CUSTOM CONTENT
NOVEMBER 18, 2019

IN THEIR 40s

LEADING FINANCIAL SERVICES & ACCOUNTING PROFESSIONALS

40 IN THEIR 40s

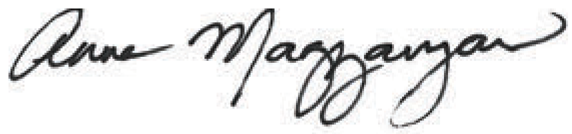
Letter from the Publisher

A skilled accountant or financial services professional can be one of the key ingredients for any company's success. Fortunately, it's a growing group – the numbers of young people training to become CPAs are up, and in Los Angeles, there is no shortage of excellent financial professionals. Many of them happen to be in their 40s.

For this issue, we've reviewed the careers of many of the standouts in the accounting and financial services space, and have selected 40 of the very best to be showcased here. Listed alphabetically, you'll find some of L.A.'s leading experts on the bottom line, along with some basic information about their careers, attributes and accomplishments.

Congratulations to each of the 40 superb accounting and financial services professionals who made this list and thank you for working to keep the people and businesses of Los Angeles on the right fiscal track.

Best regards,



Anna Magzanyan
Publisher & CEO

40 IN THEIR 40s

TOM BARRY

Managing Partner
Green Hasson Janks
Accounting

Tom Barry, managing partner at Green Hasson Janks, knows the importance of not only being a part of the discussion but to be leading it and shaping the accounting profession. His contributions to the accounting industry and push to create dialog on its evolution and changing approach to recruiting have cemented his place as a leader in his field.

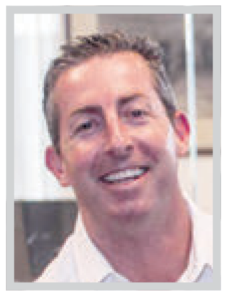
Barry has spearheaded the firm's approach to work life balance. Barry believes every day is a chance to #BeMore. Not do more. Not work more. Instead, he encourages employees to be the best they can be and enjoy life to the fullest. In Barry's #BeMore vision, he recognized that individual goals, whether personal or professional, have the greatest opportunity for success if team members can #BeMore to SELF, FAMILY and FIRM. These three tenets of the #BeMore philosophy are how Green Hasson Janks is building a next generation firm under Barry's guidance.

TONY BERKUS

Managing Director
Duff & Phelps, LLC
Financial Services

Tony Berkus is managing director in the Transaction Advisory Services practice of Duff & Phelps. He started his 18-year career in public accounting at PwC and for the last 14 years has been focused exclusively on financial accounting due diligence. Since joining Duff & Phelps in 2011, he has been a valued advisor to private equity clients, strategic buyers and lenders on over 200 M&A and recapitalization processes.

With deep experience in software, media, consumer and manufacturing industries, Berkus serves his clients by drawing from a broad range of technical and business knowledge to solve complex financial diligence matters. Recent work includes buy-side and non-control investments for clients across Southern California and the Bay Area including, H.I.G., ROCA Partners, Accel-KKR, and Morgan Stanley among others. While also working with established private equity funds and corporations, Berkus has been an advisor to several growing private equity funds and investor groups.

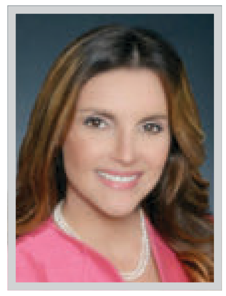


RYAN J. BERNATH

Senior Managing Director, Investment Banking
B. Riley FBR, a B. Riley Financial Company
Financial Services

Ryan J. Bernath is a senior managing director of investment banking with B. Riley FBR, Inc. Based in West Los Angeles, B. Riley FBR is a full-service investment bank specializing in initial, secondary and follow-on offerings, institutional private placements, merger and acquisitions advisory services, and corporate restructuring. The firm covers more than 450 companies.

Bernath joined legacy B. Riley in 2010 as a managing director prior to the company's acquisition of Friedman, Billings and Ramsey (FBR & Co) in 2017. With approximately 20 years of investment banking experience, Bernath has executed a wide range of mergers & acquisitions and corporate finance transactions for large-cap and middle market companies. As part of the firm's investment banking senior leadership, Bernath is focused on covering high-priority industry verticals such as Aerospace & Defense, Automotive, Business Services, Electronics and Electronics Manufacturing Services.



CLAUDIA BODAN

Los Angeles Region Market President
Commercial Bank of California
Financial Services

Claudia Bodan is Los Angeles Region market president for Commercial Bank of California. She has been in the banking industry for 23 years and her professional career has been dedicated to helping business entrepreneurs grow their business by being advisory in providing flexible and creative solutions to meet their business needs. She is passionate in serving the business and philanthropic community and is a well-respected leader given her past and continuous community contributions.

