

WOMEN OF INFLUENCE: FINANCE



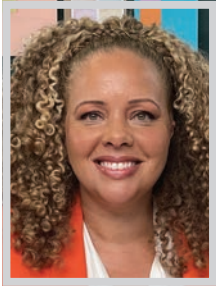
FROM NAVIGATING THE VARIOUS CHALLENGES OF THE LAST FEW YEARS TO OVERCOMING THE FISCAL REPERCUSSIONS of international unrest to charting a course for responsible data protection in the age of A.I., leadership of the banking and financial services sector has faced many key challenges. The good news locally is that many of the nation's leading financial industry thought leaders are based in the LA region.

With 2024 well underway, and businesses and individuals focused intently on financial stability, sustainability and protecting the bottom line, finance professionals are more essential than ever. There are some particularly stellar trusted advisors in the LA region – who happen to be women – and we've alphabetically listed some of the very best of them here, along with key information about their careers and relevant recent successes they've achieved.

These are the women we chose to recognize for exceptional leadership, knowledge, skill and achievements in banking across the full spectrum of financial responsibility along with the highest professional and ethical standards, and for contributions to the Los Angeles business community at large.

Methodology: The professionals featured in these pages did not pay to be included. Their profiles were drawn from nomination materials submitted to the Los Angeles Business Journal. Those selected for inclusion were reviewed by the editorial department. The professionals were chosen based on a demonstration of impact made on the profession and on the Los Angeles community.

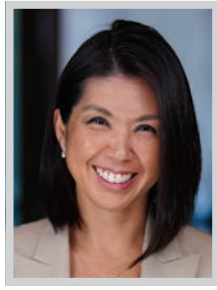
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**BELVA ANAKWENZE***Virtual CFO*

Abacus Financial Business Management

Belva Anakwenze, the principal of Abacus Financial Management Group, serves as an entertainment business manager for several creatives in Los Angeles. Her clients range from entertainers and their closely held companies to large entertainment tech companies. She also has several music live events and musicians. Anakwenze has been serving as a trusted advisor for many in the entertainment industry for more than 15 years. Her business continues to grow, serving many high-profile clients.

Anakwenze was selected to speak at SXSW 2024 on the topic of “Wealth Creation for Creatives.” Also, in partnership with Patreon, Anakwenze launched a fresh new YouTube financial show for creatives called ‘The Earn Up’ on Patreon’s Creator Hub YouTube channel. She also hosts, writes and executive produces the show, in which Anakwenze lends her expertise in helping creators manage their small businesses so they can focus on what they do best — create.

**ANGELA ANTONIO***Small Business Region Executive for Los Angeles*

Bank of America

Angela Antonio is the small business region executive for Los Angeles. She leads a team of 70 associates responsible for supporting small business owners by providing resources and information to help navigate the marketplace, as well as banking, credit and cash management solutions for their unique needs. Antonio’s team supports 1.4 million small business clients across Los Angeles, Santa Barbara and Ventura Counties, and she oversees a \$13.4 billion portfolio. Through her leadership, she has achieved 30% year over year growth and her team this year alone has extended \$300 million in lending, with \$100 million to small business clients.

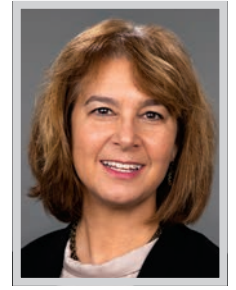
Antonio is an active member of the Los Angeles business community to support minority and women-owned businesses, working closely with organizations such as NAWBO LA to help women business owners gain access to capital, education and additional resources through Bank of America and her local team.

**TRACY ARCECI***Global Commercial Bank Market Executive,**Pacific Southwest Region*

Bank of America

Tracy Arceci is a global commercial bank market executive for Bank of America’s Pacific Southwest Region, based in Los Angeles. Her team of 11 Los Angeles and Ventura County based banking professionals work closely with commercial business clients with annual revenues from \$50 million to \$2 billion, from a wide range of industries including consumer products, distribution, service, agriculture, green economy, food and beverage, beauty and more.

Arceci’s current role is the latest in her 23-year career dedicated to helping commercial business clients grow and succeed by providing specialized industry guidance, flawless deal execution and an unwavering focus on her clients’ needs. During her career she has been recognized for delivering growth, opening and growing new markets and deal negotiation. She takes great pride in not just delivering for her business clients but also in coaching and developing her team for their professional and personal success.

**BARBARA BAGLEY***Managing Director; Market Investment Executive,**Greater Los Angeles*

Bank of America Private Bank

As market investment executive for Bank of America’s Private Bank Greater LA region, Barb Bagley leads a team of 17 portfolio managers and analysts collectively managing over \$15 billion in client assets. In this role, she is responsible for a team of professional investment specialists overseeing the creation and management of personalized client portfolios incorporating a broad range of advice and guidance for financial planning and wealth strategy. This includes helping clients establish goals and objectives, developing an appropriate overall strategy, creating and managing investment portfolios and monitoring progress toward goals.

Bagley and her team help clients navigate changing market environments by providing insight on tactical asset allocation, portfolio tax efficiency, retirement, personal liquidity events and multigenerational wealth transfer. She is also responsible for helping the market meet its investment-related goals and managing the holistic client investment experience.

