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TRUSTED ADVISORS 2015

SPECIALTY AWARD



## CLIENT SERVICES AWARD

For Consistently Outstanding Service

### **Adam Kogan Treiger, Esq.**

Partner

**Stowell, Zeilenga, Ruth, Vaughn & Treiger LLP**

(Also Honored in the Accounting Category this Year)

**A**dam K. Treiger concentrates his practice on complex employment and business law counseling and litigation. His employment law practice focuses on litigation prevention and day-to-day employment law counseling, as well as on representing employer clients, including businesses, private schools and religious organizations. He helps guide these organizations through their respective legal issues and represents them regularly in federal and state court, administrative or arbitration settings, and in typical matters including claims arising out of wage and hour, discrimination, harassment and wrongful termination disputes. In addition, he handles a wide variety of business and licensing transactions including drafting and negotiating all types of business, licensing, and real estate agreements, forming corporations, limited liability companies, partnerships, and handling mergers and sale/purchase agreements.

He is a frequent speaker on employment law, business law and litigation issues and has authored numerous published articles on subjects pertaining to these specialties.

Treiger advises clients on all of these business issues. However, what really distinguishes him is the passion he puts behind his representation. He works tirelessly for his clients, not only because he genuinely cares, but also because he is so dedicated to the law as an effective vehicle for resolving civil disputes.

"Adam has been my corporate and personal attorney for more than a decade now, and fortunately we have become friends as well. I thoroughly trust his judgment, knowledge and most importantly, his character. I consistently, zealously refer him to friends, clients and colleagues who can benefit from his wise counsel, and we all benefit. One of the things I admire most about Adam is his fiduciary standard of always putting the client's interests before his own, even when the end result may be the client not engaging him for his services. He has helped me with employment law issues, general business and real estate matters. In a way, having Adam on my team is a terrific insurance policy in navigating business risks."

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*President & Chief  
 Executive Officer  
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## COMMUNITY SERVICE AWARD

For Making a Difference in the Community, Beyond Job Responsibilities

### Donald John Miod

Senior Partner

Miod and Company, LLP

**D**onald Miod is the founding partner of Miod and Company, LLP. He oversees all aspects of the company's accounting, tax and litigation services. His vast background includes developing leading proprietary asset tracing models, several professional certifications, published articles and speaking engagements at professional conferences. He is a prominent member of several industry associations and a significant contributor to state industry conferences. He was voted one of the top 25 CPAs in the San Fernando Valley and is the recipient of the California Society of Certified Public Accountants Family Law Sections Distinguished Service Award.

Aside from Miod's tremendous lexicon of skills, one of his greatest accomplishments is his unwavering commitment to his profession and the community he serves. His is Former Chair of the Family Law Section of the Litigation Services Section of the CSCP and a current member of the Association's Business Valuation Section. He is also a member of AICPA, International Society of CPAs, Institute of Business Appraisers, the National Association of Certified Valuation Analysts and the Association of Certified Fraud Specialists, among other groups. He's the recipient of the California Society of CPAs Family Law Section Distinguished Service Award and is a tireless volunteer for the CSCP's Student Outreach program in speaking to students at the middle school, high school and college students on handling credit and savings. He served as a participant at the "CPA Day at the Capital" lobbying event on behalf of CSCP in Sacramento and has been a regular volunteer at the downtown Los Angeles and Van Nuys courthouses to help mediate family law cases.

"I have been in business since 1977 and know first-hand the importance of having a forensic accountant upon which we can rely to provide not only great integrity, but the competence that is required in legal litigation. Don Miod provides the above to my firm and sound practical answers and solutions no matter how tough the assignment. He is by definition the epitome of a trusted advisor."



**DANIEL BERGMAN, ESQ.**  
Principal  
Bergman Law Group



## Congratulations

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**Norm Tamkin**

Tax Partner

as one of San Fernando Valley's  
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# As an accounting firm, we love numbers.

Here are a few of our favorites.

102

Years in business

97

Countries served (Through Praxity, AISBL)

33

Industries served

10

California offices

5.4

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TRUSTED ADVISORS 2015

SPECIALTY AWARD

## TRAILBLAZER AWARD

For Starting a New Enterprise, Being the First to Try Something New and/or Leading the Profession Forward

### Nicole Kamm, Esq.

Attorney

Lewitt Hackman

**N**icole Kamm is an attorney in the Employment Department of Lewitt Hackman in Encino. Her practice focuses on advising employers concerning various employment-related issues, including compliance with California and federal anti-discrimination, anti-harassment and leave laws, as well as negotiating and documenting employment and severance agreements. Kamm spends a significant amount of time counseling clients on employment policies, and performs trainings on all aspects of employment conduct, including mandated sexual harassment training, discrimination training, and training on the interplay of the Fair Employment and Housing Act and Americans with Disabilities Act with state and federal leave laws.

Kamm is the recipient of this year's Trailblazer Award thanks in large part to her tireless efforts co-founding and helping to run Women to Women (W2W), an elite group of females in business who aim to support each other by providing a peer group for successful, excellence oriented industry leaders. She is also a member of several other networking organizations, including ProVisors, PIHRA, the National Human Resources Association (NHRA), and the National Association of Women Business Owners (NAWBO). She is a frequent speaker on all areas of employment law. She regularly volunteers to speak at SCORE, a nonprofit organization dedicated to entrepreneur education and the formation, growth and success of small business nationwide. She also tracks new employment legislature and case law and prepares and presents voluminous materials for an annual employment law update. Kamm also regularly publishes articles and blogs on current employment topics.



"Nicole Kamm has been assisting my company for that last year. Her ability to sort through the complexities of employment law and advise us as to the best course of action has been a lifesaver to my company. She has that perfect balance of compassion and professionalism."

**LEE THOMAS**  
President  
LT Industries

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CohnReznick applauds the 2015  
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Congratulations to our partner,  
Bill Andreozzi, for his win as a  
Trusted Advisor.

