




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William & Henry Associates Advises Twin Eagles on its sale to Dometic Group

Cerritos, CA – Twin Eagles has been 100% acquired by Dometic Group




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www.twineaglesgrills.com


Stockholm, Sweden
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About Twin Eagles
Twin Eagles is a leading US manufacturer of freestanding and built-in grills, outdoor refrigerators and other outdoor kitchen solutions for the residential outdoor market. The company's products are sold under the Twin Eagles, Delta Heat, and DelSol Grills brands targeting the mid to high-end residential market. Their products are available at more than 400 dealers across US and Canada including several online retailers. Founded in 1999, Twin Eagles is headquartered in Cerritos, California.


About Dometic Group
Dometic is a global market leader in branded solutions for mobile living in the areas of Food & Beverage, Climate, Power & Control and Other Applications. Dometic operates in the Americas, EMEA and Asia Pacific, providing products for use in recreational vehicles, trucks and premium cars, pleasure and work boats and for a variety of other uses. Dometic sells their products in approximately 100 countries and has a global distribution and dealer network in place to serve the aftermarket. Headquartered in Stockholm, Sweden.

About William & Henry
William and Henry Associates provides a variety of investment banking services to its clients. Our clients are primarily small and medium-size private, entrepreneurial and family-owned businesses in a variety of industries. The firm serves clients all over the United States from its offices in Los Angeles and Phoenix.

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Dear Readers,

We are excited to announce our first Banking and Finance Magazine from the Los Angeles Times Brand Publishing team. This issue will be the first of several engaging business-related publications coming to you in 2021.

During this unparalleled period, when individuals and companies must constantly pivot and reinvent themselves in a myriad of ways, it's crucial to remain ahead of the game. To that end, we present an insightful look at upcoming trends and updates, as well as shine a light on professionals who continually rise to meet ongoing challenges and secure future goals. The visionaries profiled here were all nominated by their peers and selected by our Brand Publishing division with input from readers. We hope you enjoy learning about some of their stellar accomplishments and

how they've propelled their organizations and our community towards success.

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ROAD SIGNS TO RECOVERY

BANK ECONOMISTS SEE HOPEFUL INDICATORS AHEAD

The U.S. economy will grow at a robust pace, about 4%, over the four quarters of 2021. That's the strongest growth in nearly two decades after the deepest recession since the Great Depression, according to the latest forecast of the American Bankers Association's Economic Advisory Committee (EAC). However, the economy remains in the grip of the pandemic and growth is expected to decelerate in the current quarter.

"The painful toll from COVID-19 continues to add up," said Beata Caranci, senior vice president and chief economist at TD Bank Group and the current EAC chair. "In addition to rising hospitalizations and deaths, the pandemic is weighing on the U.S. economy as social distancing and business shutdowns in many states have slowed commerce considerably."

After a slow start to the year, growth will accelerate into the second quarter and beyond, according to the group. Committee members agree that the outlook will brighten considerably as mass vaccinations across the nation bring many consumers out of isolation and back to stores, restaurants, movie theaters and travel. States will likely ease business restrictions when the most vulnerable individuals are inoculated, and hospitals are no longer at capacity. Moreover, \$900 billion of additional federal support will bolster the recovery, with the potential for more to come from the new Congress providing another shot in the arm for the economy.

"As the balance shifts from hospitalizations to vaccinations, growth should accelerate," Caranci said.

While all committee members expect economic momentum to build in the spring, there is divergence in views on timing and speed. Those forecasting less of a boost this year anticipate a stronger 2022. Moreover, the pace of recovery will vary across states.

The bank economists expect that the labor market will heal more slowly than the overall economy. The nation lost over 22 million jobs last March and April and overall employment remains nearly 10 million short of pre-COVID levels. While committee members forecast close to 5 million additional jobs this year, a return to full employment remains two or three years away. The committee expects the unemployment rate to decline from 6.7% last month to 5.4% by the end of 2021.

"The speed of the labor market recovery normally trails the economic recovery," said Caranci. "Many businesses will be cautious in rehiring until they see concrete signs of sustained demand and a reduction in slack."

The EAC noted further that many jobs will remain lost to business shutdowns and failures, and that many surviving firms have learned to be more efficient and operate with fewer workers.

More broadly, great uncertainty about the outlook is hindering business investment. The committee also sees significant downside risk in any delays with the distribution, administering and broad acceptance of the vaccines. Any widespread resistance to taking the vaccine, or a reluctance of the vaccinated to re-engage in their normal activities, would greatly affect the outlook.

Conversely, if widespread vaccinations contain the virus and any further mutations to the point that states relax business restrictions and people are ready to return to previous activities, a surge in consumer spending and inventory rebuilding would certainly revive the economy faster, according to the EAC.

The committee remains cautious about the outlook for external demand given the uneven recovery among the nation's major trading partners.

"International tourism also is likely to remain restrained as countries reopen at different paces," Caranci said.

The EAC forecasts price gains to pick up this year as the economy recovers, though they will barely meet the Federal Reserve's inflation goal of slightly over 2%. Accordingly, the committee anticipates that the Federal Reserve will not change the target range for the federal funds rate in the foreseeable future. Consequently, the committee sees little change for short-term interest rates this year, and projects rates on longer-term U.S. Treasury securities and mortgage rates to rise modestly.

—Paul Williams
Brand Publishing Writer

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NEW YEAR, NEW OPTIMISM

EXPERTS PREDICT
STRONG M&A ACTIVITY
SURGE FOR 2021

Despite the social and fiscal challenges of last year, 2021 is looking bright from a mergers and acquisitions (M&A) perspective. Based on surprisingly robust activity in fourth quarter of 2020, many experts are reflecting on last year's strong finish and forecasting increased M&A activity for the first half of 2021 and beyond.

Earlier this year, Mergermarket, the leading provider of M&A data and intelligence, released its 2020 global report, which revealed that \$2.2 trillion of overall M&A activity in the second half of 2020 represented the highest half-year figure on Mergermarket record. Meanwhile, the \$1.2 trillion announced in the final quarter was the highest quarterly value since the second quarter of 2007.

In contrast, M&A activity in the first half of 2020 was subdued (\$971 billion), leading to an overall 6.6% year-on-year decline by value. Amid the social and economic disruptions caused by COVID-19, deal count was down 15.5%, from 20,767 to 17,545. While a few sectors fell, others rose, making it a bumpy ride for deal professionals.

Technology, media, and telecommunications (TMT) climbed 56.8% by value compared to the previous year, from \$543.4 billion to \$851.8 billion, equivalent to more than a quarter of overall global activity. Volume, on the other hand, declined slightly to 3,943 deals.

The next-best performing sector was energy, mining and utilities (EMU), which also saw a 3.8% increase by value to \$477.7 billion, but a 13.8% decline in deal count to 1,326. The industrials and chemicals sector

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rounded out the three best performing sectors in 2020, even with a 27.1% drop from the previous year – from 3,791 to 3,023 transactions.

Although M&A markets went into stasis, debt and equity capital markets came alive. In addition to a significant volume of high yield bond issuances and secondary equity offerings, special-purpose acquisition companies (SPAC) became the phenom of the second half of 2020, particularly in the U.S. A total of 255 SPACs were launched in 2020, raising \$83.1 billion, compared to \$15.5 billion across 73 listings in 2019, according to financial markets platform Dealogic data.

If there was a "winner" in 2020, it was mega-deal professionals. Deals of \$5 billion or greater experienced an impressive surge, increasing from 91 in 2019 to a total of 111 in 2020, with 79 of them occurring in the second half. This represented the second-highest number of such large deals since 2007, only behind 2015 (127 deals).

Meanwhile, smaller-sized transactions saw double digit declines across the board. In particular, deals under \$250 million experienced a 12.1% decline in value and 1,270 fewer transactions compared to 2019.

In spite of the pandemic, global private equity investment, buoyed by a reported dry-powder of \$1.7 trillion, climbed to its highest annual value since the global financial crisis. In total, \$608.7 billion was spent by private equity firms in 2020 across 3,509 deals, 3.3% up from 2019 (\$589 billion).

"Even as 2020 recedes into the distance, its impacts continue to shape the market," said Mark Druskoff, data-driven content coordinator (North America) at Mergermarket. "Corporates and sponsors alike spent their way through the crisis in the second half of 2020, with unprecedented levels of deal making in the final few months of the year."

Experts agree that such a resurgence in the second half of 2020 bodes well for 2021.

Earlier this month, SS&C Technologies Holdings, Inc., a global provider of services and software for the financial services and healthcare industries, introduced optimism-sparking results from the Q1 2021 issue of the "SS&C Intralinks Deal Flow Predictor," an indicator of future M&A announcements.

"During an unquestionably volatile year, global M&A activity is showing continued signs of confidence and recovery," said Ken Bisconti, co-head, SS&C Intralinks. "Due diligence activity in virtual data rooms points to double-digit growth in the first half of 2021, M&A deal announcements worldwide."

From a global perspective, SS&C Intralinks predicts M&A activity in the first half of 2021, compared to the first half of last year as follows:

In Asia-Pacific, the number of announced M&A deals is predicted to increase by around 27% year-over-year (YOY), within a range of 20 to 36%, led by the financials, consumer and retail and industrials/manufacturing sectors.

In Europe, the Middle East and Africa, the number of announced M&A deals are predicted to increase by 20% YOY, within a range of 12 to 31%. The strongest growth contributions are expected in the financials, energy, and power and mining, chemicals and materials sectors. M&A announcements in DACH, Eastern and Southern Europe and the U.K and Ireland are expected to increase.

In Latin America, a strong resilience during these times shows that the number of announced M&A deals is predicted to increase by 22% YOY, within a range of 13 to 32%. The financials, consumer retail and real estate sectors are predicted to lead any growth in announcements. Brazil is expected to carry outsized volume for the territory, though Chile and Colombia will also make major contributions.

In North America, a relatively tempered increase of 5% YOY is predicted for the number of announced M&A, within a range of -4 to 16%, led by the finance, healthcare, and industrials and manufacturing sectors.

Overall, the consensus appears to be that the pronounced increase in M&A activity in late 2020 bodes well for the months to come.

—Paul Williams
Brand Publishing Writer



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A MODERN PATH

THE CENTER FOR AUDIT QUALITY RELEASES ESG REPORTING ROADMAP, ELEVATING AN INCREASINGLY IMPORTANT BUSINESS METRIC

Last month, the Center for Audit Quality (CAQ) and the Association of International Certified Professional Accountants (the Association) released a new roadmap to provide audit practitioners with a blueprint to support companies in achieving their environmental, social and governance (ESG) reporting goals. The CAQ and the Association are releasing the report at a watershed moment for public and private companies' ESG reporting: investors, consumers, and other stakeholders increasingly make decisions based on companies' ESG practices, companies increasingly report ESG information using established standards and frameworks, and the Biden administration has made climate change, and its associated risks, a focus of its policy agenda.

The report, "ESG Reporting and Attestation: A Roadmap for Practitioners," provides tools to help independent auditors inform their clients' approach to ESG disclosures, help clients determine whether to seek an attestation report on ESG information, and help determine how to report ESG information in a Securities and Exchange Commission (SEC) submission.

While ESG reporting has historically taken place outside of SEC submissions, there are increasing calls for public companies to incorporate ESG information, including the impact of climate change and diversity inclusion metrics, into SEC submissions,

such as proxy statements, annual reports, and quarterly reports. Further, rising expectations for ESG reporting come as many market stakeholders see the value of having some or all reported ESG information subject to external attestation by an independent auditor.

"ESG is a rapidly evolving area of reporting, and while there is no one-size-fits-all approach, independent auditors have an important role as this reporting continues to take shape," said Dennis McGowan, CPA, senior director of the CAQ's Professional Practice. "The auditing profession is steeped in bringing accountability, standards-based

analysis and objectivity to the review of company-reported information – and these skills are transferable to these other areas of company-reported information like ESG data."

The Roadmap also examines the history and evolution of ESG reporting, the latest developments driving towards ESG's inclusion in SEC filings and current practices of disclosure and attestation over ESG information disclosed in SEC filings. The report includes examples of companies as diverse as Vornado Realty Trust or Etsy, including, or at least referring to, attestation of an ESG report in their SEC submissions.

"With growing company interest in disclosing ESG information in SEC submissions, this is a very timely resource for audit practitioners who are being called on to perform assurance engagements over these ESG disclosures," said Desiré Carroll, CPA, association senior manager – public accounting. "The Roadmap explores how and why ESG disclosures are being included in SEC submissions and provides practitioners with insight into the risk and legal considerations associated with performing assurance engagements over such information."

The Center for Audit Quality (CAQ) is a nonprofit organization dedicated to promoting high-quality performance by public company auditors; convening and collaborating with financial reporting stakeholders; and advocating for policies and standards that promote public company auditors' objectivity, effectiveness, and responsiveness to dynamic market conditions. For more information or to find the Roadmap, visit thecaq.org.

—Paul Williams
Brand Publishing Writer



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CUSIP RE-APPROVED AS U.S. STANDARD FOR SECURITIES IDENTIFICATION

TWO COMMITTEES ANNOUNCE APPROVAL FOR MID-2020S, BOLSTER FINANCIAL TRUST WORLDWIDE

Last month the **American Bankers Association (ABA)** and **Accredited Standards Committee X9 Inc. (X9)** announced the approval of the updated **ANSI X9.6 (CUSIP)** standard for unique securities identifiers.

The approval followed an extensive review of the market by X9 as part of the customary five-year maintenance cycle. The action ensures that financial market participants in the U.S. and around the world can continue to place their trust and confidence in the CUSIP system.

Since CUSIP's launch in 1968, the standard has been relied upon to provide globally accepted identifiers for financial instruments issued by corporations, municipalities and government agencies in the U.S., along with dozens of other jurisdictions. The CUSIP system is administered by CUSIP Global Services (CGS) on behalf of ABA. In their role, CGS doesn't just assign a nine-character identifier; it also methodically scrutinizes offering documents before individual securities are taken to market, expands CUSIP coverage into new asset classes as markets grow, and continuously adjusts and updates CUSIP elements and systems as security issuers merge, split, change names, or as new market needs are identified. More than 62.8 million CUSIPs have been issued across a broad range of instruments, with at least 9.4 million identifiers active today.

"The X9 review and approval ensures that the CUSIP identifier will continue to serve as the universally

recognized standard for unique security identification in the Americas," said Rob Nichols, ABA president and CEO. "Sustained innovation and investment have been the key to CUSIP's success for over 50 years and will allow it to continue powering efficient capital markets through the unique identification of securities across countless asset classes going forward."

ABA, with guidance from the leading financial institutions at the time, created CUSIP to address the major market inefficiencies during the trading surge of the late 1960s. At the time, backlogs and failures were so frequent that trading had to be limited to four days, with Wednesdays closed for back offices to catch up. By developing a standard method of uniquely identifying securities, CUSIP became the fundamental building block of the industry's automation – the first step toward the highly efficient and reliable securities industry enjoyed worldwide today.

As the industry modernized, ABA also recognized the need for an organization entirely dedicated to developing and reviewing standards for the U.S. financial services industry. In 1974, X9 was established (originally within ABA) and, in 1976, CUSIP was among the first standards to be ratified by the new body. The most recent five-year update is part of CUSIP's



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45-year-long history as an X9 and ANSI standard.

"Our extensive review and the update to the CUSIP standard confirms its continued role as the established choice for market participants who put a premium on transparency and efficiency," said Steve Stevens, ASC X9 executive director. "U.S. clearing corporations, regulators, and market authorities continue to recognize the tremendous value and reliability of the CUSIP system."

Globally, CUSIP is a fundamental component of the International Securities Identification Number (ISIN) for securities issued in the U.S. and in other areas where designated or appointed. Similar to CUSIP, ISIN is a unique global code that identifies instruments to facilitate cross-border trading. To date, most countries have adopted the ISIN either as a primary or secondary securities identifier for trading, settlement, reconciliation and/or reporting. The standard gained accelerated global use in 1989, when the G30 countries recommended its adoption.

Today, ISIN is used in more than 200 jurisdictions worldwide and approximately 120 global stock exchanges, securities depositories, and national numbering agencies rely and support ISIN as the single cross-border ISO instrument identification standard. In the United States, Depository Trust and Clearing Corporation recognizes and uses ISINs and CUSIPs for various critical functions.

"For 50 years, CUSIP has been essential to the efficient operation and accurate processing and settlement of trades throughout the world," said Michael Manbeck, vice president of Institutional Data Governance and Strategy for Fidelity Investments and chairman of the CUSIP Board of Trustees. "The re-issuing of CUSIP by X9 is a testament to its enduring viability as a critical financial services standard that helps keep our markets moving."

With as many as 2,000 identifiers and related data created daily, ABA and CGS have and will continue to modernize the CUSIP system to bring reliability and efficiency to all sectors of the global financial markets. The creativity and innovation that resulted in the creation of CUSIP decades ago continues to deliver on the changing needs of issuers and market participants.

The X9 is a non-profit organization accredited by the American National Standards Institute to develop and maintain national and – through ISO – international standards for the financial services industry. The subjects of X9's standards include: data security; retail, mobile and business payments; corporate treasury functions; blockchain technology; processing of electronic legal orders issued to financial institutions; tracking of financial transactions and instruments; financial transaction messaging (ISO 8583 and 20022); quantum computing; PKI; checks; cloud; data breach notification and more.

