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TREVER ACERS
Founder & Managing Director
Objective, Investment Banking & Valuation

Trever Acers is the founder and managing director of Objective, Investment Banking & Valuation, a leading middle-market investment banking and valuation firm. With over 20 years of experience in investment banking, acquisitions and strategic advisory, Acers has built a firm that consistently delivers exceptional M&A outcomes for business owners. He is a leader in the firm’s Technology and Consumer practices, specializing in sell-side M&A transactions. Before founding Objective, Acers held leadership roles at TGG Capital, The Oxford Investment Group and Passage Venture Capital Partners, honing his expertise in private equity investments, financial consulting and post-acquisition integration. Currently, his responsibilities include driving business development, overseeing M&A execution, and guiding clients through tailored exit strategies.



RAUL ANAYA
President and Co-Head of Business Banking;
Greater Los Angeles Market President
Bank of America

Raul Anaya is president and co-head of Business Banking, one of Bank of America’s (the nation’s top small business lender as of September 2024) eight lines of business and is a member of the company’s executive management team. Anaya co-leads a nationwide team that serves 11 million business owner clients and more than 3.4 million start-up to mid-sized businesses with annual revenues up to \$50 million. In his role, Anaya also oversees local bankers working and living in over 200 communities across the US, serving businesses that fuel local economies and the growth of the country. During 2022, Anaya led Business Banking to record revenue growth, expanded his sales team by over 20%, and drove client acquisition to new record levels.



JENNIFER AUDETTE
President / CEO
POLAM FCU

Jennifer Audette has worked within the credit union industry for 30 years. She has been honored as a nonprofit executive by State Senator Anthony Portantino, recognized as a California Credit Union advocate of the year, and named one of only 20 nationwide to be an American Credit Union ‘Rock Star.’ POLAM is a boutique credit union with a field of membership open to anyone who lives in Southern California and makes a one-time donation of \$20 to the Polish American Congress. President and CEO of POLAM, Audette is the first non-Polish employee at a Polish Credit Union. When she isn’t volunteering at Polish events, she assists with mock interviews at her local middle schools and high schools in her area.



PAULA BAHAMON
Senior Vice President, Community Development
Mission Valley Bank

Paula Bahamon has spent her career specializing in the support and growth of small to mid-sized businesses, and currently serves as senior vice president of community development at Mission Valley Bank. She has extensive commercial banking experience, specializing in small business, financial literacy, business development and client relationship management. A results-oriented banker with a comprehensive range of management skills, Bahamon also serves as a trusted advisor, supporting financial literacy and community outreach for business owners. She was instrumental in Mission Valley Bank’s designation as a Community Development Financial Institution, enabling the bank to provide more targeted and beneficial services to underserved areas. She also helped tailor a program that addresses the core financial competencies business owners need to navigate the complex economic landscape.



CHRIS BANDOUPERIS
Principal
Centerpoint M&A Advisors

Chris Bandouveris has advised business buyers and sellers in smaller middle-market merger and acquisition transactions since 1992. Prior to co-founding CenterPoint in 2003, he was president of a boutique middle-market investment bank, where he managed M&A transactions for over 10 years. Bandouveris has completed 165 M&A transactions in several industries including mobile radiology, food processing, in-home care, industrial manufacturing, medical devices, silicon wafer healthcare services, construction equipment rental, safety supplies and automotive aftermarket parts manufacturing. He assisted one buy-side client, Rental Service Corporation, in completing 41 acquisitions throughout the US which allowed the company to go public and ultimately sell to a strategic buyer, Atlas Copco. He also represented NextMedia in 12 acquisitions of outdoor advertising billboard companies throughout the US.



CHRIS BARON
President, Commercial and Community Banking
Banc of California

Chris Baron has a special talent for identifying key trends and predicting market developments, which he uses to help Banc of California stay ahead of industry shifts. He leads a team of 650 professionals that deliver top-tier lending and treasury management solutions to clients, which range from small businesses and middle-market companies to some of the largest real estate owners and developers in the nation. Following Banc of California’s 2023 merger with PacWest Bancorp (PWB), Baron was promoted from president of the Los Angeles Region to his current position as president of commercial and community banking. Prior to PWB, he led the public finance for MUFG Union Bank in the western US and led the education and nonprofit division nationally at US Bank.