The Partners of CohnReznick

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## TRUSTED ADVISORS 2015

## HONOREES

## ▶ ACCOUNTANT



**WILLIAM ANDREOZZI**  
PARTNER  
COHNREZNICK

WILLIAM Andreozzi is a partner at CohnReznick. He has more than 23 years of diverse federal, state, and international tax experience. He specializes in serving the multidisciplinary tax needs of global and multistate middle-market companies across a variety of industries including manufacturing and wholesale distribution, technology, and private equity.

Andreozzi serves as Tax Division Leader for CohnReznick's Woodland Hills and Los Angeles offices. In his role as Tax Division Leader, he oversees the offices' joint tax department, including such matters

as workflow and scheduling, assessment and professional development, ensuring efficient and economic processes. He also serves on the firm's Tax Executive Committee and Tax Operations Committee, in which he is instrumental in establishing overall tax policy, operating procedures and quality standards for the firm.

Andreozzi helps his clients address their business and tax objectives by providing value-added tax solutions, including advising on internal and external restructurings, acquisitions, divestitures and bankruptcy. He specializes in implementing strategies to minimize federal, international and state taxes. He has extensive experience in the management of federal, international and state and local tax compliance; and development of strategies to settle federal and state tax examinations.

Truly considered a trusted advisor, Andreozzi not only is a licensed CPA, but holds a law degree as well. Acting as a mentor to his staff and others, he develops and conducts professional development sessions in the accounting and tax fields. He takes great pride in providing opportunities for his team members to develop and grow.

*"Bill's wealth of knowledge and sound advice makes him a trusted and irreplaceable advisor to our company. He provides unmatched responsiveness and a willingness to jump into the details of sophisticated transactions that has allowed us to make better informed business decisions."*

– Kaye Michaelson, CFO, Quixote Studios

## ▶ ACCOUNTANT



**MARK W. GREENBERG, C.P.A.**  
PARTNER  
MILLER WARD & COMPANY

MARK Greenberg has been a CPA for 36 years. He spent 25 of those years working with his father, with an office first in Hollywood, then in Studio City and finally in Encino. They worked together to grow a very successful and trusted practice. After his father retired, Greenberg merged with Miller Ward & Company. Here too, he has helped the firm grow with separate departments for taxes, business management, business audits and wealth management. Just before Greenberg joined the firm with his two staff in January of last year, there were 12 people in Miller Ward. Today, there are 24. He also

has a real estate license and a life insurance license.

Greenberg has prepared tax returns for individuals, partnerships, corporations, trusts, non-profits, estates, retirement plans and homeowners' associations. Besides a CPA and his other licenses, he likes to refer to himself as an "MD" – the "Money Doctor." This is because he does so much more than prepare tax returns. He does financial and estate planning, consulting regarding wealth management, and budgeting finances. He handles audits with the IRS, Franchise Tax Board, State Board of Equalization, EDD and other State, County and City agencies.

In his 36 years of doing what he does, Greenberg has managed to amass a great deal of knowledge about many different types of businesses, including (but not limited to) non-profit organizations, domestic and international manufacturing, importing and exporting, wholesale, retail, professionals, franchising, internet-based businesses, start-ups, construction, real estate, contractors, automotive, advertising agencies, medical, dental, legal and entertainment industry companies.

*"It is an honor to be associated with a trusted advisor and a knowledgeable CPA as Mark. Our family and our company has been involved with Mark for many years. His advice and direction along with his knowledge of rules and regulations and consistency of business ethics is well received and appreciated."* – John Martin Amiri, Senior Vice-President, Amiri Family Trust

## ▶ ACCOUNTANT



**MAUREEN O'GARA-ADFORD**  
MANAGING PARTNER  
GISHSIDEN LLP

MAUREEN O'Gara-Adford, the Managing Partner at gishSIDEN LLP, is a professional who has a vast amount of experience in both the Public sector as well as the Private sector of accounting. This experience in working on both sides of industry enables her to offer consulting services to a variety of businesses and to improve their operations, internal controls and overall profitability.

Her specializations include construction, software development, manufacturing, distributorships, restaurants and other specialized industries. Her

approach to examining problems and determining the proper course of action is a definite strength to any organization.

O'Gara-Adford graduated from California State University Northridge, joined gishSIDEN LLP in 1986, and became a partner in 1999. She became the first female Managing Partner in the firm's 64-year history in 2006. She is also the chair of the Information Technology Strategic Group of the firm.

In short, she is a professional who has a vast amount of experience in both the Public sector as well as the Private sector of accounting. This experience in working on both sides of industry enables her to offer consulting services to a variety of businesses and to improve their operations, internal controls and overall profitability.

Her specializations include construction, software development, manufacturing, distributorships, restaurants and other specialized industries. Her approach to examining problems and determining the proper course of action is a definite strength to any organization.

O'Gara-Adford is a member of the American Institute of Certified Public Accountants, California Society of Certified Public Accountants, CSUN Alumni Association, and St. Paschal Baylon Finance Council.

*"Gish Sieden, in particular Maureen O'Gara and her team have been a trusted advisor for Sanders Industries, it's owner and key management for over 11 years. What we value the most is their ability to quickly analyze a situation and provide practical sound advice and realistic options for complex situations. They have been extremely accessible and responsive to extremely complex audit, tax and business combination issues that have arisen over the past 11 years. Sanders Industries completed 11 acquisitions and two major liquidity events during this time frame and the Gish team was alongside of us the entire time providing practical and well thought out advice throughout the process. I would recommend them to any organization that is looking for more than a firm to provide and audit and tax work, but is clearly looking for a partner in their business."* – Richard M. Ginsburg, Principal, Sanders Industries

## ▶ ACCOUNTANT



**NORMAN TAMKIN**  
PARTNER  
HOLTHOUSE, CARLIN & VAN TRIGT, LLP

NORM Tamkin opened and leads HCVT's Encino tax office practice and has over 28 years of experience addressing complex tax planning, estate planning, and the compliance needs of high net worth individuals, as well as closely held businesses. His primary emphasis is in the real estate industry, but his experience involves many different industries, including professional service companies such as medical, legal, banking and investment advisor professionals, as well as retail, entertainment, aerospace and manufacturing companies. He works with all entity

structures, including partnerships, limited liability companies, and small business S Corporations as well as estates and trusts. Over the years, he has helped his clients by providing tax controversy assistance and resolution in Internal Revenue Service and state Franchise Tax Board audits.