**ASHLEIGH BARKER***Director*

Lincoln International

Ashleigh Barker is a trailblazer in the beauty industry, having crafted a flourishing beauty and personal care platform from the ground up at Lincoln International in less than two years. Leveraging her strong relationship-building skills, knowledge and reputation and existing connections, she has formed a robust network of relationships with founders, investors and other key stakeholders which has been instrumental in growing Lincoln’s platform and recognition among beauty industry leaders.

Barker’s commitment to fostering authentic and mutually beneficial relationships has not only expanded the firm’s reach but established a foundation of trust with clients, exemplifying her exceptional contributions to the beauty industry. Additionally, Barker has played a key role in growing Lincoln’s Los Angeles office. Her efforts have fueled the professional development of the firm’s employees, enabled the office to expand in size and significantly elevate Lincoln’s presence.

**CAROL BATES***Private Wealth Advisor*

Strategic View Advisors

Carol Bates is responsible for the creation and maintenance of financial plans and investment analyses. She chairs the financial planning committee and sits on the investment committee and contributes to our broader organizational strategy. Bates has been in the finance industry for more than a decade and brings with her extensive experience in financial planning, investment management and client advising. She graduated from Cal Poly, San Luis Obispo, with a M.S in Business Administration and a concentration in Finance. She maintains the Certified Financial Planner professional certification and holds the Series 7 and 66 registrations.

Bates has enjoyed living up and down the California coast for most of her life and currently resides in El Segundo with her family. She played Division I tennis all four years at Cal Poly and continues to be an avid player today.

**PAMELA BAUER***Director, Underwriting*

Arixa Capital

Pamela Bauer is an underwriting powerhouse. Throughout her career, Bauer has consistently exceeded production goals, demonstrated adaptability in ramping up quickly to meet tight deadlines, and actively enhanced operational efficiency to support lending growth. Her comprehensive understanding of financial risk and credit analysis, coupled with a track record of successful project management and team leadership, has made Bauer a valuable asset at Arixa Capital.

In just her first six months at Arixa, Bauer has doubled the size of the underwriting team to address increasing loan volume. She brings deep experience to work through complex issues and provide creative solutions to mitigate risk, while meeting deadlines and committing to Arixa’s culture of providing exceptional service – to borrowers as well as to colleagues at Arixa. Her focus on streamlining operations and developing clear guidelines and structure for the underwriting team will help set up Arixa for success in 2024.

**BARBARA BERNSTEIN***Wealth Management Advisor*

Fortuna Wealth Management, Legacy Strategies and Insurance Solutions

Barbara Bernstein’s role is to help people articulate their goals and connect them to the tools that are available to bring those goals to fruition. She works to establish a collaborative relationship with her clients, who know Bernstein as an advisor and an educator.

In Bernstein’s early professional life, she worked as a news producer at KCBS Los Angeles, later transitioning to America’s Funniest Home Videos, where she worked her way up to being a co-producer. Though she was enjoying success in entertainment, she wanted to make a bigger impact. Already armed with a passion for teaching and problem solving, Bernstein knew she would enjoy helping others take control of their financial position. Growing up, she experienced money as a fearful topic and saw the negative impact of living without a clear financial plan. Today, she helps people, often women, become empowered to live a life of financial freedom.

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KATHERINE BISSETT
Partner
Cox, Castle & Nicholson

Katherine C. Bissett is a commercial real estate finance attorney on Cox Castle’s Capital Markets Team, specializing in representing both lenders and borrowers in connection with complex real estate finance transactions. In 2022 alone, Bissett counseled clients on loan origination transactions valued in the aggregate of about \$700 million, and handled countless modifications and asset management matters, providing astute and pragmatic guidance to her clients as they navigated volatile market conditions.

Bissett brings extensive experience steering and closing sophisticated and complex real estate finance transactions, including acquisition, bridge and construction financing, ground lease financing, mezzanine loans, revolving credit facilities, and secondary market transactions. She regularly handles transactions throughout the United States, and her experience spans a broad spectrum of property types, including undeveloped land, hotel/resort, retail, commercial, and multi-family and mixed-use projects.



KARA BOCCELLA
Partner
Certuity

Kara Boccella has successfully advised and managed her clients’ portfolios and affairs over her 30 year career. She currently manages approximately \$900 million and is continuing to grow organically through a robust referral base. Her retention rate is above 99%. She works to create a trusting and transparent relationship with all clients.

Over the course of Boccella’s 30-year career, she has been afforded the opportunity to provide unpaid financial planning advice to those in need due to the loss of a loved one or other life-changing circumstances. She currently manages the financial affairs of seven widows and widowers on a pro-bono basis and is available to provide guidance, both financial and personal, as they navigate these unexpected, and oftentimes traumatic, changes in their lives. Community involvement is important to Boccella, and she supports and is involved with many charities and non-profit groups, both through financial commitments and/or active volunteerism.



SHERRY CEFALI
Managing Director
Duff & Phelps Opinions Practice of Kroll, LLC

Sherry Cefali is a managing director in the Duff & Phelps Opinions Practice of Kroll, LLC. She is also a member of the firm’s Fairness & Solvency Opinion Senior Review Committee. Cefali has been with Kroll for over 30 years, advising companies and boards, rendering fairness opinions and solvency opinions and determining valuations of companies and securities. In addition, she is director on the board of RF Industries, chairs its compensation committee and is a member of the audit committee.

