEM Advantage, Los Angeles Times as a Diversity, Equity, Inclusion & Accessibility Visionary Leader, and Los Angeles Business Journal as Nonprofit Executive of the Year (Growing category).

### **Gina Lara, Senior Manager, Tax and Forensics**

*Smith Dickson Certified Public Accountants LLP, Irvine*

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



### **Christy Lea, Partner**

*Knobbe Martens, Irvine*

A star litigation partner and co-chair of Knobbe Martens' Medical Device Litigation practice, Christy Lea is renowned for resolving high-stakes patent and trade secret disputes at both the trial and appellate levels. Ms. Lea has represented clients in the medical device and other industries for nearly two decades, is an accomplished IP trial lawyer, and has served as lead counsel in numerous high-impact inter partes reviews (IPRs) before the Patent Office. She is a leader within Knobbe Martens, where she holds several positions of management, is a founding member of the firm's Pro Bono and Diversity Committees, and is a frequent speaker at events across the legal industry. A firm believer in service and giving back, Ms. Lea is active in many organizations throughout her community, including currently serving as the Immediate Past President of the Orange County Public Law Center.



### **Debbie Leahy, Regional Disaster Officer**

*American Red Cross Southern California, Santa Ana*

As the regional disaster officer, Debbie Leahy oversees all regional disaster response and preparedness teams, programs and services for the American Red Cross Southern California Region (Orange, San Diego, Orange, Riverside, San Bernardino, and Imperial Counties) which includes providing 24-hour emergency assistance to people affected by fires, floods and other emergencies or disasters. In the last fiscal year, she oversaw the deployment of disaster workers from southern California to fill more than 216 assignments in 15 different national disaster relief operations and provided help and hope after hundreds of disasters across the region, from home fires to wildfires and more. Under her leadership, local teams have also delivered community preparedness education, which included installing over 5,000 free smoke alarms through the Home Fire Campaign and offering a variety of free education presentations throughout Orange County and beyond, including Be Red Cross Ready, Ready Rating, and Pillowcase Project presentations.



### **Aegea Lee, Executive Vice President, Director of Real Estate**

*California Bank & Trust, Irvine*

Aegea Lee joined California Bank & Trust (CB&T) in 1999 as a real estate analyst and is currently executive vice president and regional director of its Orange County real estate lending group. She has a proven record of cultivating, marketing and managing new and existing lending relationships for the California market. In her 24 years with CB&T, Lee has originated more than \$4 billion in new loan production and manages a portfolio worth over \$1 billion. In 2011, US Banker Magazine listed her as one of the '25 Most Powerful Women in Banking' in its annual rankings. Additionally, she has been the co-chair of CB&T's Diversity Equity and Inclusion Program since 2021, leading the charge to create a diverse and inclusive workplace that champions employees of different backgrounds.



### **Hailey Lennon, Partner**

*Brown Rudnick LLP, Irvine*

Hailey Lennon is a leading partner in Brown Rudnick's Digital Commerce practice who helps clients navigate complex legal and regulatory challenges facing blockchain, DLT, cryptocurrency and digital assets companies. Recent examples of her work include representing the Official Committee of Unsecured Creditors in the Chapter 11 case of crypto platform BlockFi, which came on the heels of the sudden collapse of FTX Trading. She is advising crypto startup Bloom Protocol register its initial coin offerings token as a class of securities with the SEC, and she advised AI company Aurora Labs with regulatory guidance in its entry into the U.S. market. She also assisted BnkToTheFuture with its bid to acquire Celsius within the U.S. Chapter 11 proceeding. Lennon hosts a regular Brown Rudnick podcast series, "The Bitcoin Verdict," that breaks down the barriers of information about bitcoin and cryptocurrency laws and



### **Susan Lindquist, Vice President of Community Development**

*Trumark Homes, Newport Beach*

At Trumark Homes' Southern California Division, Susan Lindquist holds the position of

vice president of community development where she utilizes over 30 years of extensive experience in the building industry to direct and manage all aspects of feasibility, entitlement and land development in Southern California. Lindquist keenly specializes in complex land entitlement projects, where she navigates all local, state and federal approval processes required to gain project approval. Analysis of key political and policy issues drives the entitlement strategy, coupled with responsible land planning and stakeholder consensus building. The end goal is to provide much needed housing opportunities in great neighborhoods to people in all stages of life, enhancing their lives as well as the communities around them. She has been recognized by civic leaders for her professionalism and talent, especially within tense political situations, and is an asset to the Trumark Homes team.



### **Jill Littley, CFO & COO**

*Fusco Engineering Inc., Irvine*

Jill Littley is the CFO/COO of Fuscoe Engineering, Inc., headquartered in Irvine, California. She is a resourceful and energetic financial professional with a results-focused approach. Her primary responsibility as CFO/COO is to ensure the firm's financial strength and operating efficiency, and she has greatly exceeded those goals: Littley has grown Fuscoe Engineering's top-line by a remarkable 375% and earnings by 525%! Littley's other outstanding achievements include increasing efficiencies and cost savings by establishing regional and studio financial reporting and budgets; overseeing conversion from an Axiom ERP system to Deltek Vision/VantagePoint; and strategizing the firm's transition to a 100% employee-owned ESOP. Additionally, Littley is responsible for the daily operations of Fuscoe's finance, accounting, human resources, information technology and administrative functions. She designs and implements business strategies with the CEO, board of directors and business leaders, with an emphasis on bottom-line performance, working capital and enhancing ownership value for all employees.



### **Araceli Lonergan, CEO**

*Foothill Regional Medical Center, Tustin*

During an era of unrelenting financial pressure on healthcare delivery, from nurse shortages, increasing medical costs and regulation, taking on an ailing acute care hospital was a challenge many would shy from. In a male-dominated space where only 15% of healthcare CEOs are women, Araceli Lonergan was tapped as Foothill Regional Medical Center's CEO in 2017, where she led the charge and began transforming the hospital into a thriving and significant contribution to Tustin and its surrounding Orange County communities. As an architect of change, Lonergan's strategic vision and leadership empowered her team to become innovators, where they began the organizational transformation to improve the hospital's delivery of quality healthcare, financial performance, best practices, enhanced patient experience, and employee retention. Her results include: an 83% revenue growth; service expansion including new 24/7 ER, orthopedics, spine, bariatrics, and robotics; accreditation by the Joint Commission; Healthgrades Patient Safety Excellence Award and achieved Press Ganey Patient Satisfaction, 90th percentile. Lonergan sits on Congresswoman Young Kim's, Congressional District 40 Healthcare Advisory Committee.



### **Monika Lopez, Senior Fiduciary Officer**

*Northern Trust, Newport Beach*

Monika Lopez is a senior investment officer and senior vice president at The Northern Trust Company. In her role, Lopez oversees the activities of the Orange County Portfolio Advisors, who collectively manage \$5 billion in assets under management. Additionally, Lopez specializes in comprehensive wealth management and advisory services, with a focus on creating investment strategies that are structured to meet client goals with the highest degree of confidence. Investment strategies are highly customized and grounded in best-available thinking. Lopez has a keen ability to fashion the proper asset mix to satisfy the short and long term goals of a family. She has a deep understanding of how assets contribute and perform in a portfolio.



### **Anna Lisa Lukes, Co-Founder & CEO**

*The Lukes Network LLC, Aliso Viejo*

Anna Lisa Lukes co-founded The Lukes Network, her family-owned small business to help demystify sustainability and to promote the Triple Bottom Line of People, Profit and Planet through strategic planning, fundraising, outreach, public affairs, branding and marketing. TLN also provides consulting services to assist organizations with creating and/or implementing strategies to become more sustainable environmentally, socially and financially. Based in Orange County, TLN's work has grown to other parts of southern California, and the firm's clients include enterprises of various sizes across industries, the public sector and nonprofits. Lukes earned her MBA with an emphasis in Entrepreneurship from Chapman University, her Juris Doctor from Whittier Law School and her bachelor's from UCLA.



### **Micaela Lumpkin, Chief Credit Officer**

*CoreVest Finance, Irvine*

As the only woman to run a leading portfolio rental loan product in the U.S., Micaela Lumpkin is recognized as one of the most dedicated and knowledgeable professionals in the Business Purpose Lending space. Under her leadership, CoreVest has funded over \$20 billion in real estate investment loans for approximately 150,000 units. Lumpkin has been instrumental in helping to develop and support the company's securitization platform and the development of new loan products. CoreVest leads the industry in securitizations with 22 closed since inception



## 2023 Women in Business Award Nominees

for a total issuance of \$5.9 billion. Despite the turbulence brought on by the COVID-19 pandemic, Lumpkin still managed to nearly double the size of her team and lead them to a record volume of more than \$1.3 billion in portfolio rental loans in 2021.

### Leeann Lynch, Chief Strategy Officer

*Lendistry, Los Angeles*

Leeann Lynch lives and breathes small businesses. During the COVID-19 pandemic, Lynch was a vital part of expanding Lendistry's business development as it participated in the Paycheck Protection Program (PPP), helping many small businesses in underserved communities receive much-needed funding during a severe disruption. That year, Lendistry's team grew to ten times its size. Lynch helped scale the company's infrastructure to maintain stability without losing momentum as it continued to serve struggling small businesses. As she has spearheaded new office openings and led Lendistry's developing operations strategy, Lynch has ensured the company supports small businesses as vendors. Lynch is purpose-driven, ensuring decisions at all levels align with the organization's greater mission and goals while cultivating a productive environment and progressive organizational culture.



### Justine Makoff, President

*Free Rein Foundation, Huntington Beach*

Justine Makoff cofounded the nonprofit Free Rein Foundation in 2014 and has been president since its inception. Free Rein's mission is to rescue horses and then involve them in equine-assisted therapy for individuals and groups. The continued success of FR is the result of years of Makoff's fundraising and the recruiting of a team of certified mental health professionals and equine specialists. And recruiting doesn't end there, for at the heart of the organization are all the horses that require housing, feeding, grooming and health care. Makoff has assembled a large team of dedicated volunteers who see to the daily needs of the animals. Under her leadership, thousands of individuals have received access to equine therapy/growth and learning programs, and partnerships such as the one she established with southern California police departments have served at-risk youth and first responders. Dozens of horses, including several feral mustangs, have been rescued.



### Marcia Manker, CEO

*MemorialCare Orange Coast and Saddleback Medical Centers, Fountain Valley*

As CEO of MemorialCare Orange Coast and Saddleback Medical Centers, Marcia Manker oversees all hospital operations, strategy development and business initiatives. Her accomplishments are far and wide and have had long-term positive impacts on the community. As of late, under her leadership both hospitals have received numerous awards, including the coveted Magnet® designation, "A" grades from the Leapfrog Group

and they have been named Top Workplaces. Additionally, under her direction, MemorialCare will open its Women's Healthcare Pavilion which will transform women's healthcare in South Orange County. Additionally, MemorialCare Saddleback Medical Center performed Orange County's first new minimally invasive surgery - vNOTES - for hysterectomy patients, a truly remarkable service that will help many women to come.



### Joi Mar, Managing Director

*Green Street, Newport Beach*

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



### Kate Marr, Executive Director

*Community Legal Aid SoCal, Santa Ana*

Under Kate Marr's leadership, Community Legal Aid SoCal has grown from \$8.5 million in revenue in 2017 to more than \$15.7 million in 2023, the staff has grown from 90 to 141, and the organization has expanded its free civil legal services, resulting in significant life-changing impact for clients. In the period 2018-2020, Marr led the organization through a complete rebrand, a restructure of its legal program into substantive legal units, the formation of a pro bono program, and the development of a case management program to provide more extensive and holistic services to clients. In 2020 the organization made a commitment to a culture of justice, equity, diversity, and inclusion. In 2023, CLA SoCal was selected as a recipient of the State Bar of California's Silver DEI Leadership Seal in recognition of the work it has done to advance diversity, equity, and inclusion in the workplace and the legal profession.