In 2016 Bodan was awarded the Young Hispanic Corporate Achievers award by The Hispanic Association on Corporate Responsibility in addition to The Access to Capital Banker of the Year Award by the Department of Commerce and is also a recipient of the Dulcenia Award for her leadership endeavors in the Finance Community. She has served as President of the National Latina Business Women's Association Los Angeles Chapter and California State President for DECA/DEX.

PRADEEP BUDHIRAJA

Audit and Accounting Shareholder
Gumbiner Savett Inc.
Accounting

Pradeep Budhiraja is a shareholder and quality control officer at Gumbiner Savett Inc. Budhiraja has helped startup companies navigate through the daunting process of initial public offering, having had success with four IPOs in the last five years. He also provides audit and financial reporting services to SEC registered and privately held entities. His clients include companies in the technology, manufacturing and distribution, retail, and telecommunications industries.

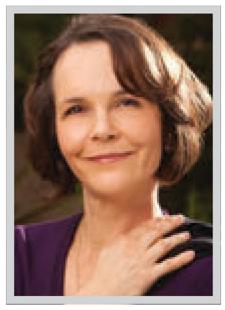
Last year, Budhiraja was appointed to the California Board of Accountancy's (CBA) Qualifications Committee (QC). The committee assists the CBA in its licensure activities by reviewing the experience of applicants for licensure and making recommendations to the CBA. Budhiraja also serves as the quality control officer for Gumbiner Savett and is responsible for promoting operational quality throughout all engagements. He is in charge of the firm's quality control system that ensures professional staff adheres to all relevant ethical standards.

SCOTT CACURAK

Assurance Partner
RSM US LLP
Accounting

Scott Cacurak is an assurance partner at RSM Los Angeles where he serves as the audit practice leader and oversees all aspects of the operations, growth, and profitability of the Los Angeles audit and accounting advisory practice. He has over 23 years of experience in professional services and has extensive experience working with various public and private companies in the technology, media, and entertainment space and has served as the lead partner and EQR for audits of various clients, including public and privately held companies ranging from emerging growth to global enterprises.

Cacurak also has extensive experience working on IPOs, secondary filings, and other financing transactions. As a transaction advisory services partner, he was responsible for leading various due diligence assistance projects supporting the acquisitions of various targets by his clients.

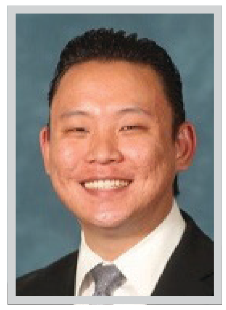


CÉCILE CHALIFOUR

West Division Manager,
Community Development Banking
Chase
Financial Services

Cécile Chalifour is West Division manager for Community Development Banking, within Commercial Real Estate at Chase, where she manages a team originating construction and permanent debt projects to affordable housing projects. With two decades of community development and finance experience, she previously served as the California Region director for the Low Income Investment Fund, leading lending activities related to affordable housing, charter schools and community facilities. Prior to that, she was a director at Citi Community Capital, where she originated construction, permanent, and gap financing for a variety of residential, commercial and mixed-use community development properties.

Chalifour serves on the Southern California Leadership Council for Enterprise Partners. She previously was a member of the Board of the Southern California Association of Non-Profit Housing and the California Coalition for Rural Housing.



ROBIN CHOI

San Fernando Valley Region Bank President
Wells Fargo
Financial Services

During Robin Choi's 16-year career with Wells Fargo, he has demonstrated outstanding leadership, established himself as a business leader and is invested in the communities that he serves. In 2018, he was named president for Wells Fargo's San Fernando Valley Regional Bank. In this role he continues to serve today with oversight of 65 branches, employing more than 1,200 financial services professionals across the San Fernando Valley region.

As an executive at Wells Fargo, Choi has established himself as a leader in the financial industry and professional mentor to many. He has developed team members by investing in their professional development and providing them with opportunities to advance their careers. Under his leadership, he has positioned volunteerism as a focus area to the team members in his region. Currently, more than 500 team members have volunteered at more than two dozen nonprofit organizations.

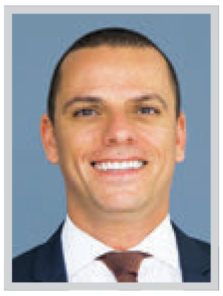
40 IN THEIR 40s

MALCOLM DAVIES

Principal/Managing Director
George Smith Partners
Financial Services

Malcolm Davies has over 20 years of experience as an award-winning capital advisor and developer. As principal/managing director, Davies has vast experience in structuring various scenarios within the capital stack that include non-recourse senior debt, mezzanine, preferred & JV equity financings in the construction, value add, and permanent finance marketplace. He has been involved in over $6 billion worth of financings, both in the equity and debt markets. Davies leverages his extensive background and knowledge to represent the entrepreneurial sponsor who invests and develops institutional level projects.