Tamkin excels at providing great client services. He truly cares about his clients and develops personal relationships with them, focusing on providing planning ideas that help his clients achieve their personal and business goals. He takes the time to understand their goals as it relates to retirement, business transactions and philanthropic goals as well as tax planning. He collaborates with his clients' advisors and places the needs of his clients above all else.

Tamkin has a passion for accounting. However, he is much more than an academically excellent accountant. He has detailed business experience in each of our business areas and is a valuable consultant who many often turn to for advice and guidance. Plus, Tamkin is very accessible and can provide quick answers - a quality that is extremely important in today's fast pace business environment.

*"Norm has the rare ability to effectively communicate complex issues. Most importantly, Norm is very accessible and can provide quick answers - a quality that is extremely important in today's fast pace business environment. Last year, Norm's detailed knowledge of the tax codes saved our firm considerable taxes. Even in times when his team is most stressed, we have found Norm's calm demeanor to set the pace among the team. Norm is our Trusted Advisor."* – Gregory Brody, Managing Partner, BW Brody Affiliated Companies

# awe — inspiring

Bank of America Merrill Lynch is proud to join in honoring the outstanding accomplishments of the 2015 Trusted Advisor nominees.

Redonna Carpenter-Woods, Vice President/Client Manager  
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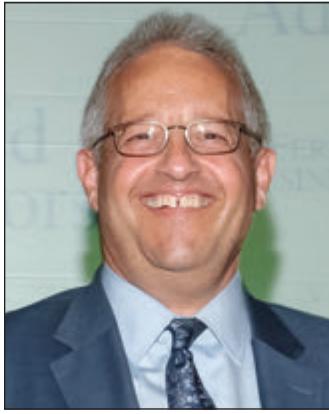
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## HONOREES

## ► ATTORNEY



**FRED GAINES**  
MANAGING PARTNER  
GAINES & STACEY

FRED Gaines is Managing Partner of Gaines & Stacey, LLP, a San Fernando Valley based law firm that specializes in land use, zoning, environmental law, related litigation and political advocacy. The firm, which has offices in Encino and Newport Beach, provides counsel and services to developers, governmental agencies, community groups and individuals related to real estate and general business issues.

Gaines concentrates his practice in a variety of areas, including administrative approvals, environmental review of development projects, and litigation involving development projects, property transactions, boundary disputes, and other real estate related matters.

He has handled numerous matters before the California Coastal Commission and has acted as lead counsel for plaintiffs in the landmark cases *Landgate v. California Coastal Commission* and *Lechuza Villas West v. State of California*. Gaines is a past president of the San Fernando Valley Bar Association and the past trustee of the Los Angeles County Bar Association. Gaines is a member of the California Building Industry Association Select Committee on Industry Litigation. Gaines is also a Past Chair of VICA, where he dedicated two very active years as chairman, sitting on all of VICA's committees, chairing the board and executive committee as well testifying on behalf of businesses. He still serves on the VICA board. He has also dedicated his time to serve as Mayor and Councilman of Calabasas

Gaines was born in Los Angeles and lives in Calabasas today. He obtained his bachelor's degree in economics and politics from UCLA. He received a master's in public policy at Harvard. He then received his juris doctorate from the UC Berkeley.

*"Fred has been an important part of our entitlement team for over a decade. He is an excellent attorney, but what I appreciate even more are his insights on strategy, vision and politics. I look for people who see the big picture and can also handle the minute detail, and that's what Fred does."* – Richard E. Weintraub, President, Weintraub Real Estate Group

## ► ATTORNEY



**STEVEN GUBNER**  
PARTNER  
EZRA BRUTZKUS GUBNER LLP

STEVE Gubner, EBG's Managing Partner, is business counsel to financial institutions, Fortune 500 companies (and their financing divisions), closely held businesses and high net worth individuals. He has particular expertise representing companies and individuals in the apparel and fashion, and banking and finance industries.

He was recently Counsel of Record in *Stephen Law v. Alfred H. Siegel, Chapter 7 Trustee*, a landmark case argued in front of the Supreme Court of the United States concerning a bankruptcy court's power to protect the bankruptcy process from abuse. He was Special Litigation Counsel to Howard Ehrenberg in *In re Ruderman Capital Partners, LLC*, stemming from the criminal case against Bradley Ruderman, who ran an elaborate Ponzi scheme and was a regular player in a series of exclusive "Texas Hold'em" games held for celebrities.

Gubner applies his experience as a business lawyer, and business owner, to each matter in order to effectively achieve his clients' long-term objectives. He listens carefully to client desires and concerns before charting the most effective course.

He is particularly skilled in commercial collections for banks and financial institutions, and has successfully litigated heavily contested, multimillion-dollar real/personal property and equity line financing cramdown cases. He also assists with pre-bankruptcy and pre-workout considerations and strategies, and with wealth management advice and planning for his high net worth clients. So adept in complex bankruptcy insolvency matters, he has been nicknamed the "involuntary bankruptcy go-to lawyer" because of his management of the sensitive issues surrounding involuntary bankruptcy filings. For the past two decades, Gubner has had an immeasurable impact on his clients' businesses, handling matters totaling hundreds of millions of dollars.

*"Steve Gubner treats each one of his clients like its his only client. He is efficient, responsive, and carefully listens to client goals and objectives. Most recently, he represented me as trustee of the Fleetwood Liquidating Trust as the successor to Fleetwood Enterprises Inc., and his work in this matter made for a expeditious and successful resolution."* – Peter Kravitz, Principal and General Counsel, Province, Inc.