WOMEN'S HEALTH PAVILION

Marcia Manker

## Congratulations, Marcia Manker

Congratulations to Marcia Manker, CEO of MemorialCare Orange Coast and Saddleback Medical Centers, on your nomination for the 2023 Women in Business Award. Each year, the OCBJ recognizes exceptional OC business women, and we are proud to count you among them.

Under your leadership, we are breaking new ground in health care. Our new Women's Health Pavilion at Saddleback Medical Center, opening this year, will offer comprehensive services in one state-of-the-art location — from expert breast care, gynecologic services, oncology care, patient navigation, and more.

Thank you for your unwavering commitment to our communities.

## 2023 Women in Business Award Nominees

### Carol Marzouk, The Executive Lion Tamer®

*Leadership 'N' Soul, Riverside*

Transforming behavior, relationships, and culture are key to a successful workplace environment. Leadership 'n' Soul was founded on the principle that nobody has to endure a toxic boss, toxic employees, or toxic workplace, and employing "simple, effective, time-tested methodologies" will be transformative. Carol Marzouk is a bilingual behavior strategist, speaker, certified coach, and expert on employee engagement, and she inspires, trains, educates, and coaches executives to operate with a conscience, putting in place a process that "allows employees to be 100% psychologically committed to the success of the company." Marzouk is insightful and intuitive - comfortable with asking the tough questions and will ensure that leaders and teams get to the heart of the matter. Through her creative methods, participants are sure to discover new ideas, develop practical techniques, and have fun in the process.



### Pam McMaster, CEO

*Pro-Tech Design & Manufacturing, Santa Fe Springs*

PRO-TECH Design & Manufacturing, Inc. provides contract manufacturing services to medical device companies, including packaging, assembly, and sterilization. Pam McMaster started the company in 1980 in her family room. At the time, she was a single mom, selling packaging solutions to medical device companies at a time when it was mostly men. Today, under McMaster's leadership, the company has grown to include 230 people across three locations (California, Minnesota, and Texas), and works with some of the largest medical device companies in the world. And, her first customer, is still a customer over 40 years later.



### Meghan Medlin, CEO

*Medlin Workforce & Reentry Solutions, Orange*

Meghan Medlin founded a consulting company, Medlin Workforce & Reentry Solutions (MWRS) in 2019. She also founded nonprofit organization, the Hub for Integration, Reentry & Employment (H.I.R.E.) in 2020. Despite the challenges brought on by the pandemic, she has grown MWRS exponentially year over year (including 98% growth in 2022) and has launched, developed and led H.I.R.E. to providing resources, service referrals, mentorship and employment to over 700 people in 2022 including the county's largest reentry resource fair held at the Honda Center. Medlin has a strong dedication to the reentry community and has devoted her efforts to bridging gaps in systems, providing services to an often-overlooked population and serving as a leader in the community. Medlin has been instrumental in growing the reentry community and paving the way for new programs to thrive. This has opened doors for those returning from incarceration to succeed and change their lives around.



### Vivian Mendoza, Director of Marketing & Communications

*WaBa Grill, Anaheim Hills*

During her almost nine years with WaBa Grill, Vivian Mendoza has had a hand in almost every aspect of the business, from training and operations to product development, and now, brand visibility and consumer awareness as director of marketing and communications. Her work across numerous functional areas and departments has resulted in significant improvements to WaBa Grill's operations, including enhancements to the WaBa Grill Support Center, internal systems, training and more. Mendoza's exemplary skills, passion for the industry and impressive attributes as a leader have created a significant imprint on the company's success, and her countless contributions and achievements have been instrumental to the growth of the brand. WaBa Grill now boasts nearly 200 locations and is primed to continue developing, having identified key markets throughout the Western U.S. that will further support the brand's original mission to make healthy food crafted with quality ingredients accessible to all.



### Jo Merriman, Senior Vice President Operations & Investment Services

*Shopoff Realty Investments, Irvine*

Jo Merriman, a seasoned finance and real estate investment professional, currently holds the position of senior vice president of operations and investment services at Shopoff Realty Investments. Having joined the company in 2021 as vice president, she quickly earned recognition and was elevated to her current role the following year. In her role, Ms. Merriman oversees investment services and operations for the firm's securities department, serves as the senior liaison for operations between all departments at Shopoff Realty Investments, and serves on the Senior Management Team and the Executive Team. Her responsibilities encompass a wide range of tasks, including managing the day-to-day operations and systems of Shopoff Securities, managing the creation of offering documents and materials for the company's capital formation, ensuring transparent investor reporting, and leading her department toward becoming a best-in-class investment services team within the industry. Ms. Merriman possesses a unique talent for bridging the complexities of the business, aggregating systems and information between various groups, and effectively communicating with investors.



### Santina Michel, Senior Vice President & Chief Human Resources Officer

*Terran Orbital, Irvine*

Santina Michel is helping Terran Orbital become one of America's fastest growing space companies, the best company to work for, and a leader in designing, manufacturing, launching, and operating satellites. As senior vice president and chief human



resources officer, Michel oversees daily operations and the creation and implementation of the organization's vision and strategy and leads organizational change, while recruiting, retaining, and developing employees and executives who advance the company's mission. In a hyper-competitive hiring market, Michel has increased Terran Orbital's workforce to 627 employees as of mid-2023, up from 385 a year ago, with plans to grow the company's total workforce to 1,000 in 2024. Michel's strategic decisions will impact Orange County for years to come as Terran Orbital expands in Irvine, most recently with the groundbreaking of a 94,000-square-foot, state-of-the-art manufacturing plant at 4 Goodyear. Michel is working to strategize and develop unique ways to support Terran Orbital's goals, while creating a high-performing work environment.

### Kari Moore, CFO

*JenaValve Technology, Irvine*

JenaValve is a late stage start up medical device company which is commercial in Europe and is currently in the process of obtaining FDA approval in the U.S. Kari Moore joined JenaValve in May 2022 and brings to the company deep experience in preparing companies to go public and executing IPOs. She was able to successfully raise \$100 million in a Series C round of financing during her first year with the company. Moore has also spent her first year preparing the company for a U.S. commercial launch and an IPO or other transaction.



### Jennifer Morris, Founder & Owner

*Ajenda PR, Orange*

Jennifer Morris founded Ajenda Public Relations 13 years ago at the age of 29. The boutique-sized PR and marketing agency now represents approximately 30 restaurant and hospitality clients, from single-unit chef-driven restaurants, to larger multi-unit



has excitedly executed the opening of new client locations in new media markets all throughout the country. For example, The Dolly Llama, founded in Los Angeles, now operates out of over 10 locations in hubs such as New York City, Las Vegas and more. Other accomplishments include helping secure awards for clients in the franchising space that have led to increased franchisee leads and sales, restaurant grand openings with lines around the block, and coverage in national publications that have increased the sales of consumer packaged goods.

### Lisa Moss, President & CEO

*The MSH Construction Company Inc., Huntington Beach*

Lisa Moss started a concrete and grading company back in 1990 with her husband Wally called The Moss Company. Together they grew the business into such a success that their client Southern California Edison, said I wish you were a General Contractor. In 2003 MSH Construction was born and they became a General Contractor for SCE. Moss took accounting/finance classes and business development courses throughout her career so that way when she was speaking with their bank or CPA she was educated and understood what was happening. Moss' positive mindset and work ethic have taken MSH Construction to a whole new level that no one thought was possible.



### Antoinette Naddour (formerly Balta), Executive Director & Co-Founder

*Veterans Legal Institute, Tustin*

Antoinette Naddour co-founded Veterans Legal Institute, a nonprofit law firm, in 2014 with her own funds as well as little seed funding from the Orange County Bar Association. Veterans Legal Institute® (VLI) provides pro bono legal assistance to homeless, at risk, disabled and low income current and former



education, and employment and foster self-sufficiency. Since its founding, Naddour has grown the organization to have over 20 employees, many of whom are military-affiliated and a volunteer force comprised of over 200 persons per year that includes attorneys, law students, paralegals, admins, fundraisers, and civilians. VLI receives over 350+ applications for service per month from low income and homeless veterans, provides 60+ legal clinics per year, presents nationally on veteran related topics multiple times per year and as a result has served close to 10,000 veterans to date.

### Rachel Nelson, CFO

*CBT, Orange*

Rachel Nelson has been a valued leader at CB Technologies, Inc. for the past 22 years and has organically risen from accounting manager to CFO. Throughout her tenure, she has led the company with unparalleled strength and steadiness during periods of growth, economic downturn, and organizational & company transformations. Nelson is part of the executive leadership team and is responsible for the financial strategy and health of the organization, as well as the management oversight of the Finance and IT departments. Nelson has been an instrumental part of the company's transition from an IT Value-Added Reseller with annual revenues of \$1.6 million to a Premier Domain Expert in IT/OT solutions servicing Fortune 100 customers with annual revenues of \$22 million in 2022.



### Kien Nguyen, Founder

*Advance Beauty College, Garden Grove*

Advance Beauty College is a remarkable institution that stands as a testament to the indomitable spirit of its founder, Kien Nguyen, a refugee from Vietnam, in 1975 at the Fall of Saigon. Recognizing the struggles faced by fellow immigrants in pursuing job security, she set out to establish a place where aspiring Vietnamese immigrants with little English skills could learn a trade in the beauty industry and help set them up for better lives.



## 2023 Women in Business Award Nominees

In 1987, Advance Beauty College opened its doors, heralding a new era of empowerment and education for aspiring beauticians. Today, the institution stands proudly as an accredited private vocational school and a member of the esteemed American Association of Cosmetology Schools. The creation of Advance Beauty College is one of resilience, determination, and the pursuit of a better future. It inspires immigrants that with passion, hard work, and education, one can overcome obstacles and achieve remarkable success.

**Linh Nguyen, President**

*Advance Beauty College, Garden Grove*

Linh Nguyen, along with her brother Tam Nguyen, assumed control of the family business in 1999, continuing their remarkable journey with Advance Beauty College (ABC). Nguyen played a pivotal role in the expansion of the business of a second location in Laguna Hills. Her unwavering commitment and dedication to the company's growth and success have been instrumental in solidifying Advance Beauty College's dominance in the nails industry. Under Nguyen's leadership, the college has graduated over 50,000 students, becoming the foremost nails program in the country. Nguyen's visionary approach and innovative strategies have gained national and international recognition. The college's ascent to success has been featured on media outlets such as Fox News, CNN, and BBC America. Moreover, ABC has received numerous prestigious awards acknowledging its exceptional leadership, trailblazing spirit, and commitment to community service.



**Carrie Nikols, CEO**

*The Nikols Company/Nikols Mortgage Fund LLC, Newport Beach*

Carrie Nikols is CEO of The Nikols Company, which is the manager of Nikols Mortgage Fund, LLC, a private commercial real estate construction & bridge lender providing \$5-35 million loans on California properties. When Nikols joined the Fund in 2008, she used her structured finance philosophy from her years in credit company lending to build the Nikols Mortgage Fund platform from scratch. Nikols has always directly lead all loan originations, underwriting and servicing for the Fund, and over the course of 15 years, has closed over 150 loans with zero loan losses ever. 70% of the Fund's loan portfolio is comprised of borrowers who have chosen to do repeat business with Nikols, and since inception over 95% of all investors have remained in the Fund. In 2022, Nikols increased loan production by 31% and brought the Fund past the milestone of closing over \$1 billion of new loan commitments.