In the past year, Davies has financed over $1.3 billion over 31 deals, representing an average of $43.9 million/per deal. This includes over 1500 hotel keys, 1000 multi-family units and over 3.6 million square feet of office/industrial/retail projects.



HATEM DHIAB

Managing Partner
Gerber Kawasaki Wealth and Investment Management
Financial Services

Hatem Dhiab, originally from Tunisia, is a founding member and managing partner at Gerber Kawasaki Wealth & Investment Management. He provides comprehensive financial planning services to his clientele composed of top physicians, C-level executives, successful professionals, business owners, tech entrepreneurs and their families. He has also developed significant contact with international communities Los Angeles and is an asset to his international clients due to his expertise in advanced planning techniques such as options & RSUs, benefits planning and complex tax issues.

Being a foreign citizen himself, it's easy for Dhiab to bridge the gap that is often experienced by international citizens moving to the US. He's able to successfully help his clients navigate the intricacies of the US financial markets, tax system and legal framework to help alleviate some of the anxiety often felt through big life changes.

SUZIE DORAN

Partner
SingerLewak LLP
Accounting

Suzie Doran is a partner with SingerLewak LLP, where she has worked since 2008. Previous to working at SingerLewak, Doran was a senior manager at Grant Thornton, LLP in the company's transaction group. Prior to that, she worked at PwC, primarily in the San Jose office, where she started her career in 1997. Her areas of specialty include professional services, real estate, technology, manufacturing and distribution.

Doran has worked with public and private companies in a variety of industries. She has transactional expertise in initial public offerings, secondary offerings, corporate restructurings, and mergers and acquisitions. Doran also presently serves as president for the Association of Corporate Growth, Los Angeles. She is a board member of the California Society of CPAs and the president of the Association for Corporate Growth (Los Angeles).

HEATHER ELLISON

Senior Vice President and Head of Retail Banking
OneWest Bank
Financial Services

Heather Ellison is the senior vice president and head of the Retail Branch Banking channel for OneWest Bank, the Southern California branch division of CIT Group. In this position, she oversees OneWest Bank's 64-branch network, spanning from San Diego to Ventura County and drives the retail banking strategy.

Prior to this appointment, Ellison served as the marketing director, banking in the Santa Monica market of the Greater LA region, where she was previously the District Manager. In that role, she managed over $3 billion in assets, including six of the company's top branches. Prior to her time at OneWest Bank, Ellison served as managing director and Southwest regional director for consumer banking at JPMorgan Chase, overseeing over 300 branches and investment offices serving approximately 1.3 million households in Arizona, Las Vegas and Southern Utah. Prior to joining Chase, Ellison spent 14 years at Wells Fargo.

ADAM FEIT

Managing Director and Commercial Banking Market President for Los Angeles Region
MUFG Union Bank
Financial Services

Adam Feit currently serves as the market president for the Los Angeles Region overseeing Union Bank's middle-market and business banking teams in Los Angeles. In this role, he leads a team that provides strategic advice and banking services to corporate clients across all industries.

Feit also leads Union Bank's private equity coverage strategy, providing financing for leveraged buyouts and recapitalizations for financial sponsors. He formed the bank's private equity coverage model when he joined the company in 2016, and over the past three years has helped build it into one of the highest growth businesses for Union Bank. Under Feit's leadership, the Los Angeles team has continued its trend of strong growth in 2019, posting another year of strong financial performance – in fact, they are currently on track to more than double their business, year-over-year – reinforcing its position as the largest Commercial Banking division for Union Bank.

BRANDON FERRERA

Market Executive
Fifth Third Bank
Financial Services

Brandon J.E. Ferrera is an established middle market banker who joined Fifth Third Bank in early 2018. Bringing more than a decade of executive-level experience in relationship and commercial banking to his new role, Ferrera joined Fifth Third from Comerica where he led a middle market team and was responsible for the bank's regional private equity strategy. Ferrera's ability to balance these two areas that sometimes intersect with great complexity is one of his most significant strengths.

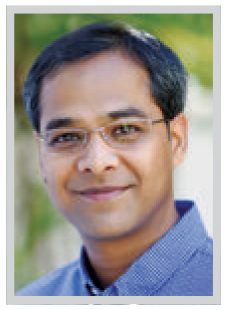
Ferrera has been charged with building a team of bankers as part of Fifth Third Bank's middle market expansion into the California market. His team's focus is developing and maintaining relationships with both privately owned and private equity owned middle-market clients. The group supports its clients' growth with financing for leveraged buyouts, acquisitions, working capital and growth capital.