X9 acts as the U.S. Technical Advisory Group (TAG) for ISO TC68 (Financial), TC321 (ECommerce) and TC322 (Sustainable Finance) and performs the secretariat functions for ISO TC68. Visit x9.org for more information.

–Paul Williams
Brand Publishing Writer

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FULL CREDIT

MARKET CONDITIONS REBOUND FOR CONSUMERS AND BUSINESSES AS HOPEFUL INDICATORS DRIVE DOWN DEBT, DRIVE UP ON-TIME PAYMENTS

Despite persistent challenges from the pandemic-induced recession, the credit card market continues to show resilience. The chief economists of North America's largest banks see improvement in business and consumer credit market conditions over the next six months, according to the latest quarterly report from the American Bankers Association (ABA).

The **Q1 2021 ABA Credit Conditions Outlook** highlights the results of the ABA Credit Conditions Index. The report represents a suite of indices derived from the quarterly outlook for credit markets produced by ABA's Economic Advisory Committee, which is comprised of chief economists from major banking institutions across North America. Readings above 50 indicate that, on net, the economists expect business and household credit conditions to improve, while readings below 50 indicate a deterioration.

"The ABA Credit Conditions Index provides a barometer on the direction of credit markets going forward," said Beata Caranci, senior vice president and chief economist at TD Bank Group and the current chair of ABA's Economic Advisory Committee. "Going forward, this quarterly analysis offers another tool to help bankers, policymakers and the public assess the outlook for consumer and business credit conditions."

The Q1 2021 report finds that near-term expectations for credit quality and availability rebounded for both consumers and businesses after bottoming out last summer. Specifically, all three components of the new Index increased in the first quarter of 2021, though each component remains below the 50-point threshold. This suggests that, while bank economists expect credit market conditions to remain soft over the next six months, their near-term pessimism has waned since the survey was last conducted in September.

"Both lenders and borrowers fared better last year than we would have expected as a result of the severe dislocations caused by the pandemic," said ABA senior economist Rob Strand. "A robust federal response has been a critical element of the recovery, and banks continue to work with consumers and businesses struggling to make ends meet."

In the first quarter of 2021:

- The **Headline Credit Index** jumped to 43.8, its second consecutive quarterly improvement after bottoming out last summer. While the current reading represents the strongest credit market conditions since mid-2018, the Index remains below 50, signaling that bank economists expect some continued weakness in credit market conditions over the next six months.
- The **Consumer Credit Index** rose to 45.3, the highest reading since mid-2019, as expectations improved for both consumer credit quality and availability compared to last quarter. Bank economists expect consumer credit availability to increase over the next six months, while a slight majority expect consumer credit quality to deteriorate.
- The **Business Credit Index** climbed to 42.2, the strongest reading in more than two years. The increase was driven by improved expectations for both business credit quality and availability;

though similar to consumer credit respondents, business credit quality is expected to deteriorate over the next six months.

"Although credit quality is still expected to worsen over the first half of the year for both consumers and businesses, the overall outlook for credit markets has improved significantly since the summer and fall," said Strand. "As widespread inoculations against the virus and new fiscal stimulus measures help heal the economy, banks will continue to work closely with policymakers, consumers and businesses to ensure that affordable credit remains available and recovery strengthens."

Meanwhile, credit card market resilience is also reflected in the ABA's latest quarterly Credit Card Market Monitor. Monthly purchase volumes rebounded strongly across risk groups in the third quarter of last year, even as the ratio of credit card credit outstanding as a share of national disposable income remained near an all-time low.

The February 2021 Monitor, which reflects credit card data from July through September 2020, found that monthly purchase volumes jumped more than 20% quarter-over-quarter, though credit card purchases remain well below pre-pandemic levels. Meanwhile, credit card credit outstanding as a share of national disposable income rose slightly by six basis points to 4.54%, though it remains near an all-time low (nearly 100 basis points below its Q4 2019 level).

The share of cardholders who are transactors (those who pay their monthly balance in full) rose 1.5 percentage points to an all-time high of 33.7% for the second straight quarter. At the same time, the share of revolvers (those who carry over a monthly balance) fell another 1.7 percentage points in the third quarter to an all-time low of 40.7%. Meanwhile, the share of Dormant accounts ticked up a tenth of a percent to 25.6%.

"The record-high share of transactors illustrates the resilience of U.S. consumers," said Strand. "Though many people are still unemployed, a combination of restrained spending and continued government support has left many consumers well-positioned to manage credit card payments."

The effective finance charge yield (which measures interest payments relative to total outstanding credit in the market) decreased 22 basis points in the second quarter to 12.33% due to the declining share of revolvers and the Fed's benchmark interest rate remaining near zero. Outstanding credit card credit fell to its lowest level since the second quarter of 2017.

"Credit card issuers continue to take a cautious-but-balanced approach toward account activity," said Strand. "The increase in super-prime accounts also reflects that many cardholders have improved their financial position and credit scores during the pandemic."

Results of this and all previous reports can be found at aba.com.

—Paul Williams
Brand Publishing Writer



MOHAMED "MIKE" AHMAR
Executive
Chairman of the Board
Partners Bank of California
Commercial Banking

Mohamed "Mike" Ahmar is a founder, and the executive chairman of the board, of Partners Bank of California, and the president of Ahmar Investment Inc., a real estate development company that develops and leases commercial and multi-family properties. In March 2019, Ahmar spearheaded the opening of Partners Bank of California's branch office in Beverly Hills, providing full-service business banking and commercial lending solutions to clients in the greater Los Angeles area.

Ahmar is also significantly involved in the Los Angeles and Orange County communities. He is currently the chairman of the Los Angeles Fire Department Foundation, and serves on several other boards, including the Cedars-Sinai Board of Directors; the USC Marshall School of Business Board of Leaders; and the Chapman University Board of Counselors. In 1999, Ahmar and his wife Hania started the Ahmar Family Foundation, a non-profit organization formed to serve and benefit charitable and educational purposes.



BARNEY A. ALLISON
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Professional Services

For more than 30 years, clients have relied on Barney Allison for practical and strategic guidance in the public finance and infrastructure fields. Allison offers public agencies unique expertise with specialized finance issues in infrastructure transactions. These include the use of public and private debt, private equity and federal credit assistance – particularly the Transportation Infrastructure Finance and Innovation Act and Private Activity Bond programs. He helps clients navigate through all elements of public-private partnerships and other innovative project delivery methods.

Over the last year, Allison has served as the legal lead on the Lincoln South Beltway Project with Nebraska Department of Transportation. Preliminary work began in February 2020 on the project, with construction anticipated to be completed in spring of 2024, a full four years ahead of the original schedule. Additionally, he has worked as co-lead on the Orange County Transportation Authority – I-405 Improvement Project.



BELVA ANAKWENZE
Entertainment Business Manager
and Tax Professional
Abacus Financial Business Management
Professional Services

As the principal of Abacus Financial Management Group, Belva Anakwenze serves as a virtual CFO for several creatives in Los Angeles. Having served as a trusted advisor for many in the entertainment industry for more than 15 years, her clients range from entertainers and their closely held companies to large entertainment tech companies. She also has several music live events and musicians.

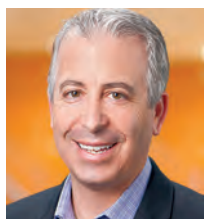
In the male-dominated financial world, Anakwenze is able to reach her goals as a CFO by facing challenges and tough conversations head-on and speaking in everyday vernacular to ensure complete transparency and financial climate understanding. Anakwenze also spends a great deal of her time educating youth and emerging creative entrepreneurs on financial literacy.



RAUL A. ANAYA
President of Business Banking,
Market President, Greater Los Angeles
Bank of America
Commercial Banking

As president of business banking for Bank of America, Los Angeles-based Raul A. Anaya leads a nationwide division that serves nearly 40,000 U.S. mid-sized companies with annual revenues from \$5 million to \$50 million. Anaya is part of the bank's executive management team that helps set the overall strategic direction of Bank of America. He is the first Latino to represent one of the eight major lines of business at Bank of America and is now the highest ranking Latino at the bank. He also co-chairs the bank's Hispanic-Latino Executive Council.

From 2015 to 2020, Anaya was also the Pacific Southwest region executive for Bank of America's Global Commercial Banking Group where he led a team of more than 100 professionals to deliver commercial and investment banking products and services to companies with annual revenues from \$50 million to more than \$2 billion.



ANDREW M. APFELBERG
Partner
Greenberg Glusker LLP
Professional Services

Andrew Apfelberg, a partner at Greenberg Glusker LLP, is a corporate and finance attorney for middle-market companies throughout the United States. Often acting as outside general counsel, Apfelberg provides advice on a business' significant transactions whether it's a merger or acquisition, private equity or other financing, joint venture or licensing deal. He has a considerable depth of experience in the branded consumer products, manufacturing and distribution, new media and technology industries.

Apfelberg's business and finance background comes from his USC's Marshall School of Business education and working in investment banking prior to going to law school. This experience enables Apfelberg to effectively structure transactions and negotiate agreements to maximize the value to the client and increase the likelihood of getting deals closed. He is also the former president of Association of Corporate Growth Los Angeles chapter and currently holds a variety of leadership positions in the global ACG organization.



BITIA ARDALAN
Managing Director,
Head of Commercial Banking
Union Bank
Commercial Banking

Bitia Ardan is managing director and head of Commercial Banking for MUFG Union Bank. The Commercial Banking group is an origination and portfolio management unit serving middle-market companies with revenues of \$50 million to \$2 billion across a range of industries with credit and non-credit ancillary products.

As the leader of a business with a 150+ year history on the West Coast, Ardan sets its strategic vision and heads a high-caliber team. Ardan oversees 160+ employees in 17 offices and more than 200 support partners. Her division is strategically designed to be lean and efficient, however she is closely aligned with many other divisions for which her team generates significant revenue, including Transaction Banking, Capital Markets, Intrepid Investment Bankers, Real Estate Industries, Asset-Based Finance, Syndications, FX, Interest Rate Derivatives, Wealth Management and Private Banking and Consumer Banking.



ED BAGDASARIAN
CEO, Managing Director,
and Founding Principal
Intrepid Investment Bankers
Investment Banking

Ed Bagdasarian's professional career spans more than three decades and his accomplishments include helping build two preeminent middle-market M&A advisory firms, overseeing their sale to two of the largest financial institutions in the world and advising some of the leading entrepreneurs and middle-market companies in defining M&A and capital transactions.

Bagdasarian is currently the CEO and a founding principal of Intrepid Investment Bankers, a Los Angeles-based investment bank providing M&A, capital raising and strategic advisory services to entrepreneurs and middle-market companies. He is responsible for setting and executing the firm's vision. His priorities include creating a winning culture and recruiting top talent who embrace the firm's values. In addition to leading the firm, he manages client relationships and oversees the execution of key advisory mandates. In 2019, nine years after founding Intrepid, Bagdasarian and his partners joined forces with MUFG Union Bank.



FRIDA BANK
Executive Vice President &
Head of Risk Management
CTBC Bank USA
Commercial Banking

Throughout her exceptional 30-year career, Frida Bank stands out for her leadership roles at top Los Angeles area banks. Beginning her career at an entry level position in banking, through a succession of promotions at several prestigious institutions, she rose to her current role.

At CTBC Bank USA, which is supported by more than \$180 billion in global assets, Bank leads the U.S. risk management team focused on traditional risks as well as emerging and complex risks including cybersecurity, fraud and other technology threats that are critical to stakeholders. Over the past few years, Frida has been instrumental in establishing CTBC's state-of-the-art risk management, compliance and governance practices in conjunction with achieving optimal business objectives and phenomenal growth. She has over 30 years of banking experience in the areas of bank operations, regulatory compliance and risk management, including the assessment of enterprise risks.



BRUCE BEHNAME
Head of Banking Services,
U.S. West Market Unit
Accenture
Professional Services

With more than two decades of experience, Bruce Behnam leads Accenture's banking and payments business in the West. Behnam works with some of the world's largest and most prominent banks to drive large-scale business transformation. He leads a multi-disciplinary team that envisions and executes digital-driven change for clients to stay at the forefront of the industry and best serve their customers. As the world becomes ever more digital, the way customers engage with their financial institutions has become an almost entirely digital proposition.

Behnam helps middle-market banks think through how to shift their business from a traditional model to a digital one in which they can bring new products and services to compete and meet the changing demands of their customers, and all in a cost-effective way. Ultimately, he makes sure financial institutions can serve their customers in the way they want to be served.



GAL BEN-NAIM
Senior Vice President & Head of
U.S. Private Banking for California
IDB Bank
Commercial Banking

Gal Ben-Naim is a highly experienced and talented private banking and investment management professional with an unwavering dedication to his clients' success. Ben-Naim's personal approach and his commitment to building deep, long-term relationships has helped his clients weather the COVID crisis while driving impressive growth for IDB's California region in 2020.

Year after year, Ben-Naim has been one of the bank's top performers. His success in bringing in new clients is a direct result of his analytical skills, his knowledge of the financial industry, and his involvement in the local community. He consistently reaches out to new customers one-on-one and through seminars, educating them about their investment options and introducing them to new and innovative products. He then delivers solutions custom-tailored to each client's financial goals and contributes to the bank's new product development based on his research.



DEBORAH BENTON
Founder, General Partner
Willow Growth Partners
Private Equity

Deborah Benton is the founding partner of Willow Growth Partners, an early-stage consumer fund focused on investing in visionary entrepreneurs building the next generation of iconic brands and the technology that supports them. A seasoned consumer retail executive, Benton brings many years of investing, operating and board management experience to Willow. Willow focuses on consumer brands (emphasizing beauty, wellness, apparel, and home/pet), that are values-led and connect deeply with the consumer.

In the past year, Willow Growth Partners, under Benton's stewardship, has completed or is in the process of completing five deals in the portfolio, including leading the seed financing and the bridge financing for Coterie. Willow also took a super pro-rata investment in Good-fair and was a major participating investor in Bubble's pre-seed financing.



JAN BRZESKI
Managing Director
& Chief Investment Officer
Arixa Capital Advisors, LLC
Lending

Jan Brzeski founded Arixa Capital in 2006 and serves as managing director and chief investment officer. In this capacity, he has ultimate responsibility for the firm's investment strategy, risk management and operations. He has extensive experience with every aspect of real estate investment. He has participated in more than 1,600 real estate transactions, investing over \$1.7 billion on behalf of Arixa's investors and partners. Since he founded Arixa Capital, it has become one of the West Coast's premier non-bank real estate lenders, providing small balance loan solutions to lower middle market residential and commercial investors and developers.

Brzeski is a regular speaker, moderator and panelist at various industry conferences and events. Over the past 15 years, he has organized an annual Real Estate Investment Roundtable at UCLA's Anderson School of Management and is also a regular guest lecturer there.

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Congratulations to our leaders and to all the visionaries recognized for their accomplishments and contributions.

Greg Seibly

President, Union Bank

Bitia Ardalan

Head of Commercial Banking, Union Bank

Ed Bagdasarian

CEO and Managing Director, Intrepid

Jim Freedman

Chairman and Managing Director, Intrepid



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**SHERRY
CEFALI**
Managing Director
Duff & Phelps
Investment Banking

Sherry Cefali is a managing director in the Transaction Opinions practice and the head of Duff & Phelps' Los Angeles office of approximately 100 people. She has been with Duff & Phelps for 30 years, advising companies and boards, rendering fairness opinions and solvency opinions and determining valuations of companies and securities.

Cefali's transactions in 2020 included a fairness opinion to the board of Neon Therapeutics, Inc. in connection with its sale to BioNTech; a fairness opinion to NN, Inc. in connection with the sale of its Life Sciences business to American Securities; a fairness opinion to the board of Xtant Medical Holdings Inc. in connection with the exchange of debt for equity; and a fairness opinion to certain funds affiliated with Blackstone in connection with a recapitalization transaction to sell BioMed Realty to a group led by existing BioMed investors; among others.



**CURT A.
CHRISTIANSSEN**
EVP Chief Financial Officer
Pacific Mercantile Bank
Commercial Banking

Curt Christianssen has dedicated most of his career working in the banking industry, with a specific focus on community banks. Christianssen is a key member of the management team that turned around Pacific Mercantile Bank, which worked with its strong board to implement and execute its strategy focused on banking medium-sized businesses, designed to help those businesses succeed.

As CFO of Pacific Mercantile Bank, Christianssen has shown to be a dedicated partner with clients during an unprecedented and challenging year serving medium-sized businesses. For example, he led the bank's efforts to implement a successful SBA Paycheck Protection Program application process within days of the CARES Act passing into law, helping over 700 businesses protect the payroll of 36,000 employees. His passion and commitment to helping companies succeed extended to the PPP Forgiveness phase with his willingness to speak one-on-one with clients to advise them on forgiveness questions specific to each client's business needs.



**KELLY
COFFEY**
Chief Executive Officer
City National Bank
Commercial Banking

When Kelly Coffey took the job of CEO of the largest bank based in Los Angeles, City National Bank, two years ago, she became the bank's fourth chief executive officer and is now one of only four women CEOs among the largest 50 banks in the country. At the start of her second year with the bank, she didn't expect a global pandemic to upend the economy. When clients needed City National most, the bank facilitated 16,000 Paycheck Protection Program (PPP) loans, literally saving thousands of businesses from going under.

Coffey oversees the bank's overall strategy and growth, as well as its private banking, commercial banking and entertainment banking divisions. She's also leading City National's journey to become a digitally-enabled relationship bank. The bank launched a new mobile app and has strengthened its treasury services capabilities and streamlined the process for onboarding new clients.



