

# Excellence in **ENTREPRENEURSHIP** Awards

FREE Virtual Awards Program | May 6, 2021 | 2:00 - 3:00 p.m.



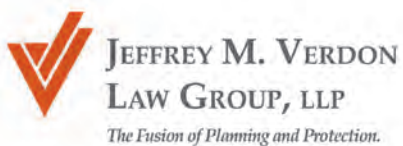
2020 AWARD WINNERS KEEP UP EXCELLENCE

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# 2020 Entrepreneur Honorees Keep Up Excellence

The Business Journal caught up with the five winners of last September's **Excellence in Entrepreneurship Awards** to see how they've fared in the past seven months. They have quite the updates to tell.

— Peter J. Brennan



240,000-person security firm in Santa Ana getting much bigger

## Global Reach for Allied Universal

When **Steve Jones** received his Excellence in Entrepreneurship Award last September, he had already built Santa Ana-based **Allied Universal** to the biggest security firm in North America—with 240,000 employees and \$8.5 billion in annual sales.

Since September, he's taken his company to a whole new level—last month he won a \$5.1 billion bid to buy London-based security behemoth **G4S LLC**.

When the companies are officially com-

bined later this year, Jones will oversee 750,000 employees—the world's seventh biggest private employer.

During its battle to acquire G4S, Jones didn't stay idle, acquiring three other firms that added about \$550 million in sales and another 15,000 employees.

"I can firmly say that it's truly an exciting and important time in the history of Allied Universal," Jones told the Business Journal. "Over the last six months, we've been extremely busy in terms of our acquisition

strategy."

In the past seven months, Jones also had to deal with a resurgence of the coronavirus. Many of his employees guard the hospitals most heavily hit during the pandemic.

On the personnel front, one of his key executives, CFO **Andrew Vollero**, left in February to take a similar role at hot internet firm **Reddit Inc.**

Jones hired CFO **Tim Brandt**, who had worked for 30 years for **Deloitte**, becoming

the managing partner of the Orange County office for the past four years.

Brandt will focus on the upcoming acquisition and integration of G4S.

And to top it off, the company is planning an initial public offering.

"We believe that excellence starts with strong local leadership and local presence," he said. "Now, we will be able to offer global and local resources to our OC customers in order to keep our people safe so our communities can thrive." ■

## ATI Goes Shopping

**American Technologies Inc.**, the largest family-owned disaster recovery firm in the U.S., in August received its first outside capital infusion from private equity firm **TSG Consumer Partners**.

In November, the Anaheim-based closed on its first-ever acquisition—**Mark 1 Restoration Service Inc.**, which brings three offices in Pennsylvania and New Jersey.

Will ATI try for more acquisitions?

"Absolutely!" ATI President **Jeff Moore** said last week. "We hope to acquire at least one to three more companies this year. We are weeks away from another executed letter of intent."

"Our future geographic expansion targets most of the country but the regions we are prioritizing include: Mid-Atlantic Region, Southeast Sunbelt Region, Great Lakes Region and Greater Southwest Region."

Moore and his brother **Ryan** are the sons of **Gary Moore**, who began the company in 1989. They have grown it to more than 1,200 people. In 2012, the company was honored with a Business Journal Family-Owned Business award.

Since Gary Moore last September also picked up the Business Journal's annual Excellence in Entrepreneurship Award, the company's been doing more than thinking about East Coast expansion.

It's been "extremely busy" with the multiple hurricanes that hit the Gulf Coast, the wildfires that ravaged the West and the impact of the Polar Vortex in Texas, officials said.

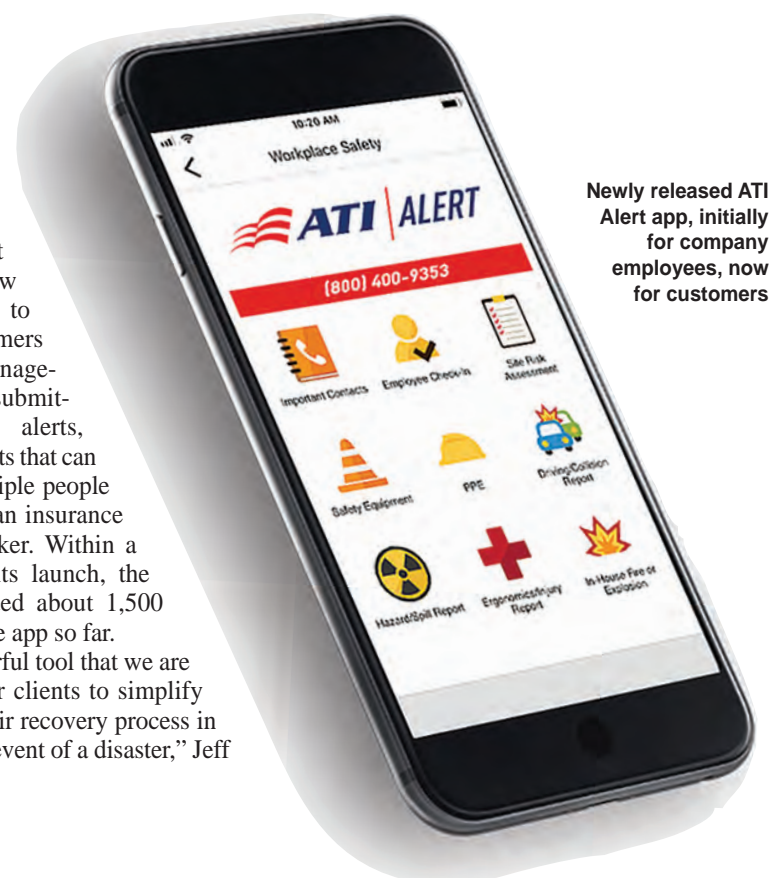
In January, it launched a webinar series on various industry topics and a monthly newsletter with whitepaper downloads. It's also planning a podcast series later this year.

"Our intent is to establish ATI as the industry

experts," Jeff Moore said.

In February, it rolled out a new app, **ATI Alert**, to help its customers with crisis management, such as submitting incident alerts, creating checklists that can be used by multiple people and contacting an insurance provider or broker. Within a few weeks of its launch, the company reported about 1,500 downloads of the app so far.

"It is a wonderful tool that we are able to offer our clients to simplify and expedite their recovery process in the unfortunate event of a disaster," Jeff Moore said. ■



Newly released ATI Alert app, initially for company employees, now for customers



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[secret sauce] 

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## Pinner Pivots in Trying Year

**Pinner Construction Co.** owner **Dirk Griffin** originally targeted \$200 million in sales for 2020. The coronavirus slowed sales to \$180 million.

"All in all, we are very pleased with our sales and how we successfully pivoted with regard to identifying unique contract opportunities as a result of the pandemic," Griffin said.

It was originally aiming for \$300 million this year, a goal that the company will probably reach in 2022, he said.

"We have started this year off right, though, with a key contract win," he said. Pinner Construction "is also pre-positioned to capitalize on several other high-profile opportunities throughout this year."

New projects include the **Port of Long Beach** and renovations of several K-12 schools.

Since last September, it has made several recent investments to solidify its growth objectives, including some strategic hires, developing a career development program and leveraging technology.

"Finally, in alignment with one of Pinner's ongoing chief objectives, we continue to give back to our community," Griffin said. "This year alone, we have donated to more than five separate women's organizations in the Los Angeles and Orange County areas to honor our female employees and Women in Construction Week 2021." ■



## KPRS Adapts to COVID Curveball

For the past 30 years, **Joel Stensby** has taken part in building some of California's best-known structures, including the Aquarium of the Pacific in Long Beach, Pac Bell Park (now Oracle Park) in San Francisco, and Library Square in Los Angeles.

In 1998, he co-founded **KPRS Construction Services Inc.**, which has consistently ranked as one of the fastest growing and largest tenant improvement and general contracting firms on the Business Journal's annual lists. Nowadays, it generates about \$600 million in annual sales and supports thousands of employees and sub-contractors.

Stensby initially believed 2020 would be a banner year. Then the coronavirus hit, which slowed some projects and pushed back timeta-

bles a few months. Last September, he predicted revenue in 2021 would "be significantly higher." After the surge in cases last December and January, he appears ready to leave the coronavirus behind.

"It has been an interesting year," he said in an email to the Business Journal. "As you know, COVID-19 threw the entire industry several curve balls."

"KPRS continues to provide service to our clients. We have continued to work as an essential work contributor."

"While progress is not without challenges, we are looking forward to being through the hurdles and moving forward as a company and as a community to have COVID in our rear view mirror." ■



Rendering of recently opened Montage Healdsburg

## Montage International Sees Booking Uptick

During the past two decades, hospitality executive **Alan Fuerstman** has seen three significant downturns—with COVID-19 as "the most severe" of them all.

"We continued to see lower occupancy numbers than usual at the end of last year, but during this first quarter of 2021, we have seen a steady pick up in bookings across the portfolio," Fuerstman, founder, chairman and CEO of **Montage International**, said last week. "Our advance bookings for the back half of the year look particularly strong."

"With the vaccine rollout—particularly over the last handful of weeks—we are seeing more confidence in travelers. Travelers are

eager to visit their favorite destinations and have time away to relax with their friends and family. Business is recovering strongly."

He didn't let the virus stop plans or creativity. In September, he launched **Montage Academy**, a back-to-school program for resort guests that offered access to an all-day monitored study hall and educational programs for guests ages 6 to 17, including a range of afternoon elective activities from yoga to hiking, art to cooking and woodshop to conservation.

It also gave "a much needed break" to parents.

"It has been a great program for our guests

looking to enhance their family's distanced learning experience," he said.

In December, he opened the **Montage Healdsburg** in Northern California for guests to experience the famous Sonoma and Napa wine countries. He plans to open the **Montage Big Sky** later this year.

A spinoff boutique brand, **Pendry**, also has big plans this year.

The **Pendry West Hollywood** was scheduled to open on April 2, followed by the **Pendry Chicago** in May and the **Pendry Manhattan West** in the summer. The 37-story Chicago building along Michigan Avenue was once known as the Hard Rock

Hotel.

Last year, his Montage Residences and Pendry Residences reported more than \$275 million in residential sales, down from \$350 million in 2019. However, the value of its portfolio rose by \$1 billion to \$4.5 billion.

It's also developing the brand's first-ever private island and Caribbean development in the Abacos, Bahamas. Its launched a collaboration with the world's leading wellness real estate technology company, **Delos**.

If that wasn't enough, he added, "We also have confirmed projects in two new destinations, which we plan to announce later this year." ■



# The Private Retirement Plan:



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# Fighting Health Disparities



Alberta Bustamante  
photographed by Shelly Burleson

Alberta Bustamante came to UCI Health in a wheelchair. The metastatic breast cancer patient is walking again thanks to an early-phase clinical trial funded by a National Cancer Institute (NCI) grant to increase the participation of ethnic and racial minorities in such research.

For a variety of reasons — including economic and cultural — ethnic and racial minorities don't get the latest and greatest care in general. They also are significantly underrepresented in clinical trials used to test emerging therapies and their effectiveness.

Committed to ending such health disparities, the UCI Health Chao Family Comprehensive Cancer Center is using the NCI grant to enroll people like Bustamante and others among Orange County's underserved Asian, Black and Latino communities in cancer therapy trials.

## Access to leading-edge treatment

"Metastatic breast cancer trials have mostly involved Caucasians in this country," says Dr. Ritesh Parajuli, who is Bustamante's oncologist. "The data we gather when minority patients have not been enrolled might not be applicable to patients from ethnic and racial minorities."

The grant enabled Parajuli to open a phase 1/2 clinical trial for a new metastatic cancer treatment and actively recruit minority participants. He invited Bustamante to enroll.

The Garden Grove woman was hesitant. But after discussions with her cancer team and son, Iker, who has been by her side throughout her long cancer journey, she agreed.

"I had already been through the worst with my initial cancer treatment," she says. "This seemed easier. I had a chance to feel a lot better. Why wouldn't I give it a try?"

Bustamante was first diagnosed with stage II cancer in her left breast in 2008. She had a mastectomy, six months of chemotherapy and took tamoxifen for eight years. A 2016 car crash brought her to

UCI Medical Center, where scans showed a broken shoulder but also signs of bone cancer. She was told to have her regular doctor check for a recurrence of cancer but that didn't happen.

## Breast cancer returns

Two years later, lower back pain and stiffness made walking difficult. In August 2019, her primary care doctor diagnosed her with metastatic breast cancer and referred her to Parajuli, who started her on a standard-of-care treatment.

When she enrolled in the clinical trial in November 2020, she began receiving the investigational agent copanlisib, an enzyme inhibitor that may also limit tumor cell growth and delay progression of metastatic breast cancer, along with the estrogen-blocking drug fulvestrant and another enzyme blocker abemaciclib.

"After only eight weeks on the treatment, Alberta's quality of life had improved significantly," Parajuli says.

"Her back pain is greatly reduced, she's sleeping well and has a good appetite. Her scans show no progression of the bone cancer and, best of all, she's walking!"

Grateful to get around on her own two feet again, Bustamante, 58, has this advice for cancer patients: "If you have the chance, join a clinical trial. I feel so much better — and you could, too."

**UCI Health**

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



# Best Asset Protection Your Lawyer Never Told You About

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

Imagine this...

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

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

Since we are in California, you can create a Private Retirement Plan (PRP) to secure your future. PRPs are used for retirement savings and because it is statutory law, it is entirely exempt from judgments and bankruptcy. Sound too good to

be true? Well, there is a catch. To qualify as a PRP, the plan must be operated strictly for retirement purposes and misuse of the plan disqualifies it.

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

## One of the Best Safety Nets Available

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



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Jeffrey M. Verdon, Esq. is the Managing Partner of the Jeffrey M. Verdon Law Group, LLP, a Trusts & Estates boutique law firm located in Newport Beach, Calif. With more than 30 years of experience in designing and implementing comprehensive estate planning and asset protection structures, the law firm serves affluent families and successful business owners in solving their most complex and vexing estate tax, income tax, and asset protection goals and objectives. Please call us for a complimentary consultation.

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## SMBs: the Post-Pandemic Life-Blood of our Communities

As we see the light at the end of this pandemic tunnel, many are feeling cautiously optimistic about returning to some level of normalcy during this calendar year, albeit looking a little differently than compared to a year ago. Most important to this recovery will be the success of small- to mid-sized businesses (SMBs), where entrepreneurs and business owners create meaningful jobs that foster local economies, keeping money close to home and supporting neighborhoods and communities. Having the right business advisor to help them navigate PPP loans, new tax policy and other business management issues is a critical driver on their road to recovery.