Cefali’s recent transactions include a fairness opinion to certain Blackstone funds in connection with the REIT roll-up IPO of Nexus Select Trust, India’s first publicly listed retail mall REIT; and a solvency opinion for WP Carey in connection with its spin-off of Net Lease Office Properties REIT, a fairness opinion to the special committee of the board of Ecovyst in connection with a share repurchase transaction.



CÉCILE CHALIFOUR
Managing Director; Head of the West Region for Chase Community Development Banking
JPMorgan Chase

Cécile Chalifour is head of the west region for Chase Community Development Banking. As part of a global financial services firm with \$3.9 trillion in assets as of December 31, 20223, Community Development Banking is a leader in providing financing solutions that benefit communities across the country. Chalifour and the real estate lending team originates roughly \$3 billion annually in construction and permanent debt products to develop and revitalize affordable housing properties throughout the Chase retail footprint.

With over two decades of community development and finance experience, Chalifour leads the West Region team that originates over one-third of the national lending goal for Community Development Real Estate. Chalifour oversees all financing activities for affordable housing transactions in the Western Region for the firm. Prior to joining Chase in 2017, Chalifour served as the director of the California Region for the Low Income Investment Fund.



BANC OF CALIFORNIA

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Patti Thompson-Derry
SVP, Market Executive



Lisa B. Kaskel
EVP, LA Real Estate and Construction

Our standout professionals are changing the landscape of banking.

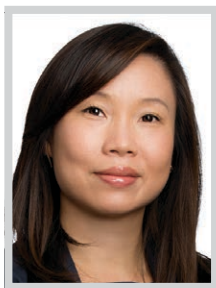
We are proud to have Lisa and Patti recognized as Women of Influence in Finance.

Their experience and expertise have helped to make Banc of California one of the most respected business banks in the country.

TOGETHER WE WIN®

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**CHERYL S. CHANG**

Partner and Vice Chair, Financial Institutions Litigation and Regulatory Compliance Practice Group; Co-Chair, Los Angeles Office
Blank Rome LLP

As Blank Rome's first female Asian-American partner, vice chair of the firm's nearly 50-attorney Financial Institutions Litigation and Regulatory Compliance Practice Group, and the newly appointed co-chair of the nearly 90-member Los Angeles office, Cheryl Chang is a skilled leader and a formidable litigator.

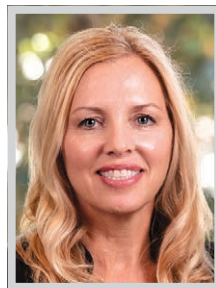
Chang consistently achieves favorable outcomes for her clients in complex corporate matters using her creative, pragmatic approach to conflict resolution in litigation, trial and settlement negotiations. Chang litigates for significant corporate and entertainment clients before state and local courts in the areas of intellectual property, antitrust and consumer class action defense. She is recognized by co-counsel and opponents alike for her keen ability to see legal issues and business decisions from her clients' point of view. Fluent in spoken Mandarin Chinese, Taiwanese and French, she often communicates with her clients, and negotiates with adversaries, in multiple languages.

**ANNA CHUNG**

Executive Vice President;
Chief Small Business Administration Lending Officer
Hanmi Bank

Throughout Anna Chung's career, she has successfully maneuvered through many challenges, but the greatest challenge she and her clients faced was during the pandemic. As the chief small business lending officer for Hanmi Bank, the financial well-being of her customers was her central focus. Chung assisted small business owners whether they were clients of the bank or not. In three months, with Hanmi Bank's CEO's backing and Chung's management, the bank processed more than 15 times the number of applications they normally process in one year.

In 2022, Chung helped Hanmi end the year with record financial performance and a strong capital base, outperforming many of its peers across several metrics. She and her team helped small business owners navigate an uncertain economy and rising interest rates by staying focused on their needs and providing them with a diverse offering of financial products that drove disciplined growth.

**KATHLEEN DELONG**

Managing Director; West Los Angeles
Senior Market Executive
Merrill Lynch Wealth Management

Kathleen DeLong has quickly risen within Merrill from her start as a financial advisor helping clients achieve their investment and retirement planning goals to being appointed to executive leadership roles. She was recently brought to Los Angeles to lead one of the largest and top-producing Merrill regions in the country: three key Merrill offices in the West LA Area – Beverly Hills, Century City and Santa Monica. This flagship market consists of 120 financial advisors and 85 support staff, operations and management teams serving high-net-worth individuals, families and businesses with current combined assets under management of \$26 billion (a nearly 14 percent increase since she was named to her new position).

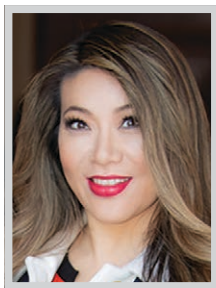
DeLong and team strive to create a culture of sharing and innovation in the market, where advisors help clients manage both sides of the balance sheet to achieve their goals through a tax-efficient strategy.

**HAYLEY DICKSON**

Founder & Wealth Management Advisor | CFP
The Financial Freedom Formula

Hayley Dickson began her career in the entertainment business. Over the space of a decade, she rose to SVP global television acquisitions at Fremantle Media, the largest media production and distribution company in Europe. Her ascent was the result of innovative business strategies and financial acumen, exacting diligence, and exceptional interpersonal skills.