ROSS GERBER

President / CEO
Gerber Kawasaki Wealth and Investment Management
Financial Services

Ross Gerber is the co-founder, president and CEO of Gerber Kawasaki Wealth and Investment Management. He oversees Gerber Kawasaki's corporate and investment management operations and serves individual clients. He has become one of the most followed investors on social and in traditional media. His investment ideas and advice have made him a regular in the business news.

Gerber is also an expert in online marketing and social media as well as co-developed the company's app My Money Page for iOS. Ross and the Gerber Kawasaki team currently oversee $921 million of investments. Since its founding nine years ago, Gerber Kawasaki has grown to 29 employees and from $50 million to $921 million of AUM. Gerber is known for his long-lasting accomplishments in the financial industry, his commitment to diversity in the workplace, and his mission to improve the lives of others.

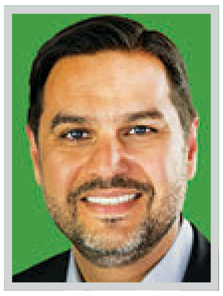


AMIT JAIN

Audit and Accounting Principal
Gumbiner Savett Inc.
Accounting

Amit Jain is a key member of Gumbiner Savett's audit and assurance department and specializes in working with privately held entities to provide overall solutions for their audit, accounting, and financial reporting requirements. As a principal, he is a respected leader within the audit department and an important advisor to his clients. His knowledge and work ethic ensure that clients get exceptional service consistently.

Jain works with clients in the real estate, information technology, retail, food and manufacturing industries. He works with several of the firm's largest clients and professionals from the Big Four, national firms, CFOs and controllers call upon Jain for special projects such as due diligence for client acquisitions and the restructuring of accounting systems. Jain is also a part of the Quality Control team for Gumbiner Savett. He helps monitor the firm's quality control system and ensures professional staff adheres to all relevant ethical standards.



ALI JAZAYERI

Managing Director
Three Point Capital
Financial Services

Ali Jazayeri heads Three Point Capital's Film and Television group. Among the 90+ titles Jazayeri has financed include "Manchester By The Sea," "Happy Feet," and "Tully." Recently, the firm's film, "Run With The Hunted" just won the Audience Award for Best Feature Film at the 20th Annual Woodstock Film Festival and it was nominated for the BNL People's Choice Award for Best Film at the Rome Film Festival.

Prior to Three Point Capital, Jazayeri served as a financial consultant to several leading entertainment companies. He also served as senior VP of finance at After Dark Films, where he was responsible for financial planning and overseeing the company's banking, investor and studio relationships. Prior to After Dark Films, she was an assistant VP at Comerica Bank's Entertainment Group, funding facilities for various industry-leading clients.

DANILO KAWASAKI

Vice-President / COO
Gerber Kawasaki Wealth and Investment Management
Financial Services

Danilo Kawasaki serves as Vice-President and COO of Gerber Kawasaki Wealth & Investment Management. In his role, he oversees the compliance and day-to-day operations of Gerber Kawasaki. He is also a member of the Gerber Kawasaki Board of Directors and the Investment Selection Committee.

Kawasaki started his career in the financial services industry joining SunAmerica Securities in 2002. He moved up the rankings in record time and was promoted to the branch manager position of the West Los Angeles office within two years by the tender age of 24. In 2010, together with Ross Gerber, he founded his own independent financial firm. Currently, Gerber Kawasaki Wealth & Investment Management has over 6,000 clients nationwide and manages over $ 900 million, with ambitious plans to eclipse the billion-dollar mark over the next few months.

KIYOUN KIM

Executive Vice President, Regional Manager for California
IDB Bank
Financial Services

In mid-2000, Kiyoun Kim started at IDB as an account officer doing Middle Market and Commercial Real Estate lending. She was promoted twice in the next four years. In 2005, she was selected to oversee and manage the new second office for IDB's California region and in 2007 was promoted to Sr. Vice President and the Head of the CA-Commercial Real Estate Group. Kim left IDB in 2012 but returned in late 2014, as EVP/Regional Manager.

Kim is the first female EVP/regional manager at IDB. Since 2014, she has led the three business units (Middle Market Business Banking, Commercial Real Estate, and Private Banking) in IDB's two California full-service branches to increase loans, deposits, and investments, with profitability nearly doubling in recent years. Kim continues to focus on bringing new and innovative products and customized solutions to the local marketplace.