Withum, a nationally ranked advisory and accounting firm, recognizes and appreciates the SMB community and has formalized its "Business Enterprise Advisors" ("BEAs") practice in response to recent events. BEAs provide tax, assurance and advisory services to privately held small- to mid-sized business clients who desire one point of contact for their needs. They support those clients within their industry specialization and can identify the opportunities and issues impacting their clients, understanding their business from the ground up. The types of businesses where BEA services are most applicable include auto dealerships, construction companies, physician and dental practices, manufacturers and professional services practices such as law firms and architecture and engineering firms. BEAs are seasoned professionals who put their experience to work as the sole trusted advisor for their SMB clients.

Mike Mulhearn, CPA, is the National Service Line Leader of Withum's Business Enterprise Advisors.

**"This service line is a great opportunity for the Firm to continue to focus on what we do best — provide clients with outstanding service. With deep experience within our clients' industry verticals, our BEAs have an intimate understanding of their clients' businesses and their challenges, working with business owners and finance teams to navigate these interesting times. They can also develop innovative solutions and tailored strategies that link the SMB owners' personal and business financial interests."**

As a result of the pandemic, many SMBs are finding themselves in a position to think about acquiring and expanding their businesses while competition struggles, or conversely, they are exiting their businesses through a merger or sale. Withum's BEAs are experts in both scenarios.

Additionally, the new virtually functioning world requires SMBs to use digital tools to remain competitive as clients and customers are always connected and expect a seamless, accessible and responsive digital interaction. Evaluate digital platforms for marketing and communicating, managing internal processes and logistics, and executing sales and payments (e.g., email, websites, social media, cloud-based software, etc.) if you haven't already. Withum's BEAs have resources to support these needs, as well.

"Withum continually evolves and expands its resources by onboarding subject matter experts in the digital, management consulting, cybersecurity, wealth management, transaction advisory and insurance service areas," continues Mulhearn. "Our BEAs work closely with these professionals to put our clients in a position of strength post-pandemic."

**Owners and finance teams of SMBs are needed to keep local economies thriving. Withum's Business Enterprise Advisors are here to help them navigate the road to recovery.**



Michael Mulhearn is a Partner at Withum, with 20 years of experience in public accounting. His expertise includes accounting and tax services, focusing on privately held businesses. He can be reached at [mmulhearn@withum.com](mailto:mmulhearn@withum.com).



Larry Gregson is the Partner-in-Charge of Withum's Irvine office. He works as a close advisor to family-owned businesses in developing business plans, budgets, and projections. Additionally, Larry assists clients in raising various forms of debt to allow for business growth and opportunities. He can be reached at [lgregson@withum.com](mailto:lgregson@withum.com).

### ABOUT WITHUM:

Withum is a forward-thinking, technology-driven advisory and accounting firm, committed to helping clients be more profitable, efficient and productive in the modern business landscape. With office locations in major cities and financial centers across the country, and as an independent member of HLB, the global advisory and accounting network, Withum serves businesses and individuals on a local-to-global scale. Our professionals provide the expert advice and innovative solutions you need to Be in a Position of Strength<sup>SM</sup> in today's fast-paced, tech-driven world.

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ADVISORY TAX AUDIT





## Secret Sauce

By Ivo A. Tjan, CEO  
CommerceWest Bank

To say that 2020 was a challenging year for businesses is simply an understatement. No one knew at the beginning of the year how much all our lives would change forever. The significant events that unfolded challenged us all as individuals and as a community.

Years ago, we discussed the three reasons that businesses fail. The **first** reason was growth. Business owners must manage growth, understand growth, and realize that once you grow extremely fast, you either need to have a rich uncle or aunt, or a Banker to provide you working capital to fuel the growth. **Second** is proper debt structure, which is important to the long-term success of your company, whether it is growing or not. It includes everything from real estate loans to lines of credits. Putting in place the correct structure on your loan before the loan funds could prevent a future default. **Third** is really understanding your company's cash flow. I mean "real cash flow", not EBITDA.

Last year we learned that there is a **fourth** reason why businesses may fail ... their bank. The events of 2020 showed the importance of making sure you have the right banking partner for your business going forward.

***"All banks are not created equal and bigger is not always better."***

As others continued to adapt to the changing technology driven environment, CommerceWest Bank pioneered the concept since inception and pursued a digital banking approach. This allowed the Bank to be a key factor in the success for many businesses throughout California in 2020. Our forward-thinking approach to business, navigated our company to be one of the first Banks in the nation to fund a PPP loan, one of the first lenders in the country to be approved to participate in the Main Street Lending Program (MSLP), which lead CommerceWest Bank to rank as the **#1 Bank in the state of California** for MSLP funded loans (\$390 million).

***"There is another program available to businesses that expires September 30, 2021."***

A lot of small and mid-sized businesses do not realize (or have not been informed by their bank) that there is another program currently available to help them. The program is set to expire September 30, 2021. Businesses can take advantage of the program and get working capital, refinance your current loan or obtain an acquisition loan with flexible terms. Business owners can also purchase a commercial real estate loan with only 10% down. CommerceWest Bank wants to help businesses determine if their business meets the program requirements and customize a loan tailored made to meet their specific needs. This is YOUR opportunity to aggressively take market share while businesses in California are all reopening.

This is what we call the "secret sauce." CommerceWest Bank has always been forward thinking and ahead of the industry when it comes to defining a business model vs. a traditional bank model. We can be there for you when you really need it and educate you on how to avoid the four reasons that businesses fail.

### 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. The Bank is simply built to last!

Our Bank embodies a culture of Bankers whose only objective is to deliver unparalleled service to the business community vs. being all things to all people like most banks today. By being all things to some people, CommerceWest Bank can provide customized and personally tailored banking services to businesses throughout California.

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 take pride in knowing that our team can and has accomplished this while providing a tailored and personalized experience for each client, without them physically coming into an office. It is clear this is the future of Banking.

***"We will create a complete banking experience for each client, catering to businesses and their specific banking needs, while accommodating our clients and providing them high-quality, low-stress, and personally tailored banking and financial services."***



**Ivo A. Tjan, Chairman & CEO**

Ivo A. Tjan is Chairman, President and Chief Executive Officer of CommerceWest Bank, a full-service commercial bank with a unique vision and culture of focusing exclusively on the business community. Mr. Tjan is the Founder of the company and launched an Initial Public Offering in 2001. The Bank is headquartered in Irvine, California and serves businesses throughout California. Call me at (949) 474-5278 or email at [itjan@cwbk.com](mailto:itjan@cwbk.com)



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# If You Get a Divorce, Will You Still Control Your Business?

By Paul Nelson, Esq.

"If you fail to plan, you are planning to fail." Benjamin Franklin said this a couple hundred years ago, but its wisdom remains just as potent today. Any successful businessowner knows that to survive in a competitive environment, let alone prosper, careful planning is essential. One must weigh likely future demand for one's products or services against the predicted cost and myriad other factors.

It's also not only critical to prepare for likely events, but unlikely ones as well. Which is why a well-run company will have insurance against fire, theft, the loss of key personnel, and even lawsuits.

## Risky Business

But how many business owners also plan how to maintain control of their company in the event of divorce? It's a contingency few consider a threat. If you believe you're in a happy, stable marriage, making plans to prevail in the event of marital dissolution feels like undercutting the trust upon which your union is built.

This mindset can be highly risky. Ignoring the dangers a divorce poses to your business you spent a lifetime

building is tantamount to going without health insurance or driving without a seatbelt. It's professionally irresponsible. Why? What can happen to a privately held business in the event of divorce can be devastating — especially where we live.

## Half of Your Company?

California happens to be a community property state. This means, in the event of divorce, a couple's assets are divided equally between them. Such property not only includes homes, vehicles, cash, jewelry, and other personal items, but also business assets that may be owned individually or jointly by the spouses.

As a result of this reality, the person who owns a small business/sole proprietorship, is a partner in a firm, or owns stock in a corporation, may

have to surrender half the value of such interests to their spouse in a divorce. This can force a divorced individual to buy out his/her "ex" to regain control of the business, a potentially expensive and not always doable proposition.

Fortunately, there are ways to plan for such a contingency. One strategy involves reducing the perceived value of the asset so when it comes time to split it in half, the loss is minimized. A skilled forensic accountant can employ numerous strategies to accomplish this goal, including:

- Reducing owner's draws
- Separating the value of the business built before a marriage from its value achieved after nuptials
- Determining what value, if

any, the spouse has in the business

- Minimizing the business' total value for community property purposes

Having an experienced, knowledgeable divorce attorney steeped in California community property law is also critical to this process. Such an attorney can help you with the considerable planning that goes into maximizing one's return while minimizing what you pay for it.

Ultimately, even if you consider your marriage to be as solid as Gibraltar, divorce planning should be just as important to you as business planning, financial planning, and estate planning. As another adage so eloquently reminds us, "It's better to have it and not need it than to need it and not have it." Truer words were never spoken.



PAUL NELSON

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## 2021 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

**360 Clinic, Anaheim***Vince Tien, Co-Founder*

Created and launched amid a pandemic, Vince Tien's OC-based 360 Clinic has tested more than 310,000 OC residents for COVID-19 at its supersites at the Anaheim Convention Center and OC Fairgrounds, as well as at 13 additional sites across the county. The company also created more than 250 jobs in OC (on its way to creating 400+ OC jobs by end of Q1 2021). Tien, in partnership with his team at 360 Clinic and the OC Health Care Agency, engineered a business model that never existed, and did so in record time to ensure that the County's COVID-19 testing needs were met. Like innovative entrepreneurs before him, Tien leveraged the talent and expertise of the local business community - from the medical and healthcare realm to restaurateurs and city officials - to create a successful business that is dedicated to the health and safety of all Orange County residents. In addition to COVID testing services, 360 Clinic is a comprehensive network of community-based health care providers and a physician-led organization providing a continuum of integrated care to include post-acute and palliative care.

**ADYA, Anaheim***Shachi Mehra, Chef & Partner*

By blending Western and Indian cultures, Chef Shachi Mehra has been able to bring a new, approachable Indian culinary experience to Orange County. Her ability to marry tradition with modernity has created a highly successful authentic Indian restaurant that reflects modern India. Chef Shachi has a passion for creating innovative and thoughtful menus that tastefully balance a variety of flavors and make her food appealing to a range of tastes. An ardent supporter of local farmers and sustainable practices, she takes great care in sourcing her ingredients. The menu revolves around fresh, sustainable ingredients and focuses on contemporary interpretations of Indian street foods, tandoori specialties and rich curries. Born in India, her early family experiences helped to develop and shape her love of food and appreciation for balance, in flavors and in life. This year, Chef Shachi will launch a bottle sauce company, Spice Girl Sauces, which are intended for retail distribution throughout the county. She has already received national attention after emerging victorious on Food Network show "Chopped!"

**ALVITA Biomedical, Irvine***Hans Keirstead, Ph.D., CEO*

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

**Aristo Cyber Defense, Newport Beach***Cory Swartzbaugh, VP of Cyber Wealth Management - Client Relations*

Aristo is a concierge cybersecurity solutions provider specifically focused on protecting high-profile individuals, their families, and business ecosystem. Cyber threats to high-profile individuals and their families are becoming the norm. As corporations are getting better at cyber protection, threat actors are turning to high value and vulnerable individuals using inadequate consumer-based products. Aristo was created to address the sophisticated and private requirements of their clients. Protecting clients from extortion, fraud, espionage and cyber-enabled physical threats is their exclusive focus. Aristo's mission is to guide their clients toward prioritizing risk management measures that assist in attaining cyber preparedness, managed threat detection and response and 24/7 global coverage and support.

**Avatar Partners Inc., Huntington Beach***Marlo Brooke, CEO & Founder*

Marlo Brooke founded AVATAR Partners in 2003 with the mission of protecting the democratic rights that are embodied in the vision of America and its Allied Countries, and those the world over who urgently seek and need such rights. As founder and CEO of AVATAR Partners, Brooke is a recognized thought leader in warfighter readiness and innovative, advanced training systems, job aids and software systems. Brooke provides vision, leadership and oversight of all programs and customer relationships that support the Department of Defense and Commercial Industry. Under her leadership for 18 years, AVATAR Partners continues to invent disruptive, high-quality enterprise solutions. Her latest innovations have transformed the Augmented Reality (AR) Ecosystem by helping to eliminate three showstoppers for global AR adoption: drift, jitter, and the inability ability to lock 100% on target. In doing so, AVATAR has achieved a 4800% accuracy for Augmented Reality above industry average, surging AVATAR 3-5 years ahead of its competitors.

**Baldwin & Sons, Newport Beach***Al Baldwin, Founder & CEO*

Al Baldwin is a pillar of the Orange County community, both as a recognized business success and a prolific philanthropist with a penchant for helping disadvantaged children and families. Embodying



true entrepreneurial spirit and grit, Baldwin has spent his entire professional career self-employed. He founded Baldwin & Sons, the Newport Beach based real estate development and homebuilding company in 1965, the same year he finished college and completed construction of his very first home. Today his company provides jobs to 122 employees, has delivered more than 20,000 homes throughout Southern California, and is the recipient of countless industry and civic awards. The company's two active masterplans - The Oaks in Orange County and Otay Ranch in San Diego County - are some of the most noteworthy, largest, and most highly sought in all of SoCal. Al Baldwin's story is fundamentally tied to his prolific charitable contributions, regionally and nationally.

**Beacon Pointe Advisors, Newport Beach***Shannon Eusey, CEO*

Shannon Eusey founded the investment advisory firm known as Beacon Pointe Advisors in 2002 and the firm has since experienced much success and growth. In 2011, she co-founded an industry leading initiative with the formation of Beacon Pointe's Women's Advisory Institute. The institute is focused on bringing women to the table, engaging female investors in conversations focused on investments and personal finance. She co-authored the international best-selling book "Your Dollars, Our Sense: A Fun and Simple Guide to Money Matters," which makes sense of a variety of financial topics and seeks to educate readers of all ages and financial circumstances in an entertaining, relatable and informative manner. The book has been ranked #1 across six different Wealth Management, Finance & Coaching categories. Eusey also mentors high school students and Girl Scouts, hosts a summer internship program and financial literacy workshops at Beacon Pointe, just concluded her adjunct professorship of four years at the UC Irvine Paul Merage School of Business, regularly runs marathons with community members home and abroad, and is thoroughly engaged in her four children's philanthropic endeavors.