Following the birth of her first child, she no longer wished to spend months away from home. She began exploring new career opportunities that promised a return to the level of challenge and stimulation she'd enjoyed over the prior decade. She joined Northwestern Mutual's network of over 6400 Northwestern Financial Advisors and set a company record for the fastest start in the history of the LA office. Now, with a growing and diverse team of six, Dickson's practice has evolved to create a greater impact on the lives of her clients and the organizations she works with.

**JACKY DILFER**

Executive Director
Business Finance Capital

Jacky Dilfer is a commercial and SBA lending expert. She's a dedicated leader and trusted advisor, helping each of her clients grow their businesses, create job opportunities and better serve their communities. Her experience in commercial lending extends two decades in Northern and Southern California where she's led Business Finance Capital's (BFC) rapid growth as the organization's Executive Director. Through Dilfer's hard work and perseverance, BFC has consistently ranked among the top national institutions in SBA loan volume.

Under Dilfer's leadership, BFC has funded more than 1000 commercial real estate transactions for small and medium-sized businesses since 2012. The last decade, Dilfer has arranged more than \$5 billion in commercial and SBA loans, cementing her position in the lending community as a go-to business consultant, strategist and adviser. BFC has also been the No. 1 SBA 504 lender in Los Angeles County by dollar volume for several years.

**LINDA DUNCOMBE**

Chief Marketing, Data and Digital Officer
City National Bank

Last year, Linda Duncombe, executive vice president and chief marketing, data and digital officer navigated and supported City National Bank clients through two major disruptions — the financial industry crisis in March and the strikes by both writers and actors in Hollywood. Through those challenging times, she was there for clients every step of the way. During the strikes, Duncombe led City National's client outreach, digital initiatives and marketing programs to help ensure entertainment industry clients were prepared to weather the uncertainty and volatility.

As the financial industry plunged into crisis in early 2023 with the fall of Silicon Valley Bank, Signature Bank and First Republic — the third, fourth and second largest bank failures in US history, respectively — Duncombe and her team ensured the bank's entertainment clients and the colleagues who serve them had the tools they needed and were reassured about the strength of City National.

**BELINDA EPHRAIM**

Partner; Founding Principal
Katalyst Point Advisors, LLC

Belinda Ephraim's illustrious career is a testament to her unwavering commitment to excellence in finance, blending a rich multicultural background with a deep-seated passion for the industry. Her journey, spanning over 25 years, has been marked by transformative roles, entrepreneurial endeavors and a profound impact on the sectors she's touched.

One of Ephraim's standout inspirational moments was the historic \$165 billion acquisition of Time Warner by AOL. This watershed moment wasn't just a headline for her—it was a catalyst that ignited her ambition to navigate the dynamic world of banking and finance. This early exposure to high-stakes finance laid the foundation for her career as a seasoned banker and entrepreneurial trailblazer. As the driving force behind Katalyst Point Advisors, Ephraim has carved out a unique niche in the finance landscape. Her dual expertise as a seasoned banker and entrepreneurial trailblazer sets her apart.

**DANI EVANSON**

Partner
Align Finance Partners

Dani Evanson has become a leading figure in the world of affordable housing. As a principal and managing director at Align Finance Partners and RMA Real Estate Investment Advisors, Evanson has contributed to and led the success of these financial institutions with the goal of creating more access to affordable housing around the US. Colleagues and clients alike report that Evanson has an unparalleled knowledge of the affordable market and potential developments, and in addition, she runs a team of well-rounded and professional associates who provide knowledgeable advice and services. Additionally, Evanson sits on the board of two major firms, Abode Communities and Evergen Equity.

Evanson's work itself plays a crucial role in ensuring low-income families have a place to live. As a board member for Abode Communities, she works to secure funding and resources for low-income housing so that affordable projects have the backing they need.

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KATHLEEN GILMORE

Chair and President
Clifford Swan Investment Counselors

Kathleen Gilmore was named chair and president of Clifford Swan Investment Counselors in 2020. In 2002, she joined the independently owned Pasadena-based wealth management firm that provides customized portfolio management and personalized wealth strategies that support each client’s goals. As president, Gilmore oversees the breadth and depth of Clifford Swan’s investment counseling services for individuals, families and nonprofit organizations. As a certified financial planner, she helps clients create a sound structure for stewardship over their assets, in addition to the investment portfolio at the core of that structure.

Stepping into a leadership role during the pandemic was a challenge that Gilmore ably and enthusiastically took on. In addition to helping the firm’s employees navigate remote work and a gradual return to the office, the firm’s leadership also hired and integrated several new employees, implemented new technology, and expanded the breadth and depth of the firm’s investment counseling services.

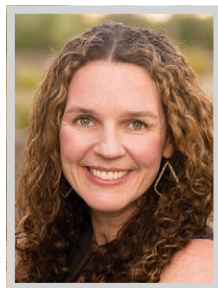


JULIE HAYES

Managing Director; Senior Wealth Advisor
Truist Bank

Julie Hayes is a managing director and senior wealth advisor for Truist Wealth. She brings over 21 years of wealth management experience advising and working with a select group of high-net-worth families. Her practice focuses on business owners and multi-generational families. Hayes builds trusting relationships with her clients. This starts by listening and working to understand their priorities, goals, and family dynamics. Hayes then custom tailors a team of specialists, who systematically manage and implement the plan. The plan may include financial and estate planning, risk and investment management, and strategic credit.