## ► ATTORNEY



**BARRY KURTZ**  
CHAIR, FRANCHISE & DISTRIBUTION  
PRACTICE GROUP  
LEWITT HACKMAN

BARRY Kurtz is the Chair of the Franchise and Distribution Practice Group at Lewitt Hackman. A Certified Specialist in Franchise and Distribution Law, Kurtz also has a wealth of experience in related business matters – including corporate, mergers and acquisitions, business transactional law, and commercial real estate leasing.

Kurtz represents franchisors, manufacturers, franchisees and distributors. His familiarity with franchising – as an attorney, a franchisor executive and franchisee developer – spans decades, and provides both domestic and international clients with a unique perspective on the issues and demands that franchised and independent business owners face in the expansion, sale, purchase, financing and operation of their companies.

He has lectured at the American Bar Association Forum on Franchising, the UCLA Extension School, the National Association of Corporate Real Estate Executives, the national Craft Brewers Annual Conference, and served as a panelist at the *Los Angeles Business Journal's 2014 Franchise Opportunities in California* forum.

Kurtz helped establish successful franchises like 1-800-Flowers, Fast Frame, Century 21 Real Estate and many more. In his 42-year career, he has worked with over 100 franchise systems multiply their businesses, negotiate real estate agreements, license beer distributorships and resolve disputes. He's worked with franchisors to expand into the far reaches of the globe, maintain and police iconic brands, and keep in compliance with the demands of local, state, national and international governing agencies.

Basically, if you've ever purchased real estate, pumped gas, or eaten a burger anywhere in the San Fernando Valley and beyond, Kurtz has probably in some subtle way, affected the daily doings of your life.

*"Barry possesses a quality most attorney's don't, the ability to analyze situations and opportunities both through legality as well as what a business needs. Through both challenging and opportunistic times, his advice and mentorship has helped steer TGA's success the past 9 years."* – Joshua Jacobs, Chief Executive Officer, TGA Premier Junior Golf and TGA Premier Youth Tennis

## ► ATTORNEY



**JONATHAN FRASER LIGHT**  
PARTNER  
LIGHTGABLER LLP

JONATHAN Fraser Light has more than 30 years of experience in the field of employment law. He is AV Preeminent-rated by Martindale Hubbell, the highest peer-review rating possible. As a founding partner at LightGabler LLP, he consults with over 600 companies throughout California regarding their day-to-day employment law needs.

Light has successful jury trial, court trial, appellate, Labor Commission and binding arbitration results in lawsuits and administrative claims involving wrongful termination, sexual harassment, race discrimination, class action, wage & hour, and other employment-related matters. He has also appeared on behalf of employers with the federal EEOC and Labor Department, the state Department of Fair Employment and Housing, the National Labor Relations Board, and other government law agencies.

Light frequently speaks to employer and human resources groups on topics such as avoiding sexual harassment, wage and hour issues, business and employment law pitfalls, diversity in the workplace, supervisor strategies, employment law updates, and preparing employee handbooks.

Light's clients know that he will always provide them with clear and accurate counsel when they need advice on employee and workplace issues. He offers employment counsel and training programs to companies of all sizes to reduce liability and protect against lawsuits.

Light enjoys a long-standing reputation as a skilled trial attorney. His employment cases involve a variety of matters and he has proven successful in a variety of litigation matters outside the employment arena as well.

Light shares his expertise with clients through periodic employment law updates and free roundtable discussions for small groups; sex harassment avoidance training for managers and staff; and strategies for protection of proprietary information and trade secrets.

*"I am honored to be able to provide some insight and thoughts about our company's working relationship with Jon Light. I have been with Line 6, Inc. for 13+ years and have had the pleasure of working with him throughout my tenure as a Human Resources professional. Jon has been supporting our company as our employment attorney well before I started with Line 6 and we have continued the successful association. Not only has Jon been an extremely knowledgeable and well versed attorney but also very supportive to Line 6 and me as a business partner. Furthermore, I have always found Jon to be extremely ethical with high principals, which is imperative in business and as an attorney. We have been very fortunate as a company to have Jon in our court and he's also a really nice guy!"* – Jackie Deimel, Senior Director of Human Resources, Line 6, Inc.



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## HONOREES

## ► ATTORNEY



**DOUGLAS H. RIDLEY, ESQ.**  
PRINCIPAL  
LAW OFFICES OF DOUGLAS H. RIDLEY

DOUG Ridley uses his knowledge as a former prosecutor to help people in the criminal courts get their lives back on track. As the founder and managing partner of The Law Offices of Douglas H. Ridley, he serves and defends clients in Ventura and Los Angeles counties.

Ridley graduated from Pepperdine University School of Law in 1998 with a focus on Trial Advocacy, earning awards for his exceptional trial skills.

Ridley became a Deputy District Attorney with Ventura County from 1999 through 2004, reviewing

thousands of DUI cases along with working in the misdemeanor, felony, narcotics, and gang units. He spent the last three years of his career as a prosecutor in the special victims Sex Crimes Unit of the DA's office, putting child molesters in prison for life.

Ridley left the DA's office in 2004 and began work in private practice. Since 2009, he has focused on criminal defense, helping people who find themselves in the criminal justice system.

Perhaps Ridley's best quality is the compassion he has for his clients. People who get caught up in the criminal justice system are facing the worst experience of their life. They are scared and completely unaware of the challenges facing them in the courts. In addition to the criminal courts, many charges like a DUI face additional licensing consequences that involve complicated administrative hearings. Ridley breaks down the procedures and presents a timeline to his clients for what they can expect on a case. He further gives them a realistic appraisal of their case, honestly assessing their chances and potential consequences.