BRIAN LITTLE

Managing Director
Duff & Phelps
Financial Services

Brian Little is a managing director in the Consumer M&A advisory practice for Duff & Phelps and is based in the Los Angeles office. Little leads the firm's consumer efforts on the West Coast in addition to heading up its global apparel practice. He has over 18 years of experience advising middle-market clients on mergers and acquisitions and private placements of debt and equity. Over the past decade, Little has closed over 35 transactions with total related transaction value in excess of $2.5 billion.

Little's most recent deals include advising For Love & Lemons (women's ready-to-wear apparel and lingerie) on its partnership with Victoria's Secret; advising on the acquisition of Journelle (retailer of lingerie and sleepwear) by an ownership group including principals of Cosabella; and advising Form Factory (leading formulations and R&D for the cannabis sector) to Acreage Holdings.

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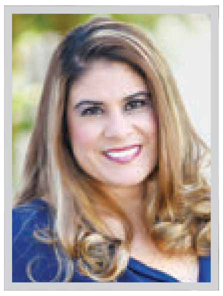
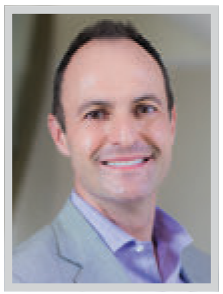


KARLA CHAVEZ LUNA

Tax Shareholder
Gumbiner Savett Inc.
Accounting

Karla Chavez Luna works with privately held companies, trusts and estates, and high-net-worth families and their entities. She works with clients in a variety of industries, including manufacturing, retail, professional services, and entertainment. She joined Gumbiner Savett in 2000 and has steadily risen through the ranks of the tax department to become the firm's first Latina shareholder as of January 2019.

In addition to her full client roster, Luna is heavily involved in the Gumbiner Savett Tax Department's operational and culture building activities. She is a mentor and role model to staff as well as a source for career advice. She graduated with a B.A. in Business Economics from UCLA and earned a Master of Science in Taxation from Golden Gate University while balancing her full-time responsibilities at Gumbiner Savett and a newborn at home.



EDWARD MOYZES

Chief Executive Officer
Northwestern Mutual - Strategic View Advisors
Financial Services

Ed Moyzes was born in Kiev before the fall of the Soviet Union, eventually immigrating to Denver with his family when he was five. After spending time at the Big Four public accounting firms and a dot com start up, he decided he wanted greater control over his professional future and started his career as a financial advisor.

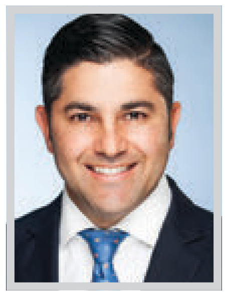
Originally a solo advisor, Moyzes was a leader among his peers from day one, finishing first in the country among new advisors during three of his first four years. As his practice grew, he saw an opportunity to expand client impact by building a team of talented professionals whose values align with his own. Over the last five years Moyzes' team, Strategic View Advisors, has doubled in size from five to ten team members, including five Certified Financial Planners (CFPs).

CANDICE NAKAGAWA

Director and Private Wealth Advisor
MUFG Union Bank
Financial Services

In her role as a Private Wealth Advisor, Candice Nakagawa partners with a team of specialists and works with high net worth clients to help them build, sustain, and transfer their wealth. In 2019, she was promoted to the position of director for making meaningful contributions to The Private Bank at Union Bank in multiple ways. First and foremost, she has developed deep, personal relationships with her clients, becoming their trusted advisor and valued partner. She also maintains a continuous drive to seek, identify and achieve business improvements, and has also achieved leading sales results for many consecutive years.

In 2019, Nakagawa was a recipient of the Union Bank President's Award in recognition of her outstanding contributions to the organization throughout her tenure. This is the highest honor that MUFG Union Bank employees can receive and is bestowed upon a select group that have made meaningful contributions towards the company's success.



OMID NOORI

Senior Vice President and Managing Director, Private Wealth Management, Greater Los Angeles Region
U.S. Bank
Financial Services

Omid Noori is a senior vice president and managing director for the U.S. Bank Private Wealth Management team in the Greater Los Angeles area. Noori takes the time to understand his clients' unique needs and he directs teams of specialists and partners to provide services that help clients work toward their goals in areas such as Investment Management, Private Banking, Trust and Estate Services, and Wealth Planning.

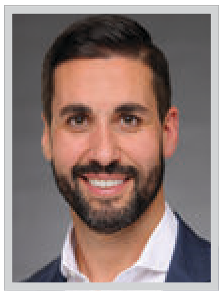
Noori's career in the banking and financial services industry began back in 2003 and includes several regional level management positions spanning across markets in Pennsylvania, California's Central Coast, and Greater Los Angeles for Union Bank and Wells Fargo. Noori is an active member of his community, serving on the Board of Directors for Boys and Girls Club of Greater Conejo Valley. He also serves as the Executive Management Advisor to the Development Network Business Resource Group at U.S. Bank.