**JAMES F.
DAVIDSON**
President
Avant Advisory Group
Professional Services

James F. Davidson is managing director, president and founder of Avant Advisory Group, a management consulting and financial advisory firm that specializes in operational turnarounds and financial restructurings, mergers and acquisitions, CFO, C-Suite and corporate governance advisory, forensic, fraud and corporate investigations. He is both a Certified Turnaround Professional and Certified Insolvency & Restructuring Advisor.

Davidson and Avant Advisory Group provide M&A transaction support and have performed hundreds of buy-side and sell-side diligence engagements that include financial/quality of earnings and operations for companies ranging from distressed to multi-billion-dollar firms. He and his firm have been engaged by both counsel and buyers/investors to investigate and opine on numerous forensic and fraud examinations. In his work, Davidson integrates experience from private industry, public accounting, auditing and consulting.



**MALCOLM
DAVIES**
Principal
Managing Director
George Smith Partners
Professional Services

Malcolm Davies has over 20 years of experience as an award-winning capital advisor and developer, having advised and been involved with nearly \$7 billion worth of financings, both in the equity and debt markets. He and his team structured and placed a \$460 million non-recourse senior construction loan for the ground up development of Block 216, a landmark 1.1 million square-foot mixed use development in the heart of Portland, Oregon's central business district. It was the largest deal in GSP company history. In 2020, while many advisors struggled to complete transactions, Davies and his team successfully closed over \$600 million, capitalizing nearly \$1 billion in transactions.

As the principal and managing director at George Smith Partners, Davies is responsible for running the highest producing team and helps drive the firm's vision and branding efforts which help steer GSP to be at the forefront of capitalization innovations.



**EVA
DAVIS**
Los Angeles Office Managing Partner
& Co-Chair, Private Equity Practice
Winston & Strawn LLP
Professional Services

Eva Davis works with some of the most active private equity funds in the country. She provides commercial advice alongside strategic M&A counseling when negotiating on behalf of U.S. and global public and private companies, and private equity funds involving significant transactional matters. As co-chair of Winston's Private Equity Practice — which includes about 75 lawyers — Davis oversees a group that last year handled more than 200 deals with a total deal value of close to \$18 billion. Despite the challenges presented by COVID-19, she personally led over 10 deals valued at more than \$1.4 billion in 2020.

As a woman in the predominantly male private equity field, Davis built her practice entirely on her own by hitting the pavement, slowly building relationships across the industry, and leveraging her knowledge to spot trends quickly and to synthesize and share that information with clients and prospects.

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JACKY DILFER
CEO
Business Finance Capital
Lending

Jacky Dilfer is a trusted advisor, helping her clients grow their businesses, create job opportunities, and better serve their communities. Her vast experience in commercial lending extends two decades in the San Francisco Bay Area and Southern California, where she has led Business Finance Capital's (BFC's) rapid growth as the organization's executive director and chairman of the board. With Dilfer's leadership, BFC is one of the top commercial real estate lenders in the country, and No. 1 in Los Angeles for SBA real estate lending. In 2020, BFC funded over \$730 million dollars in SBA commercial real estate transactions.

Dilfer, a longtime California resident, serves the local community beyond her professional life as a board of trustee member for AltaMed Health Care Services, an organization that delivers much needed health care to underserved communities in Southern California.



CAROLINE DJANG
Partner
Best Best & Krieger
Professional Services

Caroline Djang is a leading business attorney and authority in bankruptcy law whom debtors, creditors, trustees and an array of other parties rely on to help them navigate pre-bankruptcy issues through post-bankruptcy financial relationships in ways that maximize value and minimize risks.

A partner in Best Best & Krieger LLP's Business Practice group and chief bankruptcy counsel, Djang is known for her integrity, business acumen, and turnaround management and legal skills. She was the first woman appointed to serve as a Subchapter V trustee in the Central District of California from a pool of more than 150 applicants. With more than 18 million residents, the Central District is by far the most populous federal judicial district. With little diversity in bankruptcy law — a stark comparison to the District's citizens who are filing for bankruptcy — Djang's appointment as a minority woman is celebrated by women and minority bankruptcy judges and practitioners.



GENE DUNFORD
Senior Managing Director
Umpqua Bank
Commercial Banking

Gene Dunford has been in the banking industry for 30 years and has worked with both large and small banks. He holds an MBA from the University of Redlands. He also graduated with a B.S. in Business from Utah State University's John Huntsman School of Business. He has been heavily involved with the university where he has held various alumni board positions over the years. He has been instrumental in helping several students attend Utah State and receive scholarships.

Dunford is senior managing director of Umpqua Bank's Los Angeles Corporate Banking Division. He joined Umpqua Bank in 2016 to establish its new Los Angeles team. He is a 25-year veteran of L.A.'s commercial banking scene. Dunford's group currently manages approximately \$500 million in assets. Dunford played a critical role in Umpqua Bank's highly successful participation in the Paycheck Protection Program.

We are proud of all our 1st Century bankers
and congratulate Bonnie and Meredith for being recognized
among the Top Commercial Banking Visionaries.



BONNIE RUBIN
EVP, Regional Director
310-270-9511 | BRubin@1cbank.com



MEREDITH ESAREY
SVP, Regional Manager
310-270-9548 | MEsarey@1cbank.com



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CONGRATULATIONS ERIC



Congratulations to Eric Ellingsen, President and CEO of California Bank & Trust along with all the other honorees for their innovative, collaborative, and visionary leadership.

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ERIC ELLINGSEN
President and CEO
California Bank & Trust
Commercial Banking

California Bank & Trust recently announced the promotion of Eric Ellingsen, a banking industry leader and company veteran of over 20 years, from president and COO to CEO, effective January 4, 2021. Ellingsen continues his role as president with new leadership responsibilities as CEO. He will continue to oversee the growth of the bank across the state, including direct oversight of its commercial banking division.

Ellingsen began his impressive career trajectory at CB&T in a four-month temporary role as a junior accountant that led to a permanent position within the company. From there, he was promoted to more senior roles handling risk management, regulatory compliance, international banking and asset/liability management. In 2012, he was promoted to CFO, and then in 2016, to president and COO. Ellingsen now manages the credit and lending process and oversees the commercial banking division and holds a seat on the Zions Bancorporation executive committee.



MEREDITH ESAREY
Senior Vice President,
Regional Manager
1st Century Bank
Commercial Banking

Meredith Esarey is a senior vice president and regional manager for 1st Century Bank and is responsible for leading her team in developing new commercial banking clients. She has more than 15 years of banking expertise, spanning both coasts with experience in commercial, asset-based and cash flow lending solutions to privately held companies.

This past year, driven by a desire to increase connect- edness and tangible opportunities, Esarey spearheaded a committee of motivated women to launch 1st Century Bank's Women's Connection – an educational discussion group that brings awareness to issues women face in their personal and professional development. It promotes an inclusive environment where women feel safe to share their experiences, strengthening the strategic relationships between senior and junior women, and building a community where women at ICB can find practical solutions for defining their individual vision of success.



GILBERT ESTRADA
Senior Vice President,
Regional Manager
Citizens Business Bank
Commercial Banking

Gilbert Estrada brings more than 35 years of financial experience to his role as senior vice president and regional manager of the Inland Empire for Citizens Business Bank. Estrada has a background working with middle-market companies in a variety of areas, including treasury management, specialty deposits, operations, and commercial services. Before joining Citizens Business Bank in 2014, he served as director of operations for Community Bank, overseeing 18 banking centers. In his current role at Citizens Business Bank, he is responsible for all of the Business Financial Centers located within the Inland Empire.

Estrada is a graduate of California State University, Los Angeles, with a Bachelor of Science in Business Administration and Finance. He is also a graduate of Pacific Coast Banking School.



BRIAN FORD
Partner
Kirkland & Ellis LLP
Professional Services

Brian Ford is a Debt Finance partner in the Los Angeles office of Kirkland and Ellis where he continuously leads complex financing transactions for some of the firm's most prominent clients, including Oaktree Capital Management and Francisco Partners. He regularly represents private equity firms, commercial lending institutions and other private and public companies in connection with the negotiation, structuring and documentation of secured and unsecured financing transactions for both borrowers and lenders, including senior, mezzanine and subordinated debt transactions, acquisition financings, dividend recapitalizations and loan workouts and restructurings, including debtor-in-possession and exit financings.

Ford is an active participant in the alumni associations of his alma maters – the University of Notre Dame and Georgetown University Law Center. He is a member of the Sorin Society at Notre Dame and is actively working with the school to establish a greater alumni footprint in L.A.



JIM FREEDMAN
Managing Director
and Chairman
Intrepid Investment Bankers
Investment Banking

Jim Freedman is managing director, chairman, and founding principal of Intrepid Investment Bankers. He has more than 38 years of investment banking and corporate finance experience, and he is an expert in the financial aspects of corporate strategy. Founded in 2010, Intrepid has built a reputation for guiding clients through value-defining events throughout the lifecycle of their businesses, including mergers and acquisitions, shareholder liquidity, raising capital, and business succession planning.

Freedman has advised more than 500 middle-market companies in the areas of corporate finance, mergers and acquisitions, corporate valuation, and strategic decisions. In addition, he has acted as the principal financial advisor in hundreds of capital raisings and mergers and acquisitions transactions ranging in value from \$20 million to more than \$1 billion. Among his recent notable deals is his work advising RSI Home Products on its sale to American Woodmark Corporation.



DANIELLE V. GARCIA
Partner
Holland & Knight LLP
Professional Services

Danielle Garcia is a financial services attorney who focuses on representing lenders in secured finance transactions on an asset-based, recurring revenue, cashflow and leverage basis. She advises clients on the establishment of credit facilities regarding acquisitions, recapitalizations, refinancings, debtor-in-possession financings, working capital and other strategic financings. She has extensive experience with restructurings, workouts and intercreditor negotiations. Garcia's transactional experience includes U.S. and cross-border financing transactions involving a variety of public and private companies including retail, dining, technology, software, energy, transportation, importing and distribution, construction, manufacturing, service and agriculture.

Garcia began her career in representing lenders 24 years ago while still in law school. She has worked at many top 100 law firms and presently practices at Holland & Knight LLP. She is also a co-coordinator for the Women's Initiative in Holland & Knight's L.A. office.

Congratulations Jim Pitrat

You Deserve the Recognition

Thank you for leading our Firm during good times, challenging times and everything else in between. You encourage all of us to be the best we can be for our clients, business associates, and community.

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From your Partners and Colleagues at SingerLewak



Jim Pitrat
Managing Partner

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ROSS GERBER
President and CEO
Gerber Kawasaki Wealth
and Investment Management
Asset/Investment Management

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.

Gerber and the Gerber Kawasaki team oversee \$1.6 billion of investments as of last year and focus on technology, media, and entertainment sectors. Gerber Kawasaki has become a leader in fintech by leveraging technology and social media to work with a large and diverse client base. GK strives to democratize investment advice and prepare the younger generation for their future. Gerber is an expert in online marketing and social media and co-developed the company's app for iOS, My-MoneyPage. Ever since he was a child, Gerber has had a passion for investing and music.



RUSSELL GOLDSMITH
Chairman
City National Bank
Commercial Banking

Russell Goldsmith serves as chairman of both City National Bank and RBC Wealth Management in the United States.

During the COVID-19 crisis, Goldsmith leveraged his decades of banking experience to discuss these challenges and the appropriate policy responses with experts, including a former Federal Reserve chairman, a former Council of Economic Advisors Chair and others. Drawing on his years of serving on the Federal Reserve's Federal Advisory Council and his leadership of the Los Angeles Coalition for the Economy & Jobs, as well as his position in responding to the 2008 financial crisis, Goldsmith also called on Congress to pass a New New Deal in April, which included a \$2 trillion economic recovery plan that supported infrastructure investment, job retraining and other measures.



LLOYD GREIF
President & CEO
Greif & Co.
Investment Banking

Lloyd Greif is at the top of his game in his field, which is M&A deal-making. A veteran investment banker, this November marks Greif's 40th anniversary in the field and next year will mark the 30th anniversary of the investment bank Greif & Co., for which he serves as founder, president & CEO.

Greif & Co. is a middle-market investment bank that engineers merger & acquisition transactions between \$50 million and \$2 billion in enterprise value, as well as equity and debt financings in excess of \$10 million, exclusively for entrepreneurially owned and operated growth companies—hence Greif & Co.'s trademark as "The Entrepreneur's Investment Bank." His extreme work ethic is legendary, going back to the days when he worked the midnight-to-nine "graveyard" shift at a grocery store to pay his way through school at UCLA and USC, working full-time while attending college full-time.



CHANNING HAMLET
Managing Director
Objective Capital Partners
Investment Banking

Channing Hamlet is a managing director and co-owner of Objective Capital Partners, a leading investment banking and valuation firm serving the lower middle market, specifically companies with an enterprise value of \$20–\$75 million. Hamlet leads the transaction execution of the investment banking practice, and concurrently operates as the head of the business valuation practice.

Hamlet is a results-driven executive that has 25+ years of experience advising business owners on management issues, transaction execution and business valuation. He draws from a diverse background that includes direct management experience, strategy consulting, private equity investing, investment banking and business appraisal experience. As one of the primary transactional bankers at Objective, Hamlet has personally closed over 20 sell-side transactions over the last five years and countless others throughout his career, ranging in size throughout the lower middle market from \$10–250 million.



PATRICK HARDER
Chair – Infrastructure Group
Nossaman
Professional Services

Over the past several years, Patrick Harder, chair of Nossaman's Infrastructure Practice Group, has served as the leader of the legal team advising on several of the largest, most innovative, impactful and technically complex public-private partnership (P3) projects in the United States and California. These projects include the massive \$7 billion Landside Access Management Program at LAX, which is currently under construction, and the recently completed UC Merced 2020 project for the University of California Board of Regents. Progress has continued unfettered on many of the projects he leads, despite the ongoing COVID-19 pandemic.

Currently, Harder is serving as the lead on the Los Angeles Convention Center renovation and expansion for the City of Los Angeles, where he is working with the City to help negotiate and draft an implementation agreement for the LACC expansion P3 project, for which the City entered into an exclusive negotiation agreement with AEG/Plenary.



JERI HARMAN
Founder & Chairman
Avante Capital Partners
Lending

Jeri Harman is a seasoned executive, investor and entrepreneur who has built teams and markets for major institutional investors and founded and run a highly successful private asset management business. Over the course of her career, she has held board roles in over 20 private middle-market companies across the U.S. in a variety of industries, including healthcare, business services, consumer products, and industrial.

Harman has consistently provided advice on strategy, growth, management and organizational development, acquisitions and financial matters. Moreover, she is an expert in finance, M&A and capital markets issues and is a frequent speaker on these topics at conferences and symposiums across the country. She is founder and chairman, and former CEO of Avante Capital Partners. With over \$800 million of committed capital under management, Avante makes debt and equity investments to finance buyouts, minority recaps, acquisitions and growth.



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MICHELE L. HAVENS
West Region President
Northern Trust
Asset/Investment Management

Based in Los Angeles, Michele Havens is Northern Trust's president of the West Region. In this position she is responsible for leading the company's wealth management business in the Western United States, from Washington to Texas. Havens is responsible for the investment management, trust, estate, private and business banking business. She and her team work with high-net-worth families and their related charitable entities, bringing an uncompromising focus on clients. In addition, she is a member of the Northern Trust's Wealth Management Executive Committee.

Havens holds a Bachelor of Arts degree in finance and marketing from Boston College and an MBA from the UCLA Anderson School of Management, where she was recognized as the most valuable student by classmates. Havens has attended the Harvard Business School's Post Graduate Executive Education Program for members of Young Presidents' Organization.



JEREMY HOLLAND
Managing Partner,
Origination
The Riverside Company
Private Equity

Jeremy Holland moved to Los Angeles from Bakersfield to attend CSU Northridge, and he has remained in L.A. throughout his career. He spent the first 12 years of his career with smaller more traditionally structured private equity firms, allowing him to be involved in all aspects of the investing process. Now in his third decade of private equity investing, he has been with The Riverside Company since 2010.

As managing director, he is specifically focused on finding new investment opportunities at Riverside, primarily overseeing the business development function across several of the Riverside fund strategies. Holland has completed scores of investments across many different industries (including software, franchising, business services, healthcare, manufacturing and education/training) throughout the entire capital structure. Holland has also served as Riverside's global industry specialization head for investments in franchising, where the firm has made control and non-control investments in more than 35 franchised concepts.



BRAD HOLTMEIER
Partner
CriticalPoint Capital, LLC
Private Equity

Brad Holtmeier is a partner at CriticalPoint Capital (CPC), an operations-focused private equity firm in the middle market. CPC specializes in corporate carve-outs, special situations and privately-owned businesses seeking a transition. Holtmeier joined CPC at its founding in 2012 and has worked on the firm's 12+ investments since inception. His strong business acumen and transaction instincts have led to successful acquisitions across a variety of industries, including industrial and manufacturing; aerospace and defense; consumer; logistics and distribution; business services; technology, media and telecom; and healthcare.

Holtmeier has demonstrated his ability to identify companies' untapped potential and CPC's operational and financial resources to transform them. He leads the investment team at CPC and deal sourcing, evaluating, structuring, financing and executing transactions, and portfolio company management. He also serves on the boards of all of CPC's current portfolio companies.