**Beyond Fifteen Communications, Irvine***Lauren Ellermeyer, President & Co-Founder*

As a premium PR agency, Beyond Fifteen Communications has built a reputation for going above and beyond typical industry standards to deliver an unprecedented level of media and market attention to its clientele. With its implementation of entrepreneurial ideas linked with results-driven strategies, Beyond Fifteen has redefined the typical agency/client relationship. Co-founder Lauren Ellermeyer has utilized her innovative business style, instinctive eye for new talent, and her public relations and social media expertise to grow Beyond Fifteen from startup to nationally-acclaimed powerhouse. In addition to cultivating Beyond Fifteen's collaborative, "client first" business approach, Ellermeyer also finds the time to put the community first. As a long-time board member and Philanthropy Chair for American Family Housing, Ellermeyer pours her energy into giving back. Moreover, her favorite activity is developing creative ways to inspire students and industry leaders on successful execution of entrepreneurial goals.

**Blue C, Costa Mesa***Eric Morley, Co-Founder & Chief Operating Officer*

Eric Morley co-founded Blue C in 1998 and since then, has grown the company into Orange County's leading brand strategy and marketing communications agency. Under Morley's strategic leadership, Blue C has delivered branding guidance and measurable results to clients in Orange County and across the world, including Irvine Company, Ingram Micro, Segway, Volcon Epowersports and more. Morley was instrumental in the development of Blue C's proprietary BrandPWR platform, a highly detailed and multi-step process that leads companies through brand clarification, key message identification and strategic content development in order to generate sales and move their brand forward. To date, Morley and the Blue C team have guided clients through more than 500 brand refreshes and completed 1,000 brand launches. Also a leader outside the office, Morley volunteers with numerous non-profits including co-founding the California Love Drop with Wahoo's Wing Lam and serving as the Orange County Lead for the Distinguished Gentleman's Ride for Prostate Cancer. Morley also shares his expertise with local high schools and universities and is an active participant in marketing and advertising professional organizations.

**Branded Group, Anaheim***Michael Kurland, CEO*

Branded Group CEO Michael Kurland is committed to leading with purpose and giving back to the community. Under Kurland's leadership, Branded Group employees have volunteered 2,000 hours to several non-profit organizations. Additionally, the team has donated thousands of pounds of food to families through their partnership with Second Harvest Food Bank of Orange County. Kurland believes that a solid company culture focused on purpose over profit leads to stronger engagement and alignment as well as healthy retention. The company has been certified as a Great Place to Work® for three consecutive years as well as been listed on the Inc. 5000 List of Fastest-Growing Private companies for three consecutive years. Kurland has remained focused on his promise to Be Better for his community, team, clients, and vendor partners.

**Braver Players Musical Theater Foundation, Costa Mesa***Chelsea Braverman, Artistic Director & President*

Chelsea Braverman, artistic director and president of Braver Players Musical Theater Foundation. When COVID hit last spring, instead of shutting down like many companies did, Braverman found innovative ways to still make performing possible for the youth of Orange County. She raised funds to build her own outdoor theater to stage a production of Jekyll and Hyde the Musical, along with funding three short films for kids which they shot outside, with masks, and a safety supervisor. She has tirelessly fundraised to keep the doors of her non profit opened and is currently directing and producing another show online which will be held outdoors in April with a socially distanced audience.





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Braverman has modeled courage, resilience and leadership for today's youth at a time when they need it the most.

**Business Titans, San Clemente**

*Olympia Hostler, Exponential Collaborative Growth Partner*

Olympia Hostler has helped people recover from the devastating effects of COVID with both of her businesses. The Business Titans is Hostler's business consulting company that helps business owners scale their businesses working together through collaborations. In addition, The Lasting Pain Relief Center is her company that helps people heal from chronic pain, abuse, stress and traumas. Hostler works with six and seven figure plateaued business owners radically double their income, fun and freedom. She is an award-winning business consultant and speaker, a Fortune 500 companies' partner, and a leader of the highest national security programs worth billions of dollars. Since she earned her MBA in Finance, she specializes in business growth strategy that fast tracks success while also having a joyful and meaningful life. Hostler works with high-achieving business owners who seek success and wealth to make a difference for themselves and humanity.

**C3 Tech, Santa Ana**

*Tricia Sanchez, Founder & Principal*

Tricia Sanchez founded C3 Tech over two decades ago - putting their entrepreneurial dreams in print (literally). Inked on the heart of the company is the story of the founder, Tricia Sanchez. Sanchez grew up in Santa Ana, CA where her humble beginnings sparked her hard work, ambition, and determination to make her own way. Sanchez attended USC on full scholarship and after graduation, began working at Xerox. There she met Tony Sanchez (her now-husband and business partner) and the two of them became top sales representatives in Southern California. During this time, they gained valuable experience and meaningful relationships, yet they saw an opportunity to put service back into the industry. So in 1994, they founded C3 Office Solutions to do just that. Since that day, Sanchez's philosophy has been centered around client success: providing best-in-class products and services, as well as on-demand office support. Sanchez believes so strongly in client centricity that she put it in the company's name (Client-Centric Consulting).

**CBT, Orange**

*Kelly Ireland, CEO & Founder*

Kelly Ireland founded CBT in 2001 in the spare bedroom of her small LA home. CBT excelled for 15+ years as a value-added reseller (VAR) with a focus on unparalleled client service. However, having a keen eye for technology trends, Ireland assessed the impending changes in the IT industry in 2015 and saw a need for drastic change. Thus, she began augmenting her engineering team, building up the internal



expertise and external partnerships necessary to revolutionize CBT's offerings and become one of the first companies to make the difficult transition from VAR to systems integrator and IT/OT Domain Expert Integrator. CBT has evolved into an award-winning IT solutions provider with a roster of Fortune 50 clients.

**CISOSHARE, San Clemente**

*Mike Gentile, CEO, Founder & President*

Mike Gentile has established and successfully sold two businesses and is currently the CEO and president of CISOSHARE. Founded in 2015, CISOSHARE has grown rapidly over the past few years, as recognized by OCBJ's fastest growing companies list and the Inc 5000 multiple years in a row. In 2019, CISOSHARE worked with Orange County United Way and UpSkill OC to develop a free cyber security professional development program called CyberForward Academy. The program is designed to solve the livable wage gap and the shortage of needed professionals in the cyber security domain through the successful transition of people that are under or unemployed into higher paying cybersecurity careers. Since the beginning of the pandemic, CyberForward Academy has been operating online, continuing to develop talent and provide new opportunities. CISOSHARE employees actively participate in CyberForward Academy as mentors. Employees are also encouraged to spend time on other volunteer activities and CISOSHARE donates a percentage of profits to multiple organizations within the community.

**CoinLinked Inc., Irvine**

*Jenny Ta, CEO & Founder*

CoinLinked is an innovation tech company that has shattered barriers of allowing consumers to utilize different cryptocurrencies to buy essential everyday products in a COVID-19 pandemic of 2020 and beyond. CoinLinked.com is a first-of-its-kind social media platform that combines the security of a traditional, centralized platform with the freedom and opportunity of a decentralized network. CoinLinked puts a heavy focus on crypto currencies and offers users the ability to earn revenue from their content. A social commerce network that enables users to purchase products online using cryptocurrencies such as Bitcoin and Ether. The company's mission is to provide a seamless bridge between the market and emerging digital currencies. CoinLinked offers a simplified process.

**Commit2b.FIT, Rancho Santa Margarita**

*Kasia Andrzejuk, President & CEO*

Kasia Andrzejuk was born in Poland and grew up in the suburbs of Chicago. Her business specializes in virtual & corporate fitness. Andrzejuk has a background in pilates and experiential marketing. She has over a decade of experience in yoga and absolutely loves teaching pilates and sharing her passion with corporations, resorts,



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medical clinics, and academic institutions on the importance of committing to be fit using Pilates Principles. In addition, Kasia Andrzejuk is the pilates program director at IPM Medical Clinic in Orange County.

**Creative Clarity Inc., Tustin**

*Kimberly Flora, Owner*

Kimberly Flora's professional career has spanned the course of 30 years. With the launch of Creative Clarity Inc., clients have been able to directly to enhance their brands and prompt business growth by working with her. She handled the marketing of The Fremont Experience, both pre and post construction, and served as location manager for the iconic venue, creating its profitable commercial filming and photography program. During her tenure at The Fremont Experience, Flora worked on numerous high profile advertising campaigns, special events, sponsorship programs, and movie, music video and commercial photography shoots. During her time with Vestar, Flora played a role in the company's success and growth through marketing presentations and programs, a multitude of events and promotions, positive media exposure, and a profitable sponsorship program. She oversaw the pre and post grand opening marketing for The District at Tustin Legacy, introduced Union Market Tustin to the project, and launched a new creative campaign and grand re-opening event for The District at Green Valley Ranch.

**Crossover Health, San Clemente**

*Scott Shreeve, CEO*

Dr. Scott Shreeve is an emergency medicine physician who has been actively involved in the design, development, and distribution of life science technologies that improve the delivery of care and enhance the quality of life. He is currently serving as chief executive officer of Crossover Health. Dr. Shreeve was a co-founder of Medsphere Systems Corporation, the first open source electronic health record for the healthcare enterprise, where he led the Client Services team. He drove the fulfillment of large-scale electronic health record implementations at community hospitals, statewide health systems, and networks of primary care clinics. Dr. Shreeve is also a founding member of the Health 2.0 technology and reform movement, serving as an advisor to the conference and spokesperson throughout the country. His popular Crossover Health blog focuses on enabling technologies that transform the delivery, financing, and outcomes of high-performance health systems.

**David Meltzer Enterprises, Lake Forest**

*David Meltzer, Founder*

2020 was a time of forced innovation and adaptation, which has certainly been true of David Meltzer and his brand. The co-founder of Sports 1 Marketing has seen his personal brand skyrocketing in recent months, in large part due to Meltzer's understanding of traditional and digital marketing. Apart from the many accolades that he has earned recently, such as being named one of the Best Employer in Sports 2019 by Front Office Sports, a Top 100 Business Coach by renowned executive coach Marshall Goldsmith or being recognized at the Super Bowl as the MVP (Most Valuable Philanthropist), some of his biggest recent successes have been as a result of his ability to adapt to the pandemic. In 2020, Meltzer launched several new livestream shows during the pandemic including 2 Minute Drill, which evolved into a television show on Bloomberg and Amazon Prime that airs in more than 100 million homes around the world.

**Dimer, Los Alamitos**

*Elliot Kreitenberg, Co-Founder & President*

Dimer, a startup focused on UVC disinfection innovations has grown exponentially in the last year moving from a father-son duo working out of the family garage to a staff of 10 with worldwide brand recognition and product deployment. The company already boasts more than 10 allowed US Patents in the field. Dimer made its global debut in 2020 with its disinfection solution for aircraft cabins. The product was then known as GermFalcon. At the outset of COVID in January 2020, the company announced it would make the GermFalcon available for no charge at international airports to disinfect airplanes coming from China. Kreitenberg handled cleanings himself at Los Angeles International Airport (LAX) before travel restrictions eliminated most flights from mainland China. In May of 2020, Dimer signed an exclusive worldwide partnership with Honeywell to deploy this technology. Lives are already being saved around the world with early adopting airlines including JetBlue, Qatar Airways, Bulgaria Air, and Azul Airways with more committed sales in 2021. Dimer's GermFalcon was recognized by TIME as a best invention of 2020.

**DYG Beauty USA, Newport Beach**

*Dianne York, President & CEO*

DYG Beauty is a company dedicated to cosmetic and skin care rejuvenation products in sun protection and acne systems helping teens and adults company skin afflictions. Designer of YGG (You Glow Girl) and DYG (Discover You're Gorgeous) mineral makeup.

**E Factor, Tustin**

*Kari Willis, President & Co-Founder*

Following a successful career in wireless and television, Kari Willis ventured into entrepreneurship at the age of 32 and is the founder and president of E Factor. Throughout her career, Willis has gained a solid reputation for being a results-focused agent of change. Willis is nationally known for building customer relationships, creative execution of experiential events, and executing aggressive marketing strategies. Fast forward eight years, and Willis' firm, E Factor, has established a nationwide presence through their ability in event production, marketing and brand activation working with large volume and high-profile accounts. On top of that she currently sits as the executive director of the California Wireless Association and serves as the executive producer of a wireless conference. Willis is a driven entrepreneur who strives to strike a balance between cutting-edge professional endeavors and creating a family environment for her



teams. At the heart of E Factor is her family ethos.

**Expert Coatings & Graphics, Anaheim**

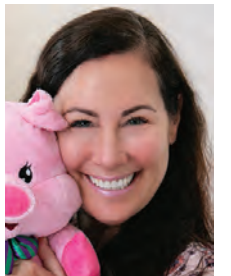
*Sandy Ceron, President & CEO*

Sandy Ceron, President & CEO, launched Expert Coatings & Graphics in Anaheim in 2014. Being a second-generation contract manufacturer, Ceron has earned her leadership position in the plastics and metal finishing industry for over 30 years. Expert Coatings & Graphics specializes in customized decorative and functionally purposed finishing solutions for plastic and metal parts and components used by the medical, aerospace, and defense industries. ECG is proud to serve an esteemed caliber of global organizations and OEM leaders and caters to all aspects of its customers' design, production, delivery and quality assurance requirements with the highest level of commitment and response to evolving needs. ECG has curated many prestigious industry certifications such as: NADCAP Certification for Chemical processes, Aerospace Quality System (AC 7004 Certificate) which allows ECG to do aerospace and military contracts, and is a certified Cerakote Applicator. Not only this, but ECG gives back locally and globally through: Second Chance Program, Air1 Positive Hits, ECG Mercy Projects (Boys & Girls Club, YMCA, local families in need), and Feeding Los Cabos Kids.

**Extraordinary Lives Foundation, Mission Viejo**

*Mara James, Founder & CEO*

Mara James started the California based 501(c)(3) non-profit Extraordinary Lives foundation, in order to improve children's mental health & wellness and support families by providing educational tools, resources and mental health awareness events. She oversees daily operations and formulate ELF's business plan and annual budget. James helped organize and developed several programs including free monthly webinars to support families during COVID-19, the Empowering Pregnant Mom's course and wrote and published "The Power of Piggie Bear" book to help increase 3-8 year old children's Social Emotional Learning. In 2019, she organized and partnered with Each Mind Matters, NAMI CA & Mental Health America CA to host mental health awareness events at all 5 CA MLB stadiums. In addition, James organized several successful fundraisers and developed the HUGS for Life Healing Center which bridges the gap between medical professionals and approved holistic healers to heal and transform lives.