RICARDO BARRAGAN
Managing Director and Market Manager
J.P. Morgan

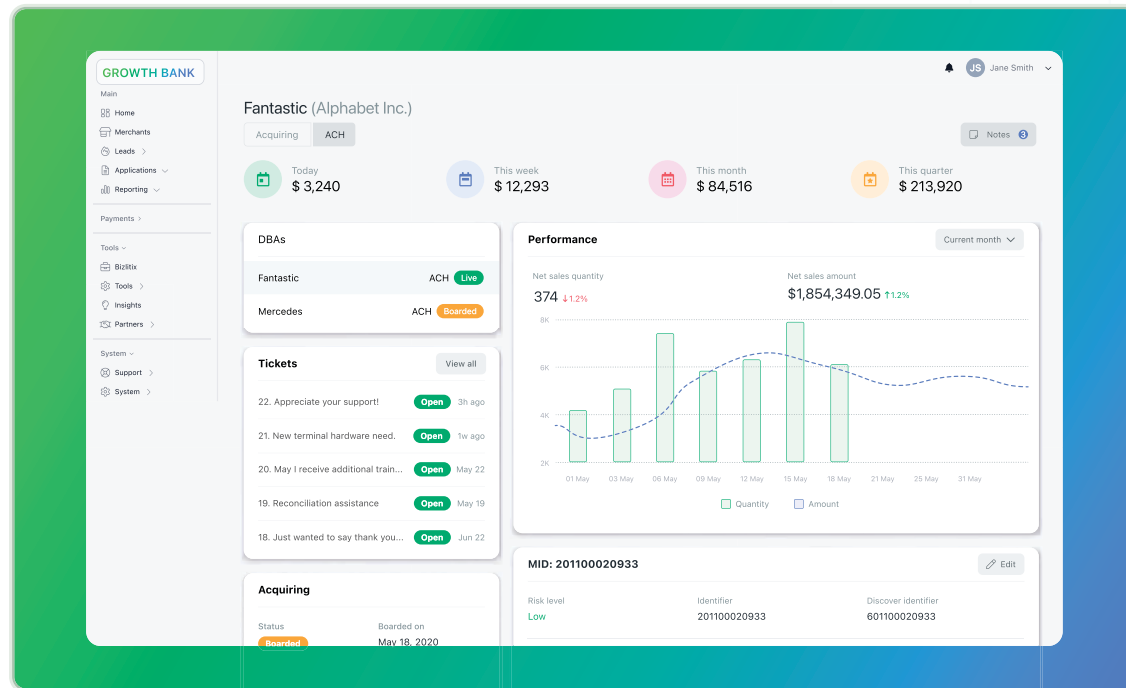
With over 35 years at J.P. Morgan, Rick Barragan has demonstrated exceptional leadership across various economic cycles, significantly enhancing the firm’s presence in the Los Angeles area. His career began in 1988 in the Global Credit Risk Management Group, followed by a pivotal role in the American Depositary Receipt Group, where he fostered international client relationships. Transitioning to the Equity Derivatives Group, Barragan excelled as head of sales for the Equity Finance Desk, serving institutional investors globally. Currently, as managing director and market manager at J.P. Morgan Private Bank, he leads a team delivering tailored wealth strategies. Barragan’s commitment to community service is evident through his board memberships and co-sponsorship of The Fellowship Initiative, supporting young men from low-income communities.



SCOTT BEREJIKIAN
Principal
CenterPoint M&A Advisors

Scott Berejikian has 28 years of M&A experience and has transactions in 35 states and Canada. He is a principal at CenterPoint M&A Advisors, a middle-market investment bank focused on representing buyers and sellers of privately held businesses. The firm’s merger & acquisition transactions range from \$10 to \$100 million in value. Berejikian works with sell-side clients — typically entrepreneurs — who are preparing for retirement, business owners taking advantage of favorable M&A market conditions, or investors and entrepreneurs who have other interests they would like to pursue. He has worked with clients in several industries including industrial manufacturing, automotive aftermarket parts manufacturing, home health care, distribution, roofing products, semiconductor metrology systems, aerospace, consumer services, healthcare services, safety products and food processing.

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DEAN BERESFORD
*SVP, Commercial Banking
(Formerly U.S. Bank)*

With a deep-rooted passion for banking, Dean Beresford has steadily climbed the ranks of several leading financial institutions, demonstrating exceptional leadership and strategic vision. Beresford saw firsthand early in his career how banking could change lives, creating opportunities, supporting communities and building generational wealth. This further shaped his purpose: fostering economic inclusion and driving meaningful relationships. Beginning in frontline banking, he quickly advanced through roles in risk management, corporate finance, and executive leadership, ultimately shaping the success of major financial institutions.

Most recently, Beresford led the U.S. Bank team managing relationships with middle-market companies (\$25 million - \$1 billion in revenue) across diverse industries in Los Angeles, overseeing business development, client selection, and relationship deepening efforts, driving tailored financial solutions and portfolio growth.



DAVID BIELAWA
*Executive Vice President & Chief Audit Executive
East West Bank*

David Bielawa has been in the financial service field in risk assurance for 42 years. He began his career with the OCC as national bank examiner for 17 years. He was also the chief auditor at City National Bank for 17 years before moving to East West Bank as their chief audit executive in 2017.

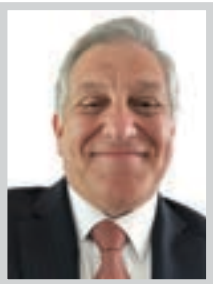
At East West Bank, Bielawa is responsible for the internal audit and credit review functions. He is a frequent speaker at both the Institute of Internal Auditors and the Information Systems Audit and Control Association Los Angeles Chapters. He has spoken on a variety of auditing related topics including emerging risks, auditing challenges, career development and risk assessment.



KARL BRIER
*Managing Director
Cappello Global, LLC*

Trusted advisor and partner to his clients, Karl Brier has assisted companies in going public through IPO preparation and has helped companies restructure and avoid liquidation. He also has a track record of successfully helping companies navigate the dot com bust, the financial crisis and COVID.

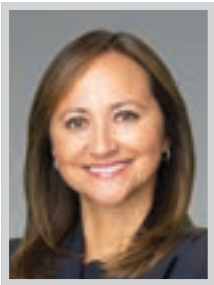
Earlier in his career, Brier focused on specialty practices, such as catering to Japanese corporations, venture lending to tech startups and lending to retailers. Recently Brier transitioned to investment banking from commercial banking and asset-based lending. This successful transition is due in a large part to the trusting relationships that he has developed throughout his career. Brier has been an active member of various industry organizations such as the Turnaround Management Organization and SFNet.



GREG BROWN
*CEO
California Lithuanian Credit Union*

Greg Brown started his career as a part-time teller over 35 years ago, and now serves as CEO at California Lithuanian Credit Union (CLCU). His early career allowed him to cultivate skills in all facets of operations and he quickly established a strong operational background and exceptional people skills, which he further developed in progressive leadership roles as vice president of consumer lending at BMO, senior vice president at Golden 1 Credit Union, and chief lending officer at Cabrillo Credit Union.