Holland & Knight congratulates our own
Danielle Garcia and all of the
2021 Banking & Finance visionaries.

Danielle focuses her practice on representing lenders in secured finance transactions on an asset-based, recurring revenue, cash-flow and leverage basis.

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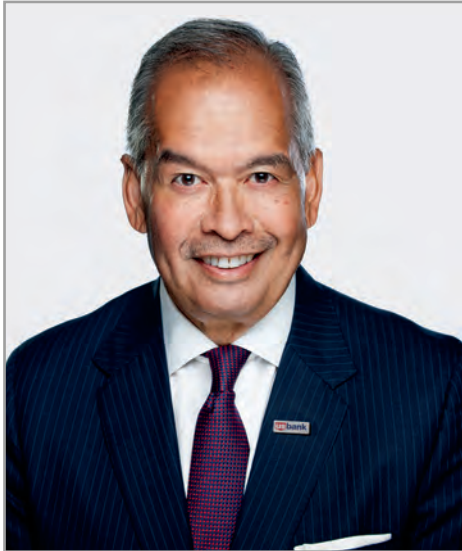
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Leader, visionary, collaborator...
attributes of true achievers.



RUDY MEDINA
Senior Vice President
Commercial Banking Group Manager



CATHERINE JOOYAN
Senior Vice President
Specialty Lending Sales Manager

Congratulations

U.S. Bank salutes the 2021 visionaries, Rudy Medina and Catherine Jooyan for their outstanding performance in their roles and dedication to prosperous business development. Thank you for your leadership at U.S. Bank and for your commitment to the Los Angeles community!

Because when our community succeeds, everyone wins.

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**CAROLYN
HUNT**

Partner
Barnes & Thornburg LLP
Professional Services

Carolyn Hunt is regarded as an authority in the film and television finance and distribution arenas. She is one of only a few women leading a film finance practice at a major law firm, offering clients big-picture thinking and more than 25 years of experience representing financiers, producers, distributors and sales agents in the financing of hundreds of film, television and gaming projects.

Hunt's clients look to her as a trusted advisor who can help solve problems that come with structuring the often puzzling deals within the entertainment industry. As a lawyer who has represented financial institutions, equity venture and production funds, production companies, sales agents, distributors, high-net-worth individuals and talent in a wide variety of capital and distribution transactions, she generally takes the lead role in complicated multi-party transactions because of her reputation for understanding the big picture of what is required to close such deals.



**DAVID
IANNINI**

President
William & Henry Associates
Investment Banking

David Iannini has over 30 years of investment banking transaction experience, having held senior positions at Salomon Brothers and Schroders, among others. Iannini has executed over 200 transactions for large capitalization companies as well as medium-size entrepreneurial and private businesses.

Some of his transaction experience with values of \$25-\$200 million includes the sale of Intercontinental Art to Madison Dearborn, the sale of KBell Socks to Compass Equity, the sale of Arrow Food to U.S. Foodservice, and the sale of Entertainment Data to A.C. Nielsen. He has a B.S. in Accounting, Magna Cum Laude, from the Carroll School of Management at Boston College as well as an MBA, Summa Cum Laude, from the Anderson School of Management at UCLA.



**SHADI
JAHANGIR**

Partner
Blank Rome LLP
Professional Services

Shadi Jahangir focuses her practice in the areas of commercial lending and corporate finance. She represents financial institutions, leading private equity sponsors, and corporate borrowers in middle-market debt financings and investment-grade credits. Her experience includes widely syndicated, club and single-lender representation in connection with traditional asset-based lending facilities, as well as cross-border financings, restructurings, acquisition financings and recapitalizations. Jahangir also represents clients in senior-secured, first-lien/second-lien, mezzanine, unitranche, and unsecured financing transactions.

In addition to her passion for law, Jahangir has a passion for community service. She is actively involved with The Center in Hollywood, whose mission it is to end isolation and homelessness in Los Angeles. She not only provides pro bono legal services to The Center, but also serves on the Board of Directors for the organization. She is also a member of Blank Rome's Diversity and Inclusion Committee.



**CATHERINE
JOOYAN**

Senior Vice President
US Bank
Commercial Banking

Catherine Jooyan is a senior vice president responsible for SBA lending in Southern California, as well as several mid-western states, for US Bank. In her capacity, she is responsible for managing a team of bankers delivering SBA lending to small business in her community. Jooyan has nearly four decades of banking experience where she has served on the executive board for a community bank and for her trade association, has helped thousands of small businesses get the financing they need, and has provided financial advocacy to business owners and her team of respected bankers.

Jooyan has served as a Girl Scout Leader for 14 years, where she has helped many girls learn about finance and helped them achieve their dreams around girl scouting. Additionally, she has worked with food banks and other need-based organizations, in her capacity as a Girl Scout Leader, servicing the underprivileged in her community.



**DANILO
KAWASAKI**

Vice President & COO
*Gerber Kawasaki Wealth
& Investment Management*
Asset/Investment Management

Danilo Kawasaki, Vice President and COO of Gerber Kawasaki Wealth & Investment Management, oversees the compliance and day-to-day operations of the firm. He is also a member of the Gerber Kawasaki Board of Directors and the Investment Selection Committee. Currently, the firm has over 7,000 clients nationwide and manages over \$1.4 billion, with ambitious plans to eclipse the \$10 billion-dollar mark over the next few years.

Kawasaki was born and raised in Brazil and received his B.S. degree in Business Administration from the University of Redlands. As a scholar athlete, he is a three-time All-American in tennis. He received a certificate in Personal Financial Planning from UCLA and is a professional Certified Financial Planner. He also received a certificate in Wealth Management Theory & Practice from Yale and is a Certified Private Wealth Advisor professional.



**RON
KENT**

**Partner, West Region
Financial Services Leader**
RSM US LLP
Professional Services

Ron Kent is an accomplished audit partner with more than 30 years of experience in public accounting. He has served as a national co-practice leader for RSM's specialty finance practice and currently serves as a regional financial services practice leader. As the firm's regional leader, Kent is responsible for providing the long-term vision and business strategies of the West region's financial services practice. Throughout his tenure with RSM, Kent has worked on numerous capital and debt raising campaigns, including initial public and secondary offerings and private placement memorandums.

Kent is also responsible for the firm's largest client relationships in the West region, assists the RSM's national office in establishing Regulation AB guidance and is the engagement leader for clients who regularly complete asset-backed securitizations. He is sought after to serve as the concurring partner or subject matter expert on the most significant mortgage banking relationships in the firm.

AT THE HEART OF BANKING AND FINANCE

Congratulations to Barnes & Thornburg partners **Carolyn Hunt** and **Troy Zander** for being named “Visionaries” by the L.A. Times Brand Publishing Banking and Finance magazine.

CAROLYN HUNT

Carolyn represents financiers, investors and content providers in their entertainment financing and distribution transactions.

310-284-3869

carolyn.hunt@btlaw.com



TROY ZANDER

Troy represents lenders to technology and life science companies, and the venture capital and private equity firms that support them.

619-933-8863

troy.zander@btlaw.com



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KIYOUN KIM
Executive Vice President &
Regional Manager for California
IDB Bank
Commercial Banking

As IDB Bank's regional manager for California, Kiyoun Kim oversees the bank's full-service branches in Downtown Los Angeles and Beverly Hills. Kim leads Middle Market Business Banking, Commercial Real Estate, and Private Banking for IDB. She continues to focus on bringing new, innovative products and customized solutions to the local marketplace. She brings more than two decades of commercial banking experience at relationship-focused banks.

Kim is the first female EVP/regional manager at IDB. Since 2014, she and her teams have worked to increase loans, deposits, and investments, all of which led to profitability nearly doubling in recent years. Despite the pandemic of 2020, IDB CA achieved its best results to date, with record-breaking growth and financial performance. Under Kiyoun's leadership, the CA region had loan growth of 20% and deposit growth of 21%, all while maintaining stellar credit quality with no losses or charge-offs.



ANDREW KLINE
Managing Director
Park Lane IBS LLC
Investment Banking

Andrew Kline, managing director and founder of Park Lane, brings a broad background of professional sports experience, investment banking expertise, and industry knowledge to his firm. Kline has advised on M&A transactions across all major sports leagues as well as emerging and international sports leagues. He has also been integral in advising on financing many early-stage sports-based businesses and real estate transactions. Within the firm, Kline actively oversees all Park Lane's strategies: sports team M&A advisory, early-stage sports-business corporate finance, traditional real estate financing, and secondaries. He focuses primarily on client relationship management and deal execution.

Before founding Park Lane, Kline was drafted by an professional football team, for whom he played center and quick guard. After retiring, Kline became an active investor in the San Diego and Arizona real estate markets and brought sizable returns to investors in his fund.



JOHN M. KRAMBEER
Founder & Partner
Camden Capital
Asset/Investment Management

John Krambeer founded Camden Capital in 2004 and is a partner of the firm and the chairman of Camden Capital's investment strategy team, where he oversees the investment management process, including manager selection and review. Krambeer has specialized in providing wealthy families with strategic investment advice, including portfolio design and creation along with oversight of investment partnerships. Krambeer has worked with both traditional and alternative investment managers, evaluating asset allocation strategies, managing long-term equity portfolios and implementing options strategies for large concentrated stock positions.

Krambeer is a member of the Advisory Board of Rosemawr Management, FrontRange Capital Partners, New Road Capital Advisors and Saybrook Fund Advisors. He was also an inaugural member of the Schwab Institutional Advisory Council for Advisors Turning Independent (ATI) – a sounding board for firms transitioning to independence in the ever-changing wealth management industry.



SIMONE LAGOMARSINO
President
& Chief Executive Officer
Luther Burbank Savings
Commercial Banking

Simone Lagomarsino serves as president and chief executive officer of Luther Burbank Corporation and Luther Burbank Savings. She leads the Executive Committee and is a member of Luther Burbank's board of directors. Prior to joining in 2019, Lagomarsino served as president and CEO of the Western Bankers Association and as a director of Pacific Premier Bancorp; from 2011 to 2017, she served as CEO of Heritage Oaks Bank and as president and CEO of Heritage Oaks Bancorp; previous to that, she held executive positions with City National Bank, Hawthorne Savings, Kinecta Federal Credit Union, Ventura County National Bank and Warner Center Bank.

Most recently Lagomarsino has provided tireless leadership in navigating Luther Burbank Savings' essential business through the evolving situation related to COVID-19. She was also recently invited to join the Federal Reserve Bank of San Francisco's Community Depository Institution Advisory Committee.



JASON A. LAWIT
President,
Los Angeles Region
Northern Trust
Asset/Investment Management

Jason Lawit is the president of the Los Angeles region for Northern Trust. He works to grow the business and regularly participates in new business and relationship opportunities. Lawit leads Northern Trust's Los Angeles client service offering, coordinating and implementing investment and broader wealth strategies around wealth transfer, tax efficiencies, and philanthropy for private clients and small and mid-sized tax-exempt and institutional clients.

He is also a leader in Northern Trust's Goals-Driven Wealth Management capabilities, which seeks to integrate portfolio management with clients' goals and full balance sheet.

Prior to joining Northern Trust in 2010, Lawit was a director at Waterline Partners, where he was a senior portfolio manager and a leader in business development. He joined Waterline Partners as a director in March of 2006. Prior to joining Waterline, Lawit was counsel to the firm from its inception. He began his career as a transactional corporate attorney.



JONATHAN LEE
Principal
Managing Director
George Smith Partners
Professional Services

Jonathan Lee recently began his 15th year at George Smith Partners, having moved to the firm from a home building development firm in 2006. He began his work in capital advisory as part of co-founder Steve Bram's team before forming his own group in 2012. He became a partner in 2014 and today he is a managing director.

In his first year as managing director, Lee established a Fannie/Freddie correspondent agreement and, in concert with his fellow partners, grew the firm's capital advisor base. From 2017–2019, firm revenue grew 58%, transaction volume increased, and GSP began to lay the groundwork for its geographic expansion. Lee and his team continue to focus on ground up construction and permanent debt in the multi-family space. Notably, Lee and team closed an 80% loan to cost project in Azusa. The 163-unit mixed use development is located one block south of the Metro Gold Line.



J. CHRISTOPHER LEWIS
Managing Director
RLH Equity Partners
 Private Equity

Chris Lewis co-founded RLH and led the firm through a multi-decade trajectory of growth and success, developing from a small family office to an institutional private equity group managing assets in excess of \$1 billion. Over that period, he has been instrumental in building a distinctive culture based on respect and fairness, shaping the firm's investment strategy, and growing the firm's team of full-time investment professionals from one to 14. Under his leadership, RLH has refined and executed a long-term investment focus and strategy that has generated consistently strong returns.

Under Lewis' stewardship, RLH has enabled numerous entrepreneurs to realize financial and professional dreams, while creating career opportunities and personal growth for many members of the portfolio companies' teams. Over the course of the past 38 years, he has also served on the boards of more than two dozen RLH portfolio companies and has counseled these companies through critical strategic transitions.



CHANG M. LIU
President and CEO
Cathay Bank
 Commercial Banking

Chang M. Liu is the president and chief executive officer of Cathay Bank and Cathay General Bancorp and serves as a member on the Board of Directors for Cathay. Liu leads the oldest operating bank in the U.S. founded by Chinese Americans, with \$19 billion in assets over a nine-state footprint with 61 branches, as well as a branch in Hong Kong, and representative office in Beijing, Shanghai, and Taipei.

With more than three decades of banking experience, Liu prides himself on his ability to think outside the box to formulate innovative and effective responses that minimize risk, and to deliver workable and timely solutions. He is successfully leading Cathay Bank's digital transformation efforts to enhance the bank's online and mobile platforms to unify seamlessly across different devices and has introduced new online service features, such as, online consumer wires and online account opening, to create better front-end user experiences.



DEREK LYNN
Vice President,
Los Angeles Regional Manager
Partners Bank of California
 Commercial Banking

Derek Lynn serves as Vice President, Los Angeles regional manager for Partners Bank of California. In this role, Lynn has helped fund several million dollars of Paycheck Protection Program loans for his clients across the Southland. Over his 20-year career in the banking industry, Lynn has held several positions in various banking departments, including new accounts representative, assistant branch manager, and vice president of credit administration. Prior to his current role, Lynn served as head underwriter in Credit Administration, with this period consisting of the bank's largest loan portfolio growth.

A graduate of California State University, Long Beach, Lynn currently resides in Belmont Shore with his wife, Danielle.

大成 **DENTONS**

Congratulations to Restructuring Partner Samuel Maizel for being recognized as one of the visionaries in the Banking & Finance industry by the L.A. Times Brand Publishing Banking and Finance magazine.

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JAMES MADDEN
Co-Founder
and Managing Director
Carrick Capital Partners
Private Equity

Jim Madden is an entrepreneur, investor, and pioneer of the HR Business Process Outsourcing (BPO) sector. He was the founder, chairman, and chief executive officer of Exult, Inc., the Irvine based, pioneer of HRBPO for Global 500 corporations. In six years, Madden grew Exult from a concept to more than \$500 million in revenue and led the company's successful IPO in 2000.

In 2012, Madden co-founded Carrick Capital Partners, where he directly oversees the sourcing and growth of successful software and software-enabled businesses. Together with co-founder Marc McMorris, he co-chairs the investment committee. Madden is closely involved in the identification, selection and post-investment growth guidance of Carrick's portfolio companies. Leveraging his deep understanding of sales, operations and corporate governance, he works with these companies to create substantial long-term value.



SAMUEL MAIZEL
Partner
Dentons
Professional Services

Samuel Maizel is a partner in the Restructuring, Insolvency and Bankruptcy practice at Dentons, the world's largest law firm. He is an authority on the issues that arise in the restructuring of health care industry entities, including nonprofits. He has spoken at many conferences nationally and internationally and is a published expert. Maizel has also counseled numerous health care organizations through complex bankruptcy proceedings.

Maizel recently concluded leading the representation of Verity Health System of California and 16 related entities, including six acute care hospitals, in the second-largest hospital bankruptcy case in American history. All six hospitals in the Verity system have now been sold as going concerns, and a contested chapter 11 plan has been confirmed. As co-lead counsel, Maizel helped craft and execute the unique, innovative legal arguments that consistently won favorable rulings from the bankruptcy court.



JENN MCCABE
Partner
Armanino LLP
Professional Services

Jenn McCabe has more than 25 years of outsourced accounting and finance experience, with a particular expertise in startups and the advertising and creative production industries. She is passionate about seeing companies utilize accounting technology to maximize their efficiency, productivity, and ultimately, success. Before joining Armanino, she founded and led Team Jenn Corp., a firm dedicated to the strategic financial management of startups and small businesses, offering a comprehensive back office solution with accounting, finance and HR solutions.

An advocate for women in accounting her whole career, McCabe plays a central role in the firm's Women's Advancement Network and helped found the Executive Access Program (EAP). The program provides high-potential female account professionals with access to firm executives earlier in their careers to help them understand the path to partnership and recognize the benefits of partnership. McCabe has a bachelor's degree in economics from Pepperdine University.



MARC MCMORRIS
Co-Founder and
Managing Director
Carrick Capital Partners
Private Equity

Entrepreneur, investor and philanthropist Marc F. McMorris is a co-founder and managing director of Carrick Capital Partners, where he is directly involved in the identification, selection and post-investment growth guidance of the firm's portfolio companies in software and software-enabled businesses. Together with co-founder Jim Madden, he co-chairs the investment committee. McMorris closely works with the CEOs, executive teams, and boards of the firm's portfolio, leveraging his deep understanding of sales, finance, capital structures and corporate governance. McMorris assists these companies in navigating growth opportunities and the creation of their substantial long-term value.