*"My son had done something really dumb. He got caught up with the wrong friends and broke into a house to steal some stuff to get money for alcohol. We were worried he was going to destroy the rest of his life. With the counsel of Mr. Ridley and the help of the court, we got my son out of the school he was in, away from his circle of friends, and helped him get on the right path. He is getting good grades and all this will be off his record once he turns 18. We are very grateful."* – Parent of Juvenile client: J.L., Simi Valley

## ► BUSINESS BANKER



**REDONNA CARPENTER-WOODS**  
VICE PRESIDENT  
BANK OF AMERICA

DRAWING on more than 25 years of experience, Redonna Carpenter-Woods offers deep insight into the many different markets of Los Angeles and Ventura counties. She leads a team of financial specialists who work with clients and other professionals to understand their business. She and her team proactively provide strategic advice and integrated financial solutions to help each client meet financial goals. She has been a Bank of America Merrill Lynch client manager since 2011. She spent two years with Bank of America Small Business Small Business Banking Group

prior to being promoted to the global commercial banking group. She has held various positions in banking throughout her career, including such roles as: Regional Manager of Retail Banking; Banking Center Manager; and SBA Business Development Officer.

Carpenter-Woods is extremely responsive to client needs. She offers personalized service to help businesses meet their financial needs. She is also very good at providing quality referrals to other trusted advisors who can assist with making important business decisions and improving operations.

She offers sound financial advisory services and understands the individual needs of each client. She also applies her vast experience in the banking world to assist clients with growth and profitability. She also plays the role of advocate on behalf of her clients with the bank to help them achieve their borrowing requirements and stay in compliance with the bank's reporting needs. She is able to offer a wide range of banking services in order to help each business run smoothly.

*"Redonna is a very insightful and sagacious banker. As the lead of a Global Fortune 200's restructuring team previously, I have worked with many bankers in the past. It was very simple to work with banks when all materials and history is available. However, my rapidly growing low margin young company was considered premature and thus, we were turned away by many banks. Redonna was able to see our company's potential. Her dedication and commitment to secure a loan for us despite a relatively longer process and smaller sum allowed me to expand a year earlier in this rapidly changing global market. Last but not least, despite her competence, Redonna has a humble, kind and genuine persona. I am more than honored to have Redonna as a trusted banker and friend."* – Billy Chen, Chief Executive Officer, B & M Global Trading

## ► BUSINESS BANKER



**SOFIA GRESEN**  
VICE PRESIDENT  
CITY NATIONAL BANK

SOFIA Gresen obtained her CPA early in her career, and entered banking as an auditor for Fleet Capital. By the time she left for City National Bank, Sofia was one of the best in her company, having led and completed audits on multi-national corporations such as Igloo and Mobile Mini - complex syndication transactions. As an underwriter for City National Bank, Gresen quickly became a star. She designed processes and systems that improved efficiencies, and has also created standardized templates, which streamline the credit process and provide transparency to the

customers of the bank. She was soon promoted to the coveted Relationship Manager position, which she has held for the past three years. In this short period of time, Gresen has received several awards and has helped her clients fund over \$200MM in new loans. She specializes in the most complicated transactions the bank has to offer, and the future is bright for this rising star.

Gresen is responsible for developing new commercial credit relationships with local businesses which have annual sales between \$10-\$150MM, as well as managing a portfolio of credit relationships. Her strong background in accounting, auditing and underwriting, gives her unique insight into the transactions of her customers. Because she understands the fundamentals of her marketplace, she is extremely creative when it comes to structuring complicated transactions in industries ranging from high-end fashion to global manufacturing. It is this insight that also allows her to work with community-based businesses to design solutions for their short and long term strategic objectives, and to pave the way for growth in her community.

*"Sofia has been an excellent partner to our business over our 10 year relationship and has helped us identify different financing arrangements as our needs evolved over the years. She has been a strong supporter to our business as an advocate and ensuring we receive the best services possible. Sofia is an important factor to value our City National Bank relationship."* – Mario Lejtman, Chief Operating Officer, Chrome Hearts

## ► BUSINESS BANKER



**ALON HAIM**  
SENIOR VICE PRESIDENT, CENTER MANAGER  
CITIZENS BUSINESS BANK

ALON Haim is Senior Vice President and Center Manager of the San Fernando Valley Commercial Banking Center for Citizens Business Bank, a financial services company with a bank at its core, offering large bank products and solutions with the hands-on touch and personal attention of a local community bank.

Haim specializes in real estate, nonprofit, acquisitions financing, and large deposit banking relationships for businesses across Southern California.

Haim is largely known for his unique, genuine, and knowledgeable approach with each and every

one of his clients. He puts a lot of effort into getting to know his clients closely before presenting his recommendations and suggestions. He is constantly coming up with ideas to improve client investments and business processes that support his clients, including new payment process structures for larger clients that make operations more efficient.

Haim has not lost a single client since starting with Citizens Business Bank in April of 2010. Rather, each of his clients have become part of a network that he encourages to interact and work together when possible, thus adding more to the community. He provides custom cash management solutions to improve business processes and cost savings.

Being a San Fernando Valley native and growing up in the community has allowed Alon to establish himself with a successful network of quality, professional advisors who can take care of his clients in the same manner that he does. His clients get access to that network of advisors, each benefiting from the connection to the best providers in the area.

*"Banking, at its best, is art and science. It's about transactions but also a relationship. It's precise but also innovative. Alon is brilliant at it all. His team embodies a culture of integrity and customer service that I haven't seen since the 1980s. It was key to earning and keeping my trust. Ten years later, I can't imagine working with any other banker— for my personal or corporate needs."* – Candace Crawford, Chief Executive Officer, Maverick Brands

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## ► BUSINESS BANKER



**JANET SHINKLE**  
VICE PRESIDENT - RELATIONSHIP MANAGER  
MISSION VALLEY BANK

It is Janet Shinkle's expertise in A/R Financing and ability to seamlessly almost become an extension to her clients' business that has made her a trusted banking advisor and valued partner to a large portfolio of clients.

Born in England, Shinkle's family moved to the United States when she was young, though eventually moved back and forth over a number of times throughout her childhood. Once back in the States, she quickly selected banking as her field of choice and started her career at First Interstate Bank more

than 30 years ago, becoming a skilled commercial lender.