During his tenure as CEO, Brown has developed major improvements in IT security, established an HR function, steadily increased the company's loan portfolio, improved the commercial loan origination process, and developed and launched new products to CLCU.



ELSA R. BURTON
*Senior Vice President; Regional Manager Los Angeles,
Middle Market Banking
Fifth Third Bank*

Elsa R. Burton joined the Southern California leadership team of Fifth Third Bank in early 2022, bringing over 25 years of experience in the Los Angeles market. As the Los Angeles regional manager, Burton is responsible for building and leading a team of Middle Market bankers and driving growth in the greater LA area. Her team is focused on developing and maintaining relationships with both privately-owned and private equity-owned middle market clients, supporting clients' growth with financing for working capital, growth capital, acquisitions and leveraged buyouts.

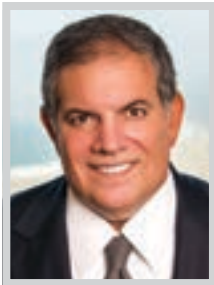
Burton was previously group head and SVP for Bank Leumi USA for six years, managing a team of relationship managers to meet clients' needs and exceed their expectations, foster growth and enable new opportunities.



DAVID CAMERON
*Executive Vice President; Head of Consumer Banking
City National Bank*

David Cameron is executive vice president and head of Consumer Banking at City National Bank and is a member of the company's Executive Leadership Team and Senior Management Team. He is responsible for overseeing the bank's branch network, as well as its consumer & preferred banking, small business banking, community banking, and mortgage & residential lending segments. He also leads City National's commitment to fair lending and the Community Reinvestment Act.

Cameron joined City National in 2005 as an associate business development officer. He spent 10 years growing his career and leading colleagues in Commercial Banking before becoming the senior vice president in charge of business banking in 2016. Under his leadership, City National has become one of the nation's top lenders for Small Business Administration 504 loans.



ALEXANDER CAPPELLO
*Chief Executive Officer
Cappello Global, LLC*

Alexander Cappello started his finance industry career and founded his investment bank while still attending classes pursuing his bachelor's degree at the University of Southern California after honing the necessary skills of fortitude, hard work and dedication, having been born and raised on an agricultural farm in Bakersfield California. Cappello Global in its many derivations over the last 51 years has become the number one cross-border transactions investment bank on the west coast, where it has remained a staple of independence, offering non-conflicted primarily financing and mergers and acquisition services for its diverse client base.

Cappello has been a guest lecturer at USC, UCLA and Harvard business schools, as well as numerous international universities and business conferences, sharing his deep life lessons and business experiences.



GERARD CAPPELLO
*Managing Director
Cappello Global, LLC*

Starting his investment banking career in 1985, Gerard Cappello has executed hundreds of financings and M&A transactions spanning over 60 countries and 40 years. Areas of focus have covered renewable and carbon-based energy, agriculture, consumer products, healthcare, biomed/biotech, industrials, manufacturing and distribution, among others. He has operated several broker-dealers, serving as principal (Series 24), focused on private placements of debt and equity, EB-5, and PIPEs for numerous public companies.

Cappello is currently responsible for generation of new business as well as production, processing and placements with institutional capital, private equity firms and family offices. In addition to his broker-dealer activity, he has founded and operated several companies, including operations involving real estate development, consulting and sustainable energy systems (design and installation).

Congratulations

TAMARA GURNEY and PAULA BAHAMON



Los Angeles Business Journal -Top 100 Bankers

Congratulations Tamara and Paula on your well-deserved recognition as part of the inaugural LABH Top 100 Bankers - your leadership and commitment to excellence in banking set the standard.



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ALEJANDRO CASTILLO
*SVP & Business Development Officer,
PNC Business Credit
PNC Bank*

With a 20-year career in banking, Alejandro Castillo began at Wells Fargo, where he held several key positions. As a relationship manager, he provided financial guidance to mid-sized businesses, helping them navigate complex financial landscapes. He later specialized in asset-based lending and originations before transitioning to underwriting in the bank’s technology finance sector, where he gained deep expertise in structuring financial solutions for high-growth technology companies.

Castillo joined PNC Bank to lead underwriting for its enterprise software lending division. He later stepped into a more generalist business development role, covering asset based and cashflow lending within PNC’s sponsor coverage group. Today, Castillo drives PNC’s growth by managing key relationships within the sponsor ecosystem, leveraging his deep industry knowledge to strengthen the bank’s position in the market.



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

Sherry Cefali is a managing director in the Duff & Phelps Opinions Practice of Kroll, and a member of the firm’s Fairness and Solvency Opinion Senior Review Committee. Cefali has been with the firm for over 30 years, advising companies and boards, rendering fairness opinions and solvency opinions and determining valuations of companies and securities.

Cefali joined Duff & Phelps (now called Kroll) as a vice president in the LA office in July 1990. Juggling her marriage, children and her new job, she continued to build her network in the LA community and was promoted to senior vice president and then to managing director in 2000. She then headed the firm’s LA office for nearly 20 years up until 2022.



CHARLES CLAVER
*Senior Vice President / Director,
Private Wealth Advisor Team
First Bank*

Charles Claver is the senior vice president and director of the Private Wealth Advisor team for First Bank Wealth Management. Possessing over 25 years of experience in the financial services field, his expertise includes investment management, trust and retirement planning, individual/commercial insurance, and private banking.

Based in Beverly Hills and serving the California market, Claver provides private wealth management planning and services to the bank’s most affluent families and business owners. He possesses the innate ability to connect with people at every stage of their wealth journey, with a specialized understanding of risk appetite, investment goals and time horizons. An integral part of the bank’s management team, Claver is credited with adding over 150 new relationships since he joined.