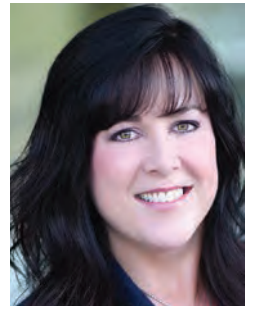


**Stacy Nishioka, VP of Operations**

*Irvine Company, Newport Beach*

Stacy Nishioka is vice president, Portfolio Operations for Irvine Company Office

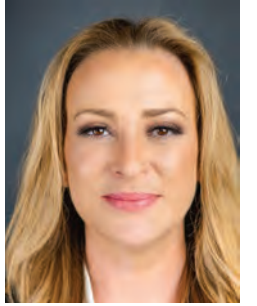
Properties and has been with the company since 2003. Nishioka currently oversees the Orange County high-rise portfolio of 10.6 million square feet, 83 buildings and 1,100 customers. Nishioka is primarily responsible for the asset financial performance, building operations, customer experience/retention and employee engagement, training & development of the operations team. Nishioka earned her Bachelors degree from University of Phoenix in Business Management and holds a California Real Estate Salesperson License. Nishioka also earned a Real Property Administrator (RPA) designation from Building Owners and Managers Institute (BOMI). Nishioka is past president of BOMA Orange County (2018) and served as president elect for CREW Orange County (2021). Nishioka has served as a dedicated mentor and advocate for innovation and growth. She is also a cancer survivor and leads with passion and poise.



**Lindsay Oglesby, CEO**

*TRA- Tax Relief Advocates, Irvine*

Since the start of her journey at TRA, Lindsay Oglesby quickly rose through the ranks starting as a settlement officer, moving quickly to a manager, director, then chief operating officer. She displays the unique leadership ability to take a hands-on approach while still allowing autonomy and growth for everyone she works with. Her dedication and tireless efforts are one of the key pillars for the unprecedented growth TRA has shown growing from 20 employees to 360 employees in a four-year time frame. Evidence of her impact can be seen through the many accomplishments TRA has been honored to receive. In 2022, TRA was awarded Inc 5000's #1 Fastest Growing Company in the Pacific Region and #10 in the entire nation. TRA was also the recipient of the Business of the Year in 2022 and Oglesby won the Women of Influence Executive Award in 2023 from the Greater Irvine Chamber of Commerce. TRA has been awarded the Great Places to Work Certification for 2021, 2022 and 2023 and recognized by the BBB for the prestigious Torch Award for Ethics in 2021.



**Brieane Olson, CEO**

*Pacsun, Anaheim*

Brieane Olson's remarkable 16-year journey with Pacsun showcases her unwavering dedication and impressive achievements. Starting as the director of Women's Design, she rose through the ranks, holding key positions such as CMO, president, and co-CEO before being appointed CEO in May 2023. Olson's leadership has been pivotal in driving Pacsun's growth and innovation, fueling remarkable milestones. With a focus on tech-centric retail, she has led with creativity, innovation, and a digital-first mindset, driving brand strength and revenue



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WOMEN**  
15<sup>th</sup> Year of Recognition  
*Seramount 2022*



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## 2023 Women in Business Award Nominees

growth through game-changing merchandising and marketing initiatives. By promoting internal talent, Olson has nurtured a culture of growth within the company. Under her guidance, Pacsun has achieved unprecedented success through strategic partnerships, digital experiences, and creative collaborations. The brand has solidified its position as an industry leader, thriving financially and creatively, thanks to Olson's visionary leadership and relentless pursuit of excellence.

### Jennifer Olson, Vice President Finance

*Apriem Advisors, Irvine*

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



### Kelly Olson, Vice President, Strategic Planning and Client Development

*Clark Construction, Irvine*

Kelly Olson joined Clark in 2014 as the company's first dedicated business development resource on the West Coast. Since then, Olson has led strategic planning efforts for Clark Western Group, serving as a trusted advisor to clients, designers, and trade contractors from San Francisco to San Diego. In her role, Olson utilizes her more than 30 years of experience in the design and construction industry to develop high-performing teams that meet client goals and performance objectives. Her extensive knowledge of client organizations, procurement, and delivery methods for capital projects and her strong network of industry relationships contribute to her exceptional strategic planning capabilities.



### Anoosheh Oskouian, President & CEO

*Ship & Shore Environmental Inc., Signal Hill*

Over 22 years since its formation, Ship & Shore Environmental is now one of the leading providers of clean air technologies, which clean our air and environment. As president and CEO, Oskouian directs the corporate strategy for engineering, product development, sales, and fabrication. She believes there is a balance between keeping the manufacturing industry alive and keeping the air and environment clean. As a leader in the industry, she is a first in many professional endeavours, setting new standards, implementing new ideas, and constantly thinking of ways to offer innovative solutions for clean air. As a result, Ship & Shore has received numerous awards and has been recognized for many clean air and sustainability initiatives.



### Ingrid Otero-Smart, President & CEO

*Casanova/McCann, Costa Mesa*

Ingrid Otero-Smart joined Casanova/McCann as president/CEO in 2008, and acquired the Agency from its parent company Interpublic Group (IPG) in 2020. Today, Casanova is minority-owned and certified (WBENC and NMSDC). Otero-Smart has almost 40 years of experience having started her career in her native Puerto Rico and came to Southern Cal 30 years ago to work in the Hispanic market. During her tenure, Casanova has doubled in size and has received many creative awards, including most awarded Hispanic agency in Cannes two years in a row. Today, the Agency represents prestigious Clients like Chevrolet, Nestlé USA, Pernod-Ricard, U.S. Bank, Activision Blizzard, Coca-Cola, and many others.



### Joyce Pae, CFO

*Cadence Aerospace, Anaheim*

Joyce Pae joined Cadence Aerospace in 2013 as VP of Finance and became CFO in 2018. She led the company through numerous M&A activities, debt financing while focusing on cost optimization and cashflow improvement. She developed strong relationship with investors, lenders and other stakeholders, ensuring financial stability through the tough time in the industry related to 737MAX grounding and Pandemic.



### Elizabeth Pagliarini, CEO

*Summit Healthcare REIT Inc., Laguna Hills*

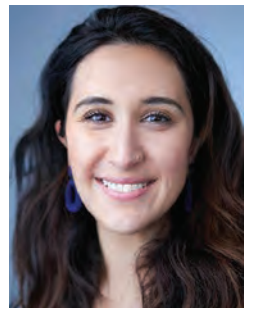
Elizabeth ("Liz") Pagliarini started with Summit as CFO in 2014. She added the title of COO in 2019 and was appointed CEO and Board Member in 2023. During Pagliarini's tenure, she has been instrumental in growing the company from 10 to over 50 assets worth over \$500 million, securing multiple joint venture partners both domestically and internationally, and raising over \$100 million in equity capital. Pagliarini has also formed significant relationships with lenders and seniors housing and care operators that have helped propel Summit's growth. Pagliarini is known for her strategic thinking and helped the company navigate the COVID-19 pandemic, a once-in-a-generation disruption and tragedy unlike any other the seniors housing and care industry has ever experienced.



### Taryn Palumbo, Executive Director

*Orange County Grantmakers, Huntington Beach*

A strategic business leader, community relations expert and public policy advocate, Taryn Palumbo has dedicated the last seven years to steering a funder collaborative committed to advancing social impact by supporting, strengthening and building adaptive leadership in the nonprofit sector. As the first-ever executive director of Orange County Grantmakers, a role she has held since 2018, Palumbo has helped the organization achieve unprecedented impact, including increasing its membership twofold, more than doubling the budget, and growing the number of events from five per year to over 70. In support of OC Grantmakers' mission to advance equity across the region, Palumbo has also enhanced the organization's public profile, transforming it from an internal-facing peer networking group into a leading voice in the nonprofit and philanthropic community at large.



### Christina Pham, President

*JMAC Lending Inc, Santa Ana*

Christina Pham is JMAC Lending's founder and president. Pham established JMAC Lending in 1997 in Southern California and has grown the company to 135 employees. A Woman-and Minority-Owned Business celebrating its 25th anniversary, JMAC has grown into one of the nation's leading mortgage lenders. With leadership and innovation, Ms. Pham leads JMAC by transforming business practices: keeping employees well and remote, changing loan programs to suit market needs, focusing on transparency in communications and teamwork, and creating new technologies to empower customers and staff. She leads with forward-thinking emphasis on creating a more empowered, knowledgeable and inclusive workforce to fit the needs of industry change. As JMAC's leader, Ms. Pham stays close to JMAC's mission and focuses on what the company does best: strength, knowledge and service. She continues to be a change agent for new technology, product development and setting an example for service.



### Regan Dean Phillips, CEO

*Court Appointed Special Advocates of Orange County, Orange*

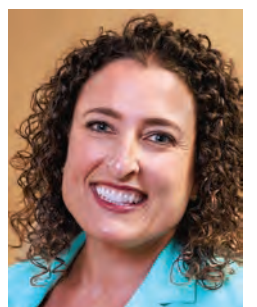
Regan Dean Phillips first became involved with CASA in 2001 while living in New York City and studying at Columbia. She completed a one-year internship with CASA-NYC, launching her career advocating for children in the dependency system. While in law school, Phillips worked as an investigator for the Law Office of Harold LaFlamme. The law firm contracted with Orange County to provide legal representation-minor's counsel-for children in foster care. In her role as minor's counsel, Phillips worked with CASA volunteers in the courtroom to obtain their valuable insight into the child's life, and better advance the child's interests. She later advocated on behalf of dependent children at the Court of Appeal, participating in a number of writ and appeal dependency cases. In 2015, Phillips joined the staff of CASA as chief program officer. Phillips was elevated to CEO position in December of 2017. Since 2017, she has overseen CASA of Orange County's growth from an expense budget of \$2.7 million to over \$5.3 million - nearly doubling the size of the staff, and more importantly, children served in the Orange County foster care system.



### Bonni Pomush, CEO

*Working Wardrobes, Santa Ana*

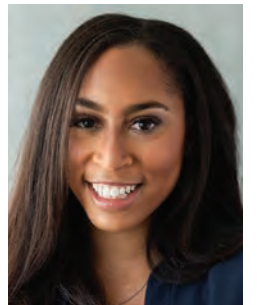
An engaging and passionate leader, Bonni Pomush serves as the second-ever chief executive officer of Working Wardrobes, a Santa-Ana based workforce development nonprofit. Her goals for the future of Working Wardrobes are to continue building upon its strengths, ultimately making the world better by helping one person at a time. She is an insightful decision maker, creator, leader and implementor of strategic plans. She strives to create a collaborative and positive workplace culture, which has led to many awards for Working Wardrobes under her guidance. The organization is currently on track to serve 6,000 clients in this year, delivering on its promise to help people overcome difficult challenges so they can achieve the dignity of work and The Power of a Paycheck™. Pomush's many contributions and successes at Working Wardrobes (WW) start with her commitment to increase capacity to serve by creating scalable infrastructure through modernization, automation and standardization. Pomush's leadership approach leans into strengths and makes weaknesses irrelevant. By leveraging the CliftonStrengths Assessment, instead of just thanking each other and congratulating successes, Pomush leads the team to (formally and informally) celebrate each other's strengths put to work. As of today, client service levels now significantly exceed pre-pandemic and pre-catastrophic headquarters fire levels. WW is on track to surpass its goal of 6,000 clients served in 2023.



### Dr. Tera Poole, Director of Clinical

*InStudio Orthodontics, Irvine*

Dr. Tera Poole is the Director of Clinical behind the innovative orthodontic appliance, InBrace. She launched and manages two InBrace-exclusive orthodontic practices in Orange County: InStudio Orthodontics. Dr. Poole launched and scaled aligner-focused orthodontic practices in three different states across the US and was the lead orthodontist behind launching an aligner education platform based out of London, UK.