Previously, as a managing director for General Atlantic, a growth-oriented \$15 billion global private equity firm, McMorris was the lead or co-lead in approximately \$900 million in investments in business services, financial services, and software, which included the successful IPOs of numerous companies.



RUDY B. MEDINA
President, Southern California
Commercial Banking
U.S. Bank
Commercial Banking

Rudy Medina serves as the Southern California market president for U.S. Bank, the fifth largest commercial bank in the United States. Medina leads the market in company-wide efforts and activities and directs commercial banking in the greater Southern California area. Medina has over 35 years of banking and financial services experience in California and joins U.S. Bank after 35 years at Bank of America.

Medina is active and dedicated in the community and currently serves as a board member of the Western Bankers Association and the California Chamber of Commerce. Medina serves on the boards of the Central City Association of Los Angeles, United Way of Greater Los Angeles, Los Angeles Economic Development Council, and the Dean's Advisory Board for the college of Business and Economics at California State University, Los Angeles.



NOOR MENAI
President & CEO
CTBC Bank USA
Commercial Banking

Noor Menai has more than 30 years of experience in global banking, having successfully led and transformed a variety of consumer and commercial businesses. With banks under more public and regulatory scrutiny than ever before, Noor possesses the rare combination of vision, operational expertise and relationships necessary to take on the toughest leadership challenges in the industry.

Since 2012, he has served as President & CEO of CTBC Bank USA, and during his tenure he has grown the institution's assets from \$900 million to over \$3.6 billion. In December 2020, he was also named CTBC Bank's Deputy Head of International Business overseeing 14 countries. CTBC's global assets total over \$180 billion. Noor is also a Board Member of USC's Rossier School of Education, where he ensured large donations to the USC College Advising Corps, which helps foster the college-going culture of Los Angeles area high schools.



**KAREN
MILES**
Managing Director
Houlihan Lokey
Investment Banking

Karen Miles is a managing director and head of Houlihan Lokey's Financial Advisory Services business for Southern California. She co-chairs the firm's Technical Standards Committee, which determines the appropriate methodologies for dealing with valuation issues. She is a leader in the firm's Global Corporate Valuation Advisory Services practice and is also a member of the firm's Estate and Gift Tax Engagement and Review Committee.

Miles has more than two decades of experience in valuation and financial consulting, with emphasis on the valuation of businesses, securities, and intangible assets. Her experience includes fairness opinions, solvency opinions, purchase price allocations, goodwill impairment analyses, valuations for transactions, financings, gift and estate tax planning, ESOPs, dissolutions, and litigation. She has consulted on ownership transition issues and liquidity alternatives. She also chairs the Director Development Panel, where she mentors, develops and selects the next generation of leaders for the company.



**STEVEN
MILLER**
Partner
Morgan, Lewis & Bockius LLP
Professional Services

Steve Miller is a partner in Morgan, Lewis & Bockius LLP's Finance practice, advising equity sponsors and their portfolio companies as well as strategic buyers and borrowers in connection with the debt component of large cap, middle-market and lower-middle-market leveraged acquisitions, in addition to a wide variety of public and private commercial lending transactions. These include syndicated credit facilities; cash-flow and asset-based loans; multiple-lien, mezzanine and other subordinated credits; recapitalizations; restructurings; and workout-related matters.

With more than 30 years of experience, Miller has represented both lenders and borrowers, but for the last 15 years has focused exclusively on borrower representation. He is one of only four domestic Morgan Lewis partners who solely practices borrower-side finance, and the only partner who solely represents borrowers on the West Coast. He leads a number of high-profile and cross-border borrower-side transactions, assisting the complete spectrum of borrowers.



**JOSHUA
MOGIN**
Partner
Raines Feldman LLP
Professional Services

Josh Mogin is a partner at Raines Feldman LLP and head of the real estate finance practice group. He is a real estate and finance attorney with over 20 years of experience representing institutional lenders, financial institutions, developers, special servicers, rating agencies, insurance companies, credit unions, hotels and property owners in financing, securitization, construction financing, agency lending, mezzanine financing, loan restructurings, foreclosures, acquisitions and dispositions. Mogin works with each of his clients to provide sound advice which enables them to efficiently and effectively close transactions.

Mogin also has extensive experience in distressed real estate transactions including the implementation of financed note sale programs, loan sales and acquisition, receiverships and the sale of REO properties. His practice also includes entertainment and corporate financing, including the representation of banks and private financing companies in connection with financing power facilities, film production, and intellectual property rights.

CONGRATULATIONS

Jeremy Holland

of The Riverside Company and all those being recognized as a Visionary in Banking & Finance in Los Angeles!



Riverside.

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JOEL MONTMINY
President and CEO
Montminy & Co.
 Investment Banking

Joel Montminy founded and leads Montminy & Co., spearheading its client assignments and operations across the globe. He is a high-impact leader who successfully spearheads both Montminy & Co.'s daily operations as well as client assignments across the globe. Montminy's expertise includes domestic mergers and acquisitions, leverage and management buyouts, and private placements of equity securities, restructurings, business valuations, fairness opinions and strategic advisory assignments.

Growing profitably every year since inception, Montminy & Co. has represented over 140 clients in various corporate finance activities across 12 countries, leading over \$3 billion in closed middle market transaction volume. Today, the firm has 22 employees, including 15 registered reps and is consistently ranked as one of Los Angeles's top boutique investment banks. Montminy & Co. enjoys a stellar reputation and a culture of trust, performance and results. Montminy holds an MBA from USC and attended Case Western Reserve School of Law.



STEVE MOON
Managing Director & Deputy Head of M&A, Americas
Duff & Phelps
 Investment Banking

Steve Moon has been with Duff & Phelps Securities for over 20 years. He is a managing director and deputy head of mergers and acquisitions for Americas. He is also co-head of the firm's Aerospace, Defense and Government Mergers & Acquisitions Group.

Moon has 23 years of investment banking and corporate finance experience. He has completed a range of investment banking engagements including mergers, acquisitions, sales, divestitures, recapitalizations, leveraged buyouts, debt and equity financings, strategic alternative reviews and fairness opinions on behalf of private equity firms, public corporations and private company clients. Among his recent transactions has been the recapitalization of Innoflight, the sale of Impresa Aerospace, the sale of Thaler Machine Co., the sale of Prospect Mold Company, the sale of AIM MRO, and the sale of SEMCO Aerospace. He is a frequent speaker on topics concerning M&A and financings.



EDWARD MOYZES
CEO
Strategic View Advisors
 Asset/Investment Management

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 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).

CONGRATULATIONS



Gil Estrada
 Senior Vice President
 Regional Manager



LaVon Short
 Senior Vice President
 Sales and Support
 Group Manager

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DANIEL MUÑOZ
Vice President,
Commercial Lender
CDC Small Business Finance
Lending

Daniel Muñoz, who began his financial career in the spring of 2011, has worked in small business banking for Bank of America, Chase Bank and now CDC Small Business Finance. In the summer of 2016, he began with CDC Small Business Finance and has served as a vice president—commercial lender specializing in SBA 504 financing. He began his professional career in the material handling industry as an entrepreneur.

With the knowledge of commercial banking and experience in owning and operating his family business, Muñoz brings a unique perspective to each and every deal. He has continued to be active in the local community as an advocate for small businesses. Over the last 12 months, he has assisted various small business borrowers throughout Orange County and beyond with expanding their current business, the purchase of a property, and relocations.



DAVID M. NEMECEK
Partner
Kirkland & Ellis LLP
Professional Services

David Nemecek is a corporate partner in Kirkland & Ellis' Los Angeles office. His practice focuses on representing private equity sponsors, portfolio companies, hedge funds, asset managers and alternative capital sources in complex financing transactions, including leveraged buyouts, liability management transactions, recapitalizations, restructurings and other special situation transactions. Nemecek's transactions span the capital structure and vary in size from multi-billion dollar to middle market and lower middle market transactions.

Nemecek specializes in helping stressed companies navigate turbulent times by developing and executing cutting edge financing transactions. He has worked with leading retailers and led the financing aspects of six out of the top 20 largest retail debt restructurings arising out of the pandemic. A driving force for the firm, Nemecek's expertise in special situations and complex liability management transactions have been market leading cementing his status as a thought leader in the field.



RENÉ NOURSE
Founder/CEO
Urban Wealth Company
Asset/Investment Management

After 25 years as a financial advisor in the corporate world, René Nourse left a major firm in 2012 to launch Urban Wealth Management Group. Sensing that a shift was taking place in the financial services industry, her intention was to build a platform that focused on strategic financial planning alongside investment management to better serve clients. But it was her own personal experience, her mother's challenges in her life (and subsequent passing in 2017) that inspired Nourse to focus on supporting the needs of women.

Focused on the many women who are strong, ambitious, and independent and yet have neglected to consider the risks of longevity and the importance of making good financial decisions today so that they can have a comfortable lifestyle tomorrow, Nourse has made it her and her firm's mission to encourage and assist women to create the lifestyle they desire and deserve.



WE GOT THIS.

As the GHJ's Advisory Practice and Transaction Advisory Practice Leader, Anant challenges both clients and employees to think outside the box in order to navigate the future.

His dedication to support clients during difficult times to help them navigate business disruption is what makes him a trailblazer in the industry.

Find out what make him a visionary.

GHJ&

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KEVIN M. O'MALLEY
Partner
Blank Rome LLP
 Professional Services

Kevin O'Malley concentrates his practice on financial services and secured lending across several industries, including manufacturing, healthcare, and technology. He advises commercial banks, mezzanine and second lien lenders, equity sponsors, and other institutional lenders and borrowers in complex asset-based and cash flow financings, including split-lien and unitranche structures. He is also experienced in guiding clients through distressed loan workouts, Article 9 sales, orderly wind downs, and bankruptcy proceedings.

O'Malley is also a co-founder, general counsel and CEO of Indie Brewing Company, a craft brewery and taproom in downtown Los Angeles with distribution throughout California, Arizona and Nevada. As general counsel, he acted as lead counsel for a private offering to raise the start-up capital necessary to start the brewery, has negotiated distribution contracts, navigated various city, state and federal licensing requirements, and handles day-to-day legal issues.



DANIEL PASSAGE
Partner & Co-Chair,
Structured Finance Practice
Winston & Strawn LLP
 Professional Services

Co-chair of Winston & Strawn's Structured Finance Practice, Daniel Passage has more than 25 years of experience structuring programs for the origination, financing, and securitization of novel or esoteric financial assets. He is among the nation's leading attorneys in the securitization and finance of several cutting-edge financial products, including life settlements, Property Assessed Clean Energy (PACE) assets (residential and commercial), and non-bank fintech or "marketplace lending."

In recent years, Passage has represented investment banks, fund managers, and originators in ground-breaking financings and securitizations of nearly \$5 billion of residential and commercial PACE assets.

He has represented originators in product development, non-bank lending platform construction, and the financing and securitization of nearly \$6 billion of consumer, small business, and franchise loans and receivables through online "marketplace lending" platforms.



ANANT PATEL
Partner
GHJ
 Professional Services

Anant has over 25 years of public accounting experience and leads GHJ's Advisory and Transaction Advisory Services practices and is a member of GHJ's Executive Committee. He advises in mergers and acquisitions and provides financial due diligence consulting. Patel has assisted on deals ranging from \$20 million to \$500 million and is a Certified Merger & Acquisition Advisor (CM&AA). Patel has clients owned by Private Equity Groups, VCs and institutional investors.

Patel is motivated by his incredibly entrepreneurial and inquisitive mindset. This is an essential asset to the firm, helping to challenge both employees and clients to think outside the box in order to navigate the future. He is a key figure of the firm and has several accomplishments, including, following the COVID-19 shutdown, exhibiting the ability to pivot and assist clients in several ways, including accessing the PPP loans that were not previously available.



JIM PITRAT
Managing Partner
SingerLewak LLP
 Professional Services

Jim Pitrat has been the managing partner of SingerLewak LLP since 2013. He has driven the growth of the firm through organic and merger growth. Since becoming MP, he has overseen over ten mergers, which have more than doubled the size of the firm and increased revenues to \$70 million. In addition to the financial success of the firm, he has also created initiatives within the firm that have added to the diversity and thus, success of an evolving and growing organization.

Pitrat has experience with both private and publicly traded companies and has also advised on cost management, internal controls, corporate restructuring, and mergers and acquisitions. Pitrat has client service responsibilities in the business sectors of investor-backed private companies, family-owned companies and public companies. His primary industries and focus areas include technology, media and entertainment, life sciences, and manufacturing and distribution.



NISHEN RADIA
Co-founder
& Managing Partner
FocalPoint Partners, LLC
 Investment Banking

Nishen Radia is managing partner and co-founder of FocalPoint Partners, a leading investment bank headquartered in Los Angeles, with branch offices in Chicago, New York, and Shanghai. Radia heads the firm's mergers and acquisitions practice. Since its inception in 2002, FocalPoint has grown to become one of the larger middle-market investment banks in the country, with approximately 60 professionals who deliver a diversified suite of advisory services to clients, including mergers and acquisitions, debt placements, and financial restructurings.

Radia has approximately 25 years of investment banking experience advising owners and stakeholders of middle-market companies (typically those with revenues of \$50 to \$500 million) on mergers and acquisitions, debt and equity recapitalizations, and financial restructurings. He has served as principal financial advisor on numerous high-stakes transactions, notably in the healthcare, consumer, and business services sectors.



PAUL RAHIMIAN
Chief Executive Officer
& Founder
Parkview Financial
 Lending

As CEO and founder of Parkview Financial, Paul Rahimian manages a national debt fund that provides construction financing to ground-up real estate development projects. Through the private fund, the firm provides short-term bridge and construction loans secured by first trust deeds to developers throughout the United States. Since launching the fund in 2015, Parkview has successfully executed in excess of \$1.6 billion in financing for more than 125 multifamily, retail, office, industrial and mixed-use projects. The executed loan size ranges between \$5 million to \$100 million.

Rahimian founded Parkview Financial in early 2009 – during the height of financial crisis – and has since originated hundreds of commercial and residential loans, always plying his trademark, hands-on management style. He has been widely recognized as an industry pioneer as he was one of the first to offer complete integration of loan origination and servicing under one roof.



Congratulations

Kiyoun Kim and Gal Ben-Naim

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“At IDB, we place strong value on collaboration and inclusivity. I’m proud to lead such a diverse team of highly experienced and passionate professionals focused on bringing relevant, customized solutions to our clients.”

Kiyoun Kim

Executive Vice President & Regional Manager for California IDB Bank

As our first female EVP, Regional Manager, Kiyoun leads Middle Market Business Banking, Commercial Real Estate and Private Banking across our two California full-service branches.

“This recognition reflects both the quality of our wealth management and private banking solutions, and the strong relationships we have with our clients. The trust and confidence that our clients place in us, creates the opportunity for us to serve them, and they are reason why this honor is possible.”

Gal Ben-Naim

Senior Vice President & Head of US Private Banking for California

Gal consistently reaches out to customers one-on-one and through seminars, educating them about their investment options and introducing them to new and innovative products.



Get in touch with us

If you’re interested in learning more about how IDB can help you with your financial needs, please contact our team at our Beverly Hills Branch at **310-860-6320** or our Downtown Los Angeles Branch at **213-861-6440**.



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BONNIE RUBIN
EVP Regional Director
1st Century Bank
Commercial Banking

Bonnie Rubin is currently an executive vice president with 1st Century Bank, a division of MidFirst Bank. She has been in the banking industry for over 30 years and with 1st Century Bank for 15 years. Her leadership, entrepreneurial spirit and enthusiasm have been integral to 1st Century's success since the bank's inception. She also maintains and grows her own book of clients.

Importantly, in 2020 Rubin personally helped 100 of her clients navigate the PPP application and their forgiveness process. Rubin, along with her various teams, are positioned to help her clients on the next round of funding as well. Additionally, she opened and staffed a new private and business banking office for 1st Century Bank in the San Fernando Valley. Rubin encourages women to continue to develop their personal and career skills through a Women's Leadership Council that she co-created and is co-chairing at 1st Century.



TREVOR M. SALIBA
Managing Partner
NMS Consulting Inc.
Professional Services

Trevor Saliba is NMS Consulting's managing partner and global head of private equity, M&A and strategy of NMS Consulting, based in the firm's Beverly Hills headquarters, where he serves a global client base. Saliba currently leads a global team of over 130 professionals across 14 offices in the United States, Europe, Middle East and Asia.

Saliba's career as an investment banker, private equity investor and management consultant spans 25 years, in which he has originated, overseen and completed over \$20 billion in transactions both as an advisor and/or principal investor. At NMS Consulting, a global management consulting firm, he recently advised clients on strategy launches acquisitions or targeted roll ups in a diverse array of industry sector including technology and virtual reality, fintech, hedge funds, sustainable products, health care and manufacturing in both the United States and Europe.



MARK SAMPSON
Managing Partner
Pacific Growth Investors, LLC
Private Equity

Mark Sampson co-founded Pacific Growth Investors and its predecessor fund, Vintage Capital Partners, to accelerate value creation at lower middle market companies as their control financial sponsor. He co-manages all aspects of PGI's investing activities and serves on its investment committee. Sampson also serves on the boards of Spectra Aerospace, Emerge Diagnostics and Originate, Inc.