Outside her work on behalf of her Truist Wealth clients, Hayes is dedicated to giving back to the communities she serves. Hayes serves on the Central Coast and Southern Central Valley Board of the Make A Wish Foundation. She also volunteers for Girls Inc., Santa Barbara and Hope Gardens, Los Angeles and is a member of ProVisors.



NEELA HUMMEL

Co-CEO
Abacus Wealth Partners

Neela Hummel’s trajectory within the finance industry is nothing short of remarkable, marked by a series of accomplishments that underscore her commitment to excellence, innovation and inclusivity. Beginning her journey as an intern at Abacus Wealth Partners in 2009, Hummel’s professional odyssey has been a testament to her unwavering dedication and exceptional leadership.

Hummel’s rise through the ranks speaks volumes about her prowess in navigating the complexities of the financial landscape. Her journey is a beacon of inspiration for aspiring professionals, reflecting the possibilities that unfold with competence, hard work and a strategic vision. Throughout her tenure at Abacus, Hummel has not only embraced leadership roles but has also actively shaped the company’s culture through transformative initiatives. Serving two terms on the Board of Directors, Hummel played a pivotal role in establishing Abacus as a trailblazer in fostering workplace inclusivity.



SHADI JAHANGIR

Partner, Finance
Blank Rome LLP

Shadi Jahangir is a Los Angeles partner of Blank Rome LLP whose practice focuses on commercial lending and corporate finance. She represents large and well-known financial institutions, leading private equity sponsors and corporate borrowers in significant middle-market debt financings and investment-grade credits. Jahangir’s more than 10 years of experience includes widely syndicated, club and single-lender representation in complex cross-border financings, restructurings, acquisition financings, recapitalizations, traditional asset-based lending facilities and debt financings for technology companies. She also represents clients in senior-secured, first-lien/second-lien, mezzanine, unitranche and unsecured financing transactions.

Jahangir was one of the first attorneys in the US to represent lenders in the national, COVID-relief Main Street Loan Program. She is representing one of the country’s largest lenders in connection with a \$230 million debt facility to an educational products supply retailer.

Congratulations to Ashleigh Barker!

Head of Beauty and Personal Care
Featured in Los Angeles Business Journal’s
2024 Women of Influence: Finance



Mergers & Acquisitions
Capital Advisory
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Valuations & Opinions

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**NISHA KANCHANAPOOMI**

Partner
Kirkland & Ellis LLP

Nisha Kanchanapoomi is a corporate partner and integral piece of Kirkland & Ellis' premier Los Angeles Corporate Debt Finance Practice Group. Her diversified practice includes representing private equity funds, hedge funds, direct lending and other credit funds as well as corporate borrowers and investors in connection with a wide variety of complex transactions. Some of her key clients include Los Angeles-based Ares Management, Brentwood Associates, Coral Tree Partners and Shamrock Capital; as well as Fortress Investment Group, Gryphon Investors, Industrial Growth Partners and Luminata Capital Partners.

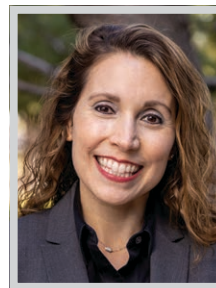
Kanchanapoomi is recognized as one of the leading finance lawyers in California and has advised on more than 20 financings totaling in excess of \$10.4 billion in the last 18 months, further evidence of her impact on Kirkland's robust deal activity. Her work during this timeframe ranges from high-profile multibillion-dollar transactions for global firms and businesses to deals for smaller companies and firms.

**LISA B. KASKEL**

EVP; Regional Manager
Banc of California

Lisa B. Kaskel — EVP, regional manager at Banc of California, formerly Pacific Western Bank — is a seasoned finance and lending leader in banking with expertise in a wide variety of credit facilities. She is a real estate professional who has dedicated her career to building strong relationships with top public and private investors and developers in the Los Angeles real estate market.

Kaskel has demonstrated leadership ability and proven performance in formulating and implementing systems and procedures for maximum efficiency and accuracy, making sure there's quality control and that financial data can be easily accessed when needed. She mentors, communicates and guides colleagues to present work product at the highest standard to ensure loans get approved for clients. She has exhibited her exceptional management and negotiation skills to secure lines of credit, ground-up construction loans, bridge loans and minipermits ranging anywhere from \$2 million to \$135 million.

**MICHELLE KINCANON**

Senior Vice President of Sustainability and Operations
Angeleno Group

Michelle Kincanon is the senior vice president of sustainability and operations at Angeleno Group and chair of the firm's ESG Committee overseeing all ESG program and initiatives. Based in Los Angeles, Angeleno Group provides growth capital for next generation clean energy and climate solutions companies.

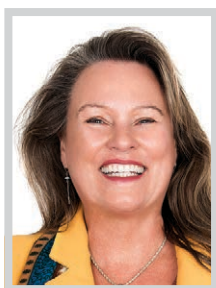
Kincanon's leadership role in shaping and managing Angeleno's ESG program for more than 12 years has resulted in the firm receiving recognition of its preeminent role in ESG among venture capital and private equity peers. Since joining the firm in 2011, Kincanon has been spearheading Angeleno Group's Responsible and Sustainable Investing (RSI) Program and ESG initiatives along with financial operations and investor relations responsibilities. Kincanon leads ESG engagement with portfolio companies working with their CEOs and senior management on ESG action plans, including assessing risks and opportunities, implementing new ESG principles and best practices, and establishing key performance targets.