### Jessica Quesada, Co-Founder & Managing Partner

*DIV Industrial, Irvine*

Jessica Quesada is a skilled and passionate commercial real estate professional and a driving force in creating change within the industrial sector for the betterment of the environment, the industry and its people. In 2022, after more than 15 years working for some of the industry's most successful and fastest-growing developers and asset managers, Quesada co-founded DIV Industrial, a minority- and woman-owned industrial



2023 Women in Business Award Nominees

real estate firm bringing an innovative approach to industrial development and investment. Dedicated to prioritizing diversity, equity and inclusion (DEI) and implementing responsible environmental, social and governance (ESG) practices within its sector, DIV Industrial is cutting a new path toward improving industry standards. As someone who has led a successful career working for leading corporations in a predominantly homogeneous industry, Quesada is committed to supporting the advancement of individuals of all backgrounds and working to preserve the natural environment.



**Manal Richa, Director**  
CSUF SBDC, Irvine

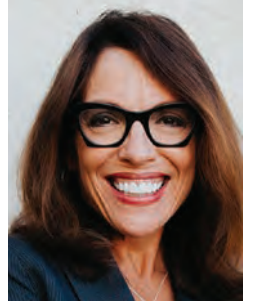
Manal Richa is the director of the California State University Fullerton Small Business Development Center, one of nine service centers under the OCIE SBDC Network, offering no-cost one-on-one assistance and training to business owners and aspiring entrepreneurs in Orange County. With a team of almost 20 consultants and over 10 second languages, who are also active business owners and/or experts in their industries, the CSUF SBDC helps entrepreneurs and business owners launch and expand their businesses through growth planning, startup assistance, marketing strategies, access to capital, building teams, and more.



**Nancy Ridge, President & Founder**

Ridge Innovative Technologies Inc., Costa Mesa

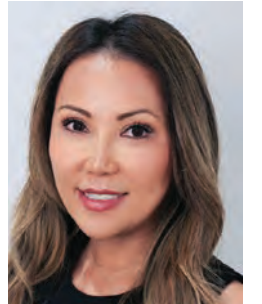
After 27 years of building successful businesses for men, Nancy Ridge wanted to build a successful business for herself. During those 27 years, she had been the primary breadwinner in her family supporting a husband and two children. By 2016, the college educations had been fully funded, and Ridge was finally in a position where she felt she could take the risk required to be an entrepreneur. Ridge had built considerable skills, connections and knowledge throughout her career. She had a great deal of experience in building successful businesses, including a non-profit she started in 2011. Ridge felt it was time to focus on what she loved doing: Working on the forefront of technology to help SMB's and enterprises, embrace ecosystems as the new frontier of digital transformation, help as many people as possible as a business coach and use her skills as a public speaker to talk about causes she cares for deeply, including diversity & inclusion and effective, empathetic leadership.



**Julie Rios, Senior Vice President of Western Region Marketing**

Newmark, Irvine

Julie Rios has been with Newmark for 7.5 years. Supporting nine offices and over 230 brokers, Ms. Rios focuses on providing strategic direction to pursuits and presentations and pioneering pre-and post-marketing efforts across the capital markets, landlord advisory, and tenant representation business lines. Based in Newmark's Orange County, California office, Ms. Rios leads a seasoned team across all marketing functions, including communications, design, analytics, and project management. She has a strong reputation for strategic execution and talent development and has established herself as an innovative leader. Her marketing and business development initiatives have created profitable new business opportunities and unlock growth potential for the firm.



**Bridgette Radzai, Owner & Operator**

GEO Building Services, Huntington Beach

Ms. Bridgette Radzai is the president and CEO of GEO Building Services Inc., a woman-owned, small business. Ms. Radzai holds a General Construction (B License). She has been in the construction industry and owned her own business for over 13 years. With 10+ years of experience, GEO Building Services, Inc. is a small business with big solutions. They provide on-time and on-budget delivery to remote job sites and performance emergency services to keep businesses up and running on tight timelines. Strategic planning allows them to troubleshoot prior to entering the field. They have extensive operational knowledge, existing contracting/procurement, specialized subcontractor relationships, and the necessary tools and equipment to perform.



**Natalie Reider, Senior Vice President, Community Operations**

Jamboree Housing Corporation, Irvine

Hired as Jamboree's director of Community Impact in 2015, Natalie Reider oversaw resident services at family and senior communities. Since then, she's climbed the ranks of this leading nonprofit housing developer to senior VP of community operations as part of the executive management team. Today, she oversees the management and services of 100+ Jamboree properties throughout California - an innovative integration of Asset Management, Community Impact, and Property Management - with a staff team of more than 60 and a \$3.2 billion asset portfolio. Since 2019, Reider has developed and monitored Jamboree's annual business plan and leads the strategic planning process. She's passionate about Jamboree's mission to deliver high-quality affordable housing and services that transform lives and strengthen communities - 10,000+ homes for 20,000+ residents.



Miracles for KIDS



The 360° Miracle Holiday Tea provides funding for our mission to help families with a critically-ill child battle bankruptcy, homelessness, hunger, and depression, so they can concentrate on fighting for their child's life.

Please join us on  
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11:30am-2:30pm

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Join a growing network of compassionate women making a difference in the lives of critically-ill children and their families in need.

Ali Landry

Special Guest Speaker

Actress, author, and philanthropist Ali Landry joins us to share her health journey and the inspiration for the launch of her RE/SHAPE lifestyle platform focused on overall wellness, lifestyle, and beauty.



For more information on the event or to purchase tickets, scan the QR code or contact Laura Collins at [lcollins@miraclesforkids.org](mailto:lcollins@miraclesforkids.org) or (714) 705-4532.



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## 2023 Women in Business Award Nominees

### Maricela Rios-Faust, CEO

*Human Options, Irvine*

Maricela Rios-Faust is a leader in preventing and ending relationship violence through her work as CEO of nonprofit Human Options, one of the most comprehensive relationship violence service providers in Orange County, and her leadership on partnerships and collaboratives aimed at ending the cycle of violence. As CEO, Maricela Rios-Faust brings strong strategic leadership, nonprofit management, and fundraising skills to her multifaceted role at Human Options. Rios-Faust's leadership has led to Human Options budget growth from \$4.5 million to \$7 million and doubling its presence in high need communities, increasing access to needed resources to survivors. She oversees the fiscal and programmatic direction, as well as its emergency shelter and 24-hour crisis hotline, transitional housing programs, community-based services (10 resource centers), a prevention education program and all administrative and fundraising functions. Rios-Faust has become a sought-after source of knowledge about domestic and relationship violence.



### Lesley Rivas, Broker

*Choice Homes, LLC, Tustin*

Lesley Rivas has dedicated her life to finding homes for actual, everyday people at face-value rates. During her time with Choice Homes, LLC., she has found several people with their dream homes. One of her most significant accomplishments has been spending her time assisting actual people at reasonable rates.



### JoJo Romeo, Luxury Real Estate Specialist

*JoJo Romeo & Associates of Pacific Sotheby's, Newport Beach*

JoJo Romeo, a highly empathic individual with a knack for connecting with others, has discovered her calling in assisting people through the emotional journey of buying or selling a home. With her experience in guiding individuals through transitions, Romeo focuses on a "people first" approach in real estate, ensuring her clients' best interests are prioritized. Known for her exceptional design and decor skills, Romeo brings boundless energy, a deep understanding of Feng Shui, extensive real estate knowledge, and a strong network of investors and service providers in Orange County. Despite approaching a billion dollars in sales since 2011, Romeo remains humble, hungry, and genuinely cares about serving her clients. Grounded in her family, daily spiritual reflection, and a strong sense of self, Romeo aspires to be dynamic—a positive spark for her community, loved ones, and clients. Her dynamism extends beyond financial gains; she strives to do good while excelling in her profession. Romeo's approach involves helping her clients visualize a brighter future and providing comprehensive support, both mentally and financially, to ensure their success in real estate endeavors.



### Carrie Rossenfeld, Executive Content Editor

*The Smart Agency, Irvine*

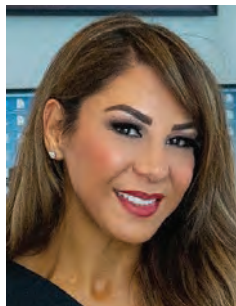
Carrie Rossenfeld has influenced the world of commercial real estate for more than a quarter of a century, with work spanning over \$100 billion in real estate transaction activity across more than 300 million square feet of office, industrial, retail, multifamily, flex, and land to date. As a commercial real estate communicator, she has served as a primary voice and interpreter of the industry since 1997, interviewing more than 200 industry titans and publishing more than 500 industry-related articles to date. Rossenfeld's is an influence that is both quiet and formidable. Her intellect is savvy and her drive is strong. She has built relationships and gathered perspectives from people at the highest levels of this industry, learning first-hand how commercial real estate continues to evolve, stumble, and reinvent itself over and over. The result is widespread impact that influences the whole of the industry by giving people a trusted perspective.



### Tenny Rostomian-Amin, Owner & Founder

*TALG (The Amin Law Group), Irvine*

Tenny Rostomian-Amin is the leader of the firm in every possible way, from organizing charitable activities to spearheading the firm's social media, she is involved in growing and developing the firm on a personal level. She is the president of the Society of Orphaned Armenian Relief (SOAR) in both Irvine and Las Vegas, and an active member of organizations devoted to developing female attorneys.



### Susan Rounds, Managing Director, Operations

*BKM Capital Partners, Newport Beach*

Susan K Rounds, SHRM-SCP is the managing director of operations at BKM Capital Partners and serves as the chair of the Compensation Committee, the chair of the ESG Committee and as the co-chair of the BKM Women's Network Group. Rounds' primary responsibilities at BKM encompass the effective implementation of human resources initiatives, policies and procedures including compliance, recruiting, retention, development, performance management and coaching. In addition, Rounds serves a critical leadership position in providing strategic and technical guidance to BKM's Marketing, Technology, and Office Administration teams. While BKM already had a strong company culture in place when Rounds joined in July of 2021, she is working to update the core values to insure they resonate with the younger team members of the firm. This project has brought together both tenured and newer team members together and has been a great learning opportunity for everyone.



### Angie Rowe, President & CEO

*Beyond Blindness, Santa Ana*

As the president and CEO of Beyond Blindness, Angie Rowe has worked tirelessly to

expand the organization to meet the growing needs of children with visual impairments and other disabilities—and their families. Since joining the nonprofit in 2020, Rowe has achieved impressive growth for Beyond Blindness, including reaching a record-breaking number of families last year and launching a five-year strategic plan that aims to reach 2,680 new families in the greater OC area. In addition to leading the nonprofit through a complete rebranding, she has also elevated the stature of the board with high-quality appointments and is fostering growth through collaboration in new leadership roles on the boards for several California agencies, including First Five OC. Under Rowe's leadership, Beyond Blindness is now the leading accredited organization for children with visual impairments and other disabilities in OC, offering expanded services, including Early Intervention, Education + Enrichment, and Family Support.



### Jacqueline Erickson Russell, CEO

*Social Impact Advising Group, Huntington Beach*

Jacqueline Erickson Russell founded Social Impact Advising Group to increase philanthropy's community impact. As the founder and CEO, she consults with family foundations and philanthropic institutions as they start up, create succession plans, and redesign strategy to achieve their philanthropic goals. Since launching the company in 2021, she has conducted two program needs assessments for the Orange County Community Foundation, designed new grantmaking systems for a national corporate foundation awarding over \$800,000 a year to more than 100 organizations, lead four strategic planning processes, facilitated board retreats, launched a family foundation, and designed a social entrepreneurship accelerator. Her company provides consulting services to philanthropic leaders and institutions such as Orange County Community Foundation and Orange County United Way. Her work is recognized with an international award from the International Economic Development Council (IEDC) with its Excellence in Economic Development Award, highlighting diversity, equity, and inclusion efforts.