Over the years, Shinkle worked at several institutions including American Independent Bank, First Private Bank and Trust (now Boston Private) before joining Mission Valley Bank in 2008 as Vice President and Manager of Mission Valley Bank's Accounts Receivable Financing division. Since joining Mission Valley Bank, she has successfully managed both the Accounts Receivable portfolio, as well as serving as Relationship Manager to a number of the bank's high profile commercial accounts.

Shinkle's depth of knowledge and thorough understanding of the many facets of commercial lending – both conventional business financing as well as less traditional lending options – allows her to provide clients with solutions that they may not have found with other lenders. This knowledge, paired with her absolute commitment to fully understand the specific goals and needs of the people and businesses she works with, enables her to truly act as a trusted advisor to each of her clients.

*"As a small business owner I can't say enough good accolades about Janet and Mission Valley Bank. She is a very important part of our business and our continued growth and success. Janet is a trusted voice to our business and I would be happy to recommend her to anyone in business. Janet handles all of the banking needs that keep my business running so I can keep running my business. I highly recommend her." – Fausto Sanchez, Owner, Performance Post*

## ► INSURANCE PROFESSIONAL



**STEVE BROOKS**  
PRESIDENT  
B & B PREMIER INSURANCE SOLUTIONS, INC

Steve Brooks is President of B & B Premier Insurance Solutions, Inc, a renowned independent insurance agency in Southern California. B & B provides coverage in the areas of property and casualty, including: personal insurance (auto, home, earthquake and umbrella coverage for jewelry, collectibles and artwork); as well as business/commercial insurance (general liability, workers compensation). Brooks is also one of the nation's most recognized independent insurance agents, speaking frequently at conventions and colleges, while also regularly contributing articles to national and regional publications.

By 2009, after 25 years of success, Steve Brooks Insurance Services was one of the largest independent agencies in the Tri-County areas of Ventura, San Luis Obispo, and Santa Barbara, and Brooks was ready for the next step.

Eric Bossuk was the CEO of Tri County Insurance based in Calabasas, and he and Brooks were friendly competitors for years. They realized that joining forces made a lot of sense. The duo formalized their partnership in 2010, and the new company became B & B Premier Insurance Solutions. Today the company employs nearly 50 people and writes more than \$70 Million in insurance each year, making it one of the largest independent agencies in the area. Despite this success, Brooks remains as personally dedicated to his clients as ever.

In addition to receiving certificates of Recognition from the California State Senate and Assembly, Brooks has received many awards including the Beverly Jordan Memorial Award for Achievement for Independent Insurance Agents in the San Fernando Valley, the L.A. County Board of Supervisors Committee Involvement Award, six SAFECO Insurance Awards of Excellence, and others.

*"Steve Brooks has been my personal insurance broker for more than a decade. Steve cares about me and my family, as people. Steve does not care about making a commission on me. He cares about making my life safe and secure (and easier). Steve is passionate about getting me the best coverage at the best price, every time. He is also readily available to me whenever I need him, and he is generous with his advice in times of need. One recent example was after my wife had a small car accident while driving a rental car. Steve spent hours with us, the rental car company, and the body shop, to make sure that our out-of-pocket costs were very reasonable. Steve helped us through a situation with no financial reward to himself because that's what Steve does – he helps his clients, no matter what." – Adam K. Treiger, Esq., Partner, Stowell, Zeilenga, Ruth, Vaughn & Treiger LLP*

## Congratulations to the Trusted Advisor Nominees!

Special congratulations to Montage winner:

**Tobias Kennedy**  
Executive Vice President  
Montage Insurance Solutions



*"I just wanted to take the time to thank you and all of the staff at Montage for the service in which has been provided to us so far. I knew when the decision was made to appoint Montage as our Broker of Record that we would not regret it. You have exceeded all expectations." - Director of Human Resources & Facilities, Health Services Provider*



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<b>Tamara Gurney</b> President & Chief Executive Officer 2011 Trusted Advisor -Business Banker and 2011 Trailblazer	<b>Marianne Cederlind</b> Senior Vice President Chief Business Banking Officer 2012 Trusted Advisor - Business Banker	<b>Jahun Smith</b> Vice President Branch Manager 2013 Trusted Advisor - Business Banker	<b>Lola Forbis</b> Vice President and Relationship Manager 2014 Trusted Advisor - Business Banker	<b>Janet Shinkle</b> Vice President and Relationship Manager 2015 Trusted Advisor - Business Banker
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2013  
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TRUSTED ADVISORS 2015

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► INSURANCE PROFESSIONAL



**TOBIAS KENNEDY**  
EXECUTIVE VICE PRESIDENT  
MONTAGE INSURANCE SOLUTIONS

TOBIAS Kennedy serves as the Executive Vice President of Montage Insurance Solutions. Having developed his skills with amazing swiftness over the last nine years with the company, Kennedy has played a key role in the development of the company since he was in college. With HealthCare Reform on the horizon and Arnold Schwarzenegger's HealthCare proposal in 2007, Kennedy cut his teeth on the industry's recent changes. Today, he presents on the topic to local Human Resources industry events, such as PIHRA seminars. He has spoken to many CEO's

from national CEO groups, traveling as necessary for not only their chapters, but also credit union organizations and many others.

Kennedy has won the hearts of many through his authentic leadership and service style. He is touted by Montage's carrier reps as one of their favorite brokers. He cares about the details and creates impressive analysis for our clients. He handles a large book of business for Montage and is a partner in its sister company Simplicity. Simplicity handles smaller clients, individuals and Medicare eligible, property & casualty and workers compensation, events and just about any type of insurance an individual would need.

Kennedy has personally saved Montage clients thousands to millions of dollars on their premiums bringing forth great plan designs because he holds the true core values of serving clients with dedication, service and integrity.

Plus, he is passionate about his knowledge of the insurance industry – and has become a tremendous resource regarding insurance products and services, technology and beyond.