MICHELLE COBERLY
*Vice President, SBA Lending
Banc of California*

With nearly 20 years in the financial industry, Michelle Coberly, is currently the vice president of Small Business Administration (SBA) Lending at Banc of California. Coberly works closely with clients to deliver loans that are tailored to their specific needs, and she advises clients on how SBA 7(a) and SBA 504 loans can benefit their businesses.

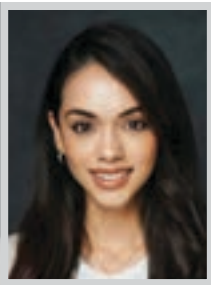
Before joining Banc of California, Coberly was a vice president of SBA Business Development for Pacific Premier Bank, where she was responsible for developing contacts nationwide in order to generate SBA 7(a) and USDA loans. Additionally, she served as a vice president at Community Bank, where she provided SBA commercial financing to business owners for expansion, working capital, equipment and commercial real estate purchases.



BRENNON CRIST
*Managing Director and Region Manager
JPMorganChase*

As managing director and region manager for Greater Los Angeles and Hawaii, Brennon Crist leads JPMorganChase’s Middle Market Commercial Banking business, serving mid-size companies across diverse industries. He also serves as co-chair of the Market Leadership Team in Los Angeles.

By combining JPMorganChase’s global resources with local expertise, Crist and his team deliver comprehensive financial solutions that drive client growth. Crist’s contributions to the banking profession extend beyond client service – he actively mentors colleagues through JPMorganChase’s mentorship programs and participates in national promotion committees, fostering professional development and advancing industry standards. Additionally, he is consistently involved with the Los Angeles County Economic Development Corporation and the Los Angeles Area Chamber of Commerce, where he has served in leadership roles.



LIZBETH DA BROY
*Assistant Vice President | Business Access Advisor
U.S. Bank*

Lizbeth Da Broy is a dynamic leader in banking with a passion for sales, business development and community advocacy. Da Broy takes a personalized approach to financial consultation, helping clients navigate complex financial decisions with confidence. Her ability to evaluate credit requests, prepare strategic budgets and analyze market trends enables businesses to secure the funding and financial stability they need to thrive.

Beyond her direct client impact, Da Broy is actively involved in industry organizations and professional associations that promote financial literacy, economic growth, and business development. As a mentor within the Multicultural Business Alliance (MBA), she provides invaluable guidance to small business owners, helping them access capital, navigate financial challenges, and build sustainable businesses.



OLIVIER de GIVENCHY
*West Region Head, J.P. Morgan Private Bank
J.P. Morgan*

As the west region head at J.P. Morgan Private Bank, Olivier de Givenchy leads a diverse team of professionals across 15 offices in 10 states, focusing on providing comprehensive wealth management services. He oversees the strategy and expansion of the businesses through hiring, real estate planning and client acquisition. Within California, de Givenchy oversees approximately 700 employees managing nearly \$355 billion in client assets.

In addition to his role at J.P. Morgan, de Givenchy is actively involved in community rebuilding efforts. He has joined SteadFast LA, a nonprofit organization dedicated to accelerating the rebuilding of Los Angeles following devastating wildfires. He consistently contributes his financial expertise and extensive network at J.P. Morgan to help brainstorm potential solutions and increase community support.



JACKY DILFER
*Executive Director
Business Finance Capital*

A commercial and SBA lending expert, Jacky Dilfer helps each of her clients grow their businesses, create job opportunities and better serve their communities. Her vast experience in commercial lending extends two decades in the San Francisco Bay Area and Southern California, where she’s led Business Finance Capital’s (BFC) rapid growth as the organization’s executive director for more than 12 years.

Under Dilfer’s leadership, BFC has funded more than 1,000 commercial real estate transactions for small and medium-sized businesses since 2012. In just the last decade, she has arranged more than \$5 billion in commercial and SBA loans. Additionally, Dilfer serves the local community as a Board of Trustee member for AltaMed Health Care Services, delivering essential health care to under-served communities in Southern California.

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Bonnie Rubin

Executive Vice President | Regional Director



Lyndsey Hudgins

Senior Vice President | Senior Managing Director



Carolina Morera

Vice President | Relationship Manager



Carlos Payan

Senior Vice President | Regional Director

**We proudly congratulate Bonnie, Lyndsey, Carolina and Carlos
for being recognized in the Top 100 Bankers of Los Angeles.**

A testament to their leadership, client commitment and ability to deliver personalized financial solutions with integrity and care, this recognition reflects their professional excellence and the value they bring to their clients.

Thank you to our bankers for setting the standard in relationship banking.



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GENE DUNFORD
Senior Managing Director
Umpqua Bank

Gene Dunford is a managing director and heads Umpqua Bank’s commercial banking activities across the Greater Los Angeles area, where he oversees a seasoned team of commercial bankers. Starting with a modest team of three, Dunford has transformed the group into a formidable force, expanding its ranks to twenty bankers since 2016, who together have grown the bank’s committed assets from zero to several million dollars.

In 2025, Dunford and his team have been busy assisting clients navigate tariffs, supply chains, the impact of the LA fires, and helping business operators find ways to protect margins, diversify supply chains and identify opportunities for growth. Dunford is also considered one of the leading tax exempt bond experts, with over 16 years of experience on the topic.



PHILIP FEGHALI
President
American Business Bank

Philip Feghali started off as a relationship manager, developing clients for ABB. He then opened the bank’s Inland Empire office in Ontario, providing commercial lending opportunities in an underserved community. He then became president of ABB, and is now leading the bank as it grows as the leading mid-size commercial lender in Southern California.