**Fable & Spirit, Newport Beach**

*Darren & Jean Coyle, Owners*

Husband-and-wife team, Darren and Jean Coyle, incorporate their family flavor to present a progressive, modern dining experience at three Orange County restaurants - Dublin 4 Gastropub, Wineworks for Everyone, and Fable & Spirit. The Coyle's daughter, Ali, serves as Director of Wines & Sommelier, and son, Drew, serves as the Director of Spirits. Their newest restaurant, Fable & Spirit, has received an incredible response from the local media and diners, alike. With glowing reviews in the Orange County Register, Modern Luxury Magazine and Coast Magazine, the restaurant earned the title of "Best New Restaurant" from Orange Coast Magazine and the Golden Foodie Award, a people's choice award.

**FivePoint, Irvine**

*Emile Haddad, Chairman & CEO*

Long regarded as one of the most entrepreneurial and innovative leaders in America's real estate industry, FivePoint Chairman and CEO Emile Haddad applies a holistic approach to community building in ways that few others are even contemplating. Founded by Haddad in 2009, FivePoint designs and develops mixed-use communities in three of California's most dynamic markets: Orange County (Irvine), Los Angeles County (Valencia), and San Francisco. Haddad is breaking down silos and shifting from a structure-based and transactional model defined by his industry to one that focuses on people and cultivating relationships. He is creating sustainable "cities of the future" where people from all walks of life have equal access to all that is essential to them - their homes, offices, retail, schools, entertainment, sports, recreation, parks and open space - all within close proximity to each other. Through his integrated and inclusive communities, Haddad and thought-leading partners are narrowing social inequities and creating solutions to some of California's biggest challenges: climate change, transportation, job creation, personalized healthcare, technology adoption and the lack of affordable housing and housing inventory.

**FreightPop, Lake Forest**

*Kurt Johnson, Chief Executive Officer*

A serial entrepreneur, Kurt Johnson created FreightPOP by observing the needs of one of his other companies, Horizon Technology. The profitable company needed a better logistics model, one that would increase the margins and improve the chances of survival in a structurally declining market. He created a three-tiered strategy, including acquiring their top competitor, expanding into datacenter growth markets, and finally, exploring new business models. The software that is now FreightPOP was developed to serve the company but also as a reinvention strategy for Horizon Technology. The software platform was so outstanding that other companies asked to use it, and a new business was born. Today, FreightPOP is a SaaS leader with more than 100 customers and 22 employees. The company has grown more than 700% since 2018, and has attracted investors such as The Cove Funds, Newth Morris, Jared Smith, and co-founders of DealerSocket. The company contributes to Orange County every year, by gifting each employee 16 hours of paid volunteering hours per year.

**Glasspar, Dana Point**

*Rob Wilson, Executive Chef & Owner*

Glasspar is a classic American seafood hall - redefined. Executive Chef and Owner Rob Wilson presents a menu that is thoughtfully sourced, respectfully prepared, and creatively presented. Since its opening in December 2019, Glasspar has reinvigorated Dana Point



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Harbor with its high energy atmosphere, all while delivering a high level of service. It's light and open concept features contemporary styling using traditional components creating a charming character and architectural interest. Glasspar is the best of both coasts, delivering a true East Coast-style seafood dining hall brought to the West coast and given an elevated fresh California artisanal feel. During the COVID-19-related dine-in closures, Glasspar opened its doors to the community as a resource with the Glasspar Seafood Market. While supermarkets were barren, Glasspar converted its raw bar into a seafood market, providing the community with fresh seafood at better-than-supermarket prices.

**Haven Collective, Orange**

*Wil Dee, Founder & CEO*

As founder & CEO of Haven Craft Kitchen + Bar and Provisions Deli Shop in Old Towne Orange, Wil Dee not only sets the bar, but also continues to raise it when it comes to the Orange County culinary and beverage scenes. With his two establishments, as well as his positions as president of the Orange County Brewer's Guild and Founding Partner of Orange-based Chapman Crafted Beer and Chapman Crafted Coffee, Dee is a leader in the local craft beer movement and has been integral to shaping it in Orange County and beyond for the past two decades. In addition, Dee currently sits on local City Advisory Boards, as well as on the executive board for the Orange Chamber of Commerce executive board for the Orange Chamber as Vice Chair & CFO.

**IBEC Inc., Irvine**

*Bardia Vahidi, Founder & CEO*

IBEC is an international consulting and engineering firm, dedicated to the improvement of organizations by providing professional Management Systems consultancy, auditing and training. Dr. Bardia Vahidi is responsible for overseeing IBEC's overall business direction and development. He has over 20 years of consulting and auditing experience with more than 800 companies worldwide from small to fortune 500 in oil and gas, petrochemical, power and energy, construction, food, Medical, pharmaceutical, manufacturing and recycling industries. As we all know 2020 was the most uncertain time, with businesses hurting significantly, Dr. Vahidi set aim to help as many businesses as possible to continue operating as smoothly as possible. Despite all unforeseen circumstances of the global pandemic, IBEC team with the leadership of Dr. Vahidi, successfully helped over 110 essential businesses, nationally and internationally, obtain and maintain management system certifications, which are required to operate in the fields of food and Medical industries and electronic refurbishing facilities. Almost all IBEC's clients were considered as essential business and Dr Vahidi worked tirelessly, most days working more than 14 hours per day to be able to meet all client's needs and concerns. As a result, IBEC experienced tremendous growth in 2020, revenue up 50%.

**Idea Hall, Costa Mesa**

*Rebecca Hall, President & CEO*

Idea Hall, founded by Rebecca Hall, enjoys the reputation and position as Orange County's (OC) agency of choice. While rooted in public relations, Hall identified a gap in the industry and successfully brought digital marketing, branding, public relations and advertising services together under one roof. Through an integrated marketing model, Hall and her team have been privileged to work with some of the most established commercial real estate businesses in OC, as well as healthcare and non-profit organizations taking on some of the county's biggest issues -COVID-19, homelessness and mental health. In addition, the agency has attracted and retained top, local talent through its strong corporate culture where people come first. Under Hall's leadership, Idea Hall has successfully maintained aggressive growth, averaging +15% YOY, for the last four years. Since establishing the agency in 2003, Hall remains one of the first female heads of an agency and one of the most successful marketing and PR entrepreneurs in the county. She attributes her success to staying ahead, constantly innovating and developing and maintaining strong relationships.

**InBrace, Irvine**

*Dr. John Pham, CEO & Co-Founder*

John Pham DDS, MS is a researcher, three-time entrepreneur, team builder, former aerospace engineer and practicing orthodontist. His research is featured in numerous cover articles in the American Journal of Orthodontics and the Journal of Clinical Orthodontics, and he frequently speaks on cutting edge technology topics at industry association meetings, orthodontic conferences and residency programs. Since his first ideas for creating a new orthodontic treatment took hold, Dr. John Pham has closed more than \$70 million of venture funding for InBrace – the most advanced, invisible orthodontic solution in the world. Dr. Pham was performing research at USC's Ostrow School of Dentistry when he met InBrace inventor and co-founder, Dr. Hongsheng Tong. Their published research garnered numerous cover articles in the American Journal of Orthodontics and the Journal of Clinical Orthodontics. Consumer demand for better aesthetic treatment options was growing, due to the popularity of Invisalign, so Dr. Pham assembled a team that successfully founded InBrace in 2012, incorporated in 2014 and shipped the first commercial case of InBrace in 2016. The Company tripled production capacity moving to new facilities in August 2018 and has now grown to more than 150 employees.

**Indi, Newport Beach**

*Neel Grover, Founder & Executive Chair*

Indi is a groundbreaking influencer monetization platform that brings multiple revenue streams to influencers and experts, all in one convenient place. Indi was created to empower and reward users by providing the tools and revenue share that they deserve for

their digital influence. Since launching the business in 2019, Indi has closed Series A funding of \$9 million and ranked #8 in apple's app store top chart within the business category. Seasoned ecommerce leader who has led great teams and sold \$5 billion online running 4 marketplaces, including the 3rd largest Marketplace in the U.S. with over 20 million products from 7,000 retailers as well as a top fashion Marketplace with over 1,000 brands integrated. During Grover's tenure, Buy.com went from losing almost \$100 million per year to 13 consecutive profitable quarters competing with Amazon on every product. Built and ran Marketplaces for Rakuten, BestBuy and Bluefly.

**Inside Sales by Design, Aliso Viejo**

*Dionne Mischler, CEO & Founder*

A 20+ year inside sales veteran and executive, Dionne Mischler specializes in establishing and growing inside sales teams at mid-sized companies. As a Midwesterner living in Southern California, Mischler brings the best of both cultural norms to each conversation and engagement. She provides the perfect blend of Midwest down-to-earth common sense with Southern California sunshine allowing for each client to thrive as they discover their own voice in leading their Inside Sales team or rep in shepherding clients to a positive outcome. Bringing almost two decades of experience, Mischler provides workshops and seminars packed with practical, down to earth best practices to companies looking to either start or grow their inside sales teams. This leads to tangible results and rewards in the shape of clients and revenue. The intangible rewards are clarity, everybody working together, a feeling of shared purpose, and a greater forward momentum.

**Intellivision, Santa Ana**

*Tommy Tallarico, CEO & President*

Tommy Tallarico has brought back to life the iconic Intellivision brand video gaming console! In the past year he has tripled the company employees; opened a brand new 15K SF office in Orange County; raised \$10 million; secured \$25 million in pre-orders; inked distribution deals worldwide to include Amazon, Walmart, GameStop, and Koch Media; and established partnerships with MLB, Hot Wheels, Sesame Street, Care Bears and many more. Prior to Intellivision, Tallarico was a video game music composer, musician, sound designer, television personality and live show creative director and producer. Tallarico has worked on over 300 video game titles since the 1990s. He is the creator of the concert series Video Games Live (VGL), a multi-award-winning symphony orchestra that has played video game music across the world since 2002 and co-hosted the television shows Electric Playground and Reviews on the Run from 1997 until 2006. Tallarico holds several Guinness Book of World's Records, including playing to the largest audience for a live video game concert in 2016 to more than 750,000 people.

**Ivantis Inc., Irvine**

*Dave Van Meter, CEO*

Dave Van Meter joined Ivantis Inc. as president and CEO in January 2008 (as employee No. 2), having previously led the commercial launch of over a dozen medical devices. Before joining Ivantis, Van Meter helped drive significant growth for Abbott's Vascular division, increasing revenue from \$60 million to \$400 million between 2001 and 2006. With little fundraising experience and no background in ophthalmology, Van Meter's first major accomplishment for Ivantis was raising \$18 million in Series A funding within 90 days of leaving his stable career to make the nascent startup a go. He then made the strategic decision to invest in rigorous clinical data for Ivantis' Hydrus® Microstent, a minimally invasive glaucoma surgery (MIGS) device designed to lower eye pressure in patients with open-angle glaucoma. Under his leadership, and upon Food and Drug Administration approval in late 2018, Ivantis achieved one of the fastest first 18-month growth trajectories of any privately held venture-backed nascent medical device company in the past two decades, with \$26 million in first full-year sales of Hydrus in 2019.

**Janene Verbian CHt, CLC, CWK, Newport Beach**

*Janene Verabian, Clinical Hypnotherapist & Relationship Expert*

Janene Verabian is recognized as Southern California's Premier Certified Clinical Hypnotherapist and Relationship Expert. She has dedicated her career to helping others move through past trauma in order to live happy, fulfilled, and meaningful lives. She is a graduate of the prestigious Hypnotherapy Academy of America - an approved school of the American Council of Hypnotist Examiners which sets the highest standards for hypnotherapists. Janene has earned a reputation for results from providing over a decade of personalized guidance for men and women. With her keen gift as an empath, combined with her progressive and proven healing approaches, she has an innate ability to guide her clients along a path to practical and permanent healing. With an office in Newport Beach, Janene assists clients near and far through in-person and virtual appointments. She is currently working on her first book which provides a raw and relatable approach to navigating toxic relationships in pursuit of emotional wellness which is due to be released later this year.

**Kadenwood LLC, Newport Beach**

*Erick Dickens, Co-Founder & CEO*

Erick Dickens created a team specialized in scaling successful businesses and experienced in shaping consumer perceptions. This is reflected in the achievements Kadenwood has made in the short time since its founding, thanks to his emphasis on transparency and unwavering commitment to quality. Leveraging his experience with leading CPG brands to success, Dickens quickly grew Kadenwood into the largest vertically integrated supplier of CBD materials in the country, with a portfolio of brands spanning the personal care, supplement and pet care industries. Raising over \$25 million in funding to date, Kadenwood is noted as a top CBD company in the media and continues to lead the mainstream conversation around CBD as it works to change its perception to a





## 2021 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

trusted market. It was the industry's first to launch a national broadcast ad campaign and is the exclusive CBD partner of Discovery Networks. On a local level, Kadenwood contributes to Shore Hospitality, a nonprofit conducting toy drives for Children Today Long Beach and providing food to first responders during the pandemic. It also sponsors the Garvey 6.0 foundation, providing youth baseball development programs and scholarships to players with diverse economic backgrounds.

**KCOMM, San Clemente**

*Sinan Kanatsiz*

Sinan Kanatsiz has founded several organizations in Orange County, including KCOMM, the Internet Marketing Association (IMA), the International Executive Council (IEC), Gen NeXt, Chapman50 and Pretend City Children's Museum to name a few. His innate ability to connect leaders and funding to market needs have been proven time and time again. Growing KCOMM to several million in revenue, sustainable growth of the Internet Marketing Association and achieving the Guinness World Record for hosting the largest Virtual Marketing conference in history, 2020, with over 113,000 registrations, including the following speakers Palmer Luckey, Glenn Stearns, Laura Schwab and Steve Wozniak. Sinan has earned the distinction of Ellis Island Medal of Honor recipient as well as becoming knighted in Rome by the Royal House of Savoy.

**Kirksey & Co., Irvine**

*Kimberly Kirksey, CEO & President*

Kimberly Kirksey founded her company and grew it to a \$4.8 million business with 10 full-time employees in five years. She has maintained business volume throughout the COVID pandemic shutdowns without releasing any of her employees. She has been a board member of the 44W of Orangewood Foundation since 2008, serving as board vice-chair 2016-2017 and as board chair 2019-2020, and is a board member of Orangewood Foundation as of 2020. She continues to serve in an advisory and fundraising capacity as the current past chair. She has also contributed to a grassroots movement called California Love Drop that originated during the pandemic to help frontline workers and people in need.