**GAYANE KIRAKOSYAN**

Managing Director
B. Riley Securities, Inc.

Gayane Kirakosyan is a managing director with B. Riley Securities, a leading middle market investment bank based in Los Angeles. She was previously affiliated with FocalPoint Partners, which was acquired by B. Riley Financial in January 2022. She has over 20 years of investment banking experience advising companies on debt and equity capital raises, mergers and acquisitions, financial restructurings and bankruptcies.

Kirakosyan primarily works with middle market and sponsor-backed companies seeking capital for a variety of corporate purposes, including refinancing, growth capital, acquisition financing and rescue financing, among others. She has advised on financings across a wide range of capital structures, including asset-based, senior/first liens, unitranche, second liens, subordinated, mezzanine and minority equity. Throughout her career, she has closed over \$3.1 billion in transactions across a wide variety of industries and structures. She recently achieved a dividend recapitalization for one of the largest franchisees of Krispy Kreme Donuts.

**DEBORAH LA FRANCHI**

Founder/CEO
SDS Capital Group

During a distinguished career, SDS Capital CEO Deborah La Franchi has truly been a woman of influence, leading the charge for women in a male dominated industry, and helping provide opportunities for other women with her talent and her passion.

In 2001 La Franchi founded SDS Capital Group, an institutional fund manager and private lender that focuses on providing both debt and equity for developers of affordable housing throughout the United States with the goal of engaging the private sector in the battle against poverty. Since that time La Franchi has built SDS into a firm with over \$1.9 billion assets under management. Each impact fund on SDS's platform serves a different geography and employs a unique investment strategy, but they all generate positive impacts for low-income communities and people. Each fund either targets a risk-adjusted rate-of-return or provides capital at a below-market cost.

**FRANCINE LAI**

Partner
Gerber Kawasaki Wealth and
Investment Management

After years of hard work and dedication to helping her clients achieve their financial goals, Francine Lai was made partner at Gerber Kawasaki Wealth and Investment Management in 2023. Lai stands out at the top of her field. She is motivated to set an example that inspires more women to join the world of finance.

Lai's primary goal as a certified financial planner is to help individuals and families achieve their financial aspirations. Helping clients look at the bigger picture, she puts together customized plans for each client based on specific financial goals. Lai enjoys working with all types of people but focuses her practice on women and families. It is her mission to educate and empower women in all stages of their lives; single women, women with families, career-oriented women and home makers so they can make educated choices to help in reaching their goals.

**BONNIE LEE**

President and CEO
Hanmi Bank

Bonnie Lee is a devoted leader committed to developing the future cadre of community bankers. Her journey into community banking begins at a pivotal moment when she accompanied her parents seeking a small business loan to acquire a wholesale fruit and vegetable enterprise following their move from Chicago to Los Angeles. This experience prompted her to apply to a banking trainee program that profoundly altered the course of her career.

Today, as a dedicated CEO and seasoned banker, Lee dedicates time to mentoring and building programs that will help develop principled and experienced community bankers. Through her mentoring, Lee emphasizes the important role bankers play in fostering economic growth through advising small business owners, middle market companies and retail customers on vital matters like effectively managing capital, appropriate financing to support growth, succession planning, managing savings and checking accounts, etc.

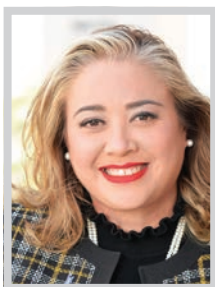
**MARISSA LEPOR**

Director; Head of Beauty & Personal Care
The Sage Group, LLC

Marissa Lepor has put an entrepreneurial spin to her career in investment banking, an approach that has led her to thrive as a director and head of beauty & personal care at The Sage Group and has quickly catapulted her into a leadership position in the broader finance community as well. Sage is an investment bank with a focus on mergers & acquisitions and capital raises for the branded consumer sector, specifically fashion & retail, beauty & personal care, and digitally native brands.

While most people who work in finance jump around from firm to firm, Lepor has built her career at Sage and has been at the firm since she graduated from college. Lepor primarily works with founder owned or operated businesses, representing them in the sales to private equity firms and public companies, and as she says, she's "in the dream business."

WOMEN OF INFLUENCE: FINANCE

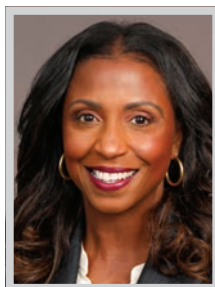


VANESSA MONTAÑEZ

Head of Community Lending
City National Bank

Vanessa Montañez, DEL, is head of community lending at City National Bank. Since she was hired for this newly created role in November 2021, she has created a lending program from scratch, and built a talented team of more than two dozen professionals.

With more than 25 years of experience in residential lending and sales and business development management, Montañez and her team are working hard to build better communities by making an impact on sustainable homeownership through the bank's "Ladder Up Home Loan Grant Program." She is managing a nationwide team that is responsible for building strategies and programs to expand mortgage lending to serve historically underserved communities through community outreach and financial education. Reinforcing City National's commitment to serving underserved communities, she leads a community loan program aimed to increase homeownership that started in California and is also available in New York and New Jersey.