Sampson began his career in banking, culminating with his role as the head of the West Coast credit product portfolio and member of the investment banking healthcare group for Credit Suisse First Boston. Over the years, Sampson has been involved with financing and investing over \$3 billion for a wide variety of companies in aerospace and defense, healthcare, medical devices, industrial manufacturing and technology companies, both public and privately held, including many in California. Currently PGI holds investments across four platform companies, three of which are growing California-based companies.



AMANDA SCHUTZBANK
Co-Founder,
General Partner
Willow Growth Partners
Private Equity

Amanda Schutzbank spent the last six years investing in and supporting portfolio companies. Having been an operator herself, she's passionate about what comes after the check. Prior to Willow, Schutzbank was an investor at Amplify.LA and Primary Venture Partners where she focused on the e-commerce sector. At Primary, she built one of the most renowned portfolio support platforms in New York, which her portfolio companies leveraged for operational advice, mentorship, board seats and recruiting.

Prior to her time in venture capital, Schutzbank was an operator on the founding team and vice president of marketing of Karma, a consumer products company. She was one of the first Associates in the Techstars New York City program. She is able to leverage her operating experience and years of investing to add real value to her portfolio companies.



JOHN SCHWEISBERGER
Partner-in-Charge,
Business Outsourcing Services
Armanino LLP
Professional Services

John Schweisberger serves as Armanino's partner-in-charge of the Business Outsourcing Services practice, focused on providing essential outsourced accounting, finance, human resources and restructuring services to clients in a variety of industries. He brings over 30 years of experience to his role.

After the pandemic hit and the CARES Act was passed, virtually every bank in the country was inundated with hundreds, if not thousands, of PPP loan requests. Schweisberger and team, by the beginning of 2021, had supported roughly 25,000 loans that aggregated to about \$3.5 billion. With a second round of PPP loans set to seek forgiveness at the end of 2021, it is industry leaders like Schweisberger who have the vision to build out the infrastructure to help banks and their borrowers focus on their work and keep the loans serviced and forgiven in a timely manner.



GREG SEIBLY
President and
Head of Regional Banking
Union Bank
Commercial Banking

Greg Seibly stepped into his role at Union Bank at the beginning of March 2020, joining Union Bank from Federal Home Loan Bank of San Francisco, where he served as president and CEO.

Seibly started at Union Bank right at the onset of the pandemic in the United States. As Union Bank has navigated through the pandemic, Seibly has spearheaded the effort to ensure that safety, transparent communication and empathy were added to every situation – whether client interactions or internally with colleagues – so that the bank could address the needs of the business and communities. With his team, Seibly has been able to prepare and create a seamless transition to a remote environment (over 80% of MUFG Americas Colleagues are working remote), allowing them to continue offering uninterrupted service to clients. For Seibly, the pandemic brought an opportunity to further demonstrate Union Bank's commitment to the communities it serves.



MAYTAL SHAINBERG
Senior Vice President,
New Media
East West Bank
Commercial Banking

Maytal Shainberg began her career focused on venture capital-backed digital advertising start-ups, where she developed strong competencies around the publishing, user-experience and video categories. In 2015, she joined fintech start-up FastPay, where she developed the company's sales strategy and led a 15-person team focused on enterprise clients.

Today, Shainberg leads East West Bank's New Media Lending Group, leveraging her 10+ years of experience in the new media, advertising and technology industries. She is skilled in business development, origination, sales management, and strategic planning. Within the first 60 days of joining the bank, she closed a \$10 million facility with Sonobi, Inc., a consumer-focused tech company. In less than a year, she has successfully revamped the sales strategy and has grown the bank's customer base in this constantly evolving industry. The result has been over \$400 million in commitments in one year.



DAN SHEA
Managing Director
Objective Capital Partners
Investment Banking

Dan Shea is a managing director of Objective Capital Partners, a leading investment banking and valuation firm serving the lower middle market, specifically companies with an enterprise value of \$20–\$75 million. Shea leads the business development and transaction advisory efforts for engagements across all practice groups. He is a results-oriented leader with a 25+ year track record of success with transaction experience including private and public company sales, corporate divestitures, mergers, acquisitions, and capital raise engagements, as well as preparing strategic assessments for owners, management and their boards, often as a precursor to transaction execution.

As one of the primary transactional bankers at Objective and his previous firms, Shea has assisted in closing countless transactions throughout his career in a wide variety of sectors. From 2019 to now, he has been particularly active in the manufacturing and distribution space.



LAVON SHORT
Sales Support
Group Manager
Citizens Business Bank
Commercial Banking

LaVon Short has more than 40 years of financial services experience. She began her career with Crocker National Bank and later joined Wells Fargo Bank as a personal banking officer. She was a branch manager for 15 years for five branches before moving to Citizens Business Bank. During her time with the bank she has been honored with an entry into the President's Club for three different years, was awarded the President's Award, and successfully led her teams to a Department of the Year award.

In her current role as senior vice president and sales support group manager, Short oversees the Treasury Management Sales, Bankcard Sales, Deposit Services, Product and Sales Support, and Marketing groups. She serves on several committees within the bank, including the Fair Lending, Management Risk Committee and the Management Compliance Committee. In addition, she is chair of the Citizens Experience Committee and the Digital Customer Experience Committee.



DAN SHUMOVICH
Principal,
Business Risk Consulting
RSM US LLP
Professional Services

Dan Shumovich is a principal of business risk consulting at RSM US LLP. In his current role, he is responsible for the delivery of business risk consulting services to financial institutions and specialty finance companies, including risk assessments, internal audit, regulatory compliance, Bank Secrecy Act/anti-money laundering, commercial loan review, and Sarbanes-Oxley/FDICIA testing in the Western Region of RSM.

Shumovich has more than 33 years of experience serving financial services companies and has been responsible for managing the regional business risk consulting practice in various capacities for financial institutions for the last 22 years. He has assembled a team of highly qualified and specialized professionals to provide full outsourcing or co-sourcing of various services. In addition, he serves as a member of RSM's national financial institutions leadership team. Shumovich holds a Bachelor of Science in business administration and finance from California State University, Northridge.



LISA SIMONETTI
Shareholder
Greenberg Traurig, LLP
Professional Services

Routinely listed among the best lawyers in America for banking and finance litigation, Lisa Simonetti joined Greenberg Traurig in 2019 and has quickly become a key member of the firm's Financial Services Litigation and Regulatory Compliance practices, carving out an important niche defending complex class actions and enforcement proceedings. Simonetti handles cases in state and federal courts nationwide.

Simonetti is recognized by colleagues at the firm and within the industry for her creative thinking in the courtroom, and her ability to craft unique arguments and present issues of first impression. Among her many career achievements, Simonetti has scored high-profile wins defending credit card companies, loan servicers, mortgage lenders, e-commerce companies, automotive finance companies, national banks, and savings and loan associations. She regularly works with financial services companies to build plans to mitigate litigation or regulatory risk, providing counseling on compliance with federal and state law.



AARON SOLGANICK
CEO
Solganick & Co.
Investment Banking

Aaron Solganick has built a strong boutique investment bank focused exclusively on software and technology companies over the past 11 years. He has successfully managed and completed several M&A transactions (of more than \$8 billion) and is considered an expert among his peers. He has worked in M&A and investment banking for approximately 25 years and projects a positive attitude to all of his clients and employees.

A high-energy and experienced technology investment banker with an entrepreneurial spirit, Solganick launched the investment bank Solganick & Co. in 2009 to focus exclusively on completing mergers and acquisitions software and tech-enabled services companies. Prior to starting Solganick & Co., he was a senior investment banker with B. Riley FBR, KPMG Corporate Finance, Southwest Securities, and Bear Stearns & Co.



ALEX SOLTANI
**Founder,
 Chairman & CEO**
Skyview Capital
 Private Equity

Alex Soltani founded Skyview Capital in 2005 and is chairman of the firm's executive and investment committees. He is a serial entrepreneur and started his first business when still a student at UCLA. Soltani brings extensive operational experience to his work in private equity. His strong business acumen and prescient investment instincts have led to successful acquisitions across a number of different industries.

Soltani is actively involved with every aspect of the transaction life cycle and plays a significant role in all of Skyview Capital's investments. Soltani serves as chairman of the Board of Directors for all current Skyview Capital portfolio companies. He holds a B.A. degree from the University of California, Los Angeles and is a sought-after guest speaker on the topics of entrepreneurship, mergers and acquisitions and corporate divestitures at the UCLA Anderson School of Management and financial conferences.



MARSHALL C. STODDARD
Partner
Morgan, Lewis & Bockius LLP
 Professional Services

For more than four decades, beginning as an in-house counsel with Aetna Business Credit (now a part of Bank of America), Marshall Stoddard has distinguished himself as one of the foremost advisers to the secured finance industry. His indispensable legal counsel has helped guide virtually every major institution in the industry, including JPMorgan Chase, Citibank, Bank of America, Wells Fargo, Finova, HSBC, BNY Mellon, TransAmerica, GECC, and PNC, among many others. He has closed more than 1,000 asset-based lending transactions. He successfully defended several of these aforementioned institutions in a significant lender liability action before the bankruptcy court in Seattle.

Stoddard is currently a partner in Morgan, Lewis & Bockius LLP's Transactional Finance Practice, where he continues his longstanding relationships with many financial institutions, representing them in a variety of debt transactions in the United States and globally, including syndicated, club, and bilateral transactions.



DUANE STULLICH
**Co-founder
 & Managing Partner**
FocalPoint Partners, LLC
 Investment Banking

Duane Stullich is managing partner and co-founder of FocalPoint Partners, a leading international boutique investment bank headquartered in Los Angeles. Since its inception in 2002, FocalPoint has grown to become one of the larger middle market investment banks in the country, with approximately 60 professionals who deliver a diversified suite of advisory services to clients, including mergers and acquisitions, debt placements, and financial restructurings. Stullich spearheaded FocalPoint's international expansion, resulting in a Shanghai office opening in 2019.

Stullich has over 20 years of experience advising owners and stakeholders of middle-market companies. He has recently been actively working with companies across an array of consumer sectors including food and beverage, healthy and active living, enthusiast products, and franchising. An area of particular focus is e-commerce, digitally native consumer brands, and industry sectors being disrupted by D2C business models.



PAUL W. SWEENEY, JR.
Partner
K&L Gates LLP
 Professional Services

Paul Sweeney is a member of the K&L Gates LLP Los Angeles office's commercial litigation group, where he focuses his practice on handling complex business disputes, both individual and class action lawsuits, involving unfair business practices, false advertising, consumer fraud, trade regulation, privacy violations, civil rights, and violations of various federal and state statutes and regulations. Sweeney has also handled a number of employment arbitrations and lawsuits. He represents clients primarily in the manufacturing, retailing, technology, financial services, food and beverage, medical device, and entertainment industries.

Sweeney recently prevailed for the broker-dealer subsidiary of a global financial institution in a one-year FINRA arbitration. In that matter, the claimant sought in excess of \$7 million plus punitive damages and penalties in a proceeding that took more than one year to finally conclude. The final decision by the arbitration panel was that the claimant should receive nothing on her claims.



JAMES VERZINO
Managing Director
Northwestern Mutual
 Asset/Investment Management

When a childhood friend introduced him to Northwestern Mutual, James Verzino discovered a place where he could truly lead and inspire people. Nearly a decade later, he has developed and influenced dozens of new financial advisors, while maintaining a successful practice. As a wealth management advisor, Verzino has impacted the lives of hundreds of clients, striving to build lasting bonds and human connection in a world of uncertainty. As a leader and managing director of Northwestern Mutual's downtown Los Angeles office, he upholds the highest standards of success within the largest district office in the country.

Verzino often partners with affluent families, small business owners, entertainment professionals, and successful attorneys to help steer them toward financial success. Adhering to the "power of now" philosophy, he helps his clients plan for tomorrow, so they can spend their life living for today.



DANIEL K. WALKER
**Chairman of the Board
 and Chief Executive Officer**
Farmers & Merchants Bank of Long Beach
 Commercial Banking

Daniel K. Walker has been with Farmers & Merchants Bank of Long Beach since 1975, and he has held nearly every position in the company. From his first job as an elevator operator at the age of 14, to the executive titles he holds now, his dedication to growing and strengthening the F&M organization is unsurpassed.

When Farmers & Merchants Bank of Long Beach's reins were passed to Walker in 2002, he was ready. And when the Great Recession crippled the banking industry and the global economy, he did not flinch or falter. He relied on a century of tradition and a lifetime of experience to calmly navigate F&M through the rocks and shoals of a disaster to safety and unprecedented growth. During 2020 under his leadership, Farmers & Merchants Bank led the Long Beach area with the highest volume of processed loan applications for the first round of PPP loans.



JEFFREY WHITE
Partner
Skyview Capital
 Private Equity

A founding partner, Jeffrey White has been actively involved with all M&A efforts at Skyview Capital since its inception. Skyview is a privately held investment firm headquartered in Los Angeles, operating a portfolio of acquired companies worldwide. Skyview specializes in the acquisition and management of mission critical enterprises in the areas of technology, telecommunications, business services and niche manufacturing worldwide. One of Skyview's specialty focuses that has been extremely successful for the firm has been its acquisition of non-core corporate divestures from large public/private companies worldwide.

White helped take Skyview Capital from zero portfolio companies to over 30 acquisitions since its inception. His diverse background encompasses mergers and acquisitions, debt finance, strategic consulting, operations, sales and marketing and commercial banking. He also brings decades of experience that encompass private equity, investment banking and executive management.



JARED WOLFF
**President
 & Chief Executive Officer**
Banc of California, Inc.
 Commercial Banking

Jared Wolff is President and Chief Executive Officer of Banc of California, Inc., one of the state's leading full-service business banks, with approximately \$8 billion in assets. Under Wolff's leadership, Banc of California remains one of the largest banks headquartered in the state, providing financial solutions and products to entrepreneurs, small businesses and growing companies, with the highest level of service.

Wolff is a proven, successful banking executive, with nearly two decades of experience financing countless companies within the state across a wide range of industries. He has a genuine understanding of the California economy and banking landscape. From the time he joined in Q1 2019, Banc of California's performance — in terms of improving cost of deposits, loan yield and net interest margin — ranks in the top 10% of major exchange-traded banks nationwide with assets between \$3 billion and \$50 billion through Q3 2020.



MATTHEW WRYNSKI
**Partner and Co-chair
 Finance Group**
Alston & Bird
 Professional Services

Matthew Wrynski is co-leader of Alston & Bird's Finance Group, the largest transactional practice in the firm, with over 100 attorneys. He also has one of the largest transactional practices, representing private equity funds and their portfolio companies, as well as commercial banks, finance companies, and other commercial lenders in various types of secured and unsecured financings. Wrynski regularly structures financing on behalf of his private equity clients in diverse industries, such as hospitality, manufacturing, media, software, shipping, energy, and seafood.

Wrynski also participates in deals of all sizes, from lower middle market and middle market deals to billion-dollar transactions. He leads transactions that include asset-based credit facilities, acquisition financings, debtor in possession financings, debt restructurings and workouts in single and multiple-borrower, single lender, agent and participated syndication arrangements involving a variety of commercial enterprises. He also guides clients through bankruptcies and other insolvency proceedings.



MATT YOUNG
CEO and Founder
CriticalPoint Partners, LLC
 Investment Banking

Matt Young is a passionate dealmaker and in 2020, has shown tenacity and determination to keep going and push through the most challenging of circumstances. He is the founder and CEO of the investment banking firm CriticalPoint Partners (CPP), headquartered in Manhattan Beach. CriticalPoint offers lower and middle-market companies strategic and transaction execution advice across sell-side and buy-side mergers and acquisitions, debt and equity financings, and special financial advisory situations.

Young established CriticalPoint Partners in 2012 with a vision to help owners, entrepreneurs, and stakeholders realize their companies' full growth and value potential. He has over 20 years of finance experience, including holding principal investing and investment banking positions at Platinum Equity and Bear Stearns, respectively. Matt received his bachelor's degree in Management from the U.S. Air Force Academy, and earned an MBA with a concentration in Finance from University of Southern California.



BORYANA V. ZAMANOFF
Family Wealth Strategist
BNY Mellon Wealth Management
 Asset/Investment Management

Boryana Zamanoff works with high-net worth multigenerational families and entrepreneurs as well as their private foundations and family offices and provides advice related to trust administration, wealth transfer, business succession, philanthropic planning, family governance and next generation education. While being highly skilled in technical tax and trusts and estates matters, Zamanoff approaches every client situation with eagerness to understand, find practical solutions and truly help clients protect and grow their wealth for generations to come. Many clients lean on her for advice in other aspects of their life and business, as they rely on her judgment and experience.

Zamanoff lectures to the ABA, Entrepreneurs' Organization, Vistage, UCLA Law School, USC Business School, Hawaii Tax Institute, STEP and the AAML. Zamanoff serves on the Board of UCLA Law School LEAD. She obtained her JD from UCLA School of Law and BA in Economics and German from Colgate University.



TROY ZANDER
Partner
Barnes & Thornburg LLP
 Professional Services

Beyond serving as the partner-in-charge of Barnes & Thornburg's San Diego office, Troy Zander counsels banks and non-regulated lenders, which lend funds to technology and life science companies, and the venture capital and private equity firms that support them. Zander has closed more than 90 finance deals valued at more than \$2 billion since 2019 alone and has also restructured debt in excess of \$2.5 billion in federal, state and out-of-court proceedings. In this work, he represented participants and companies in credit facilities aggregating in excess of \$50 billion.