**Kofax Inc., Irvine**

*Reynolds Bish, CEO*

Reynolds Bish was named to be Kofax's CEO in 2007. In addition to creating a new vision for the company, he's driven substantial strategic and transformational change throughout the business - leading unprecedented growth in revenues, operating income, and shareholder value creation. Prior to Kofax, he co-founded and was CEO of Captiva Software Corporation, a NASDAQ-listed company and leading provider of input management software and services, which was acquired by EMC Corporation in December 2005. Kofax software combines robotic process automation, cognitive capture, process orchestration, mobility and engagement, and analytics to ease implementations and dramatically improve the customer experience, greatly reduce operating costs, improve compliance and increase competitiveness, growth and profitability. The company is headquartered in Irvine, CA, has approximately 2,100 employees and expects to realize over \$625 million in annual revenues and a 34% EBITDA margin in 2019.

**KushCo Holdings Inc., Cypress**

*Nick Kovacevich, CEO*

Founded in 2010, KushCo is one of the leading pioneers and longest-standing companies in the legal cannabis industry. It was one of the first cannabis-related companies to go public in 2016. Since 2014 - 2019, the company was one of the fastest growing companies in the industry, more than doubling its sales each year. The company has sold more than a billion units to date to a customer base that is largely comprised of the leading operators across North America. Through its KushCares platform, the company has been a strong supporter of social justice and philanthropic initiatives that help strengthen local communities, empower KushCo employees and positively impact the legal cannabis and CBD industries. Its most recent projects include partnering with The Weldon Project's Mission Green to offer social equity programs for industry inclusion; being one of the first in the industry to award paid time-off for all employees on 2020 Election Day; and donating PPE supplies to healthcare workers on the frontline fighting the COVID-19 pandemic.

**Leaf Communications, San Clemente**

*Dan Leaf, President & CEO*

Leaf Communications, owned and operated by Dan Leaf, is dedicated to the community and supporting local growth by creating jobs and developing a workforce's skills in a relatively new but exponentially growing industry. The way Leaf quickly reacted to protect his employees in early 2020 when the pandemic hit showed leadership at a whole new level. His dedication to the health of the employees, in addition to the health of the company, set us up for continued growth for years to come. Leaf has grown and sold five businesses, including an \$80 million company post-sale in 2011. In an industry where the technology is changing faster than the networks can keep up, he represents innovation at its finest in both leadership and business development. Leaf has been recognized for his leadership across a gamut of awards, including Entrepreneur of the year 2019 from SBA, A finalist for Ernst & Young Entrepreneur of the Year Award for growth year over year, and INC5000 fastest growing company four years in a row.

**Lifestyle of Giving, Aliso Viejo**

*Melinda Masson, CEO*

Melinda Masson is known and recognized as an innovator, visionary and passionate entrepreneur. Having successfully founded and sold four related real estate companies, she received the highest multiple in that industry from a NASDAQ traded company; after this accomplishment, she paused to reboot and align herself with supporting fundraising efforts.

Masson pivoted her vision to support the non-profit industry with Scripsense, now rebranded and known as a Lifestyle of Giving. With this new business venture, Masson began creating private Marketplaces that immediately attracted large non-profits like OC United Way, Laura's House, and appealed to large corporations in their give-back programs, such as Nolet Spirits. This strategic move earned Masson one of the Top 100 Innovators and Influencers in Technology Award by InterCon, a feature as an influencing Woman Philanthropist by Desert Charities Magazine, and along with the Girl Scouts Leadership Award, the Servant Leadership Award from Chapman University, and Entrepreneur of the Year Award from INC. Magazine and many others.

**Managed Direct Response, Irvine**

*Pat Mercuri, Founder & CEO*

Pat Mercuri is founder and president of Managed Direct Response one of leading Direct Marketing companies in Orange County. Mercuri is recognized as an innovator in the direct marketing and lead generation industries in Orange County. Mercuri has over 20 years of experience in the industry. Mercuri is recognized within the industry for his expertise in direct response having introduced a number of innovative marketing programs for the Mortgage, Solar, Automotive and Retail Services. Mercuri's desire to create a company that was different and better, combined with fulfilling broader social responsibilities, led to unprecedented growth.

**Manna Kadar Beauty Inc., Irvine**

*Manna Kadar, Founder & CEO*

In January of 2012, after years of careful research and development, Manna Kadar Cosmetics was born. A prestige line of luxury cosmetic products formulated with the finest ingredients and most innovative technology. Manna Kadar designed the one and only Beauty Simplified System that minimizes the makeup application process to seven minutes or less. The award-winning Beauty Simplified System separates the makeup application process in three steps; Step 1- Prime, Step 2-Polish and Step 3- Perfect. Each product clearly indicates which step the product should be used indirectly on the product. This process guides women on how to easily create their desired look on a daily basis. A noted industry expert, beauty editor, and makeup artist to an impressive roster of celebrity clients, Manna Kadar has made a mark as an industry expert and a true trendsetter in the world of beauty. Kadar has been recognized by countless professional organizations for her business acumen and has received the USC Remarkable Women's Award in 2014 and has been recognized as one of the Fastest Growing Businesses by the Business Journal.

**Margaux Agency, Long Beach**

*Monica Garrett, Founder & CEO*

Monica Garrett is the CEO and Founder of the Margaux Agency, a Los Angeles County-based fitness digital marketing agency. Her passion for design, a keen eye for detail, and a deep understanding of digital marketing are the key elements of success for both herself and clients. Garrett believes creative branding is the greatest asset to any company, and that now more than ever, fitness brands need to invest in intelligent, competitive digital marketing strategies. From designing an enticing brand logo to an SEO strategy to social media content creation, the Margaux Agency understands every key element that is needed for a company to thrive in the digital marketing space. The Margaux Agency has become a top social media agency in Los Angeles, CA. Harnessing the agency's multifaceted skill set, the team is able to effectively help businesses grow and be recognized. From mid-size brands to large Fortune 5000 companies, every client the Margaux Agency works with is given the proper time, attention, and commitment to see their desired results - and beyond.

**McClain Cellars, Laguna Beach**

*Jason McClain, Proprietor & CEO*

After spending over 20 years in the dot-com world and over 30 years running a business McClain found himself on a true mission and a search for one thing: To create the finest wine from the best soils in California that would truly bring about an emotion to the one who enjoyed it. Since 2016 McClain Cellars has produced numerous award-winning and 90+ point wines, and has grown to two locations, with three additional locations on the roadmap for 2021, 2022, and 2023. As a mentor, coach and 30-year entrepreneur, McClain has sought to help people find their true passion in both business and life. He has had the privilege of employing hundreds of employees throughout the U.S., UK and other countries as well. He has built and sold more than a dozen companies over his career and in 2015 alone McClain's online efforts earned more than \$10 million.

**Modulating Imaging Inc. (DBA Modulim), Irvine**

*David J. Cuccia, Ph.D., Founder & CTO*

Modulim is a medical device company originally spun out of the Photonic Incubator in the Beckman Laser Institute and Medical Clinic (BLI) at UC Irvine. Dr. Cuccia founded Modulim to develop optical technologies that will impact a number of clinical problems in the diagnostic and therapeutic monitoring sector, particularly prediction, staging and monitoring of chronic wounds. To date, Dr. Cuccia and his team have successfully raised approximately \$11 million in grant funds and \$10 million of private capital to develop the company. Modulim received 510(k) FDA clearance and CE Mark for Clarifi, a quantitative, non-contact optical device for wide-field imaging of subsurface circulatory compromise, and aimed at helping Diabetic patients avoid complications such as chronic wounds and resulting amputations. Modulim received its own CPT code, 0061U, which allows doctors to typically bill \$25 patient visit.





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**Montessori Preschool, Irvine & Lake Forest, Irvine***Dr. Seema Choudhary, Founder*

Montessori Preschool, Irvine & Lake Forest evolved during COVID-19 by offering Preschool program Virtually. School also offered special discounts to families who lost the job during this time. A special program was created for low income families including Math Camp where services were provided virtually at no cost. School also offered Virtual sessions as a guest at kids museums and organizations. Montessori Preschool, Irvine & Lake Forest bought the whole community together during COVID-19. During these difficult time, kids & families stayed connected. Lot of sessions were offered at the Pretend City as well for Kids to learn and play.

**Movandi, Irvine***Reza Rofougaran, CTO, Co-CEO & Founder*

Reza Rofougaran is CTO, co-CEO and founder of Irvine-based 5G mmWave startup, Movandi. He is a leading pioneer, engineering executive, and entrepreneur in wireless system design. Prior to Movandi, Rofougaran was co-founder of Innovent Systems in 1998, and is one of the top ten patent holders in U.S. and top twenty patent holders in the world. Rofougaran is a Fellow of IEEE and Broadcom and was influential in starting and building the wireless business at Broadcom that shipped in excess of 1.5 billion radios per year. Rofougaran holds over 810 issued patents. Through Rofougaran's leadership, Movandi was named to the coveted 2020 CNBC Disruptor 50 list, a collection of the most innovative and game-changing private companies shaking up the business landscape and forcing incumbents to react and change. The CNBC Disruptor 50 accolade follows Movandi's recent news of partnering with Verizon to expand 5G mmWave coverage, and recognition as a CNBC 2019 Upstart 100, Global Semiconductor Alliance (GSA) Startup of the watch, Fast Company 2020 innovative startups to watch and one of the most disruptive technologies in 5G.

**Moxxe PR Inc., Tustin***Mona Shah, Owner*

Owner of Moxxe PR, Mona Shah is regarded as one of OC's most experienced and successful restaurant publicists. As an entrepreneur and mother to three beautiful children under the age of six, Shah approaches everything in her professional and personal life with creativity, authenticity, empathy and honesty. It is because of an unwavering commitment to these qualities, she has managed to have maintained long-lasting relationships with the area's top restaurants, including The Winery Restaurant & Wine Bar, Haven Craft Kitchen + Bar, Bruxie and Portola Coffee Roasters - all of whom she has worked with for more than a decade. Other current clients are ADYA, Driftwood Kitchen, Fable & Spirit, Georgia's, Hendrix, Knife Pleat and Sushi Roku Newport Beach, among others. In addition, Shah sits on the Board of Directors of the Orange County Restaurant Association and promotes the region's largest culinary event, Orange County Restaurant Week. Prior to her nearly 17 years leading Moxxe, she served as PR Director for the Miss Universe Organization, where she worked on three annual televised events, as well as initiatives in sub-Saharan Africa with the Harvard Aids Institute. Today, she continues to assist with the Golden Globes and Academy Awards telecasts annually.

**My Green Network, Santa Ana***Ken Hwang, Co-Founder, President & Chief Legal Officer*

My Green Network (MyGN) is an innovative, membership-based incubator cannabis company that offers members guaranteed licensing and business support services. The company was designed to counteract a consolidating cannabis market by fusing a shared-economy model with California's Type-S license. MyGN is revolutionizing the industry by breaking traditional barriers to entry through its network of licensed manufacturing facilities, allowing start-up brands to process cannabis products such as topicals, edibles, and beverages for legal distribution throughout California. Ken Hwang has over a decade of experience as an entertainment attorney. He began his career at NBCUniversal in Television Business Affairs before becoming General Counsel to GDC Technology Limited. When cannabis became legal in Colorado, Hwang was trusted with developing multi-million dollar start-up cannabis companies. His extensive knowledge and expertise in cannabis licensing has translated to success in California as well. He co-founded My Green Network with James Shih in 2018.

**My Green Network, Santa Ana***James Shih, Co-Founder & CEO*

My Green Network (MyGN) is California's premier membership-based space intuitively designed for cannabis entrepreneurs. Leveraging the power of community-based collaboration to revolutionize an infamously complex industry, this "cloud-kitchen meets cannabis incubator" accelerates the journey from idea to entrepreneurship. At MyGN, membership provides exclusive access to essential elements of a successful venture: a compliant cannabis facility, an extensive network of cultivators and manufacturing partners, guidance and supervision from industry experts, licenses, legal advice and much more. James is an attorney and licensed real estate broker. He is a partner at SMS law, specializing in investment immigration, international business development, and estate planning. Shih's legal expertise also includes family law and civil litigation. He co-founded My Green Network with Ken Hwang in 2018.

**Osmond Marketing, San Clemente***Amy Cook, CEO*

In 2009, as a Hail Mary following the Financial Crisis of 2007, Amy Cook took her portion of a tax refund she split with her husband and started a marketing company. Her decision paid off. Between 2013 and 2017, Osmond Marketing experienced 1,506 percent revenue growth. And every year from 2016 through 2020, Osmond Marketing was ranked as one of MountainWest Capital Network's Utah 100



fastest-growing businesses. While the company began by primarily serving book publishing and healthcare clients, Cook has led her team to provide services for technology, real estate, nonprofits, and other verticals. Osmond Marketing is a remote workplace with employees spanning the globe. It's challenging to create a cohesive culture with a remote workforce, but Cook has done just that, bringing together a hand-picked team of people who work exceptionally well together.

**Outshine Public Relations, Newport Beach***Talia Samuels, President*

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 recognized as a force in her field. Her agency, Outshine Public Relations, is a full-service agency providing public relations, social media management, photography, videography, and digital marketing.

**Pinnacle Petroleum Inc., Huntington Beach***Liz McKinley, President & CEO*

Liz McKinley founded Pinnacle Petroleum, Inc., a national wholesale marketing and distribution company in 1995. Pinnacle Petroleum, Inc. is a best-in-class provider of fuel and fuel management services to commercial, retail, and government Clients throughout the United States. Since founding the company McKinley has been the sole owner and key component to Pinnacle's growth and success. Operating initially out of her home, the company steadily grew to just under 200 million in revenue. McKinley's greatest achievement was winning the Ernst and Young Entrepreneur of the Year Award in 2010 and served on the judging committee in 2014, 2015 and 2017. McKinley began her career in the petroleum industry at Koch Industries, a large integrated privately-owned company, in Wichita, Kansas. She was the first woman hired at a commercial level as a Petroleum Commodities Trader. In 1995 she decided to leverage her experience and start her own business.