PATRICK NYGREN

Managing Director/Regional President Los Angeles and Central Coast
MUFG Union Bank
Financial Services

Patrick Nygren joined Union Bank in August 2018 as regional president of the Los Angeles and Central Coast division (LACC), which also includes Ventura, Santa Barbara and Monterey counties. Nygren oversee the branch banking activities of more than 87 branches and 580 employees. Nygren has more than 15 years of experience in consumer and small business banking. Most recently he served as regional bank president for Wells Fargo, where since 2017, he led all aspects of consumer, small business and affluent business banking throughout Los Angeles and the San Fernando Valley.

Nygren is an active member of the Los Angeles community. He currently serves on the Board of Directors for the Valley Industry and Commerce Association (VICA) and is very active with organizations that serve the well being of children and health of the community.



MICHAEL ORMONDE

Los Angeles Region Bank President
Wells Fargo
Financial Services

Michael Ormonde is region bank president for Wells Fargo's Los Angeles Bank division. In this role, Ormonde oversees 1,300 Wells Fargo banking professionals at approximately 87 branches across the cities of Los Angeles, Beverly Hills, South Bay and Santa Monica. He assumed his current role in November of 2017. He began his 21-year career with the company as a teller and personal banker, store manager and district manager leading branches in the San Francisco Bay and Washington DC region. Ormonde also served as Area President in the Greater Philadelphia and Washington D.C. regions. Additionally, he served as Region Bank President in the Washington DC area.

Ormonde is committed to the communities that he has served and is a leader in corporate citizenship. He has served on numerous boards for SMYAL, Outlet, and Los Angeles LGBT Center.

JASON OZUR

Senior Managing Director, President
Lido Advisors, LLC
Financial Services

Jason Ozur is a senior managing director and president of Lido Advisors, LLC. He also serves as a member of Lido's investment committee and is responsible for the management of Lido Advisors' Hedged Hybrid strategy. He is an integral part of the firm's due diligence on real estate-oriented strategies utilized in client portfolios. His talent for scrutinizing investments such as real estate, hedge funds, and other alternative investment strategies in today's volatile market has made him an integral part of the Lido team and a valuable resource for his clients.

Ozur takes on a mentorship role at the firm by helping to facilitate a company culture that's immersed in progression, excellence, and integrity. Not only does he offer most of his time and consideration to his clients, he continues to lead Lido Advisors' team of over 70 employees.

ANANT PATEL

Partner
Green Hasson Janks
Accounting

Anant Patel, partner at Green Hasson Janks, is known for his leadership pushing forward the future of the accounting profession and the shift from compliance to advisory. With more than 20 years of public accounting experience, Patel leads the firm's Consulting and Transaction Advisory practice. He advises clients in the area of mergers and acquisitions and provides financial due diligence consulting. He has hands-on experience in the shifts happening in accounting today.

Patel is often featured as a premiere thought leader in discussing the future of the accounting profession. He guides poignant conversations highlighting how firms are shifting from compliance to advisory services. He highlights the swift market plans that are taking place and how accounting firms have the opportunity to assess how well they are meeting clients' needs and how they plan to meet future needs.

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ANDREW ROSEN

Partner
Miller Kaplan
Accounting

Andrew Rosen, with more than 20 years of experience, is part of Miller Kaplan's Industry Metrics group, which specializes in the operational and financial structures of broadcast and media clients. From the early days, Rosen's focus has been on advancing his clients' goals through technology and data analysis. He played an integral role in developing a web-based reporting portal and extending data collection and aggregation services to salary surveys, financial surveys, as well as licensee reporting – enabling the firm to facilitate invoicing and subsequent royalty collection on behalf of licensors.

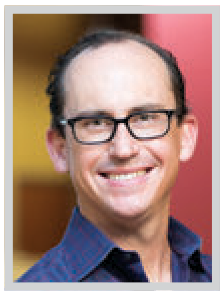
Rosen also offers audit services within the media and broadcast industries. His knowledge and impact in the media and accounting fields have led to his committee membership in the Media Financial Management Association, in addition to other industry roles. Rosen helps strategically guide the firm's in-house development team and plays a prominent role in the firm's leadership, marketing, and IT committees.

BEN SAVAGE

Partner
Clocktower Technology Ventures
Financial Services

Ben Savage is a partner at Clocktower Technology Ventures (CTV), where he oversees the fund and leads an innovative approach to venture capital investing that weaves together a broad range of investment disciplines. CTV, which specializes in early stage fintech investing and is affiliated with macro investment firm Clocktower Group, represents a unique synthesis of many aspects of Savage and the team's experience in financial services, which they apply to venture capital.