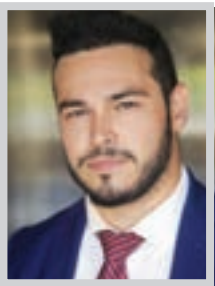
Feghali is known for his uncanny ability to recognize businesses who have the potential to grow – which benefits the business, the bank and the community. He invests in the character of the people with whom he provides commercial credit. He takes justified risks because he knows these businesses will prosper and ABB not only will profit from the relationship but will take pride in seeing the business clients grow.



BRANDON J.E. FERRERA
Southern California Market President
Fifth Third Bank

Brandon Ferrera serves as Southern California market president for Fifth Third Bank, N.A. Based in El Segundo, he is responsible for leading teams in Los Angeles, Orange County, Inland Empire and San Diego focused on developing and maintaining relationships with both privately-owned and private equity-owned middle market clients.

Led by Ferrera, the Southern California teams support their clients’ growth with financing for working capital, growth capital, acquisitions and leveraged buyouts. He also oversees the bank’s Middle Market Healthcare practice in the state of California. During his career, Ferrera has carved out a niche as a builder of businesses within the banking industry. He is passionate about helping middle market companies achieve their financial goals and grow their businesses.



BRYAN FLORES
Director, Specialty Deposits
SMBC MANUBANK

Bryan Flores has been serving the business banking community for 12 years and joined SMBC MANUBANK’s Specialty Deposit team in 2019. He established the program in the Beverly Hills area, and has had notable success working with trust & estate and family law attorneys and fiduciaries.

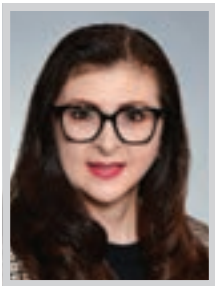
Flores is an experienced banker with expertise in reviewing and analyzing legal and court documents to open various types of accounts. Building client relationships and delivering exceptional customer service is Flores’ signature to success. His top-level experience, skill and knowledge makes him a trusted advisor who can add value to a client/attorney relationship. His market covers Beverly Hills to the South Bay and Northern California. His Midwest roots and close family ties give him the compassion to work closely with his clients.



JEFF FORSYTHE
Senior Vice President, Commercial Banking
Torrey Pines Bank,
a Division of Western Alliance Bank

As senior vice president, commercial banking, for Torrey Pines Bank, the Southern California-based regional division of Western Alliance Bank, Jeff Forsythe is a leading force in commercial real estate finance. His 40-year career spans both large and small financial institutions. Forsythe’s current focus includes institutional commercial real estate finance, working with investors alongside local developers to structure sophisticated land transactions, construction financing and bridge loans.

After graduating from the University of Wisconsin with a degree in construction management, Forsythe served clients through various capital markets, banking and lending roles at banks and non-bank lenders in Chicago and Los Angeles. Since joining Torrey Pines Bank in 2015, he has specialized in construction, bridge and term real estate loans ranging from \$10 million to \$100 million.



MARIA GARCIA
Divisional Director, Consumer Bank for California
JPMorganChase

Maria Garcia, a Los Angeles native, has devoted 38 years to JPMorgan Chase, skillfully navigating mergers like Home Savings of America and Washington Mutual. Her career in the retail branch system is marked by a passion for empowering employees and serving clients. As divisional director of the Consumer Bank for California, Garcia is committed to employee development and community engagement, ensuring branches meet client needs while fostering team growth and job creation. Her leadership philosophy emphasizes empowerment and support, creating a nurturing environment for both clients and employees.

Garcia’s involvement as a board member of NEW and the YWCA, along with her role in internal resource groups, underscores her commitment to community engagement and the advancement of diversity and inclusion within the banking industry.



EVERARDO GOMEZ
Director, Venture & Innovation Banking
Bridge Bank,
a Division of Western Alliance Bank

Everardo Gomez is a director in the Technology Banking Group at Bridge Bank, a division of Western Alliance Bank, where he leads a team of five bankers and oversees nearly \$300 million in loan commitments for startups and VCs. During his nearly 20-year career in banking, Gomez has taken on increasing levels of responsibility, working primarily with tech companies to support them throughout all phases of their growth cycle.

Prior to his banking career, Gomez was a manufacturing engineer at Lockheed Martin, which gave him a unique perspective into cutting-edge technologies. Gomez also worked at Wells Fargo, Silicon Valley Bank and East West Bank, where he launched a national digital media lending practice, building a significant portfolio of leading new media and tech companies.



KEVIN GONZALEZ
Senior Vice President & Regional Manager
Commercial Bank of California

Since joining Commercial Bank of California in 2019, Kevin Gonzalez has demonstrated exceptional leadership and commitment to client success in multiple roles. As vice president and relationship manager — and later as first vice president — he played a pivotal role in managing and expanding client relationships, delivering tailored financial solutions, and driving business development initiatives.

In 2022, Gonzalez advanced to the position of senior vice president and regional manager of the Downtown Los Angeles office. He currently oversees daily operations, leads a team of professionals, and ensures the delivery of personalized banking services to meet the diverse needs of clients in the Los Angeles area. His client-centered approach guides his close collaborations with business owners to secure funding and elevate their businesses.



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Congratulations *Judi Prejean*

We're proud to celebrate
Judi Prejean's recognition as one of
the *Los Angeles Business Journal's*
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excellence drive our continued
success.

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TAMARA GURNEY
CEO | President
Mission Valley Bank

Tamara Gurney’s journey in community banking began in 1980 when she joined American Pacific State Bank as the executive assistant to the president. Over the course of two decades, she ascended to the role of executive vice president and chief operating officer before the bank’s eventual sale.

Today, Gurney is the visionary force behind Mission Valley Bank, serving as its founding president and chief executive officer. With assets totaling \$588 million as of September 2024, Mission Valley Bank stands as a foundational enterprise of the community, boasting three branches and divisions with a focus on specialized lending, accounts receivable, specialty banking, community development and merchant services, catering to the needs of over 6,000 clients.