**Pismo Ventures, Irvine***JJ Richa, CEO*

At Pismo Ventures, they strongly believe that innovation is the life of our society. It is their goal for every entrepreneur, along with their ideas, to be heard and provide them with the support and direction needed to launch, grow and expand their business. Pismo Ventures launched, in the midst of the pandemic, its inaugural National Venture Plan Competition where 100s of companies competed in front of 160 investors that judged the competition. Further, 42 VCs and Angel group have given the winners the opportunity to raise capital across the nation. Pismo ventures has been helping startups and entrepreneurs build, grow and fund their business. JJ Richa is an accomplished serial entrepreneur, executive and investor. Richa has successfully founded several companies, where he served as president and CEO, including a software company for the hospitality industry, an online eCommerce portal for high-end made-to-order gifts, and a custom software development company concentrating on the financial sector. Richa is a private equity investor, a longtime member of Tech Coast Angels where he served as its vice president and a member of its executive committee.

**Pivotal Law Firm, Costa Mesa***Adam Miller, Co-Founder*

Adam Miller is the co-founder of Pivotal Law Firm, Inc., a corporate boutique law firm which is comprised of only partner-level attorneys that previously spent decades at large, international law firms. The firm's core mission is to provide high quality, cost-efficient legal services to its entrepreneur, start-up and venture finance clients. Pivotal's attorneys have represented clients in a variety of industries, including technology, software, sports and entertainment, food and beverage, manufacturing and retail, in venture capital financings raising more than \$400 million and sale transactions exceeding \$2 billion. Miller's clients at Pivotal include Tech Coast Angels (one of the largest angel investor group in the U.S.), UC-Irvine spinouts including Debut Biotechnology, Inc. and Immerse, Inc., Raise Holdings, Inc. (who has raised more than \$120 million in venture capital financings) and Parcel Pending Inc. (who sold for over \$100 million). Miller is also active in the startup community including serving on the Board of Directors of Tech Coast Venture Network, acting as an Innovation Advisor at UCI's Applied Innovation and presenting in numerous UCI Wayfinder Incubator Workshops and Bootcamps.

**Planet DDS, Newport Beach***Eric Giesecke, CEO*

Eric Giesecke and his investors acquired Planet DDS in 2015 and he has held the CEO role since that time annual revenues have grown from approximately \$5 million in 2015 to \$25 million in 2020. Employee headcount grew from approximately 35 to 95 today with offices in Scottsdale, AZ, Atlanta GA and Dayton, OH. Giesecke has lead and expanded the product offering to include the leading cloud-based software used by dental practices (Denticmon). In addition, the company acquired a smaller imaging firm Apteryx Imaging Inc. 2020. Previous to the Planet DDS role Giesecke worked at venture capital firms District Line Partners in D.C. Giesecke took over a stagnant water service business in Indianapolis in 2005 and grew to over 25,000 customers in five years and growing revenue 500%.

**Plutos Sama Holdings Inc., Irvine***Matthew Browndorf, CEO*

Matthew Browndorf is one of the best in locating and structuring strategic purchases of



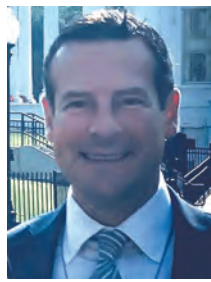
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international and domestic undervalued and distressed assets from companies in extreme distress. Browndorf has on multiple occasions formed consortiums of top banks and hedge funds to bid on distressed companies in excess of \$800,000,000 USD taking the lead as general partner for its stalking horse limited partners and navigating the complicated legal structures to exit the assets to western countries from eastern countries. Browndorf has bid on housing, commercial real property, gaming and online assets, restaurants and does business in China, Central & Eastern Europe, Western Europe and the United States. Browndorf has deployed in excess of \$198,000,000 USD in capital and managed a gross 23.16 XIRR on its own portfolios.

**Powerhouse Communications, Santa Ana**

*Kristin Daher, President & Founder*

Since founding Powerhouse Communications in 2016, Kristin Daher has shaped the agency into a literal communications powerhouse delivering an imaginative approach to PR, influencer and social media programs for consumer brands across a variety of industries including restaurant, CPG, franchise, retail, technology and health and fitness. In the last year, Daher expanded the agency's reach to work with international brands looking to increase awareness in the U.S. Always committed to company culture, Daher has built a healthy, creative environment for her employees to grow and thrive. Under her leadership, the agency has the privilege to manage communications strategies for clients like Mountain Mike's Pizza, Juice It Up!, WaBa Grill, London-based Tone & Sculpt and Japan-based Asahi. For the second consecutive year, Powerhouse was recognized as a high-ranking company in Entrepreneur's Top Franchise Suppliers list, which recognizes leading companies providing services to franchise companies. Daher also serves on the Board of Directors for the California Restaurant Foundation where she provides strategic counsel to increase awareness of the non-profit which provides much-needed support to the struggling restaurant community.

**Procure American Inc., San Juan Capistrano**

*Fred Armendariz, CEO*

In 2001 Fred Armendariz accepted a Senior Executive Service appointment by President George W. Bush to join the Administration. Amongst his initial assignments was to assist in the drafting the "President's Management Addenda" (PMA). His role within the PMA project was to identify private sector best practices that could be applied to government business purposes in an effort to deliver cost and operational efficiencies. It was here Armendariz first learned of "business intelligence services" (BIS) and the benefits that government agencies could achieve through leveraging this capability. In 2010, Mr. Armendariz formed Procure America (PA), the first company in the United States that specializes in providing government agencies with BIS services. Since the launch of PA, the company has worked with over 200 government clients including-federal, state and local agencies: including the County of Orange, and over 20 of the county's cities. With the extreme stress placed on local government budgets during the pandemic, PA has been instrumental in helping agencies lower expenses and manage services over this past year.

**Rallio, Irvine**

*Chuck Goetschel, CEO*

Chuck Goetschel is the co-founder of Rallio, a powerful SaaS combining cloud-based social media technology, artificial intelligence and employee advocacy. As the supplier of choice for franchise organizations and small businesses, Rallio enables multi-location brands and SMB operators to optimize their social media engagement, while managing their entire social media presence, online reputation, and online directory listings in one dashboard for all locations. By automating agency-like services and employee advocacy across their social media pages, brands multiply their reach exponentially and experience rapid month-over-month growth on social media. Rallio has earned recognition as an Entrepreneur magazine Top Franchise Supplier for three years running; an Inc.com Fastest Growing Company; and an Inc.com Fastest Growing Regional Company in California. Rallio has grown into one of the fastest growing technology companies in America, receiving numerous awards: OCTANE High Tech Innovation Awards finalist for Outstanding Emerging Technology in 2018; Comparably.com Best CEO award in 2018; Entrepreneur magazine's 360 list in 2019 featuring the top companies mastering the art and science of growing a business; Entrepreneur magazine's Top Franchise Supplier list in 2018, 2019, and 2020, where Rallio is listed as the #1 recommended social media technology for franchise brands; as well as Inc.com's 2020 list for fastest growing privately held companies in America - listed at #1,226.

**Revive, Irvine**

*Michael Alladawi, CEO*

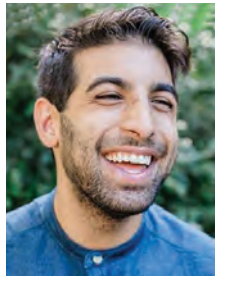
Revive is a fast-growing startup that is rapidly innovating in the real estate industry. The company offers a suite of products/services that add value to real estate professionals, homeowners, and service providers. Their platform is centered on lifting the burden of finding & managing the right contractor, designing for maximum profit, and fronting the costs for pre-sale home improvements. All of this is offered with zero fees/zero markups/zero additional costs to homeowners. The ability for real estate agents and brokerages to offer this solution to clients allows them to provide real value: creating a competitive edge, reducing stress/headaches, and maximizing home value. Michael Alladawi has 15 years of real estate experience in Southern California and beyond. He is recognized as being an expert in home value creation and in the industry in general and has been featured on the Bravo TV show Real Estate Wars.

**Revive, Irvine**

*Dalip Jaggi, Co-Founder*

Recognized as an active entrepreneur filled with high-energy, passion, and new ideas. Dalip Jaggi's career kicked off by building a brand-focused, engineering studio, Devise

Interactive. He led a team that concentrates on helping entrepreneurs & companies with early-stage concepts & innovations. The agency was acquired in 2018 by an international public-traded company, Vincit. Jaggi recently founded a start-up studio in Orange County, Branch Startup Studio. He is now focused on building companies in it's entirely for disruptive CEO's locally. Their first portfolio company is Revive, is a real estate services company that focuses on maximizing value and profit for home sellers.

**Robotic Assistance Devices, San Juan Capistrano**

*Steve Reinharz, President*

Steve Reinharz, founder of the company, started coding at 10 years old (1982) and self-published a book, An Introduction to Artificial Intelligence in 1991 while attending University in London, Ontario, Canada. The book was Reinharz's first entrepreneurial effort - he spent that summer selling it to high schools around the province for a profit of \$4,000. After accelerating his double major (political science and commercial studies) he moved to California and opened a security integration firm. By 30 years old had the trappings of financial success, building a custom home in Laguna Beach, etc. Had a big government contract, didn't get paid, and then subsequently lost everything by 32 years old. Reinharz then opened a division for a different security company and sold to Securitas for a nice exit a few years later and then floated around various firms until, after building a relationship with NVIDIA, started working with a mobile AI processor that could perform accurate human detection - from a mobile platform. It was in 2015 and Reinharz decided to open a security robotic company which he did in 2016.

**Scarlet Kitchen & Lounge, Rancho Mission Viejo**

*Paige Riordan, Executive Chef & Owner*

Since its opening in January 2020, Scarlet Kitchen & Lounge has delighted the Orange County community. Executive Chef/Owner Paige Riordan's menu focuses on time-honored family recipes and East Coast classics brought to life with the finesse and flair of West Coast farm-to-table cuisine. Scarlet Kitchen & Lounge is a family-owned business in every sense of the word. Riordan's husband, mother, and father are all involved in the day-to-day operations at the restaurant. Riordan is joined in the kitchen by her father Marty Manley, a former East Coast commercial fishing captain, who attended culinary school at the Art Institute of Orange County. The father-daughter duo attended their respective culinary schools simultaneously, and much like the menu at Scarlet itself creates a convergence of East Coast meets West Coast. Her husband Matt Riordan, a former finance executive, runs front-of-house operations as the restaurant's general manager; and her mother, Anne Manley co-owner and CFO of a family-owned business on the East Coast will manage business operations including HR and financials.

**SCGWest Development, Irvine**

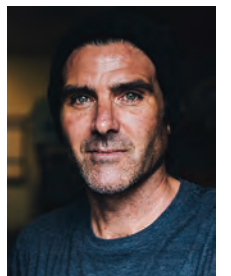
*Kyle Gorman, Co-Founder & Partner*

Kyle Gorman took his finance background and his passion for real estate and construction, and co-founded SCGWest Development in 2012. Gorman's formula of synchronizing all aspects of a project to a single point of contact while coupling proprietary technology, has facilitated the success of SCGWest. SCGWest is now the leader in development and design-build of retail, restaurants, and medical clinic offices across the southwestern United States. His career has traversed a variety of industry submarkets, including a financial analyst for investment sales, construction management of ground up builds and large-scale interior renovations, to eventually the industry of commercial real estate brokerage. In 2018 and 2019 the Orange County Business Journal awarded SCGWest as a top tenant improvement contractor for its work in the renovation of build out of hundreds of restaurants through the county. In 2020 INC. Magazine recognized SCGWest as one of the fastest growing companies, this was all possible because of the leadership that Gorman has shown.

**Sessions West Coast Deli, Newport Beach**

*Max Schlutz, Partner*

As the executive chef & partner of Sessions West Coast Deli in Newport Beach, Huntington Beach and Irvine, Chef Max Schlutz presents a menu of gourmet, culinary-focused sandwiches in a relaxed environment. The term "West Coast Deli" perfectly describes the marriage of a high-quality deli menu with a chill vibe that appeals to area locals and tourists alike. Sessions' dedication and commitment to its community has made it a hub for local surfers, skaters and Orange County diners looking for great sandwiches. Unlike most sandwich shops in the region, Sessions proudly boasts a scratch kitchen with housemade sauces, sides, salads, and soups prepared daily. All sandwiches are made to order with fresh, locally grown produce; humanely and naturally raised meats; and locally baked bread delivered daily.

**Ship & Shore Environmental, Signal Hill**

*Anoosheh Oskouian, President & CEO*

As the pollution control industry's only female CEO, Oskouian is unique within the environmental sector. For over two decades leading her global corporation to new heights, Oskouian has extensive experience in the engineering, design, and fabrication of industrial and commercial projects of a wide range of clean air technologies and established her expertise in air pollution abatement, carbon footprint reduction, waste heat and reusable energy recovery, and fabrication of integrated "green" solutions. Recognizing that her company has the capable technical assets and resources, Oskouian constantly empowers her team to innovate other technologies that will not only help the environment, but can be utilized for the betterment of humanity as a whole. In 2020, under Oskouian's direction, S&SE launched a new product line utilizing technology which will help to disinfect surfaces as well as purify air free from pathogens. The Korozone disinfection system utilizes







# Joe Pirro

## CEO of Sovereign Lending Group

When it comes to mortgage lending, the Pirro name is brought up often. Joe Pirro was exposed to the mortgage industry from a young age, thanks to his father who owned his own mortgage company. Pirro went on to study at the University of Southern California where he met his roommate and future Sovereign Lending Group Co-Founder, Dan Holtz.

Since SLG's inception, Pirro has put an emphasis on creating a culture that has a customer-first approach dedicated to helping homeowners save money on their mortgage.

Pirro has made it his mission to invest heavily in technology in order to streamline the lending process. His vision is to incorporate his mortgage lending expertise with the best cutting-edge technologies to automate as many systems and processes as possible, creating a better borrower experience. We consider ourselves a technology company just as much as we are a mortgage company.

Sovereign has also been able to leverage technology in its hiring efforts this past year. In the midst of COVID-19, Pirro's focus was to create jobs for those whose lives had been impacted by the pandemic and to provide opportunities within the mortgage industry. As a result of this, Sovereign Lending Group increased its headcount in 2020 by 182%.

The growth of the company over the past year has been impressive, but this is only the beginning. Under Pirro's leadership, SLG plans to expand to over 10,000 team members nationwide in an effort to continue to help hard-working Americans improve their financial situation.

### About Sovereign Lending Group

Sovereign Lending Group is a mortgage lender headquartered in Southern California. With interest rates near historic lows, refinancing your mortgage may be beneficial for you. If you would like to learn more about Sovereign Lending Group, visit [www.slgmortgage.com](http://www.slgmortgage.com) and give us a call at 1-800-689-1057.