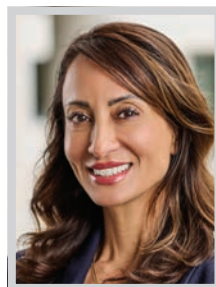


DIEDRA PORCHÉ

Managing Director; National Head of Community and Business Development
JPMorgan Chase

Diedra Porché is the National Head of Community and Business Development for JPMorgan Chase. In this role she is responsible for the continued success and strategic direction of the Community and Business Development team. She also leads the firm's financial health strategy across the country, where her team works to build trust in underserved local communities while providing resources to help drive economic equity for our Black and Hispanic/Latino communities nationwide.

Porché is also the diversity, equity and inclusion lead of the Los Angeles Market Leadership Team – overseeing the racial equity business commitments and understanding local vulnerabilities. During her 28 years with Chase, Porché has held several senior leadership positions across the firm in Retail, Business Banking and the Commercial Bank. Prior to her current role, she was the divisional director of California for Business Banking where she led a team of more than 400 bankers.

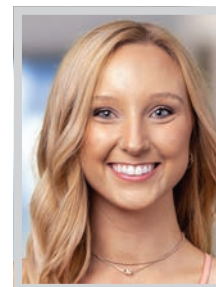


HEATHER QUINN

Financial Advisor
Fortuna Wealth Management, Legacy Strategies and Insurance Solutions

Heather Quinn started career in the entertainment industry – first at CAA, then moved to Sony, Warner Bros., and Fox. Eventually, she became the head of television for Overbrook Entertainment, overseeing a heavy portfolio of high-profile projects. Though she started in a different industry, themes of personal financial planning were woven throughout Quinn's career. She once produced an ABC special called "Un-broke: What You Need to Know About Money" alongside Mellody Hobson. She saw firsthand how the entertainment career can have many phases, shifting from short-term contract gigs, to loan-outs, to vested corporate positions.

Today, Quinn helps clients, many of whom share a similar entertainment background, take control of their financial future. With her hard working self-made immigrant mother in mind, Quinn strives to help as many women as she can find the financial peace all hard-working women deserve.



MIA SAMSON

Director of Marketing
Gerber Kawasaki Wealth and Investment Management

Mia Samson is an investment advisor representative and was recently named the director of marketing at Gerber Kawasaki at only 25 years old. In 2020, she obtained the Certified Digital Assets Advisor designation to have an elite understanding of the ever-developing world of cryptocurrencies. At Gerber Kawasaki, she works to ensure that the company's brand and messaging are in line with their investment decisions. She collaborates with all members of the firm to execute marketing goals in order to develop business opportunities with a large audience.

Using social media, Samson has grown recognition as an advisor. With her direction, Gerber Kawasaki has grown to over 345,000 followers on X, 9000 on Youtube, and 16,000 on TikTok. She uses these channels to educate the younger generations on essential financial knowledge that typically is not taught in schools. She has been featured in conferences for financial planning and regularly records podcasts and shows.

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WOMEN OF INFLUENCE: FINANCE

**KAREN TATMAN**

Founder and CEO
KMT Wealth Management, LLC

Karen Tatman is the founder and CEO of KMT Wealth Management, an SEC registered investment advisory firm that adds value to clients' financial lives through empathy, expertise and an evidenced based framework. In 2023, Tatman courageously left her corporate role to start up her company and create more space to do what she loves - serving clients as their personal, trusted advisor and sharing her expertise to make a difference in their lives.

Tatman offers more than 25 years of success helping her clients gain greater power and peace over their wealth through goals-based wealth management practices. Her most recent career history includes over 15 years at Northern Trust Wealth Management preceded by her role as an analyst with Goldman Sachs. Tatman stands out as a holistic investment advisor providing personalized advice on financial planning, portfolio construction, asset allocation, trust and estate planning, charitable giving and tax strategies.

**PATTI THOMPSON-DERRY**

SVP; Market Executive
Banc of California

Patti Thompson-Derry, SVP market executive with Banc of California, is a force to be reckoned with in the world of finance. She has experience in credit analysis, asset-based lending, lines of credit, credit risk, commercial mortgages, loan origination and financial analysis. Thompson-Derry's journey in the finance sector is nothing short of inspiring. From her early days navigating the complexities of the market to her current role, she has demonstrated an aptitude for strategic decision-making, problem solving and an understanding of the financial landscape in healthcare and charter school lending.

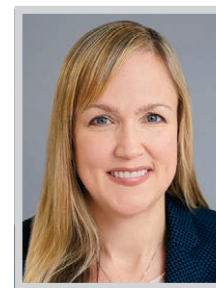
Thompson-Derry started her career in healthcare finance with First Professional Bank, making small loans to physician, dental and veterinary practices, surgery centers and large managed care organizations. After First Professional Bank became Pacific Western Bank (now Banc of California), she expanded her healthcare expertise to include lending to non-profit and for-profit acute care and behavioral health hospital operations and facilities.

**GOHAR TUMANIAN**

Division Advisor; Development Program Executive
Merrill Lynch

Gohar Tumanian is the division advisor/development program executive for Merrill Lynch based in Los Angeles, overseeing the career development pipeline in California, Nevada, Hawaii and Guam. In her role leading and coordinating the Advisor Development Program for financial advisors, she manages 13 market leaders and oversees a training program of 337 trainees to help the next generation of diverse Merrill advisors build their practices. Since joining the Merrill FA Development program in 2019, she has helped oversee the successful graduation of more than 130 new financial advisors.