A significant amount of Zander's work resides in the technology and life sciences/healthcare industries. Beyond his extensive practice and leadership of the San Diego office, Zander is a member of the firm's Racial and Social Justice Committee, which is dedicated to combatting systemic injustice due to discrimination against people of color.



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REBUILDING MOMENTUM

REPORT EXAMINES CONSTRUCTION LENDING
BEFORE AND AFTER COVID-19

The outlook for bank construction lending was strong prior to the onset of the COVID-19 pandemic, and bankers remain optimistic despite challenges resulting from the health and economic crisis, according to a report released by the American Bankers Association. More than 90% of bank respondents surveyed at the end of 2019 reported that their construction lending business grew or remained stable over the past two years, and nearly all, at that time (95%), expected construction lending to grow or remain stable in 2020. When questioned again after the arrival of the pandemic, they largely held those views.

The ABA Construction Lending in 2020 report provides a snapshot of construction lending in December 2019 as it stood before the COVID-19 outbreak. In follow-up interviews conducted in April and May 2020, bankers said that their fundamental view of the market remained unchanged, although they acknowledged that a period of transition is inevitable. Bankers identified strong credit cultures and a focus on risk management as keys to thriving in a challenging COVID-19 environment.

“While the pandemic has created significant uncertainty, it’s clear that banks are on solid footing and are helping customers weather the storm,” said ABA senior economist Rob Strand. “Construction lending has enjoyed a strong revival since the Great Recession, and the outlook remains favorable even as banks navigate the potential challenges posed by the COVID-19 crisis.”

In interviews conducted after COVID-19 reached the U.S., bankers said they were

carefully reviewing loans in the pipeline, tweaking some underwriting requirements (such as loan-to-value ratios and reserve requirements), paying close attention to secondary mortgage market requirements (even if they tend to hold loans in portfolio), and scrutinizing builders’ track records and capacity. By and large, they voiced confidence that their approaches to underwriting and risk management, along with strong capital and liquidity, put them in a good position to help customers weather the storm.

Construction Lending Experienced a Revival Prior to COVID-19

Total construction spending in the U.S. – a broad measure that includes both new structures and improvements to existing structures – exceeded \$1.3 trillion in 2019, roughly on par with 2018 levels, an upward trend since spending hit a trough of \$788 million in 2011, according to U.S. Census Bureau data.

Just prior to the pandemic, banks indicated an intent to improve their construction lending businesses over the next two years by expanding training, streamlining loan administration, upgrading technology and outsourcing. Participants identified factors that would make them more likely to expand their construction loan portfolios more aggressively, including less risky loans (54%), easier compliance (40%) and less time needed to manage loans (28%).

The report also found that banks of all sizes are involved in a range of construction lending activities. More than 90% of respondents reported conducting new single-family and commercial real estate construction lending. In addition: 81% said they fund builders’ spec, one-off, and pre-sold residences; 78% provide consumer renovation loans; 67% offer lines of credit to home builders; and 64% finance fix-and-flip residential loans.

According to the survey, 46% of respondents cited staffing and 42% cited regulatory and compliance costs as the top drivers of expenses in construction lending. Other expenses, including technology expenditures, as well as sales and marketing costs, were each cited by 4% of survey participants.

“While compliance costs are unlikely to diminish, technology has the potential to help banks lower those expenses and more efficiently deliver on their fiduciary obligations,” said Strand. “Perhaps even more important than streamlining costs, improved efficiency can boost customer satisfaction.”

Learn more and download a complimentary copy of the report at aba.org.

–Paul Williams
Brand Publishing Writer

MBA INSIDER

AN IN-DEPTH LOOK AT MBA SCHOOLS AND THEIR PROGRAMS

Throughout our MBA Insider, you'll find a variety of outstanding schools. The participating schools within this special section provide information about their MBA program accreditation, tuition, application deadlines, rankings and more, plus insights into the school's mission and learning environment. We hope to make it easier than ever to pursue an advanced degree.

An MBA degree can help students attain future career goals, such as salary increases and promotions, and offers extensive networking opportunities with fellow students, tomorrow's business leaders. It also develops management and leadership skills, which may be called upon in current or future positions.

Whether you're looking to advance your career or open new doors towards entrepreneurship, an MBA propels you closer to achieving your dreams. Although it costs time and money in the short term, it pays huge dividends throughout your career. Plus, many companies gladly assist with an employee's tuition.

Please use the following information to guide you along your path towards higher education. We look forward to presenting additional options within upcoming issues. We want to thank all the participating schools for taking part in the MBA Insider.

Los Angeles Times Brand Publishing Team

University of California, Irvine (UCI)

DIGITAL TECHNOLOGY HAS DRASTICALLY CHANGED HOW COMPANIES OPERATE AND GROW. WILL YOU BE ABLE TO KEEP UP WITH THE PACE OF CHANGE AND INNOVATION? MORE IMPORTANTLY, WILL YOU BE PREPARED TO LEAD THE WAY?

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"The Merage School has shown incredible innovation in its ability to adapt to rapidly changing circumstances," said Dean Ian O. Williamson. "We are proud to prepare the next-generation of business leaders for the challenges and opportunities that lay ahead."

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Full-Time MBA

The Full-Time MBA program is geared toward highly motivated professionals who

want to develop critical leadership skills and increase their career potential. Graduates from this unique two-year program represent diverse academic, professional and cultural backgrounds, and rejoin the workforce with a leadership skill set for the digital world.

Fully Employed MBA (FEMBA)

The Fully Employed MBA program is designed for early- to mid-career working professionals and managers who want to pursue a graduate education while they continue their career climb. Students have the flexibility to customize the program around their career objectives and graduate in as few as 24 months. FEMBA students also participate in an international, experiential learning opportunity and an executive leadership residential, both unique to the Merage School program. Classes are offered weeknights on-campus and in a hybrid format that combines the best in online learning with four on-campus Saturdays per quarter.

MBA for Executives (EMBA)

The MBA for Executives program is designed for those who want to immerse themselves in the dynamic thinking required in our current business environment and aligns with the career goals of mid to senior-level professionals. Classes are held every third weekend for 21 months beginning in September in a format that supplements in-class sessions with state-of-the-art online learning between classes and on weekends. Specializations may be earned in Digital Transformation, Real Estate and Urban Development and Innovation and Entrepreneurship. A Healthcare Leadership Track has been built out within EMBA for those who want to apply their knowledge of business as a leader in the changing healthcare industry.



Specialized Masters Programs

In addition to these well-respected MBA programs, the Merage School also offers four specialized one-year master's degree designed for early career professionals ready to launch into their field.

- Master of Finance: Preparing students for entry and mid-level finance positions such as risk management, portfolio management, asset and wealth management.
- Master of Innovation and Entrepreneurship: The only program of its kind in the UC system, providing extensive integrated and immersive academic and practical experience for students looking to embark on careers as entre-

preneurs (innovating to form new companies) and "intrapreneurs" (innovating within existing companies).

- Master of Professional Accountancy: Preparing students for a successful accounting career by offering an intensive and comprehensive one- or two-year option.
- Master of Science in Business Analytics: Preparing students for high-demand opportunities in big data and business analytics across a variety of industries throughout California and beyond.

NAME OF INSTITUTION

University of California, Irvine (UCI)

NAME OF BUSINESS SCHOOL OR PROGRAM

The Paul Merage School of Business

BUSINESS SCHOOL DEAN

Ian O. Williamson, Ph.D

YEAR INSTITUTION WAS FOUNDED

1965

YEAR BUSINESS SCHOOL OR PROGRAM WAS STARTED

1967

TOTAL MBA ENROLLMENT

631

MBA PLATFORMS OFFERED

- Full-Time MBA (FTMBA)
- Fully Employed MBA (FEMBA)
- MBA for Executives (EMBA)

MBA AREAS OF EMPHASIS OFFERED

Digital Transformation

Health Care Management and Policy

Health Care Leadership (EMBA only)

Innovation & Entrepreneurship

Real Estate and Urban Development

LENGTH OF PROGRAMS

Full-Time MBA: 21 months

Fully Employed MBA: 21-33 months

MBA for Executives: 18 months

PROGRAM CAMPUS OPTIONS

Virtual and hybrid models both offered

PROGRAM ACCREDITATIONS

AACSB, WASC

RANKINGS

- No. 21 Full-Time MBA in the U.S. and No. 42 worldwide (Financial Times, 2021)
- No. 25 Full-Time MBA in the U.S. and No. 40 worldwide (The Economist, 2021)
- No. 8 Executive MBA among U.S.-based schools and No. 58 worldwide (Financial Times, 2020)
- No. 13 Executive MBA in the U.S. and No. 27 worldwide (The Economist, 2020)

- No. 27 Part-time MBA in the U.S. (U.S. News & World Report, 2020)
- No. 9 Public University (U.S. News & World Report, 2020 Best Colleges)
- No. 1 in the world for percentage of female faculty (Financial Times, 2021)
- No. 3 in the world for percentage of female students (Financial Times, 2021)
- No. 19 (tied) in the U.S. and No. 32 (tied) in the world for salary percentage increase at 117% (Financial Times, 2021)

TOTAL COST OF MBA

Fees vary by program. Please contact our school or visit our website for more details.

- Full-Time MBA: \$92,207.20
- Fully Employed MBA: \$98,567
- MBA for Executives: \$136,658

REQUIRED TESTING

GMAT/GRE waiver available for qualified Full-Time MBA, Fully Employed MBA and EMBA candidates. Official English language proficiency score (TOEFL, IELTS,

UCI Paul Merage School of Business

Leadership for a Digitally Driven World™

PTE) also required for international students

UPCOMING INFORMATION SESSIONS

Visit merage.uci.edu/events to register for our next Info session, webinar or preview event.

APPLICATION DEADLINES

Fall 2021

Full-Time MBA: Apr. 1

Fully Employed MBA: Apr. 1, June 1

MBA for Executives: Apr. 1, June 1

PROGRAM CONTACT INFORMATION

merage.uci.edu/programs

mba@uci.edu

(949) 824-4565

Dare to Define™ Your Future



Left to right: Dana Gavrilenko, MBA '19; Shivi Tandon, MBA '20 candidate; Fernando De Souza, MBA '20 candidate; Alto Okamura, MBA '19; Katherine Hunt, MBA '19

UCI Paul Merage
School of Business

Leadership for a Digitally Driven World™



Digital disruption is on the rise, at every company, within all industries. Such transformation needs a new kind of leader. You.

UCI's Paul Merage School of Business is dedicated to preparing leaders to go beyond conventional thinking and embrace the challenges of digital disruption in a world where creative leadership and rapid innovation is required.

Take the next step.

merage.uci.edu

Loyola Marymount University

THIS IS HOW WE DO BUSINESS.

We do things differently at Loyola Marymount University. Our graduate business programs transform students into agile professionals and executives who positively impact organizations and society. Small, intimate classes are led by faculty experts who are invested in your success. Real-world examples illustrate key concepts and hands-on projects give you opportunities to apply your new skills. Experienced career coaches work with students to achieve their career goals.

MBA PROGRAM

The LMU MBA Program, ranked a top-50 program by U.S. News & World Report, develops agile, innovative and impactful leaders for a changing global business landscape. The program is designed for individuals with a bachelor's degree and at least two years of professional experience. Classes are held in the evenings to accommodate working professionals.

EXECUTIVE MBA PROGRAM

The LMU Executive MBA Program, ranked No. 27 by U.S. News & World Report, empowers students to redefine their narrative by building capacity for leadership and strategy in a values-driven environment. Designed for mid-career executives with a bachelor's degree and a significant amount of professional, managerial or entrepreneurial experience, the 22-month program features Saturday-only classes.



NAME OF INSTITUTION

Loyola Marymount University

NAME OF BUSINESS SCHOOL OR PROGRAM

College of Business Administration

BUSINESS SCHOOL DEAN

Dayle M. Smith, Ph.D.

YEAR INSTITUTION WAS FOUNDED

1911

YEAR BUSINESS SCHOOL OR PROGRAM WAS STARTED

College of Business Administration: 1926

MBA: 1974

EMBA: 2000

TOTAL MBA ENROLLMENT

110

MBA PLATFORMS OFFERED

- MBA
- Executive MBA
- JD/MBA
- M.S./MBA

MBA AREAS OF EMPHASIS OFFERED

- Entrepreneurship
- Finance
- Marketing

LENGTH OF PROGRAMS

MBA: 21-36 months

EMBA: 22 months

PROGRAM CAMPUS OPTIONS

All programs take place on LMU's main campus in Westchester near Playa Vista.

PROGRAM ACCREDITATIONS

AACSB

WASC

RANKINGS

U.S. News & World Report graduate rankings:

- Entrepreneurship: No. 12
- Marketing: No. 23
- Accounting: No. 25
- Executive MBA: No. 27
- Business Analytics: No. 33
- Part-Time MBA: No. 50

CEO Magazine Global MBA Rankings:

- MBA: Tier One
- Executive MBA: Tier One

The Princeton Review/Entrepreneur Magazine

- Entrepreneurship: No. 31

TOTAL COST OF MBA

MBA: \$85,000

EMBA: \$103,000

REQUIRED TESTING

MBA: GMAT or GRE required. Waivers available to qualified applicants.

EMBA: GMAT/GRE not required for applicants who are able to demonstrate — either through past academic performance or work experience — sufficient strength in the areas of quantitative and analytical reasoning.

UPCOMING INFORMATION SESSIONS

MBA: Visit mba.lmu.edu/infosessions to schedule a virtual appointment with an admission recruiter.

EMBA: Sat., Apr. 10, Wed., Apr. 21, Sat., May 1



Loyola Marymount University
College of Business
Administration

APPLICATION DEADLINES

MBA: July 6, 2021

EMBA: July 6, 2021

PROGRAM CONTACT INFORMATION

MBA: Dustin Cornwell, Senior Director

dustin.cornwell@lmu.edu

(310) 258-8707

mba.lmu.edu

EMBA: Joe O'Hannigan, Senior Director

johannig@lmu.edu

(877) 568-8585

emba.lmu.edu

Visit cba.lmu.edu/gobeyond to learn more about our programs.



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- M.S. in Business Analytics
- M.S. in Entrepreneurship and Sustainable Innovation
- M.S. in Management
- Joint Master in Global Entrepreneurial Management

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cba.lmu.edu/gradprograms



Pepperdine University

AT PEPPERDINE GRAZIADIO, THE MISSION IS TO DEVELOP STUDENTS INTO BEST FOR THE WORLD LEADERS THROUGH EXPERIENTIAL-BASED LEARNING THAT IS NOT ONLY ETHICAL IN FOCUS, BUT ALSO GLOBAL IN ORIENTATION.

By making a positive impact on students, they will be equipped to go out into the world and do the same — turning small ripples into significant waves. The Pepperdine Graziadio Business School proudly offers a diverse range of full-time, part-time, executive, and C-level graduate degree programs. From their nationally recognized MBA and specialized master's programs to their executive doctorate and a bachelor's degree completion degrees, the school provides options tailored to any career stage, schedule, academic interest, and professional aspiration. Each of Pepperdine Graziadio's programs offer an unparalleled experience through experiential learning with an emphasis on real-world application, small class sizes that allow for personalized mentorship from industry renowned faculty, and access to a growing global alumni network of over 43,000.

In addition to their top-ranked business degrees, students have a wide-range of networking and learning opportunities available. Graziadio's events cover a comprehensive range of industry relevant topics, bringing in leading executives and entrepreneurs to share their insights. Their Dean's Executive Leadership event series is just one of their prominent events that features senior executive and thought-leader speakers from top organizations

who share real world success stories that reflect the ethical business models taught at the school. Alumni events include career development, networking, and lifelong learning opportunities.

Unique to Graziadio is the Center for Women in Leadership (CWL) which provides mentoring, networking, and skills development programs dedicated to empowering students to reach their full potential and contribute to the overall conversation around women in leadership. Additionally, for those interested in corporate citizenship and sustainability, the Pepperdine Graziadio certificate in Socially, Environmentally, and Ethically Responsible (SEER) business strategy allows students to complement their MBA with courses and activities that will empower them to be more mindful leaders and entrepreneurs.

Founded in 1969, the Graziadio Business School at Pepperdine University is dedicated to shaping leaders who will contribute to the betterment of business practice. This intention is embodied in the school's mission, its founder's and benefactor's points of view, and a daily commitment to hallmarks of entrepreneurship, integrity, and academic excellence.

The Pepperdine Graziadio Business School was endowed by, and takes its name from George L. Graziadio Jr., in 1996. Graziadio's core values are anchored in integrity, courage with compassion, a pioneering spirit, and action taken "today not tomorrow." This ethos continues to be reflected in the program offerings to this day.

With an entrepreneurial spirit, and anchored in integrity and innovation, the school advances applied learning



in small classes that deepen connections and stimulate critical thinking. Pepperdine Graziadio's faculty inspires students to think boldly and drive meaningful change, and to realize their greatest potential as values-centered, Best for the World Leaders — professionals who apply educational, spiritual, and ethical approaches to positively impact the lives of their colleagues, customers and communities.

Programs are offered in-person at campuses in Malibu, West Los Angeles, Irvine, Encino, Calabasas, and online. Learn more about becoming a Best for the World Leader by visiting bschool.pepperdine.edu/mba.