**Sovereign Lending Group**  
**Incorporated**  
NMLS #189421





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a non-chemical disinfection and sterilization method. It can be used for large facilities including airplanes, restaurants, hotels, theatres, or other public areas in frequent contact with passengers and travelers to significantly decrease the risk of infection and - most importantly - provide peace of mind.

**Siege Pharmaceuticals Inc., Irvine**

*Aimee Edinger, President & Founder*

Siege Pharmaceuticals, Inc. was founded by Dr. Aimee Edinger in 2018. Dr. Edinger is a Professor in the Department of Developmental and Cell Biology in UCI's School of Biological Sciences and President and Founder of Siege. The company's objective is to translate academic research on intracellular transport into products to treat cancer by starving cancer cells. Prior to launching Siege, Dr. Edinger was awarded two grants from the UCI Beall Applied Innovation Proof-of-Product Program designed to move promising technologies out of the lab. In 2019, results from these awards helped launch Siege and secure a multi-million dollar investment from Kairos Ventures. Subsequently, Siege has successfully secured a one million dollar, Direct-to-Phase 2 SBIR award and attracted a new CEO, Dr. Dan Gil. The lead product is currently in preclinical development.

**Smart Cups, Mission Viejo**

*Chris Kanik, Founder & CEO*

Chris Kanik started Smart Cups from his kitchen table in 2013. From there, he went on to build out a 23,000-square-foot facility in Mission Viejo, CA that gained FDA approval and became home to The World's First Printed Beverage. Smart Cups launched an energy drink, its first product on December 11, 2017. The company currently produces and sells a line of energy drinks and a line of beverages for kids called Refreshers. Smart Cups is a sustainability driven technology company and Kanik's vision goes beyond consumer beverages, the technology will eliminate the need to bottle and ship liquids, which will have a significant impact on the current carbon footprint tied to the transportation of liquids. This technology can be easily implemented across a myriad of industries. In 2018, The Additive Advantage, the mother company that held the patents, was acquired by International Flavors and Fragrances (IFF). Smart Cups remains a licensee and manufacturing arm. Kanik obtained a TTB Distillery Permit in 2020, as well as has a patent pending on novel manufacturing. In November 2020, Smart Cups introduced their family-friendly and caffeine-free beverage option, Refreshers.

**Smart Energy Water (SEW), Irvine**

*Deepak Garg, Founder & CEO*

Deepak Garg is the founder, chairman, CEO of Smart Energy Water (SEW). SEW was founded in 2012, under the guidance, vision, and leadership of Garg. He has been solely responsible for setting the direction for the company and over the years, he has brought together like-minded, passionately driven teams, to develop the world's leading Digital Customer Experience, Digital Workforce Experience, Smart AI/ML Analytics Platforms that addresses key business challenges for the energy and utility industry. Each SEW Platform is a category leader- with robust technological foundation, delivering tangible and intangible benefits for the clients. Garg has been leading the development and execution of long-term strategies for SEW, with the goal of increasing shareholder value. All of SEW's platforms leverage next-gen technologies such as Artificial Intelligence, Machine Learning, IoT to power customer and workforce experiences. Driven by Garg's stellar vision, SEW has navigated across geographies to serve energy and utility companies in over 18 countries. It is his passion and dedication that is reflected in the 600 employees of SEW, who are working towards a movement – building a sustainable future, together.

**Smart Kitchens, Irvine**

*Nicholas Crane, Founder*

First Ghost Kitchen concept in Orange County, Smart Kitchens launched March 2020 with 8 restaurant concepts that all have 4-5 stars on Yelp. Smart Kitchens (also known as ghost kitchens) are a great way for caterers, meal delivery, restaurants and everything in between to grow and expand. Crane is working to build additional Smart Kitchens throughout Orange County.

**Soul Community Planet, San Juan Capistrano**

*Ken & Pam Cruse, Co-Founders*

Soul Community Planet ("SCP") was launched in 2018 as a Social Enterprise. The vision of Soul Community Planet is to make the world a better place by serving those who value wellness (Soul), kindness (Community) and the environment (Planet). Soul Community Planet grew from an idea in 2018, to three hotels by the end of 2019. At the end of 2019, Soul Community Planet completed a Series A capital raise valuing the company at approximately \$28 million. At the end of 2020, after achieving overwhelmingly positive traveler acclaim, with each of its prototype hotels gaining significant market share against established, dominant brands, Soul Community Planet announced a \$210 Million equity investment giving it the ability to add upwards of \$500 Million in new hotels to the brand. This is proof that, despite one of the most difficult years for the hospitality on record - due to the pandemic - Soul Community Planet's new approach to Holistic Hospitality has been very well received by conscious consumers and positions the company for success as the post-COVID recovery continues.

**Sovereign Lending Group, Costa Mesa**

*Joe Pirro, Co-Founder*

Sovereign Lending Group has grown to extreme heights ever since its inception in 2005. During the Coronavirus pandemic, many companies had to cut off their recruiting and lay off employees. Sovereign Lending Group decided that it would be a great time to grow the company and help people transition out of their old careers that have been affected by the pandemic. The stories that we hear about changing peoples lives is



why we are thrilled to work with each other every day. Joe Pirro is a Co-Founder of Sovereign Lending Group and is extremely active within the company. The company has reached over 450 team members in just 15 years and is licensed in 45 states. Pirro and SLG also created their very own MLO training program called Tech 1 which is where 85% of the companies production comes from.

**Spinnaker Investment Group, Newport Beach**

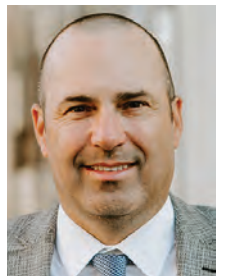
*Morgan Christen, CEO & Chief Investment Officer*

Morgan Christen leads the investment committee in building customized portfolio solutions for their clients. Spinnaker's business model is 'client-first' and its advisors are equipped to act as personal CFO's for their customers, be they individuals or small to mid-size companies. The entire team is focused on a community-based approach, participating in numerous philanthropic and civic organizations and activities. Mr. Christen was recently appointed to the Board of Directors for Pepperdine University's Graziadio School of Business. Christen, together with co-founder Joe Stapleton, launched Spinnaker Investment Group with the belief that clients would be better served by an objective and transparent fiduciary portfolio management approach. In previous roles the firm's principals witnessed other financial managers incentivized to promote particular investment funds tied to specific banks and institutions. Consequently, Spinnaker is a completely independent practice that does not represent any specific company, bank or Wall Street institution. The firm advises clients with the ultimate goal of enabling clients to achieve financial independence. Spinnaker's services include Financial Planning, Wealth Planning, Retirement Planning, Asset Management, Securities and Insurance, catering to a broad customer base throughout Southern California, along with many clients across the United States.

**Sprive, Newport Beach**

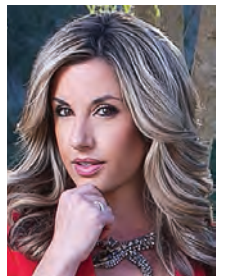
*Jason Prattes, President*

Born and raised in San Clemente, CA, Jason Prattes started out in the industry of finance and wealth management early in life. While attending college and double majoring at SMU, he interned during the summers for ING, a financial services firm. He later went on to become a founding employee and shareholder of National Retirement Partners (NRP) in Orange County and contributed to its rapid growth to become the largest independent broker dealer specializing in 401(k) retirement plans. NRP was acquired by LPL Financial in 2010. Prattes continued his career at LPL and began focusing on a special niche in the field of professional athletes. Many professional athletes often lose track of their spending habits and are left with very little when their careers are over. Prattes wanted to change that. With a true passion for sports, investing and helping people budget and grow their wealth, he went to great lengths to network within the sports industry and narrowed in on the NFL, although he serves baseball, golfers in addition to high-net-worth clients as well. He then started Sprive Capital Management which he skillfully named by combining the words: Succeed, Prosper, and Thrive.

**Sterling Public Relations, Corona del Mar**

*Paula Steurer, President & Founder*

Celebrating the 13th anniversary of Sterling Public Relations, Paula Steurer founded the company as a Publicity, Branding and Marketing hybrid in 2008. Steurer's innovative vision, strategic approach, and forward-thinking philosophy has played a vital role in propelling the brand's her firm represents into the spotlight. 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. Her refreshing perspective on the world of PR, Marketing and Branding has positioned her as a keynote speaker and workshop leader for nationally recognized brands such as Mindbody, Vizio and Oracle. Through her leadership, Sterling Public Relations has become the in-demand firm for brands throughout California and North Texas who desire a competitive edge. The firm is designed for those who are ready to reimagine, reconnect, and reignite their brand strategy, messaging, and PR efforts.

**Stretto, Irvine**

*Jonathan Carson & Eric Kurtzman, Co-CEOs*

As entrepreneurial partners for nearly two decades, Jonathan Carson and Eric Kurtzman share a vision and passion for building new solutions for the bankruptcy industry. In establishing Irvine-based Stretto, they have combined their entrepreneurial vision and experience as former corporate restructuring attorneys to create an unparalleled portfolio of solutions for consumer and corporate bankruptcy professionals and fiduciaries. Over the past year, their business has played a significant role in response to the COVID-19 economic crisis as they support companies undergoing corporate bankruptcy, providing more efficient and streamlined approaches to the administrative aspects of the process for restructuring professionals and debtors. With a wave of consumer bankruptcy filings expected in the months ahead, they have ramped up capabilities to help consumer bankruptcy professionals and debtors to navigate their case management needs. Through opportunistic M&A activity and a culture of innovation, they have identified new ways to serve the bankruptcy industry and remain focused on continuing their quest to make the bankruptcy process easier for companies, professionals and individuals.

**Synergy Restaurant Consultants, Newport Beach**

*Dean Small, Founder & Managing Partner*

Founded in 1988 by two graduates of the Culinary Institute of America Synergy Restaurant Consultants is a full service consulting group. They have helped over 1,800 restaurants both domestically and internationally improve its operations, food quality, consistency and create organizational structure that enables it to grow and create new jobs. Some of their major accomplishments include launching Boston Chicken, developing the food programing for the Princes Nora University, developing the new Red Lobster menu, launching new restaurants in the caribbean and Latin America. As part of their





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community involvement, Synergy created a Culinary Institute of America scholarship program designed to help students entering the entrepreneurial program.

**Synoptek Inc., Irvine**

*Tim Britt, CEO*

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

**TAE Technologies, Foothill Ranch**

*Michl Binderbauer, CEO*

Dr. Michl Binderbauer is the chief executive officer of TAE Technologies and is a co-inventor of many of the company's technological advancements. Dr. Binderbauer has dedicated the past two decades to evolving the knowledge and technology of TAE. He is an expert in reactor kinetics, equilibrium, and stability of advanced beam-driven Field-Reversed Configurations and aneutronic fusion systems. Recently, he has focused on reactor physics, engineering and enabling technologies, and a wide array of applications of the core TAE technologies — from medicine to isotope production and chemical processing. He holds more than 40 issued and pending U.S. patents and numerous international technology patents, and he has authored or co-authored many peer-reviewed publications in the areas of plasma physics and fusion. As a founder of the company, Dr. Binderbauer has helped build the team and the company from its very beginning. He has been instrumental in helping raise over half a billion dollars in investment capital beginning with small investors and a \$1 million seed round to multi-hundred million dollar rounds at a \$1 billion-plus valuation from some of the world's largest venture capital firms.

**Tagnos, Aliso Viejo**

*Neeraj Bhavani, Founder*

Neeraj Bhavani founded Tagnos which improves the patient journey inside the hospital using IoT and AI. He has raised over \$12 million for Tagnos through recognized venture capitalists, corporate investors including Honeywell, Zebra Technologies and Cisco, and prominent angel investors. He has taken Tagnos through EvoNexus and Cisco

EIR(entrepreneur-in-residence) program. Bhavani is a recognized expert in wireless healthcare and workflow automation and holds several patents in the space. He has served as Sponsorship Chair on the board of the Healthcare Information and Management Systems Society (HIMSS) Southern California Chapter and served as co-Chair for EvoNexus IoT group. Bhavani is also past President of TiE (The Indus Entrepreneurs) SoCal chapter where he founded a virtual incubator called TiE SoCal Labs which gave birth to TiE SoCal Angels. Prior to founding TAGNOS, he served in management consulting and IT leadership roles at Kaiser Permanente, IBM, Amgen, Blue Shield and THQ Wireless. Bhavani earned a Master's degree in Computer Science from BITS Pilani (India) and an MBA from UCLA Anderson School of Management with an emphasis in Finance and Entrepreneurship.

**Terra Tech Corp., Irvine**

*Derek Peterson, CEO*

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

**The Bahnsen Group, Irvine**

*David L. Bahnsen, Founder, Managing Partner & Chief Investment Officer*

What started as a one-man practice inside Paine Webber twenty years ago has become one of the most successful wealth management businesses in the country, and among the most premier firms in Orange County. With \$2.6 billion of assets under management and a 31% growth rate for twenty years, David has built The Bahnsen Group into a business that is annually recognized as one of the best financial advisory businesses in the country by Barron's, Forbes, and the Financial Times.

**The Mark USA INC., Irvine**

*Traci Shirachi, CEO/President*

Traci Shirachi is the president/CEO of The Mark and oversees all of the company operations, finances, and business development. She bought The Mark in September 2017



Soul Community Planet congratulates  
its founders Ken and Pam Cruse  
along with all honorees of the

2021 OCBJ Excellence in  
Entrepreneurship Awards



HEALTHY. KIND. GREEN.





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and came in with a vision of how to use her business background to grow the company. The Mark has been around for 12 years and has primarily worked in the education sector. Through Shirachi's vision and networking she has helped grow the business to include nonprofit and corporate clients. Shirachi has over 17 years of work experience with consulting companies of various sizes, including PricewaterhouseCoopers. She received a B.A. in political science at the University of California, Davis, and an M.B.A. from Vanderbilt University.

**The OC Nest, Irvine**

*Stacy Borroto, Owner & Broker*

The OC Nest is a woman-owned, small business located in Orange County that has helped Buyers and Sellers find their dream home for the past decade. The OC Nest provides the Orange County community the comfort of working with an experienced broker, but the personal touch of a friend whose goal is to help you find your perfect "nest." The OC Nest has a measurable impact on the lives of first-time home buyers, sellers, and families. Having a dedicated & experienced broker negotiating on behalf of the client has helped save tens of thousands of dollars for the clientele of The OC Nest. It is well-documented that buying or selling real estate has traditionally been a high stressor for people. With that in mind, The OC Nest has tailored their business model to provide a consultative process that leads with transparency, and pride of integrity to each client. This perspective alone has made this monumental difference in the overall experience for the client which eliminates the stress and creates a space of joy, achievement, and appreciation. Real estate is one of the largest financial investments one can make, The OC Nest recognizes this and approaches each client with care and gratitude which transcend throughout the process. It's no wonder why 98% of their business is referral based.