DAHLIA GUTIERREZ
Relationship Manager, Nonprofit Banking
First Bank

Dahlia Gutierrez is a senior relationship manager for Nonprofit Banking at First Bank. She has held various roles throughout her banking career spanning over 20 years, including leading loan originations and underwriting teams. She also served as a director of portfolio management at her prior bank and was responsible for restructuring and managing a team that oversaw risk management of a \$13 billion commercial real estate portfolio.

As a nonprofit banker, Gutierrez is responsible for providing consulting, philanthropic, community investment and banking services to nonprofit organizations across the bank’s footprint. She works closely with each organization with a focus on financial stability, access to capital and strategic growth opportunities. In her current role, Gutierrez has successfully grown the bank’s nonprofit business portfolio by over 600%.



CHANNING HAMLET
Co-Founder; Managing Director
Objective, Investment Banking & Valuation

Channing Hamlet is a managing director and co-owner of Objective, Investment Banking & Valuation, where he plays a pivotal role in the firm’s success as both a leader in the Business Services practice and the head of the Valuation Advisory Services Group. With over 25 years of experience in investment banking and business valuation, Hamlet has advised business owners on transaction execution, exit strategies and business performance improvement, delivering impactful results.

At Objective, Hamlet has personally closed more than 25 sell-side transactions in the last five years, with deal experience spanning middle-market companies in business services, healthcare and technology. His ability to drive M&A execution and business development has directly contributed to tens of millions of dollars in revenue for Objective.



HOWARD HAMMOND
President & Chief Executive Officer
City National Bank

Howard Hammond is the president & chief executive officer of City National Bank, a subsidiary of the Royal Bank of Canada. He is also a member of City National’s board of directors and the executive committee of RBC’s US intermediate holding company.

Hammond brings more than 30 years of experience in the financial services industry and a strong track record of transforming organizations for operational strength and risk management. Prior to joining City National, he held numerous leadership roles at Fifth Third Bancorp, including head of Consumer Banking, head of Retail Banking and Brokerage Distribution and managing director of Fifth Third Securities. Hammond began his career at Citigroup, where he rose from management associate to eventually managing the largest investment group within Citicorp Investment Services.



LAUREN ANTION HANSEN
Director; Co-Head of Beauty,
Personal Care & Wellness
Intrepid Investment Bankers

Lauren Antion Hansen was named co-head of Beauty, Personal Care & Wellness at Intrepid Investment Bankers in January 2023 as a result of her increasing role and leadership within the industry group. With almost ten years of beauty mergers and acquisitions experience, Hansen has a strong understanding of the trends and value-drivers across the sector, close relationships with leading strategic acquirors and investors, and significant experience sourcing and executing transactions.

Hansen has worked on most of the beauty, personal care and wellness transactions at Intrepid since 2015, including sell-side and buy-side mergers and acquisitions, capital raising, and restructuring transactions. She has represented brands such as Native, The Wet Brush, Obagi, Loving Tan, Tubby Todd, DIME Beauty, Biossance, BOOM!, and Salon Grafix, among others.



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 by listening and working to understand their priorities, goals and family dynamics. She then custom tailors a team of specialists, who systematically manage and implement a plan, which can include financial and estate planning, risk and investment management, and strategic credit. 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.



LYNDSLEY HUDGINS
Senior Vice President; Managing Director
1st Century Bank

Lyndsey Hudgins’ career in financial services spans multiple facets of the industry, beginning in insurance and expanding into investments, business banking, management, and, for the past decade, relationship management. As a senior managing director at 1st Century Bank, she expertly oversees high-value client relationships, driving significant business growth while ensuring alignment with organizational goals.

Hudgins leads her team with dedication, cultivating a high-performance culture that thrives on efficiency and results. Her ability to balance revenue generation with prudent risk management has been key to her success in identifying, developing and securing new business opportunities. By engaging with stakeholders at every level, from corporate clients to internal executives, she fosters long-lasting partnerships that are crucial for sustained success.



DUNCAN HUGHES
Regional Manager; Commercial Banking Consultant
for Entrepreneurs
Endeavor Bank

A 20-year banking veteran, Duncan Hughes is a driving force behind Endeavor Bank’s strategic expansion into the LA, Orange County and Inland Empire markets. Hughes began his journey at Wells Fargo as a retail banker, which laid a strong finance foundation that he strengthened during his tenure at Bank of America, honing his skills in client relationship management. Later, at Bank of California, his role as a market allowed him to develop a comprehensive understanding of the local business landscape.

Hughes was brought onto the Endeavor Bank team in early 2024 and made quick work introducing the community-focused bank to new markets. In just over a year, he has assembled a high-performing team and executed strategic initiatives that have exceeded regional performance expectations.



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KATHLEEN SALMONS
F&M Bank Chief Risk Officer

Congratulations to Kathleen for being named one of
Los Angeles Business Journal's Top 100 Bankers.

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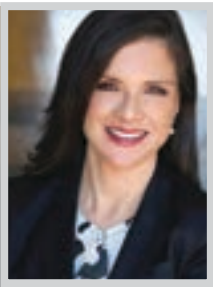




TIFFANY HUGHES

Managing Director, Foreign Exchange
PNC Bank

Tiffany Hughes began her career in foreign exchange on the trading floor — a fast-paced, high-energy environment where she thrived amid the intensity. She quickly built her own book of clients, setting the foundation for a career that would evolve alongside the industries she served. Her early years were spent in Silicon Valley, working with middle-market firms, growing alongside them as the sector transformed. As her expertise deepened, Hughes expanded her focus, working with money managers, and eventually, Fortune 500 corporations. She became a trusted advisor in managing foreign currency risk, optimizing foreign denominated cash flows and developing strategies to mitigate financial risk. With the PNC's expansion into LA, Hughes saw a unique opportunity to play an entrepreneurial role in shaping the bank's market presence.