NAME OF INSTITUTION

Pepperdine University

NAME OF BUSINESS SCHOOL OR PROGRAM

Pepperdine Graziadio Business School

BUSINESS SCHOOL DEAN

Dean Deryck Van Rensburg

YEAR INSTITUTION WAS FOUNDED

1937

YEAR BUSINESS SCHOOL OR PROGRAM WAS STARTED

1969

TOTAL MBA ENROLLMENT

Full-time programs MBA: 131

Part-time and executive programs MBA: 1023

*As of Fall 2020

MBA PLATFORMS OFFERED

On-campus, online, hybrid, and fast-track

MBA AREAS OF EMPHASIS OFFERED

Part-time MBA (for working professionals), Full-time MBA, Executive MBA (for more tenured professionals), Presidents and Key Executives (PKE) MBA (for C-suite, senior, and ex-

ecutive levels), Joint Bachelor's and MBA Pathway (MBAJ), Joint MBA Options (JD/MBA, MBA/MPP)

LENGTH OF PROGRAMS

Duration depends on the specific program a student selects. Some programs take as little 12 months to complete, while others are more flexible, allowing students up to seven years to finish their degree.

PROGRAM CAMPUS OPTIONS

Malibu, West Los Angeles, Irvine, Calabasas, and Encino

PROGRAM ACCREDITATIONS

Association to Advance Collegiate Schools of Business (AACSB) and Western Association of Schools and Colleges (WSCUC)

RANKINGS

Full-Time MBA

U.S. News & World Report: No. 83 Best Full-Time MBA Nationwide.

Forbes: No. 61 Best Business School

Part-Time MBA

U.S. News & World Report: No. 74 Best Part-Time MBA

Nationwide, No. 12 Faith-Based School in the nation, No. 4 Private School in California, No. 15 Part-Time MBA West Coast Ranking.

Executive MBA

U.S. News & World Report: No. 27 Best Executive MBA in the U.S. CEO Magazine: No. 33 Best MBA in the World, Tier One Executive MBA among North American Programs

Online MBA

U.S. News & World Report: No. 26 Best Online MBA Program and No.17 Best Online MBA Programs for Veterans

TOTAL COST OF MBA

Cost varies by program and scholarships and financial aid are available.

REQUIRED TESTING

Required testing varies by program.

Please contact a recruitment advisor to learn more.

APPLICATION DEADLINES

Part-Time MBA Fall '21 Final Deadline: July 12, 2021

Full-Time MBA Fall '21 Final Deadline: April 26, 2021

Executive MBA and PKE MBA Fall '21 Final Deadline: July 5, 2021

PEPPERDINE
GRAZADIO
BUSINESS SCHOOL

PROGRAM CONTACT INFORMATION

Part-Time MBA Contact Info: Shany Mahalu
Fully Employed Programs, Director
(310) 568.5695
shany.mahalu@pepperdine.edu

Full-Time MBA Contact Info: Kandace Phyll
Full-Time Programs, Director
(310) 568.5637
kandace.phyll@pepperdine.edu

Executive MBA and Presidents and Key Executives (PKE MBA)
Contact Info: Rachel Staples Guettler
Executive Programs, Director
(818) 702.1342
rachel.guettler@pepperdine.edu

AN MBA THAT FITS YOU

Pepperdine Graziadio offers full-time, part-time, and executive MBA degree options to meet your unique personal and professional needs. You'll receive an unparalleled experience through experiential learning, small classes, and hands-on mentorship from industry-leading faculty.

[BSCHOOL.PEPPERDINE.EDU/MBA](https://bschool.pepperdine.edu/mba)

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California Lutheran University

Professionals who want an edge in the business world have a variety of programs to choose from at California Lutheran University.

The Executive MBA is an accelerated hybrid program with compressed weekend and online courses. It is designed for managers and leaders of corporate and non-

profit organizations who strive to excel and transform their teams. The curriculum focuses on five key areas: Leading Operations; Managing Processes; Creating and Leading Business Strategy; Developing People/Talent and Professional Advancement.

Cal Lutheran also offers a traditional MBA for students who require additional

scheduling flexibility or have limited work experience. Evening and weekend classes are offered on-campus or online in Thousand Oaks and at the Woodland Hills, Westlake Village, and Oxnard centers. Pursue a general MBA or specialize in corporate finance, human capital management, international business, IT management, marketing or entrepreneurship.

With over a decade of online teaching and full accreditation from the Accreditation and Council for Business Schools Programs, the School of Management can elevate professionals in any capacity. For more information, access this QR code with a smartphone.



NAME OF INSTITUTION

California Lutheran University

NAME OF BUSINESS SCHOOL OR PROGRAM

School of Management

BUSINESS SCHOOL DEAN

Dr. Gerhard Apfelthaler

YEAR INSTITUTION WAS FOUNDED

1959

YEAR BUSINESS SCHOOL OR PROGRAM WAS STARTED

1986

TOTAL MBA ENROLLMENT

462, breakdown by program: MBA: 334 EMBA: 128

MBA PLATFORMS OFFERED

Full-Time and Part-Time MBA; Executive MBA (Cohort-based); MBA Pathway Program for international/ESL students; Weekend, evening and online courses available.

MBA AREAS OF EMPHASIS OFFERED

Enterprise Innovation and Entrepreneurship, Finance, Financial Planning (online only), General Management, Human Capital Management, Information Technology Management, International Business, and Marketing. Post-Graduate Certificates also offered in these areas.

LENGTH OF PROGRAMS

MBA averages 12-24 months; EMBA: 18-month cohort

PROGRAM CAMPUS OPTIONS

Thousand Oaks, Oxnard, Westlake Village, Woodland Hills, online, hybrid

PROGRAM ACCREDITATIONS

Western Association of School and Colleges (WASC), The Accreditation Council for Business Schools and Programs (ACBSP)

RANKINGS

- No. 1 San Fernando Valley Business Journal, Regional MBA Programs (2020)

- No. 8 Great Business Schools, Online Master's in Entrepreneurship Programs (2021)
- No. 10 U.S. News & World Report, Regional Universities West (2021)
- No. 7 U.S. News & World Report, Best Colleges for Veterans (2021)
- No. 5 U.S. News & World Report, Most Innovative Schools (2021)

TOTAL COST OF MBA

MBA: \$38,475, EMBA: \$54,720

REQUIRED TESTING

GMAT or GRE (waiver available), TOEFL or IELTS for international applicants.

UPCOMING INFORMATION SESSIONS

EMBA Virtual Dinner: Thursday, Apr. 15, 2021 6 - 7:30 p.m.

MBA Online Information Session:

Tuesday, Apr. 20, 2021 6 - 7 p.m.

To RSVP and find future sessions, visit: callutheran.edu/info

California Lutheran University

School of Management

APPLICATION DEADLINES

MBA Priority Application Deadlines:

- Fall Term (Aug. - Nov.): July 15
- Winter Term (Nov. - Feb.): October 1
- Spring Term (Feb. - May): January 15
- Summer Term (May - Aug.): April 15

EMBA Priority Application Deadlines:

- Fall Cohort (Oct. start): August 1
- Spring Cohort (March start): February 1

PROGRAM CONTACT INFORMATION

Dr. Vlad Vaiman, Associate Dean and Acting Director
vvaiman@callutheran.edu
 (805) 493-3325

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With more than 35 years of experience in graduate business education and more than 10 years in delivering online programs, we'll be here when you're ready to transform into the professional you were destined to be.

Our ACBSP-accredited graduate programs include business, IT, financial planning, economics, and public policy.

Learn more at Callutheran.edu/som

California Lutheran University

School of Management



California State University, Northridge

The part-time evening MBA program at CSUN's David Nazarian College of Business and Economics offers working professionals the opportunity to invest in their future and secure their careers. This MBA program is not simply education offered "to" students, but an educational experience "with" students. Professionals are admitted to the

program because their work experience offers insight into what faculty members teach. The program's mission is to produce innovative leaders who:

- Apply knowledge and create strategies to manage dynamic environments
- Contribute sustainable value to their

organization, industry, and community

- Integrate theory and experiential learning to benefit career networks and trajectories

The Wall Street Journal/Times Higher Education College Ranking 2021 ranked the university the second-most diverse

learning environment in the nation. In 2020 Money Magazine ranked CSUN as nationally competitive and 45th among 739 on its "Best Colleges" list and 29 of the "Best Public Colleges."

Plus, CSUN students graduate at higher rates and earn more as alumni than those at other institutions.

NAME OF INSTITUTION

California State University, Northridge (CSUN)

NAME OF BUSINESS SCHOOL OR PROGRAM

David Nazarian College of Business & Economics

BUSINESS SCHOOL DEAN

Dr. Chandra Subramaniam

YEAR INSTITUTION WAS FOUNDED

1958

YEAR BUSINESS SCHOOL OR PROGRAM WAS STARTED

1958

TOTAL MBA ENROLLMENT

182

MBA PLATFORMS OFFERED

On-campus (currently virtual due to COVID-19)

MBA AREAS OF EMPHASIS OFFERED

Contemporary curriculum with topical electives

LENGTH OF PROGRAMS

2.5 years

PROGRAM CAMPUS OPTIONS

Part-time evening program

PROGRAM ACCREDITATIONS

AACSB

RANKINGS

- 2021 Best Business School: Best On-Campus MBA - Princeton Review
- 2020 Best Colleges for Business Majors - Money Magazine

TOTAL COST OF MBA

\$25,000 - \$36,000

REQUIRED TESTING

GMAT/GRE (waiver applications available)

UPCOMING INFORMATION SESSIONS

Apr. 8, 2021

CSUN | NAZARIAN COLLEGE

APPLICATION DEADLINES

Fall 2021 admission: May 1, 2021

Spring 2022 admission: Oct. 1, 2021

PROGRAM CONTACT INFORMATION

Dr. Kristen Walker, MBA Program Director

mba@csun.edu

(818) 677-2467

(818) 677-2467
CSUN.EDU/MBA

SECURE

your career

CSUN's David Nazarian College of Business and Economics offers a part-time evening MBA program designed for working professionals

Faculty expertise and student experience coalesce to produce innovative leaders who:

- Apply knowledge & create strategies to manage dynamic environments
- Contribute sustainable value to their organization, industry & community



CSUN | NAZARIAN COLLEGE



Claremont Graduate University

At the Drucker School of Management, we embrace Peter Drucker's philosophy that the practice of management requires a people-oriented approach. Our students enjoy small class sizes, approachable faculty, and supportive career counselors to help them grow professionally and meet their goals. We teach each student how to lead their

organizations to success in a way that benefits society.

The Drucker MBA offers the rigorous curriculum of a Full-Time MBA with a focus on people and performance. The program features the innovative Drucker Signature Platform, an exploration of leadership in practice through a study of Drucker's

philosophy, leadership, resilience, and mindfulness. In addition to selecting one of eight areas of concentration, students may earn up to three certificates as part of the MBA.

The Flex MBA is designed for working professionals looking to sharpen their leadership and strategic decision-making skills.

The program prioritizes flexibility, allowing students to move through the program at their own pace and choose from hybrid, weekend intensive, and weekly course options to fit the MBA around their many commitments. An elective-rich curriculum allows students to design their coursework around their professional goals and earn certificates along the way.

NAME OF INSTITUTION

Claremont Graduate University

NAME OF BUSINESS SCHOOL OR PROGRAM

Peter F. Drucker and
Masatoshi Ito Graduate School of Management

BUSINESS SCHOOL DEAN

David Sprott

YEAR INSTITUTION WAS FOUNDED

1925

YEAR BUSINESS SCHOOL OR PROGRAM WAS STARTED

1971

TOTAL MBA ENROLLMENT

120

MBA PLATFORMS OFFERED

Full-Time and Flex (evenings, weekends, hybrid)

MBA AREAS OF EMPHASIS OFFERED

- Entrepreneurship
- Finance
- HR Management
- IT Management
- Leadership
- Marketing
- Strategy
- Supply Chain

LENGTH OF PROGRAMS

- Full-Time - 21 months
- Flex - typically 24 months, students may progress more quickly or slowly

PROGRAM CAMPUS OPTIONS

Full-Time & Flex MBA - Claremont (main campus)
with hybrid options

PROGRAM ACCREDITATIONS

AACSB
WASC

TOTAL COST OF MBA

MBA (Full-Time or Flex): \$1,980/unit
(average \$23,760 at 12 units/semester);
Fellowships available for qualified students

REQUIRED TESTING

MBA: GMAT/GRE requirement waived for students
applying to start in Fall 2021
Flex MBA: GMAT/GRE not required

DRUCKER
SCHOOL OF MANAGEMENT
 Claremont Graduate University

UPCOMING INFORMATION SESSIONS

Spring preview, Apr. 9-10

APPLICATION DEADLINES

Summer 2021 (Flex only): Final deadline, June 1
Fall 2021 (Full-Time & Flex): Round 4, June 1;
Final deadline, Aug. 15

PROGRAM CONTACT INFORMATION

Matthew Gold, Associate Director of Admissions
druckermba.com
(909) 607-7811

Ignite: opportunity

On a Wing and a Prayer

Tom Hsieh pivoted quickly. His new aero-commuter company would avoid Southern California gridlock by flying over it. As the company was poised to launch last March, the pandemic hit. No one was commuting. At least not in California. Tom quickly moved his operation to Alaska, where commuting is not a luxury but a critical necessity. And once the pandemic is in the rearview mirror, Tom's company will return to SoCal stronger than ever. In the face of adversity, Tom sees opportunity.



Ignite Opportunity: Explore CGU.

To read more about Tom and other
CGU success stories, go to cgu.edu/ignite



Claremont Graduate University

#carrytheflame



TOM HSIEH
EMBA, '04

USC Marshall School of Business

USC Marshall is a global business school in the heart of L.A. Consistently ranked among the nation's premier schools, Marshall offers impressive international and experiential opportunities, cutting-edge research and industry engagement, and is supported by the powerful Trojan network.

Marshall's students and alumni play lead-

ing roles in the industries that drive L.A. forward in accounting, real estate and finance, entertainment and tech. With cross-disciplinary excellence spanning arts and sciences, students draw on L.A.'s cultural diversity, entrepreneurial mindset and creativity.

Our focus is on producing skillful leaders who turn ideas into outcomes for the real world, right now. Marshall's award-winning

faculty and experiential learning environment create leaders who are prepared for both today's jobs and future careers not yet imagined.

The unrivaled Trojan family is 90,000 strong across 100+ countries, Marshall graduates make up an impressive 20% of all USC alumni. The Trojan network bolsters powerful career options and links students

and business leaders.

Marshall has an outsized role to play in the evolution of business toward a more sustainable, equitable, and engaged future. I continue to believe that business can change the world for the better and that the USC Marshall School of Business is helping power that change.

- Dean Geoffrey Garrett

NAME OF INSTITUTION
University of Southern California

SCHOOL OR PROGRAM
USC Marshall School of Business

BUSINESS SCHOOL DEAN
Geoffrey Garrett

YEAR INSTITUTION WAS FOUNDED
1880

YEAR BUSINESS SCHOOL OR PROGRAM WAS STARTED
1920

MBA PLATFORMS OFFERED
Full-Time MBA (FTMBA) Part-Time MBA (MBA.PM)
Online MBA (OMBA) Executive MBA (EMBA)
International Business Education and Research MBA (IBEAR)

TOTAL MBA ENROLLMENT
FTMBA: 427; MBA.PM: 638; OMBA: 313; EMBA: 144; IBEAR: 44

MBA AREAS OF EMPHASIS OFFERED
Accounting, Branding, Business Analytics, Commercial Banking, Corporate Finance, Entertainment, Entrepreneurship, Health Care Administration, Hedge Funds, Information Systems, International Business, Investment Banking, Marketing Operations, Management, Organizational Leadership, Private Equity, Real Estate Finance, Social Entrepreneurship, Strategic Management and Consulting, Supply Chain Management, Sustainability, Technology Commercialization, Venture Capital

LENGTH OF PROGRAMS
FTMBA: 2 years MBA.PM: 3 years OMBA: 2 years EMBA: 2 years IBEAR MBA: 1 year

PROGRAM CAMPUS OPTIONS
University Park Campus, Los Angeles

PROGRAM ACCREDITATIONS
AACSB, WASC

RANKINGS
U.S. News & World Report: FTMBA: No. 17
MBA.PM: No. 13 OMBA: No. 4 EMBA: No. 22

TOTAL COST OF MBA
FTMBA: \$129,150* MBA.PM: \$129,150*
OMBA: \$112,346 EMBA: \$156,000 IBEAR: \$124,715
REQUIRED TESTING FTMBA: GMAT or GRE
**Tuition only*

UPCOMING INFORMATION SESSIONS
Visit marshall.usc.edu/news-events/usc-marshall-events for upcoming information sessions by program.

APPLICATION DEADLINES
Visit marshall.usc.edu/programs/mba-programs for application deadlines by program.

PROGRAM CONTACT INFORMATION
FTMBA, MBA.PM, and EMBA USC Marshall MBA Admissions
630 Childs Way - JKP 308, Los Angeles, CA 90089-2633
Phone: (213) 740-7846 Fax: (213) 749-8520



marshallmba@marshall.usc.edu
marshall.usc.edu/programs/mba-programs
OMBA
(213) 821-6800
onlineimba@marshall.usc.edu
marshall.usc.edu/programs/mba-programs/online-mba
IBEAR
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