### Denise Ryan, Vice President of Global Branding

*BioPhotas Inc., Tustin*

Denise Ryan was employee number two at BioPhotas, Inc. Her first role was director of marketing and sales. Her responsibilities included hiring and training of the initial sales force and creating the marketing strategy for BioPhotas' flagship LED Light Therapy product, Celluma. As a result of her successful marketing strategies, BioPhotas experienced increasing domestic and clinical acceptance of LED Light Therapy and growing sales. In addition, BioPhotas emerged as a market leader and Ryan was promoted to vice president of brand management. As BioPhotas expanded into international distribution, continued to sustain their clinical market leadership, and increase its presence within the direct-to-consumer market, Ryan moved into the role of vice president of global brand management. Ryan is now responsible for all aspects of domestic and worldwide branding for the clinical and direct-to-consumer markets.



### Lisa Salisbury, CEO & Founder

*Salisbury Land and Law, Corp., Irvine*

Lisa Salisbury started her own law firm back in the early 2000s and has since assisted countless clients in her home community. She has protected people from greedy corporations, ensuring that Orange County real estate remains in the hands of Orange County residents.



### Talia Samuels, Founder & President

*Outshine Public Relations, Newport Beach*

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



### Tricia Sanchez, Founder & President

*C3 Tech, Santa Ana*

Tricia Sanchez is an exceptional business leader whose inspiring journey embodies resilience, dedication, and compassion. Her unwavering commitment to client-centric strategy and remarkable contributions to the Orange County business community, along with her genuine passion for empowering others, set her apart as a true trailblazer. This year, Sanchez's most notable success was leading her team to win a major copier contract with the County of Orange. This partnership entails the sale, implementation, and service of over 1,000 copiers and printers throughout the county's offices. Sanchez spent years building relationships with county officials, and her exemplary work and commitment came to fruition for her and her team.



### Lucy Santana, CEO

*Girls Inc. of Orange County, Santa Ana*

Under Lucy Santana's 20+ years of leadership, Girls Inc. of Orange County has grown into one of the strongest chapters of Girls Inc. nationally. Santana and her team directly impact 7,900+ girls in OC each year, with transformative programs designed to empower

2023 Women in Business Award Nominees

girls from economically disadvantaged circumstances to become "strong, smart and bold." The organization's programs address the full range of topics for girls + young women - healthy bodies/body image, literacy and financial literacy, to making good life choices, building life skills and preparing for college and career. Thanks to Santana's efforts, Girls Inc. of OC shares \$10 million in funding from Melinda French Gates' Pivotal Ventures' Equality Can't Wait Challenge with a handful of Girls Inc. chapters nationwide, launching Project Accelerate in 2022. Santana helped to create the program that is aimed at expanding the power and influence of women in the United States by 2030.



Rising Leadership Academy is a professional development program, and a sister program to the CSUF WLP that explores the issue of the under representation of women in organizational leadership. The program offers creative and practical solutions to help young women overcome the barriers to advancement they are likely to face in their careers.

**Erin Schultz, General Manager, Google Fiber West**  
*Google Fiber, Mountain View*

At Google Fiber Erin Schultz is responsible for delivering the fastest internet possible with an unmatched customer experience. As general manager of Google Fiber West, Schultz oversees build operations, engineering, strategy, sales, community engagement and customer acquisition efforts for the company in Seattle, San Francisco, San Diego and Orange County. Previously, she served as city manager and head of sales and operations for Google Fiber in Orange County, where she was responsible for sales, marketing and business operations across Southern California. Schultz was a founding member of Google's first office in Southern California (Irvine) in 2001, and during her 22-years at Google she's led and scaled several sales and strategy teams supporting the company's full suite of digital advertising solutions. In her current role, Schultz manages the West region's overall growth business strategy, including subscriber acquisition and retention as well as community impact and involvement.



**Pam Scamardo, Founder**

*The C.R.E.A.T.E Wealth Network, Irvine*

Entrepreneur Pam Scamardo is the founder of The C.R.E.A.T.E Wealth Network - the #1 free educational resource for commercial real estate investing. The organization's mission is to provide high quality commercial real estate education for all, with an emphasis on uplifting women leaders in the industry. Officially "job optional", Scamardo discovered the benefits of passive income while working in the aerospace industry. An aerospace engineer by trade, having been employed by Lockheed Martin, Boeing, and UTC Aerospace, Scamardo made a career pivot over 10 years ago and founded her first company TPK Properties. As a privately held multi-family investment company that acquires, manages and renovates medium to large sized apartment complexes, TPK Properties has successfully syndicated over 100 units along the West Coast for investors, nearly tripling its portfolio in the last few years. Scamardo offers private multi-family investment coaching and is proudly serving as a Forbes Council Member and Cal State Fullerton's Center for Real Estate Director. Additionally, Scamardo is the author of "Create Wealth: How You Can Ditch the 9-5 with Multi-Family Investing."



**Mercedes Shaffer, Multifamily Investment Realtor**

*Investing In The OC, Newport Beach*

Mercedes Shaffer's dedication to her clients and commitment to spreading financial awareness have earned her a reputation as a trusted advisor in the real estate industry. Her ability to combine her expertise in multifamily investment real estate with a genuine passion for teaching and helping others sets her apart as a top agent, making her an invaluable resource for those seeking to create long-term wealth and financial stability through real estate. Beyond her professional achievements, Shaffer is also a passionate advocate for financial literacy, particularly among young people. She understands the value of saving and living below one's means and actively imparts this knowledge to the younger generation. Through various platforms and speaking engagements, she educates and empowers young individuals to make sound financial decisions, and teaches them the skills for building wealth one door at a time.



**Lacy Schoen, President & CEO**

*Brea Chamber of Commerce, Brea*

In 2022, Lacy Schoen accepted the position of president and CEO of the Brea Chamber of Commerce, identifying to her Board of Directors the Diversity, Equity and Inclusion issue of gender equity as the business issue of our era. Ever the consummate woman's advocate, she was able to convince her Board of the importance of such a program through the Chamber for working women, both for the advancement of women, and as well as a workforce development program. The Women Rising Leadership Academy through the Brea Chamber of Commerce launched in September, 2022 for working women of all ages, backgrounds and career paths in the Orange County and Los Angeles areas. In just one year, the program is already demonstrating impressive results in the advancement of women who are participating in the program. The Women



**Sona Shah, CEO & Founder**

*My Private Professor LLC, Irvine*

Sona Shah is the CEO & founder of My Private Professor, LLC (MPP), an impact-driven, educational services company that partners with individual & institutional clients to provide a critical academic resource to thousands of students across the country and gives back with every hour to provide free tutoring to students experiencing homelessness. Since the pandemic, MPP expanded its reach to include local, national,



**Congratulations Pritha Sridharan**  
2023 Women in Business Awards Nominee

Slalom Orange County is proud to honor General Manager Pritha Sridharan for her excellence in business leadership. Thank you for leading our teams to help businesses dream bigger, move faster, and build better tomorrows for all.

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**CONGRATULATIONS**  
**KATE ARMADO**

Recognized by the Orange County Business Journal as one of their 2023 Women in Business Award nominees



Thank you for partnering with clients and associates to help Enterprise grow and thrive.



## 2023 Women in Business Award Nominees

and international organizations to help businesses provide free & discounted tutoring as a meaningful benefit to employees and their families. MPP also works with nonprofits to provide free weekly tutoring to students residing in emergency shelters and transitional living homes and collaborates with individual and corporate supporters to help as many students benefit from this free resource as possible. Through her leadership at MPP and in the community, Shah aims to inspire and empower others to achieve their greatest potential & lead tomorrow's world.

### **Guita Sharifi, CFO**

*Lifelong Learning Administration Corp-Learn4life, Irvine*

Guita Sharifi has been a CFO in the healthcare and education nonprofit sector for 20 years. She currently serves as CFO of Lifelong Learning, a national nonprofit educational service organization serving Learn4Life public schools that provides personalized learning to nearly 67,000 at-risk youth across the county. Sharifi is a community activist, for the past 20 years having served on numerous charitable boards, as co-chair/founder of the Orange County CFO Leadership Council, founding member of Private Director Association South County and as the OC 5th Supervisorial District Representative on Taxpayers Oversight for Measure M. She has been nominated nine consecutive years for CFO of the Year awards including Lifetime achievement awards by Orange County Business Journal (OCBJ) and won the Outstanding Nonprofit CFO of the Year Awards in 2019. Sharifi was named to the 2020 OCBJ's inaugural OC500, which is comprised of the most influential businesspeople and opinion shapers in the county. She earned her undergraduate degree at Eastern Michigan University, MBA and a certificate in healthcare management and leadership from the Pepperdine Graziadio School of Business. She also earned her Ph.D. in organizational leadership from the Chicago School of Professional Psychology. Sharifi also holds an IRS Enrolled Agent license that allows her to practice anywhere in the world.



skills throughout her career. With over 20 years of experience in the field, including 16 years as a senior manager for a waste and recycling company in the San Gabriel Valley and Orange County, Silvestri has a profound understanding of the industry's intricacies. Silvestri's specialization in assisting municipalities in meeting California's zero waste goal showcases her commitment to environmental sustainability. Her proficiency in managing hauler transitions, ensuring contract compliance, and developing administrative and technical processes further demonstrates her exceptional organizational and strategic abilities. Additionally, her expertise in customer service, contract negotiations, sustainability, government affairs, strategic planning, and relationship building significantly enhances the quality of services provided by MBC.



### **Nuka Solomon, CEO**

*Free Wheelchair Mission, Irvine*

Nuka Solomon joined Free Wheelchair Mission in 2017 as the executive director and was appointed CEO in 2019. With her wealth of experience, she streamlined team management, spearheaded strategic planning, executed programs effectively, optimizing the organization's resources, and has helped to lead Free Wheelchair Mission's Orange County's Women's Council. Collaborating with the Board of Directors and Founder, Solomon implemented strategic priorities, driving the organization's growth while exploring avenues for enhanced fundraising and marketing capabilities, as well as improved program execution. When the pandemic led to shipping issues and supply chain challenges, Solomon led her team to secure a second wheelchair manufacturer to ensure a sufficient flow of inventory. Her steadfast leadership has enabled Free Wheelchair Mission to continue its vital work of providing wheelchairs in developing countries, demonstrating resilience and commitment in the face of adversity.



### **Jessica Spaulding, President**

*The Spaulding Agency, Aliso Viejo*

Whether it is launching real estate firms and establishing industry brands to elevating business investment and job creation for Southern California cities and counties, Jessica Spaulding, as president of The Spaulding Agency, delivers on a commitment that when strategy leads, business follows. She thrives on working with industry leaders and entrepreneurs, helping them to bring their vision and perspective to market.



### **Kim Sherman, President & CEO**

*Echo Media Group, Tustin*

Kim Sherman founded Echo Media Group with the aim of providing exceptional public relations services in Orange County, Calif. in 1993. Over the last 30 years, her firm has transformed into a comprehensive marketing communications agency that has become a well-established presence in the region. Echo Media Group is dedicated to delivering intelligent and measurable campaigns, which is achieved by investing in data and analytics to strategically plan and validate the success of each campaign, ultimately demonstrating a positive return on investment.