*"Toby consistently provides our organization with best-in-class business practices, constantly striving to deliver exceptional service with meaningful financial impact while maintaining an energetic and direct approach. In the years I have worked with Toby, he understands the unique industry specific challenges I face and is goal-oriented, innovative, collaborative and among the most focused professionals dedicated to finding the right solution to meet my needs I have ever worked with. We receive personal attention and accountability and in my industry that is paramount in any service provider."* – Michele S. Evans, PHR-CA, Human Resources Director, Sunkist

► INSURANCE PROFESSIONAL



**MITCH ROSENBERG**  
CEO  
MDR INSURANCE AND FINANCIAL SERVICES

A consummate professional and the epitome of a trusted advisor, Mitch Rosenberg has been in the financial services business for almost 30 years and has changed the lives of many individuals and families and impacted many businesses and communities. Rosenberg helps clients crystallize their objectives, figure out where they are and where they want to be as it relates to their Insurance, Benefits, Business Continuation, Estate and Legacy Planning.

Rosenberg works closely with clients and their other Advisors and "gets the job done" so that clients have money when they need it most. Through his planning and resources, hundreds and millions of dollars have been created for families, businesses and charities.

Rosenberg is also a great resource to other advisors. In addition to his CPA background and numerous designations, he is a member agent of the Nautilus Group and is very active in his community through Estate Planning Councils, Networking organizations and charities. He is one of the most committed professionals in the field of continuing education, as is evidenced by his numerous professional designations. He is known to say one of the ways he helps people is because "we know stuff," in addition to caring deeply for his clients.

He is current president of the Conejo Valley Estate Planning Council and Former president and current member of the Woodland Hills Estate and Tax Planning Council. He is also a Member of Provisors Warner Center I Chapter and member of the executive committee and a founding member of the Westlake 2 Chapter.

*"In over 17 years working with Mitch, I have found him to be a creative problem solver with an unusually comprehensive knowledge of insurance strategies, estate planning concepts and related tax laws. Mitch is an important resource to my practice. He goes above and beyond to keep me updated on the most cutting edge estate planning strategies involving insurance. He also has a unique ability to take a complex Insurance strategy and explain it to the client in a straightforward matter. I always enjoy collaborating with Mitch as I know the client will receive exceptional service and a well-crafted insurance plan."* – Kenneth E. Devore, Esq., LL.M. (Taxation) Certified Specialist in Estate Planning, Trusts, & Probate, Kenneth E. Devore & Associates, APC



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*“Congratulations to our partners Brian E. Kogle, Chris S. Jacobsen, and Hunt C. Braly on being nominated for the 2015 San Fernando Valley*

*Business Journal Trusted Advisor awards.*

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*David S. Poole and John H. Shaffery  
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## TRUSTED ADVISORS 2015

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## ► WEALTH MANAGER



**MAZIAR ESMAILBEIGI**  
CHIEF INVESTMENT OFFICER AND CO-FOUNDER  
STEEL PEAK WEALTH MANAGEMENT

Maziar Esmailbeigi is Chief Investment Officer and Founding Partner with Steel Peak Wealth Management. He draws on his background as a former business owner and as a veteran financial advisor to benefit his clients as well as Steel Peak.

Esmailbeigi uses his broad advisory skills to benefit both individual and business clients, and is well versed in helping business owners translate their success into liquidity events and the retirement that they envision. He attributes Steel Peak's success to a deep understanding of its clients and providing the

exacting solutions that they require and expect.

The best judge of a financial advisor's impact on its clients is none other than the clients themselves. Esmailbeigi's clients have consistently chosen him as their top advisor, not just for the competent advice he has to offer but also for his deep interest in their personal lives. A few years back, he received a call from the wife of one of his clients who told him in a broken voice that her husband had passed away. The widow asked for his assistance in organizing his remaining assets, declaring, her husband "would've wanted us to continue working with you." Just a little while later, the wife also passed away, and, in the weeks that followed, their children reached out and told him they each wished to create a new financial plan portfolio with his help. This is just one multi-generational example of why his clients have chosen Steel Peak for the person-to-person relationship that he offers them.

*"When I think of 'why' Maz would be a worthy candidate to receive this award, it comes down to three criteria. The first (obvious) criteria is trust. Do my wife and I trust him to guide us through our golden years? The second criteria is competence. In other words, can this person execute on our mutual agreed upon strategy and make the tough choices that deliver win-win results? The last criteria that we feel ties all three criteria together is, does this person have integrity? We chose Maz because of his stellar reputation. In doing our homework, we found that his name speaks volumes about his integrity. I recently retired after 40 years with the same company, so it was important that my wife and I found a person whom we trusted to handle our Wealth Management portfolio. Maz is not only that person – we consider him part of our family!!" – Philip Illions, Director, Supplier Manager, Avnet Electronic Marketing (retired)*

## ► WEALTH MANAGER



**GREG A. GUTFLEISCH**  
SENIOR VICE PRESIDENT, FINANCIAL ADVISOR  
MORGAN STANLEY

Greg Gutfleisch is a Senior Vice President, Financial Advisor and Investment Consultant at Morgan Stanley Wealth Management in Woodland Hills. A seasoned wealth management professional, Gutfleisch is dedicated to helping people and their families plan for and achieve their most important financial and life goals, from sending children to college and retiring comfortably to practicing purposeful philanthropy and leaving a meaningful legacy. As a Certified Financial Planner, he upholds the highest standards of excellence for financial planning and provides personalized financial

advice and tailored investment solutions to each of his valued clients.

Gutfleisch can't control what the financial markets do on a day-to-day basis but he can control the service he provides to his clients. Service is what he prides himself on. He cares about his clients and makes every effort to exceed their expectations.

His clients know they can turn to him for advice on anything. As a CFP and a non-practicing CPA that worked at both a major accounting firm and major hedge fund, he has the knowledge and experience to give advice. One's financial future is of major importance and he works with his clients to ensure they are addressing what they need to and not procrastinating.