MARIA HUNTER

Market President, Los Angeles
Enterprise Bank & Trust

Maria Hunter joined Enterprise Bank & Trust as a senior vice president in 2022 and quickly distinguished herself with her proficiency in both financial analysis and team leadership, earning a near-immediate promotion to relationship manager team lead. In 2025 she was appointed to the role of market president, Los Angeles, and now leads an expert team of banking professionals in providing strategic guidance for the development and implementation of innovative financial solutions tailored to the evolving needs of small and midsize businesses. Hunter champions extensive communication to develop creative, flexible financing options for her clients, resulting in impactful development projects across Los Angeles, Orange County and beyond. A member of the DE&I Council at Enterprise, Hunter dedicates her efforts to nurturing the company's mentorship program.



DEAN INDOT

Senior Vice President, Commercial Banking
Torrey Pines Bank,
a Division of Western Alliance Bank

As senior vice president of commercial banking at Torrey Pines Bank, Dean Indot leads a powerful team of seven committed banking professionals from the company's Beverly Hills office. Indot joined the bank in 2013, and supports high-net-worth clients with all their banking needs, including managing their real estate portfolios and personal accounts, providing working capital for their businesses, offering lines of credit at the personal level, and more. Indot and his team develop funding solutions for commercial and real estate investors and projects, including construction, owner-occupied, short-term bridge/turn-around loans and more. With a background in finance, he also has strong experience in C&I lending, primarily in revolving lines of credit, asset-based lending and non-real estate secured term debt.



KATHY IRBY

Senior Vice President & Regional Manager
Commercial Bank of California

With a career spanning over 25 years in the financial services industry, Kathy Irby began her journey in banking shortly after college as a teller. Over the years, her dedication and keen understanding of the industry allowed her to progress through various institutions and roles, including lending officer, account officer, and eventually senior vice president & regional manager at Commercial Bank of California (CBC). Irby oversees CBC's Santa Monica branch and its operations, with an expertise in credit analysis, risk management and structuring commercial lending solutions. For over 20 years, she has actively supported local Santa Monica community initiatives, exemplified by her affiliations with the Kiwanis Club of Santa Monica and the Santa Monica Police Activities League.



CARL JORDAN

Executive Vice President,
Branch and Small Business Banking
U.S. Bank

In 2001, Carl Jordan was key in the expansion of U.S. Bank's business banking operations to California and the western states. Jordan currently leads the Consumer and Small Business Banking division for the California region, which includes several California markets, and oversees 600 branches, more than 3500 team members, and a total of \$70 billion in deposits. Jordan serves on the board of the U.S. Bank Foundation, which is committed to working through collaborative grantmaking to bring equitable and lasting change to communities. He also serves as the vice chair for the bank's PAC board of directors. He is a champion for financial literacy, spearheading efforts to promote early childhood financial education throughout California.



ALICE JUAREZ

Regional Branch Network Executive
Wells Fargo

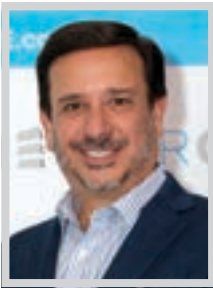
A 34-year financial services veteran, Alice Juarez has spent her career serving customers throughout the state of California, where she has held several leadership positions. As regional branch network executive of Wells Fargo, she provides oversight to 80 banking stores with \$15.5 billion in deposits, employing over 780 financial services professionals across Greater Los Angeles. Focused on strengthening and making communities more financially resilient, Juarez oversees seven districts within her region from, ranging from affluent markets to low- to moderate-income communities throughout the county. As a business leader and executive, her experience has been invaluable to local business owners and individual banking customers across the enterprise. She serves in the LA Chamber CEO Council, providing strategic direction to help retain businesses in Los Angeles.



LISA KASKEL

Executive Vice President and Regional Manager
Banc of California

Lisa Kaskel, EVP and regional manager at Banc of California, is a seasoned finance and lending leader in banking with expertise in a wide variety of credit facilities. With 25 years of commercial real estate finance experience, she has devoted her career to structured finance, with a focus on bridge and construction lending. In 2011, Kaskel joined Pacific Western Bank — now Banc of California — and today, she manages a team of experienced lenders, overseeing the loan business and deposits for clients who include many of the top real estate owners and operators in the country. She specializes in lending for real estate transactions that require repositioning, and has extensive experience with both recourse and non-recourse financing for high-net-worth individuals and entities.



LEE KLEINMAN

SVP, BDO
Business Finance Capital CDC

Lee Kleinman has been providing banking and lending services in the local community for 35 years and has helped hundreds of clients meet their financial goals. His lifetime loan fundings are close to one billion. Kleinman's consultative approach to his business ensures he fully understands his clients' objectives and goals. When employed at Wells Fargo, he earned the rare SVP corporate title for his production and leadership. Kleinman regularly attends industry events with the goal of assisting non-profit organizations. He is always available and eager to share best practices with his colleagues and industry partners, and regularly provides SBA 504 training within the marketplace, allowing for more business owners to benefit from the program.



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DOUGLAS P. KRAUSE

*Vice Chairman & Chief Corporate Officer
East West Bank*

Douglas P. Krause is the vice chairman & chief corporate officer of East West Bancorp and East West Bank. Previously, Krause served as general counsel of Metrobank after starting his legal career at the law firm of Jones Day.

Krause serves on the boards of the Western Bankers Association and the International Bankers Association of California. He is a past commissioner and audit committee chair of the Port of Los Angeles and of the Alameda Corridor Transportation Authority. He received a bachelor's degree from Carleton College and a J.D. from Columbia Law School, where he graduated with honors and was managing editor of the Columbia Law Review.