CTV's differentiated model generates alpha through the robust relationship ecosystem the firm has cultivated in financial services, bringing together incumbents and challengers to craft productive, mutually beneficial partnerships. The CTV team, shaped and developed by Savage, has taken a leadership position in the Los Angeles venture capital landscape, sharing opportunities and insight broadly in the market. Savage has overseen investments in more than 60 financial services startups over the past four years.



JASON SCHOETTLER

Co-Founder
Calibrate Ventures
Financial Services

Jason Schoettler is a co-founder of Calibrate Ventures, a Pasadena-based venture capital firm he co-founded in 2017 with Kevin Dunlap. Calibrate raised approximately $80 million for its inaugural fund in 2018 and focuses its investments in advanced automation, B2B SaaS, and managed marketplaces. Schoettler leads investments for Calibrate across all of its areas of focus.

Schoettler is a veteran investor with a proven track record of identifying disruptive businesses and facilitating their development while generating outsized returns, including companies like Dollar Shave Club, that was acquired by Unilever for $1 billion. He partners with visionary founders of early stage companies developing advanced, emerging technologies reshaping industries and the future. For example, one recent investment has been with Farmwise, which builds autonomous farming robots that address labor concerns as well as the rising demand for organic produce and increasing regulatory initiatives for more sustainable agriculture.

KARL SEITZ

Senior Manager
CBIZ & MHM
Accounting

Karl Seitz is a tax manager with CBIZ & MHM, LLC. With more than 17 years of public accounting experience, Seitz's technical expertise is in succession and estate planning, tax consulting, tax return preparation, financial analysis and consulting, and mergers and acquisitions. He works with high-net-worth individuals, trusts, partnerships, corporations, and s-corporations in a variety of industries, including architecture, entertainment, real estate, wholesale and retail.

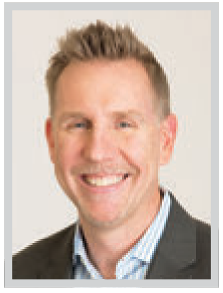
Seitz is a member of CBIZ's International Taxation Committee. He is a current board member and treasurer of Los Angeles Donauschwaben and past vice president of the club. The organization's mission is to pass on the traditions of ethnic German peoples (donauschwaben) that were almost entirely exterminated in work camps during World War II. Seitz has a 5-year-old son who is visually impaired and spends a significant amount of his free time volunteering and fundraising for community causes.

BARRY G. SIMMONS

Managing Director – California Divisional Director for Consumer Banking & Wealth Management
JPMorgan Chase Bank
Financial Services

Barry G. Simmons is a managing director – divisional director for Consumer Banking & Wealth Management for JPMorgan Chase Bank. He currently leads a team of over 10,000 people across 1,000 branches in California. Simmons joined JPMorgan Chase Bank in 2016 as the head of Card Customer Service, responsible for leading a team of 6,000 people across the United States and International territories.

Before joining JPMorgan Chase Bank, Simmons was the wealth management executive for enterprise business and community engagement responsible for driving integration efforts for US Trust and Merrill Lynch with all lines of business across Bank of America. In addition, he served as an executive sponsor for the Black Professional Group. During his time in wealth management, Simmons was also the associate market executive for the New York Metro Division with Merrill Lynch Wealth Management.



KEN TEASDALE

Partner
Armanino LLP
Accounting

As an audit partner for Armanino, Ken Teasdale is the Southern California leader of the Foundations and Grantmakers nonprofit sub-niche and is a leader of the firm's rapidly expanding Cannabis practice. He's Southern California partner-in-charge of the Armanino Foundation, and serves on the foundation's board of directors. In his day-to-day, he is responsible for audit, review and compilation engagements, which include large private foundations, not-for-profit organizations, publicly and privately held corporations, partnerships and employee benefit plans. Prior to joining the firm, he was the chief financial officer for a publicly traded in-line skate company and was instrumental in the company's initial public offering.

Teasdale is the current audit committee chairman and former chairman of the board for the Child and Family Guidance Center. He's also the former chairman of the board for Camp Ronald McDonald for Good Times. In 2019, he was received the California Society of CPAs' Public Service Award.

ANDY TOROSYAN

Partner
Holthouse Carlin & Van Trigt LLP
Accounting

As the leader of HCVT's Mergers & Acquisitions Tax practice, Andy Torosyan addresses the tax structuring and reporting issues associated with complex transactions. He focuses on the analysis of the tax efficiencies of proposed deal structures and conducts comprehensive tax due diligence.

Torosyan's M&A experience includes both buy-side and sell-side strategic advisory services. He has worked with clients through all phases of the business cycle, including start-up, rapid growth, steady cash flow, and workouts. Last year, the M&A team at HCVT worked on over 100 transactions, and the momentum continues. Torosyan is also a mentor to many young professionals at HCVT. Plus, beyond all of his successful endeavors here in Los Angeles, he has also been instrumental in the establishment of the firm's international office in Armenia.