Gutfleisch has impacted his clients by being there for them and connecting them with the right people for advice, strategic partnerships or other guidance as needed. He thrives on being the first point of contact for his clients who need advice, want a second opinion, or are looking for a different perspective on things. He is transparent in his dealings with clients and won't compromise his values.

*"Greg can't control what the financial markets do on a day to day basis but he can control the services he provides to his clients. Service is what he prides himself on. He is dedicated to helping his clients achieve their financial and life goals from sending kids to college, retiring comfortably, giving back and to leaving a meaningful legacy. He is committed to collaborating with his clients, earning their trust and understanding their personal wealth management needs. Greg cares about his clients and he always puts himself in their shoes when making recommendations." – Joeli Monblatt*

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► WEALTH MANAGER



**ELIZABETH PELL**  
 FINANCIAL ADVISOR, CERTIFIED  
 FINANCIAL PLANNER  
 MORGAN STANLEY

As a Certified Financial Planner, Elizabeth Pell develops, implements, and monitors custom financial plans. She works with affluent individuals and business. Her goal is to empower clients and give them peace of mind. Pell started in the business with Morgan Stanley in 2006. She focuses on retirement planning, tax-minimization, and creating income streams. She is also a Financial Planning Specialist, a Chartered Retirement Plans Specialist, and a Chartered Retirement Planning Counselor. She has garnered a number of honors as a financial

advisor. Morgan Stanley awarded her Pacesetter's Club from 2011 to 2013.

She is currently on the board of Accounting and Financial Women's Alliance. She is a former board member of Commercial Real Estate Women. Ms. Pell was the Vice President of Member Services for the Los Angeles chapter.

Pell brings a fresh face to the wealth management industry and is known by those who have had the good fortune to work with her to be a professional that will "get it done" promptly, or find someone who will. She remains open-minded and looks to find new and innovative ways to solve problems of the modern retiree. Unlike some brokers that simply review their clients' investments, Pell goes above and beyond, truly taking each client's bigger picture into consideration so that she can bring plausible options and strategies to the table. With each client, she also reviews the pros and cons of every major financial decision so that each person she works with can carefully consider when to think about managing their money differently.

*"I thought I was organized and diligent with my finances until I met Elizabeth Pell. She brings a fresh perspective to an otherwise dated industry. I walk into her office and she makes me feel like I am the only client in the world. She makes great effort to see where I am coming from. When I leave, I always feel like we are moving another step forward toward my financial goals. It is a great feeling. I have worked with a few financial advisors before, but she stands out in the crowd. I am so glad she runs the show, it shoulders some of the responsibility off of me. For the first time, in a long time, I don't feel like a number. Her follow through on the promise of holistic wealth management always continues to surprise me. It is incredible all the things she is able to accomplish. She has my vote!"* – Dr. Bebe Jacobson, Clinical Psychologist from the Los Angeles Police Department, serving on the SWAT Crisis Negotiation Team (Retired)

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## TRUSTED ADVISORS 2015

## FINALISTS

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**Diana Weiss Aizman, Esq.**

Criminal Defense Attorney  
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**Stan Arutti, CPA**

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**Alex Bruno**

Founding Partner  
Lynk Law, Inc.

**Steven B. Chroman, Esq.**

Attorney  
Law Offices of Steven  
B. Chroman, P.C.

**Daniel Cislo**

Managing Partner  
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**Jennifer deSpain**

Founder  
Canyon Oak Financial

**Dennis DeYoung, CFP**

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**Lisa S. Kantor**

Attorney  
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**Alexander Kasendorf**

Senior Associate  
Alpert, Barr & Grant

## Stowell, Zeilenga, Ruth, Vaughn & Treiger LLP Congratulates all of the Valley's 2015 Trusted Advisors Nominees

Congratulations to **Adam K. Treiger**, our firm's Business and Employment Law Partner, for being recognized as one of the **San Fernando Valley Business Journal's Trusted Advisors** and recipient of this year's **Client Service Award**.



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## Congratulations, Mitch Rosenberg.

**Your friends and colleagues at New York Life, David Brecher and Rick Paulsen, applaud you on your nomination as one of the Top Trusted Advisors by the San Fernando Valley Business Journal.**

**It's a well deserved honor! Thank you for all you have done to enhance the lives of those within your community.**



**Mitch Rosenberg,**

CFP®, CLU®, CPA (Inactive), MSFS, AEP®  
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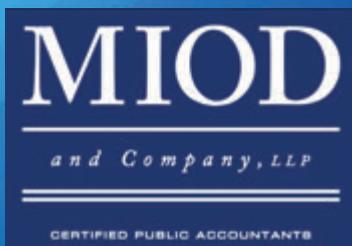


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CFF, CFS, CGMA, MAFF, MFP  
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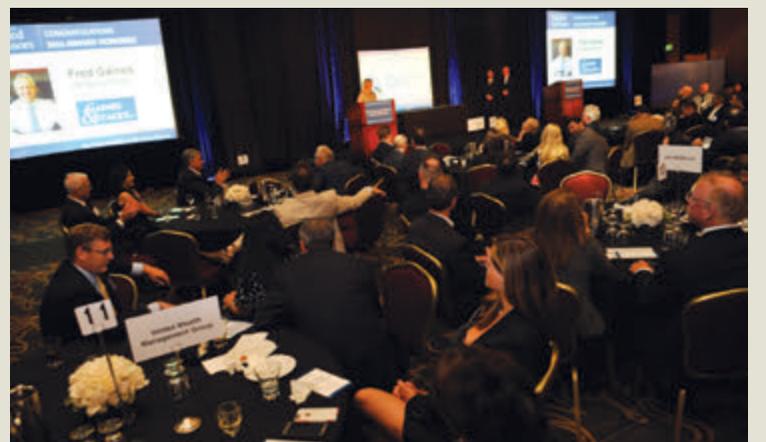
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TRUSTED ADVISORS 2015 AT THE EVENT



Nearly 300 attendees were on hand for the San Fernando Valley Business Journal's Trusted Advisors Awards reception at the Hilton Los Angeles/Universal City hotel.