### **Maliha Siddiqui, GM Sales Director**

*PepsiCo Beverages North America, Buena Park*

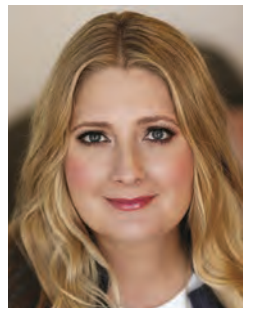
Maliha Siddiqui is the GM sales director at Pepsi Beverages North America in the West Division. She has 15 years of sales and operations experience in the CPG industry. In her current role at Pepsi she is responsible for approximately 500 employees, manages the total P&L and delivers location profit plan. When Siddiqui joined Pepsi in 2021, she established a "one-vision" for her organization that was built on three anchors: developing the talent to be future PepsiCo leaders, selling and executing flawlessly to grow topline and share, and striving for operational excellence to deliver profit targets. In order to drive talent development, Siddiqui has prioritized the DE&I agenda with the belief that people perform their best when they feel they belong and are convinced that they have a strong future with the company. Her leadership philosophy is simple: Lead with the people and the business will follow; not the other way around. She has supported the career development of more women in the operations function, a largely male-dominated side of the business, to help the company achieve its female representation goals. On the business front, as the landscape continues to evolve, Siddiqui has led her team through major transformation initiatives such as bringing Gatorade into the Pepsi Beverages distribution network and constantly evaluating more efficient ways to go to market while meeting customers' needs. Her focus on growing share through flawless execution of Pepsi's massive beverage portfolio across multiple categories such as energy, carbonated soft drinks, hydration and sports drinks, is central to the location's success.



### **Brenda Springer, Founder & CEO**

*Reveille Inc., Costa Mesa*

Brenda Springer, founder and CEO of Reveille Inc., is a trailblazer making a difference in Orange County. Since founding the agency, Springer has worked with top consumer, health care and nonprofit organizations delivering award-winning, innovative and highly strategic solutions for clients. Many of the clients Reveille serves are Orange County nonprofits solving challenging community issues such as food insecurity, domestic violence, human trafficking, workforce readiness, unhoused families, cancer care and racial equity and equality, among others. Springer uses her tremendous talents to identify and communicate the most compelling stories in a way that both raises awareness of the issues they are addressing as well as encourages our community to take action and get involved. Her work has been recognized by the Public Relations Society of America, with her agency receiving many accolades over the last 12 years, including its prestigious "Best in Show" award more than once and the Distinguished Service Award.



### **Pritha Sridharan, General Manager**

*Slalom Orange County, Irvine*

Pritha Sridharan is a courageous, yet humble leader. She is a great role model for our people, showing how our consultants can find balance between work and family; how we can be leaders, challengers and true partners to our customers. Encouraging and empowering women in business is something Sridharan is very passionate about. Beyond leading Slalom Orange County and mentoring countless colleagues, Sridharan re-launched an association of women in leadership for Slalom. Under her guidance, the association known as the Women's Leadership Network quickly grew from an idea to over 50 charter members. The association gathers quarterly and focuses on knowledge sharing topics aimed to support women with overcoming challenges in growing their careers. The first session centered on imposter syndrome and how women can better arm themselves psychologically to address and overcome perceived obstacles they may have about themselves that could hinder achieving their career aspirations. As a keynote speaker, Sridharan was very candid about her upbringing and how to juggle her personal life as a mother of two young children with a demanding professional role overseeing a large organization across the Orange County market.



### **Laura Sillen, Investment Advisor & Founding Principal**

*Purus Wealth Management, Newport Beach*

In 2005, Laura Sillen joined the team that would later become known as Purus Wealth Management. She began her career immediately after college as an administrative assistant. Through the years, her passion for helping clients became apparent and, as a result, her path evolved to an advisory role. Her background provided two critical lessons in the industry: a strong foundation regarding industry regulations and a deep understanding of how to manage money through a breadth of market cycles. This experience makes her proficient in thinking outside the box when building strategies to meet her client's needs. When Purus Wealth Management was established in 2015, she was offered the opportunity to join as one of the Founding Principals. Over this time, her role has expanded to also serve as the lead financial planner, manager of the firm's risk management business under Purus Insurance Services, and member of the Purus Investment Committee.



### **Ann Stawicki, Vice President, Employee Benefits**

*Burnham Benefits, Irvine*

With 20 years of employee benefits and healthcare experience, Ann Stawicki has earned a lasting reputation within the industry and with her clients for serving their best interests and business plans while having an unyielding commitment to the community. At Burnham Benefits, Stawicki currently serves as vice president, strategically working with executives to develop better and effective long-term benefit and wellness plans for their employees. Her care for the community is immediately evident, actively taking on leadership and volunteer roles, including serving as the first-ever female president of the board of directors at Waymakers and as a past president of the Orange County Employee Benefits Council (OCEBC). Stawicki continues to



### **Susan Silvestri, Principal Partner**

*Michael Balliet Consulting LLC, San Juan Capistrano*

Susan Silvestri is known for her remarkable achievements and expertise in the waste and recycling industry. As a principal partner at Michael Balliet Consulting, LLC, located in San Juan Capistrano, she has demonstrated exceptional leadership and management



Zara Cerni, COO  
Center For Renewal Inc.  
Forever Ageless Inc.

# Congratulations Zara,

*On your nomination for Orange County Business Journal's 2023 Women in Business Awards.*

*Your continued growth and service to the medical aesthetic community is highly valued and noteworthy. Wishing you much continued success.*

*~ Dr. Michael Cerni, Dr. Joe Cerni,  
your team, patients and friends*

## Zara Cerni, COO

**Dr. Joe Cerni**  
Forever Ageless Inc.



**Dr. Michael Cerni**  
Center For Renewal Inc.



3620 Birch St., Suite 100 Newport Beach, CA., 92660

Phone: 949-553-0260



## 2023 Women in Business Award Nominees

shine because she is one of the top consultants in Southern California and an exemplary individual who demonstrates daily the qualities of a compassionate leader and professional. Her achievements, unwavering commitment to others, and infectious energy make her a consultant that clients love working with and a key contributor to our Burnham culture.

### Paula Steurer, Founder & President

*Sterling Public Relations, Corona del Mar*

Paula Steurer founded Sterling Public Relations in 2008 as a Publicity, Branding, and Marketing hybrid and has scaled her company's services nationally. Known for her personalized approach to cultivating connections and curating brands, her innovative vision and forward-thinking philosophy have become her clientele's secret ingredient for success. With a passion for building brand identities and her innate ability to connect, engage and drive brands to the next level, Steurer has become a trusted authority among entrepreneurs and executives. She can often be seen as the keynote speaker and workshop leader for nationally recognized brands such as Mindbody Inc, Vizio, and Oracle. Sterling Public Relations celebrates its 15-year anniversary this year and has become the in-demand firm for brands who desire a competitive edge.



### Carly Stevenson, EVP of Property Management

*Avanath Capital Management, Irvine*

A 20-year-plus real estate industry veteran, Carly Stevenson is an icon among women in property management. As executive vice president of Property Management, she is part of the executive leadership team for Avanath Capital Management, LLC, a private real estate investment manager that focuses on affordable and workforce housing in underserved communities throughout the U.S. Stevenson is a true visionary and a model for women rising in the male-dominated field of commercial real estate. In under a year with Avanath, Stevenson has already made an indelible imprint, initiating changes that will elevate its communities across the nation. Most notably, she has unified the efforts of the community teams and corporate office, ensuring the quality of property management across Avanath's portfolio continues to meet its high standards and aligns with its mission to holistically invest in each property. Stevenson is a one-of-a-kind individual and a constant inspiration to her peers.



### Autumn Strier, Co-Founder & CEO; President - Board of Directors

*Miracles for Kids, Irvine*

Autumn Strier is the driven co-founder & CEO of Miracles for Kids. She possesses significant leadership skills and a lifelong passion for helping those in need. Two decades ago, she built Miracles for Kids from a small employee contribution program into the consequential nonprofit it is today. To date, the organization has raised over \$44.8 million in service of 2,749+ low-income families throughout Southern California and beyond with children facing over 100+ critical illnesses. As CEO and lead fundraiser for 19+ years, Strier is the architect of every program and event held. She is also the founding president of the Board, a handpicked group of executives whose expertise and contacts span all industries. Her deep personal commitment and unwavering dedication to those in need have led to the success of the mission since 2002, along with loyal relationships and partnerships formed that have helped fundraise or support the families in need.



### Miranda Su, Executive Vice President

*The Joy Factory, Irvine*

Miranda Su is a highly accomplished nominee for the Women of Excellence Award. With over 26 years of experience in the IT industry and an MBA in marketing, Su has made significant contributions to her company, The Joy Factory. As a co-founder of a minority-owned business and woman executive, she has broken barriers and paved the way for other female leaders exemplifying her dedication to empowering women in the corporate world. Her visionary leadership and strategic acumen successfully established partnerships with renowned big-box retailers across North America, including Walmart, Best Buy, Walgreens, Radio Shack, Office Depot, and Future Shop in Canada, and as a result quadrupled the company's growth in the first three years.



### Mary-Christine (M.C.) Sungaila, Partner

*Complex Appellate Litigation Group, Newport Beach*

An Orange County native, M.C. Sungaila is a highly regarded appellate attorney, successful podcast host, and award-winning author. Over her illustrious career heading practice groups at some of the country's largest law firms, Sungaila has briefed and argued appeals before the U.S. Supreme Court, multiple state supreme courts, numerous federal and state appellate courts, and the Inter-American Court of Human Rights. Sungaila's prescient and cutting-edge appellate work has helped to shape underdeveloped areas within constitutional law, employment law, franchisor liability, product liability, class actions, probate, immigration, Holocaust art recovery, and human rights. This year, Sungaila joined the Complex Appellate Litigation Group as partner and launched its Orange County office.



### Rachel Svoboda, CEO

*Sunday Brunch Agency, Huntington Beach*

Rachel Svoboda is an entrepreneur, philanthropist, and author. She is on a mission to build businesses, companies, people, and initiatives that she believes in and that

empower people. Svoboda is the CEO, Sunday Brunch Agency, the first fully remote female-owned marketing agency in Orange County. It is a full-service advertising and public relations company that works alongside local businesses and entrepreneurs to help them achieve their goals. Svoboda Founded Lynxx Spirits, the first bourbon made by an all-female team. Svoboda is a co-founder of The Young Entrepreneur Syndicate, an online coaching platform that teaches entrepreneurial skills to students, professionals, and corporations. Svoboda is the author of the best-selling book "Grit & Grace: A woman's ultimate guide to empowerment, personal development, business leadership & success."



### Agnes Swanson, Chief Development Officer

*The Shea Center, San Juan Capistrano*

As the first chief development officer at The Shea Center, Agnes Swanson leads a team of seven professionals to success. During her five-year tenure, she maintained a seven-year average staff retention rate and grew the budget from \$3.9 million to \$6.5 million. In addition to managing two highly successful special events, each surpassing the \$1 million mark, Swanson strategically expanded major gifts and grants revenue, resulting in a significant increase in financial support for The Shea Center's mission. Recognizing the importance of sustainable funding, she launched a new annual campaign in 2020 that raised over \$1 million in its inaugural year. This campaign not only provided crucial resources but also established a solid foundation for future fundraising efforts. Through her strategic leadership, unwavering dedication, and strong relationship-building skills, Agnes has driven The Shea Center's growth and financial success, contributing to its continued impact in the community.



### Jill Swartz, CEO

*Spotlight Marketing Communications, Orange*

Jill Swartz is the founder and CEO of Spotlight Marketing Communications, a firm specializing in marketing and PR for the securitized investment real estate space. Since founding the firm in 2011, Ms. Swartz has spearheaded Spotlight's rapid growth, positioning it as the premier marketing and PR agency for alternative investments. As the face of Spotlight Marketing, she leads the company's overall direction, developing the firm's vision and strategy. Her responsibilities extend to providing day-to-day leadership and guidance for employees and clients alike.



Leveraging her extensive relationships, she continuously explores new opportunities and seeks to add value for Spotlight's partners. Under her leadership, Spotlight has flourished into a multimillion-dollar firm, serving numerous clients nationwide.