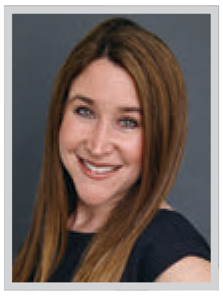
JAMES VERZINO

Managing Director
Northwestern Mutual
Financial Services

James Verzino is the managing director of Northwestern Mutual Los Angeles. An early standout among his peers, Verzino was appointed Managing Director after only five years as a financial advisor. Under his leadership, the office has been the national leader of Northwestern Mutual's 274 offices in early-advisor production for three consecutive years. This year, the Downtown Los Angeles office is on track to recruit 40 new financial advisors, more than any other office has ever recruited.

Verzino is a key leader in the development of the company's managing directors. This year, he was invited to be the closing speaker at the Northwestern Mutual Managing Directors' Conference, where he shared his leadership vision with representatives from 267 Northwestern Mutual offices across the country. He also serves as a coach and mentor for his network's newest managing director, Josh Johnston, who will be leading the new Manhattan Beach office.

40 IN THEIR 40s

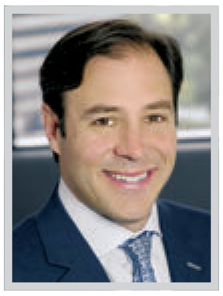


ALYSSA WEINBERGER

Senior Managing Director
Lido Advisors, LLC
Financial Services

A third-generation CPA who began her career at Rothstein Kass & Co. (now KPMG), Alyssa Weinberger joined Lido Advisors, LLC in 2004 and became a CFP in 2005. Having been with Lido Advisors, LLC for over 15 years, she first ran the Operations and Marketing teams, soon becoming senior managing director, and breaking ground as the first female partner.

In addition to her executive position, Weinberger also serves as senior managing director of Lido Consulting, LLC and co-founder of Oakhurst Advisors, LLC. Through her passion for marketing and networking, she created the Annual Family Office Symposium in 2005, heads up an annual panel with Dr. Carolyn Friend at the Exit Planning Institute (EPI) and speaks at events such as IMN's Annual Real Estate Family Office and Private Wealth Forum, the Marcus Evans Real Estate Spring Summit and more.



JEFFREY WESTHEIMER

Senior Managing Director
Lido Advisors, LLC
Financial Services

Jeffrey Westheimer joined Lido Advisors, LLC in January 2008 and is a principal and senior managing director. In addition to working with clients on investment and wealth planning, Westheimer sits on the Executive Committee, which provides overall direction for the firm and is a member of the investment committee for liquid and alternative assets. He oversees certain asset allocation models and handles some due diligence performed by Lido on certain private real estate offerings.

Westheimer began his career working for American Express for over nine years. As a life-long investor, he grew up in San Antonio, Texas where his investment interest was piqued in real estate, stock, and bond investments. In the last year, he has worked as part of a dedicated team to increase the firm's client base by offering unique investments through custodial relationships and community outreach.

STACY YAMANISHI

Partner
Holthouse Carlin & Van Trigt LLP
Accounting

Stacy Yamanishi brings over 20 years of public accounting experience to her client engagements. She began her career in public accounting at HCVT. As a member of the firm's Trust and Estate Tax practice, Yamanishi focuses on providing tax consultation to help her clients achieve their estate planning, gifting, and charitable giving goals.

Yamanishi specializes in estate tax compliance and sub-trust allocations. She has extensive experience working multi-generational trust ownership and planning. She also works with high net worth individuals and their related entities, partnerships, and trusts. She has experience working with closely held businesses which results in her ability to address the needs of the business and business owner in an integrated manner to help her clients achieve tax savings. Yamanishi also serves as part of HCVT's women's initiative, Women@HCVT.

SEAN YU

Managing Director
Morgan Stanley Private Wealth Management
Financial Services

Sean Yu is a managing director and the leader of The Sean Yu Group at Morgan Stanley Private Wealth Management. For his financial services efforts he has been the recipient of a multitude of industry awards.

Yu also leads in numerous philanthropic and social leadership activities. In 2012, he established the Sean Yu International Relations Fellowship at the University of Chicago, where he committed $1 million to the scholarship to help graduate students at the university. In 2014, he created the Taiwanese American Scholarship Fund to alleviate college tuitions of underprivileged students of Taiwanese descent, and he has helped raise approximately $3 million in pledges to support over 100 students. He established the David Speak/Sean Yu Endowment Fund at Cal Poly Pomona University in 2016 in gratitude to Professor Speak, benefiting students in the field of political science.