Tumanian's current role is the latest in her 27-year tenure at Bank of America and Merrill, where she has worked in three different lines of business and has been promoted nine times. She's helped implement pivotal programs to expand client outreach and experience, such as helping establish the Social Media Servicing Team to help client engagement on platforms like Twitter and Facebook.

**LISA WELLS**

Senior Vice President; Market Trust Executive
Bank of America Private Bank

Lisa Wells is a senior vice president and market trust executive with Bank of America Private Bank in Los Angeles. With more than 20 years' experience providing complex and sophisticated planning and trust services, Wells heads the Personal Trust and Fiduciary Services for Los Angeles and Arizona and is regional trust executive for the West Division, which spans across seven states and 11 markets. In these roles she leads a dedicated team of 30 professionals providing wealth management, trust and estate planning services for high net worth and ultra-high net worth clients.

Wells and her team have been integral in helping grow assets under management for the Western Division of the Investment Management and Trust services for Private Bank clients in California, Nevada, Oregon, Washington, Colorado, Utah and Arizona over the past year by \$10.8 billion to \$58.8 billion, an 18% increase over the year prior.

Women Business Owners Outpace the Market

Women-owned businesses continue to fuel the economy, representing 39.1% of all businesses – over 14 million – employing 12.2 million workers, and generating \$2.7 trillion in revenue. According to the 2024 Wells Fargo Impact of Women-Owned Business Report, in partnership with Ventureer, CoreWoman, and Women Impacting Public Policy (WIPP), the number of women-owned businesses between 2019 and 2023 increased at nearly double the rate of those owned by men; and from 2022 to 2023, the rate of growth increased to 4.5 times.

Whether it was during COVID-19 lockdowns in 2020 or supply chain disruptions throughout the pandemic, women businesses are driving economic growth:

- During the onset of the pandemic in 2020, despite business closures, women launched more businesses than they closed, while the number of men-owned businesses declined. Women-owned businesses also grew their workforces and increased their revenue while men's numbers shrank.
- From 2019 to 2023, women-owned businesses' growth rate outpaced the rate of men's 94.3% for number of firms, 252.8% for employment, and 82.0% for revenue.
- During the pandemic, women-owned businesses added 1.4 million jobs and \$579.6 billion in revenue to the economy.
- Nearly half a million women-owned businesses with revenues between \$250,000 and \$999,999 grew their aggregate revenues by about 30%, illustrating their ambition, grit, and readiness to cross the \$1 million revenue threshold.

"The impact that women-owned businesses

'The impact that women-owned businesses make on the economy is undeniable. Even more impressive is that growth in women entrepreneurship – whether it was their workforce or revenue – grew during an extremely difficult time.'

make on the economy is undeniable. Even more impressive is that growth in women entrepreneurship – whether it was their workforce or revenue – grew during an extremely difficult time," said Wells Fargo Women's segment lead for small business, Val Jones. "From the trillions in revenue they contribute to the economy to the millions in jobs, women-owned businesses are coming out of the pandemic stronger than they went into the pandemic and many are thriving. It's a testament to their resiliency and the breadth and depth of support they've received from government entities, banks, corporations, and philanthropic organizations that must be sustained."

Also, during the COVID-19 pandemic and the transition to the post-pandemic period, Black/African American and Hispanic/Latino women-owned businesses increased at a much higher rate than all women-owned businesses. Between 2019 and 2023, Black/African American women-owned businesses saw average



revenues increase 32.7% and Hispanic/Latino women-owned businesses 17.1% compared to all women-owned businesses' 12.1% rise.

Further, women-owned businesses with 50 or more employees account for nearly half of women-owned businesses' employment and revenues. Currently, women-owned businesses with 50 or more employees average \$31.8 million in revenue generating \$1.3 trillion in aggregate revenue. If they achieved the average revenue of men-owned businesses with 50 or more employees, they would add \$1.2 trillion in revenue to the U.S. economy.

"The surge in growth rates of women-owned firms with more than 50 employees proves their strength and adaptability during and post the pandemic era," said Wells Fargo Women's segment lead for commercial banking, Judith Goldkrand. "To sustain the growth and close the gaps, it's important that we continue to create opportunities that help these businesses flourish, including removing barriers

to capital, providing technical assistance, and offering support with business certification."

INDUSTRY TRENDS

More than a decade ago, women-owned businesses were concentrated in just three industries. Now, half of all women-owned businesses (50%) are concentrated in these four industries:

Other services (hair and nail salons, pet care, laundries, and dry cleaners): In 2023, women owned 2,267,000 other services companies, accounting for 16.2% of all women-owned businesses.

Professional, scientific, and technical services (legal, bookkeeping, and consulting businesses): In 2023, women owned 2,017,000 businesses in this category, accounting for 14.4% of all women-owned businesses.

Administrative, support and waste management, and remediation services (office administration, staffing agencies, and security and surveillance services): In 2023, women owned 1,671,000 businesses of this type, accounting for 11.9% of all women-owned businesses.

Healthcare and social assistance (child day care and homecare providers, mental health practitioners, and physicians): In 2023, women owned 1,588,000 healthcare and social assistance companies, accounting for 11.3% of all women-owned businesses.

While these industries have the most women-owned businesses, between 2019 and 2023, the sectors that saw the most significant growth (50%) were in finance, insurance firms, real estate, transportation, and the warehouse industry.

Learn more at wellsfargo.com.