**The Zandbergen Group, Laguna Beach**

*Bart Zandbergen, CEO & Founder*

Bart Zandbergen is an esteemed Certified Financial Planner and the founder and CEO of The Zandbergen Group. An OC native and long-time Laguna Beach resident, Zandbergen couldn't think of a better city for his namesake office to call home. As a nationally recognized authority in financial planning and investment advising, Zandbergen has devoted his career to guiding clients to a life full of purpose and financial freedom through personalized financial planning. Zandbergen holds a FINRA Series 7 license as well as a Life/Health/Disability Insurance license and is a Certified Divorce Financial Analyst. Now in its third year of production, Zandbergen is also the podcast host behind The Zandbergen Report. His podcast show features commentary on the world of finance and investments as well as interviews with some of Orange County's hottest entrepreneurs, philanthropic leaders, and industry innovators.

**TurnKey Beauty Inc., Vincenzo Skincare LLC, Capistrano Beach**

*Vince Spinnato, Founder & CEO*

Over 25 years, Vince Spinnato went on to consult, help develop and manufacture new product lines and private label lines for numerous cosmetics and health care companies such as Chanel, Limited (Victoria Secret, Bath & Body Works), Gap/Banana Republic, P&G, J&J, Trader Joes, Whole Foods, Kmart/Sears and many others. He also worked on developing new products for celebrities including Jennifer Lopez, Ole Henriksen, Jessica Simpson, Lilian Garcia, Carrie Underwood, Pitbull and French Montana, among others. Spinnato's vigilance to ingredients and their corresponding results has been key to his product successes. As soon as Spinnato was financially able, he began giving back in five areas: music scholarships, water wells in Africa "Wells Of Life", the Wounded Warrior project, finding treatments for trichotillomania, a hair pulling disorder that has beset him since age 11, and the Muscular Dystrophy Association, a non-profit trying to find treatments and cures for amyotrophic lateral sclerosis (ALS), the disease that took his mother's life. And, Spinnato established two scholarships in the arts at his alma mater, Vineland High School in New Jersey, to honor his father and grandfather both who were well known musicians. It is named "The Professor Enrico Serra & Vincent Spinnato Sr. Scholarship" and Spinnato personally presents the awards every year.

**U.S. Alliance Group Inc., Rancho Santa Margarita**

*Fadi Cheikha, CEO*

Fadi Cheikha was raised in Lebanon by his Lebanese father and Greek mother. He finished college with two degrees: Business Management and Economics, and at the age of 20 left Lebanon for the United States. Cheikha speaks, reads, and writes fluently in English, French, and Arabic; but struggles to remember his Greek. US Alliance Group, Inc, doing business as Electronic Cash Systems and Alternative Payments International, has had the honor of being ranked six times on the Inc. 500/5000 lists of the fastest-growing companies in America as well as recognized by the Orange County Business Journal multiple times as the top 100 Fastest Growing Private Companies. The Orange County Register and its own supplier partners have also recognized USAG for growth and innovation. Most recently, US Alliance Group, Inc. has been recognized by Inc Magazine and The Orange County Register as a top place to work. Being recognized by his employees for providing a work environment where people feel appreciated and respected is one of Cheikha's proudest achievements.

**Utility Systems Science & Software, Santa Ana**

*Mark Seres, Vice President*

Utility Systems Science & Software (US3) provides nationwide, cost-effective IoT web enabled wastewater flow monitoring services, including SSO/CSO alert monitoring using their exclusive StreetSmart technology. US3 engineers and technical personnel have applied advanced instrumentation system technology to water/wastewater



monitoring & control systems, pipeline evaluation, engineering and data analysis. Their industrial hardware & software solutions address production operations, production performance, utility intelligence, operations management and collaboration. By relentlessly focusing on solving customers' most pressing operational problems, and delivering robust, secure and easy to use solutions to solve those problems. US3 has grown to become one of the leaders in hardware/software solution providers for both water and electric utilities. This unique integrated systems approach allows the company to bring greater insight and intelligence gathering information about the water and wastewater system performance to their clients, and in turn to support the fulfillment of their commitments to manage and obtain cost efficient designs, operations, and maintenance of these systems.

**Vincit, Irvine**

*Villie Houttu, CEO*

Ville Houttu is founder and CEO of Vincit California, Inc., a custom software development and design agency. Houttu opened Vincit California in 2016, and has grown US operations to \$6.5 million with two successful acquisitions, one in 2017 and one in 2018. Houttu's innovative nature and track record for value creation has led Vincit in supporting software projects across multiple industries nationwide. His creative ideas and ability to motivate those around him has led to consistent growth in earnings; \$2.1 million in 2017 to earning \$5 million in 2018 and \$6.5 million in 2019 and 2020 despite the uncertainty amongst the pandemic; as well as business recognition. Vincit has been named a Best Workplace for Innovators by Fast Company Magazine 2020, Best and Brightest Companies to Work For in the Nation, Inc. Magazine Best Workplace list 2019, final four for Best Small Technology Company CEO by Octane, OCBJ Best Places to Work List 2020, 2019 and 2018, and OC Register's Top Workplaces 2020, 2019 and 2018.

**Virtanza, Laguna Beach**

*Debbie Holzkamp, CEO*

In three decades of managing sales at Fortune 500 companies, Debbie Holzkamp led teams that achieved over \$1 billion in sales. Her ongoing challenge was finding sales candidates with the appropriate qualifications to keep the pipeline full: a common dilemma for companies. To close that gap, she created Virtanza, the only sales training company that offers higher education institutions a scalable sales education solution directly connected to employers. The online program is engaging and experiential for students and effortless for colleges, plugging seamlessly into any school's Learning Management System (LMS). Essentially a turn-key method of adding valuable, skill-based education to attract enrollees, Virtanza's core programs earned the approval of the American Council on Education (ACE) for transferable college credit. Holzkamp and her team are committed to giving the unemployed and under-employed tools to enter the workforce and thrive in it.

**Wahoo's Fish Taco, Tustin**

*Eduardo Lee, Co-Founder/Partner*

Ed Lee is co-founder and partner of Wahoo's Fish Taco, responsible for the expansion and development of what has become one of the most iconic fast-casual restaurant brands in the United States. With more than 35 years of experience in the restaurant and hospitality industry, he has helped his co-founding brothers Wing Lam and Mingo Lee establish Wahoo's as a pop culture mainstay in California and beyond. In addition to forging partnerships with renowned brands like Quiksilver, Billabong, Hurley and Vans, Lee has ensured Wahoo's consistent brand presence at high-profile surf, sporting and music events such as the X-Games, Vans Warped Tour and Coachella among others. The company has 60 locations in the U.S. and Japan, with 33 in California, and continues expanding thanks to the tenacity and hard work of the three brothers.

**Ware Malcomb, Irvine**

*Lawrence Armstrong, Chairman*

Ware Malcomb Chairman, Lawrence Armstrong, is both an accomplished architect and strong business leader. He is well known for his strategic, visionary approach to the company's management and growth, as well as his commitment to fiscal discipline to ensure the overall health of the firm. His strong design ability and focus on creativity and innovation greatly influence all aspects of the organization. His philosophy of embracing change and rewarding achievement and innovation has resulted in a highly successful, dynamic firm. Armstrong is a past winner of the Ernst & Young's Entrepreneur of the Year Award, Orange County/Desert Cities Region and was also a national finalist. Armstrong has led the creation of Ware Malcomb's overarching business strategy, which focuses on innovative measures promoting ongoing success of the company and community.

**Xponential Fitness, Irvine**

*Anthony Geisler, CEO*

Founded in 2017 by Anthony Geisler, Xponential Fitness has built and curated the largest diversified platform of eight disruptive boutique fitness brands spanning across fitness and wellness verticals - including Pilates, indoor cycling, stretch, rowing, dance, running, and yoga. Most recently, Xponential Fitness has also launched their video on demand platform, GO, which delivers on demand and live class content across all 8 brands. Xponential Fitness's portfolio of brands includes Club Pilates, the nation's largest Pilates brand; CycleBar, the nation's largest indoor cycling brand; StretchLab, a concept offering one-on-one assisted stretching services and group stretch services; Row House, a high-energy, low-impact indoor rowing workout; AKT, a dance-based cardio workout combining toning, interval and circuit training developed by Celebrity Trainer Anna Kaiser; YogaSix, a modern boutique yoga brand; Pure Barre, a total body workout that uses the ballet barre to perform small isometric movements; and most recently, STRIDE, a treadmill-based cardio and strength training concept. Headquartered in Irvine, CA, the company currently has over 1700 studios across the world and continues to grow at a rapid pace.







## Congratulations 2021 Nominees

**360 Clinic** - Vince Tien  
**ADYA** - Shachi Mehra  
**AIVITA Biomedical Inc.** - Dr. Hans Keirstead  
**Aristo Cyber Defense** - Cory Swartzbaugh  
**Avatar Partners Inc.** - Marlo Brooke  
**The Bahnsen Group** - David L. Bahnsen  
**Baldwin & Sons** - Al Baldwin  
**Beacon Pointe Advisors** - Shannon Eusey  
**Beyond Fifteen Communications** - Lauren Ellermeyer  
**Blue C** - Eric Morley  
**Branded Group** - Michael Kurland  
**Braver Players Musical Theater Foundation** - Chelsea Braverman  
**Business Titans** - Olympia Hostler  
**C3 Tech** - Tricia Sanchez  
**CBT** - Kelly Ireland  
**CISOSHARE** - Mike Gentile  
**CoinLinked Inc.** - Jenny Ta  
**Commit2b.FIT** - Kasia Andrzejuk  
**Creative Clarity Inc.** - Kimberly Flora  
**Crossover Health** - Dr. Scott Shreeve  
**David Meltzer Enterprises** - David Meltzer  
**Dimer** - Elliot Kreitenberg  
**DYG Beauty USA** - Dianne York  
**E Factor** - Kari Willis  
**Expert Coatings & Graphics** - Sandy Ceron  
**Extraordinary Lives Foundation** - Mara James  
**Fable & Spirit** - Darren & Jean Coyle  
**FivePoint** - Emile Haddad  
**FreightPop** - Kurt Johnson  
**Glasspar** - Rob Wilson  
**Haven Collective** - Wil Dee  
**IBEC INC.** - Bardia Vahidi  
**Idea Hall** - Rebecca Hall  
**InBrace** - Dr. John Pham  
**Indi** - Neel Grover  
**Inside Sales by Design** - Dionne Mischler  
**Intellivision** - Tommy Tallarico  
**Ivantis Inc.** - Dave Van Meter  
**Janene Verabian CHt, CLC, CWK** - Jenene Verabian  
**Kadenwood LLC** - Erick Dickens  
**KCOMM** - Sinan Kanatsiz  
**Kirksey & Co.** - Kimberly Kirksey  
**Kofax Inc.** - Reynolds Bish  
**KushCo Holdings Inc.** - Nick Kovacevich  
**Leaf Communications** - Dan Leaf  
**Lifestyle of Giving** - Melinda Masson  
**Managed Direct Response** - Pat Mercuri  
**Manna Kadar Beauty Inc.** - Manna Kadar  
**Margaux Agency** - Monica Garrett  
**The Mark USA Inc.** - Traci Shirachi

**McClain Cellars** - Jason McClain  
**Modulated Imaging Inc. (dba Modulim)** - David J. Cuccia, Ph.D.  
**Montessori Preschool, Irvine & Lake Forest** - Dr. Seema Choudhary  
**Movandi** - Reza Rofougaran  
**Moxxe PR Inc.** - Mona Shah  
**My Green Network** - Ken Hwang  
**My Green Network** - James Shih  
**The OC Nest** - Stacy Borroto  
**Osmond Marketing** - Amy Cook  
**Outshine Public Relations** - Talia Samuels  
**Pinnacle Petroleum Inc.** - Liz McKinley  
**Pismo Ventures** - JJ Richa  
**Pivotal Law Firm** - Adam Miller  
**Planet DDS** - Eric Giesecke  
**Plutos Sama Holdings Inc.** - Matthew Browndorf  
**Powerhouse Communications** - Kristin Daher  
**Procure America Inc.** - Fred Armendariz  
**Rallio** - Chuck Goetschel  
**Revive** - Michael Alladawi  
**Revive** - Dalip Jaggi  
**Robotic Assistance Devices** - Steve Reinharz  
**Scarlet Kitchen & Lounge** - Paige Riordan  
**SCGWest Development** - Kyle Gorman  
**Sessions West Coast Deli** - Max Schlutz  
**Ship & Shore Environmental Inc.** - Anoosheh Oskouian  
**Siege Pharmaceuticals Inc.** - Aimee Edinger  
**Smart Cups** - Chris Kanik  
**Smart Energy Water (SEW)** - Deepak Garg  
**Smart Kitchens** - Nicholas Crane  
**Soul Community Planet** - Ken & Pam Cruse  
**Sovereign Lending Group** - Joe Pirro  
**Spinnaker Investment Group** - Morgan Christen  
**Sprive** - Jason Prattes  
**Sterling Public Relations** - Paula Steurer  
**Stretto** - Jonathan Carson & Eric Kurtzman  
**Synergy Restaurant Consultants** - Dean Small  
**Synoptek Inc.** - Tim Britt  
**TAE Technologies** - Michl Binderbauer  
**Tagnos** - Neeraj Bhavani  
**Terra Tech Corp** - Derek Peterson  
**TurnKey Beauty Inc., Vincenzo Skincare LLC** - Vince Spinnato  
**U.S. Alliance Group Inc.** - Fadi Cheikha  
**Utility Systems Science & Software** - Mark Serres  
**Vincit** - Ville Houutu  
**Virtanza** - Debbie Holzkamp  
**Wahoo's Fish Taco** - Ed Lee  
**Ware Malcomb** - Lawrence Armstrong  
**Xponential Fitness** - Anthony Geisler  
**The Zandbergen Group** - Bart Zandbergen

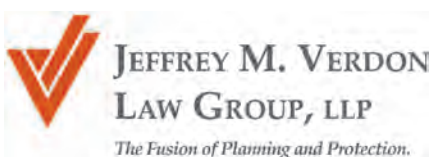
### FREE Virtual Awards Program

May 6, 2021  
 2:00 – 3:00 p.m.

### Reservation Information

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