### Jinger Tapia, Vice President, Design

*Ware Malcomb, Irvine*

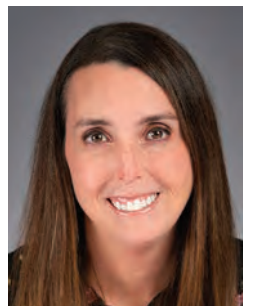
Jinger Tapia started her career with Ware Malcomb in 1996 as a designer. Tapia joined the leadership team of Ware Malcomb upon her promotion to director, Design in 2006, Principal, Design in 2013 and subsequently vice president, Design in 2022. In 2023, Tapia was appointed to the board of directors and is the first woman to hold this position. A licensed architect with 25+ year Tapia's vision has define Ware Malcomb's standards of high quality, creativity, and futureproofing to ensure long-term real estate value for clients. Tapia leads architectural design for Ware Malcomb and oversees the Digital Transformation Team and Branding Studio. Under Tapia's leadership, Ware Malcomb has achieved OCBJ #1 Top Architecture Firm in 2021, 2022 and additionally ranked among the top Architecture Firms in preceding years.



### Deborah Taylor, CEO

*FUSION OF IDEAS, Lake Forest*

Deborah Barlow-Taylor, the CEO of FUSION OF IDEAS, is a consummate leader of a large and diverse team. Taylor's role with the Company was neither inherited nor handed. It was the fruit of 16 years of relentless work. Growing the company from a start-up to a thriving corporation was largely due to Taylor's many roles and responsibilities over the years. From sales and marketing to finance and operations, she stepped in when needed, regardless of the task. This experience gave her a deep appreciation of the critical functions that make up a business. What began as a kiosk at the Shops of Mission Viejo is now a 22,000 sq ft. building in Lake Forest, California. Deborah Barlow-Taylor is fulfilling her dreams through her perseverance, authenticity, and heart.



### Kara Taylor, EVP, Marketing

*ATTOM, Irvine*

As head of the marketing department for ATTOM, Kara Taylor leads a results-driven team, comprised of brand, content and marketing strategists, as well as lead development representatives, which has largely contributed to company's exponential growth in data sales since the company's inception. Under Taylor's leadership, ATTOM's value proposition continues to gain momentum across a range of industries, further solidifying its unique position as the one-stop-shop for premium property data, as illustrated by the company's successful M&A strategy and proven ability to make the data more widely available to a broad spectrum of companies.



### Kimberly Taylor, President

*JAMS, Irvine*

In the U.S., there are more disputes than the Courts can handle. Recently, this was amplified by the pandemic. While Courts adopted innovations to keep up with the pace

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## 2023 Women in Business Award Nominees

of lawsuits, the field of alternative dispute resolution (ADR) plays an important role in delivering efficient, cost-effective resolution to individuals and businesses. Kimberly Taylor has been at the center of the rapid growth and reliance of ADR in the United States since joining JAMS in 1999. Starting as the manager of one of JAMS' smallest offices, she quickly became associate general counsel. In 2003, she relocated to New York to lead national expansion. In 2005, she was promoted to regional VP. Six years later, JAMS named Taylor COO and later-chief legal and operating officer. In 2021 she became president overseeing operations and business functions at JAMS aiding in the resolution of thousands of the world's most important business disputes.



scientist advancing breast cancer research and treatment at Orange County's most advanced comprehensive cancer center and beyond. The double board-certified surgical oncologist is a key clinical leader for City of Hope's more than \$1 billion expansion in Orange County, which includes a cancer campus of the future. By leading a groundbreaking clinical trial for robotic breast cancer surgery at City of Hope, Dr. Tseng is transforming breast cancer surgery and further strengthening Orange County's reputation for medical innovation. The Orange County native has authored hundreds of peer-reviewed research publications and books and is widely regarded as one of the nation's foremost experts in breast cancer surgery. A champion for her patients and her profession, she teaches and inspires many medical professionals in this lifesaving work.



**Pamela Tipton, Owner**

*ABC Swimming Pool Products, Los Alamitos*

Pam Tipton started ABC Swimming Pool Products with her husband in 1967. She opened & ran two retail/wholesale stores. She is known for her hands for repairs for filters, pumps, automatic cleaners, etc. She is a pioneer in the swimming pool industry since it was an industry dominated by men. She currently holds down five contractor licenses. She has always contributed to the local youths & charities in the community. She is widely known as to donating her time & energy to the cities she lives in & works in. If she wasn't donating to the local youth programs, she was volunteering her time to coach. Tipton has been a staple in Los Alamitos since the 70's & is well known as the pool lady. Tipton has always put her family first & has treated all of her customers as an extension of her family. If you need to know how to take care of your pool, she is the lady you always come back to after your first encounter. She not only knows what she is talking about, she will help teach you to be self reliant by doing it yourself.



**Jennifer Vallinayagam, COO**

*Sun West Mortgage, Buena Park*

Jennifer Vallinayagam is the chief operating officer at Sun West Mortgage Company. She has been a driving force in propelling Sun West Mortgage Company forward and significantly impacting the industry in the past 12 months. Her unwavering commitment to service has been evident through her tireless efforts in contributing her time and energy to employees, clients and borrowers alike. As a true role model, Vallinayagam's exemplary leadership skills have inspired and motivated her team to strive for greatness. Her relentless pursuit of excellence and unwavering dedication to growth has resulted in improved retention and recruitment of top talent, bolstering the company's success. Vallinayagam's visionary leadership has been instrumental in driving positive changes within the company. Through her keen insights, she has identified areas for improvement and provided valuable feedback and suggestions that have streamlined processes, enhancing efficiency and productivity. Over the past 12 months, she has been a driving force in propelling Sun West Mortgage to new heights, making significant positive impacts on the mortgage industry.



**Lauren Trevathan, Chief of Staff**

*ATTOM, Irvine*

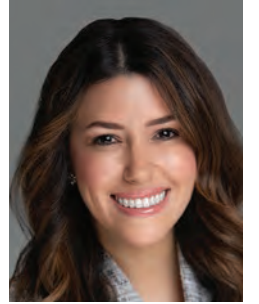
A seasoned customer success executive, Lauren Trevathan recently joined the executive team at ATTOM as chief of staff, responsible for driving companywide initiatives, as well as ensuring alignment and success across the organization as a whole. Trevathan's proven track record of cross-departmental collaboration, leadership and organizational accomplishments over the past three years at ATTOM has positioned her as a key contributor to the company's primary objectives.



**Camille Vasquez, Partner**

*Brown Rudnick LLP, Irvine*

Camille Vasquez is a partner in the Firm's Litigation & Arbitration Practice Group and co-chair of the Firm's Brand & Reputation Management group. She first joined the Firm as an associate in 2018 when she immediately began working on actor Johnny Depp's litigation cases. In 2022, Vasquez received global attention and praise for her leading role in the high-profile defamation trial of Depp against ex-wife and actress Amber Heard. Her commanding performance in courtroom strategy and passionate and fearless advocacy of Depp resulted in the jury's unanimous ruling in favor of Depp. It was a truly "decisive win" in what has been called "Hollywood's trial



**Jennifer Tseng, M.D., Medical Director of Breast Surgery**

*City of Hope Orange County, Irvine*

Jennifer Tseng, M.D., medical director of Breast Surgery at City of Hope Orange County and associate clinical professor at City of Hope, is a renowned physician-

**Medtronic**

**Medtronic congratulates Dominique Worthington**

Orange County Business Journal  
2023 Women in Business Awards Nominee


Medtronic is proud of its reputation for attracting and developing some of the brightest women leaders in the medical technology industry. Strong leadership is vital to achieving the Medtronic Mission to alleviate pain, restore health, and extend life.



**Congratulations!**

**LACY SCHOEN**  
2023 WOMEN IN BUSINESS AWARDS NOMINEE

Thank you for your tireless efforts to advance women in the workforce.




**LACY SCHOEN**  
PRESIDENT/CEO  
BREA CHAMBER OF COMMERCE  
FOUNDER,  
WOMEN RISING LEADERSHIP ACADEMY

**Women RISING LEADERSHIP ACADEMY**

The Women Rising Leadership Academy is a professional development program that explores the under representation of women in organizational leadership.

The program offers creative & proven solutions to help women overcome the barriers to advancement they are likely to face in their careers.



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*2023 Women in Business Award Nominees*

of the century.” She was immediately promoted to partner. Her focus has always been advocating for her clients first and foremost, and she continues to help her clients protect and manage their image in an increasingly competitive and connected world.

**Roeya Vaughan, CEO**

*TACORI, Glendale*

Since joining TACORI as chief commercial officer in 2020, Roeya Vaughan has been instrumental in charting the brand’s path forward. She led the development of the company’s strategic plan, and helped to define and reinforce the brand’s values, vision, and purpose. Under Vaughan’s guidance, TACORI has strengthened its leadership team, expanded the product assortment beyond bridal to fine jewelry, upleveled brand presence, and created more visibility and communication across the organization. In her first two years, TACORI has won design awards, increased sales associate performance, and improved profitability. Vaughan also implemented TACORI’s first cohesive philanthropic program benefiting OC-based organizations such as Girls Inc. and the Ocean Institute in Dana Point. Today, as CEO, she is the first non-family member at the helm of the organization, and is on the path to take the brand to new heights.



**Serene Vernon, President**

*OCMBC / LoanStream Mortgage, Irvine*

In 2016 Serene Vernon began the Wholesale Lending Division, launched innovative NanQ/Non-QM Loan Programs that lead the industry in innovative lending. In 2021 she grew the LoanStream Organization to \$4 billion in Loan Origination. In 2022 LoanStream / OCMBC was named a TOP 10 Wholesale Lender. As of 2023 the company has more than 500 employees, and has added Wholesale DBAs in addition to LoanStream such as Forward Lending and LendingPros that continue to grow the organization and Non-QM Lending.



**Kamryn Villegas & Whitney Kumar, Owners**

*Kamryn / Whitney Court Reporting, Irvine*

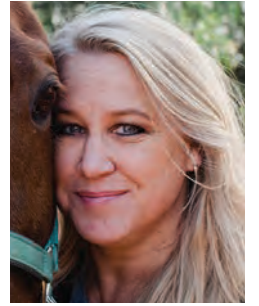
KW Court Reporting is a full-service court reporting firm co-founded by twin sisters and tenured court reporters, Kamryn Villegas and Whitney Kumar. KW Court Reporting is family owned as well as being a certified women- and minority-owned business. They are considered leaders in virtual legal proceedings with the highest-quality reporters, unmatched customer service, and legal technologies. KW delivers excellence in service and industry expertise. Kamryn & Whitney have been invited into the exclusive Forbes Business Council two years in a row.



**Sonya Violette, Director of Donor Relations**

*The Shea Center, San Juan Capistrano*

In her 18 years at The Shea Center, Sonya Violette has gone above and beyond to establish and maintain meaningful connections with donors, fostering a culture of philanthropy and generosity. Her exceptional ability to connect with individuals and align their philanthropic passions with The Shea Center’s mission has greatly increased donor retention and giving levels. Violette came to The Shea Center in 2005 after 10 years as an early education teacher and brings 45 years of equestrian experience. Her Shea Center career began as an adaptive riding instructor, working with disabled children and adults for four years before joining the development team. In 2010 Violette created the first-of-its-kind grassroots fundraising campaign called “Drive to Ride” which has raised more than \$2 million for client financial aid and horse care since its inception. Most recently, she created The Shea Center’s inaugural horse retirement fund to ensure every therapy horse has a wonderful home after retirement.



**Ginny Walker, Public Relations Director**

*KBS, Newport Beach*

An exceptional leader and industry veteran with a deep passion for commercial real estate communications, Ginny Walker is a gamechanger. Her proficiency in establishing brand awareness and achieving robust publicity for her company is unsurpassed. Walker is among an influential group of individuals who are both detail oriented and visionary. Her extraordinary ability to prioritize and focus while managing a high number of projects has earned her the respect of her peers and co-workers time and again. Walker has a keen intuition that guides her decisions and has led her to be a highly influential woman in business. During her four-year tenure with KBS, one of the largest investors in premier commercial real estate, Walker has achieved an exceptional 140% increase in publicity. At a time when the media is questioning the stability of office assets, Walker works hard to instill confidence in the long-term strength of this property type.



**Amber White, Global Vice President of Marketing**

*Phillips (Phillips Industries, Phillips Connect and Phillips Innovations), Irvine*

Amber White serves as global vice president of marketing at Phillips, an international leader in the design and manufacturing of components and innovative technology and solutions for the commercial truck and trailer industry. White leads a talented team of professionals, and fosters a collaborative work environment that encourages creativity and drives results. Her ability to inspire and motivate others has been integral to the



*Celebrating An*  
**EXCEPTIONAL &  
INSPIRING LEADER**

SUSAN LINDQUIST  
VP OF COMMUNITY DEVELOPMENT  
Southern California

TRUMARKHOMES

Congratulations Susan!  
From all of us at Trumark Homes



## 2023 Women in Business Award Nominees

success of her team. White's expertise and innovative mindset have propelled Phillips to new heights, as she continually pushes boundaries and challenges industry norms. Her visionary approach has been instrumental in transforming Phillips's marketing strategies and reinvigorating its brand image. As a result of White's efforts, Phillips has experienced a myriad of positive outcomes, including increased brand recognition, customer engagement, and a competitive edge in the marketplace.

### **Audra DiPadova Wilford, Chief Hope Officer, Founder, & CEO** *MaxLove Project, Tustin*

When Audra DiPadova Wilford's son, Max, was diagnosed with brain cancer in 2011 at just four years old, they faced not only a tough diagnosis, but also no curative strategy. As she consulted with experts to improve Max's future survivorship, she saw an incredible opportunity to support other families like hers fighting childhood cancers and related life-threatening illnesses. Using her classical training in the culinary arts and business acumen, Wilford launched MaxLove Project - a nonprofit dedicated to increasing the quality of life and reducing health risks for all children surviving cancer, both in treatment and beyond. Over the last 13 years as founder and CEO, she has impacted thousands of families across the United States through evidence-based culinary medicine, integrative care and emotional health resources including an innovative new cookbook released this year, wellness retreats, personalized nutrigenomics, an e-learning mobile app, online and in-person classes, and more.



### **Anika Wilson, Financial Advisor**

*Spinnaker Investment Group Newport Beach*  
Anika Wilson, a financial advisor at Spinnaker Investment Group, has achieved remarkable success during her tenure with the company. With a Bachelor of Science in Business Administration from Pepperdine University and an Investment Advisors Certification, Anika brings exceptional expertise and a winning mindset to her role. At Spinnaker, Wilson develops personalized financial plans and investment management strategies for individuals, families, and businesses. Her dedication to her clients is reflected in her ability to combine wealth, retirement, asset management, and securities and insurance expertise to surpass expectations. Wilson's unwavering dedication, compassionate approach, and ability to navigate financial literacy make her an outstanding nominee for the prestigious Annual Orange County Businesswoman Awards. Her remarkable contributions and commitment to success within the financial industry make her a deserving candidate for this esteemed recognition.



### **Diane Wittenberg, Partner**

*Haskell & White LLP, Irvine*

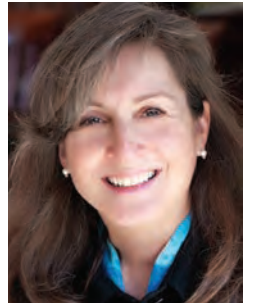
Diane Wittenberg, a partner of Haskell & White, one of the largest independently owned public accounting firms in Southern California, brings over 35 years of public accounting experience to her clients and the expertise to help them navigate a complex economic and regulatory environment. Providing value beyond meeting compliance requirements is a focus for each of her clients. Her leadership is integral to many vital initiatives for the Firm, such as mentoring and training programs for young professionals pursuing a Certified Public Accountant license. As a member of the Association for Corporate Growth's Board of Directors, she co-chairs the group's Women in Leadership Committee. She also serves as the audit committee chair for the Discovery Cube Orange County and is the treasurer and finance committee Chair for Mariposa Women and Family Center.



### **Dr. Tammy Wong, CEO**

*Fostering Executive Leadership Inc., Irvine*

Dr. Tammy Wong leads Fostering Executive Leadership Inc., an international executive coaching and leadership development firm focused on providing results-driven expertise to executives and high potentials. The firm consists of hundreds of leadership coaches worldwide. Fostering Executive Leadership's coaches focus on leadership development and executive coaching with leaders improving their leadership capability and capacity. The firm has a proven record of strong ROI through our coaching engagements.



### **Dominique Worthington, Vice President & General Manager**

*Medtronic, Irvine*

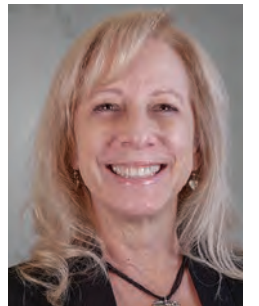
Dominique Worthington is the vice president of Advanced Energy and CSF & Critical Care Management for Medtronic's Enabling Technologies group. She led integration activities for Medtronic's acquisition of the Covidien Neurovascular group and several strategic acquisitions for the Neurovascular business. Prior to Medtronic, she was with Edwards Lifesciences where she held key leadership positions in information technology, operations, planning and strategy. In addition, Worthington has held executive leadership positions in several successful technology start-up companies.



### **Denise Wright, Chief of Staff**

*Phillips (Phillips Industries, Phillips Connect and Phillips Innovations), Irvine*

Denise Wright is a highly accomplished professional serving as chief of staff at Phillips, an international leader in the design and manufacturing of components and innovative technology and solutions for the commercial truck and trailer industry. Wright plays a crucial role in supporting the executive team and driving strategic initiatives across the organization. Her ability to streamline processes, improve efficiency, and mitigate risks has proven instrumental in driving operational excellence within the organization. She collaborates closely with senior executives, offering invaluable guidance on business development, market expansion, and strategic decision-making. Throughout her career, Wright has built strong relationships across all levels of the organization, fostering a positive and collaborative work environment. Wright's ability to inspire and motivate teams has resulted in enhanced productivity, employee engagement, and overall organizational success.



### **Michelle Wulfestieg, Executive Director**

*Southern California Hospice Foundation, Costa Mesa*

Michelle Wulfestieg suffered a stroke at the age of 11 and then again at age 25, which almost killed her. After recovering, she vowed to dedicate her life to bringing comfort to others. She has served as the executive director of Southern California Hospice Foundation, a nonprofit organization committed to enhancing the lives of terminally ill patients and their families, for the past 13 years. Throughout her tenure with the organization, Wulfestieg has served more than 7,000 terminally ill people and in 2023, Wulfestieg opened the Heavenly Home, a six-bedroom residential care home that allows people to complete their lives with peace and dignity, spending their final days making meaningful memories with loved ones. Located in Mission Viejo, the Heavenly Home is the only hospice care home in Orange County and just one of four in the state.



### **Lisa Yamakwa, Partner**

*Baker Tilly, Irvine*

As the tax lead for Baker Tilly's Irvine office, Lisa Yamakwa is committed to professional development and excellence for a department of 60+ team members. Her advanced tax knowledge enables her to provide educational opportunities to more than 2,000 of Baker Tilly's CPAs. Yamakwa is a member of the Tax Training Steering Committee, where she helps write curriculum and facilitates training on the firm's tax procedures. In her role on the national GROW committee, Yamakwa has played an integral role in the integration of West-based merger firms, setting up local champions and chapters, and working with the national committee to achieve annual goals. Pushing forward the advancement and equality of women in the workplace. She has also been involved in the Environmental, Social, and Governance (ESG) initiative, serving as a social committee member. Her commitment is a reflection of her dedication to making a positive impact on the world.



TACORI

### Congratulations

to our Orange County Business Journal  
Women in Business Award Nominee

Roeya Vaughan, TACORI Chief Executive Officer

2023 Women in Business Award Nominees

**Crystal Young, VP, Organizational Human Wealth**  
*Human Wealth, Irvine*

Crystal Young has established and runs business advisory consulting services for our firm, the first of its kind, to complement financial advisory services we offer to clients and business owners. These high impact services enable small, mid-size and family businesses to build profitable and sustainable structures, processes, and teams.



cross-border M&A evaluations, Ms. Zhang's experience and expertise bridged the cultural gaps and generated significant values for shareholders. Ms. Zhang also spearheaded the execution of Naturade's e-commerce strategies both in the U.S. and in China. In 2020, Ms. Zhang assumed the chief role in Operations and Supply Chain management. She steered the Company through the global supply chain crisis with limited resources, leading to a successful launch of Naturade's high protein meal replacement product in Costco.

**Christina Zabat-Fran, General Counsel (North America) & Corporate Secretary**

*St. John Knits and LANVIN Group, Irvine*

Christina Zabat-Fran is the general counsel (North America) and corporate secretary of LANVIN Group (NYSE: LANV), a global luxury fashion group, responsible for all aspects of the Group's legal strategy and corporate governance and its portfolio brands: LANVIN, St. John, Wolford, Sergio Rossi, and Caruso. Zabat-Fran has 20 years of exceptional experience across all facets of legal, corporate and public affairs on a global scale, and currently serves as president-elect of the Orange County Bar. Prior to LANVIN Group, Zabat-Fran served as general

**Heidi Zuckerman, CEO & Director**

*Orange County Museum of Art (OCMA), Costa Mesa*

Since arriving at OCMA in January 2021, Heidi Zuckerman has raised over \$40 million for the Capital and Endowment Campaign and added sixteen new Board members. She was recently profiled in the Los Angeles Times about her vision for the museum, where she explained, "I believe access to art is a basic human right, it's not a privilege, so our mission and vision is to connect as many people to art and artists as possible." OCMA has welcomed over 213,000 visitors - 10x more than its previous annual attendance and presented over 50 programs that have roughly served 17,000 individuals.



counsel for St. John Knits, an American knitwear giant with roots in OC. As GC, Zabat-Fran oversaw global corporate

operations, including legal, risk, HR, loss prevention, security, real estate and facilities, and corporate social responsibility. During her tenure, she was lauded for leading one of the best legal departments in the country. Prior to St. John, Zabat-Fran worked in public affairs, leading initiatives for non-profits, government, and the arts.

**Jenny Zhan, CEO**

*Beyond Holding U.S., Irvine*

Jenny Zhan, CEO, founded and leads all areas of business and operations for Beyond Holding U.S., an alternative investment



management firm focused on investing in real estate assets on behalf of high-net worth investors and family offices. In January 2020, with Zhan's guidance, Beyond launched its U.S. Fund, focusing on

U.S. real estate assets. Zhan's vision in creating the firm was to make professionally managed real estate investments accessible to all high-net worth investors while delivering stability, returns, and personal attention that goes beyond most major investment firms. Beyond is headquartered in Irvine, CA, with additional offices in Canada, China, Hong Kong, and Singapore. Zhan brings more than 20 years of investment experience focused on institutional investing and managing multi-asset strategies. As a chartered financial analyst (CFA), she specializes in international wealth management and has managed investments in real estate assets and global equities markets for large institutional investors.

**Catherine Zhang, CFO**

*Naturade, Irvine*

Catherine Zhang serves as Naturade's chief financial officer and oversees



Finance, Operations, Supply Chain, and IT functions. She joined Naturade in 2014 to strengthen the Company's financial management and capital sourcing capabilities. In

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**JO MERRIMAN**

Senior Vice President of Operations & Investment Services



**TERRI HOVDESTAD**

Senior Vice President of Transaction Management



**CORYNNE GORDON**

Vice President of Marketing

**Shopoff Realty Investments is an Irvine-based, national real estate investment firm, founded more than 30 years ago by Bill and Cindy Shopoff.**

**The firm primarily focuses on the repositioning of commercial properties, the entitlement of land assets, and development.**

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