MELANIE KRINSKY

*Head, Entertainment and Media Group
Western Alliance Bank*

As managing director of Western Alliance Bank's (WA) Entertainment and Media Group, which she founded in 2021, Melanie Krinsky extends her 35-year run as one of the most impactful entertainment lenders in the industry. To date, this group has underwritten \$1.4 billion in commitments, including some of the most high-profile deals in the business.

Krinsky is recognized internationally as a leader in the field of entertainment lending. She is an expert in tax incentives, studio ultimates, library valuations, production credits, print and advertising credits, and gap financing. Previously, she founded the entertainment banking divisions at Bank Hapoalim, Bank Leumi USA, California United Bank, and has been part of successful entertainment departments at Mercantile National Bank and City National Bank.



BRAD LARSEN

*Managing Director; Senior Market Executive
Bank of America Private Bank*

As managing director and senior market executive for Bank of America Private Bank, Brad Larsen directs the Greater Los Angeles region, leading a team of nearly 200 Private Bank professionals and managers who provide integrated strategy and execution in multiple disciplines to ultra-high net worth individuals and families in the areas of: investment management, wealth structuring, trust and estate planning services, philanthropy, and credit and lending through Bank of America.

Larsen and his team oversee \$26 billion in AUM, an amount which has more than doubled in the last four years through his leadership. He oversees the provision of in-depth offerings to high-net-worth clients who have complex needs. He is also responsible for hiring and retention in the region.



BONNIE LEE

*President and CEO
Hanmi Financial Corporation & Hanmi Bank*

Bonnie Lee is the president and CEO of Hanmi Bank and one of just 11 female CEOs leading publicly traded financial institutions in the country. Since taking on the role of CEO, Lee has led Hanmi Bank through a successful multi-year business transformation that has strengthened the bank's balance sheet, diversified its loan portfolio, expanded its products and services, optimized its branch network and significantly grown its Corporate Korea Initiative.

Lee has grown total assets 36%, from \$5.5 billion to nearly \$8 billion, and continues to evolve the institution from its humble beginnings as the first Korean American bank to a full-service community bank serving multi-ethnic communities through a network of 32 branches and five loan production offices across the country.



HOWARD LEE

*Senior Vice President;
Director of Consumer & Retail Lending
New Omni Bank, National Association*

Howard Lee is a seasoned banking professional whose career spans over two decades of leadership in consumer credit, residential lending and strategic financial services. His depth of experience, from large institutions to community banks, gives him a unique perspective on delivering lending solutions tailored to the needs of diverse communities.

Lee leads the New Omni Bank's Consumer & Retail Lending division, overseeing residential mortgage lending, portfolio management, credit analysis, underwriting and loan servicing. He is known for designing lending solutions that meet the unique needs of underserved borrowers — particularly immigrants and first-time homebuyers with limited credit histories. His hands-on leadership style, deep knowledge of fair lending laws, and commitment to compliance have elevated the bank's reputation for both personalized service and responsible lending.



DEBORAH LEERHSEN

*Executive Vice President; Head of Global Banking
East West Bank*

Deborah Leerhsen brings 25 years of global corporate and commercial banking business leadership to her role as head of global banking at East West Bank. Prior to her latest role as global head of client coverage for Commonwealth Bank (Market cap \$165 billion), Leerhsen was deputy head of Asia & Oceania for Mizuho Bank and head of global banking for HSBC in Hong Kong.

Leerhsen spent over 15 years as a senior coverage banker and account owner for HSBC's largest institutional banking and markets clients in London and Hong Kong. She also led commodity trade finance business in HSBC Singapore. She holds a degree in economics from the University of Chicago, and completed the Board Directorship Program in 2015 at the University of Hong Kong.



BRIAN LEVIN

*Managing Director;
Head of Food, Beverage & Agriculture
Intrepid Investment Bankers*

Brian Levin joined Intrepid Investment Bankers as an associate in 2010, steadily growing his expertise as a VP, director, and finally as managing director in June of 2023. During that time, he completed several transactions across the consumer sector in toys & giftware, lifestyle brands, and personal care & wellness. Ultimately, he determined his passion was in the food, beverage & agriculture sector and dedicated himself to that focus.

Levin currently advises clients within consumer packaged goods, distribution, private label, ingredients, nutrition and other key sectors of the industry. In 2025, he was named head of Food, Beverage & Agriculture at Intrepid. Just last year, his team executed landmark deals involving Raymundo's, California Custom Fruit & Flavors, Bloom, Rockenwagner Bakery, Snak King, and Watkins.



PENG LI

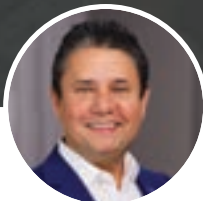
*Senior Vice President; Branch Manager,
Los Angeles Branch
Bank of China*

Peng Li is a highly accomplished banking professional with over 25 years of experience in corporate banking and trade finance. His tenure at the head office of Bank of China provided him with extensive experience in shaping high-level strategic initiatives. Over the years, Li has advanced through various leadership roles, including key overseas positions in Hong Kong and Europe, where he successfully navigated international financial markets, strengthened cross-border partnerships and led diverse teams.

As a senior vice president and manager of the bank's Los Angeles branch, Li oversees strategic planning, business development, risk management and compliance. Under his leadership, the Los Angeles Branch has established strong banking relationships with major multinational corporations and Fortune Global 500 companies.



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When disaster strikes, Bank of America is on the ground supporting businesses in our communities. We've committed \$2 million to support rebuilding Los Angeles, including \$500,000 to the Los Angeles Chamber of Commerce. Because the sooner our businesses are back to thriving, the better for everyone.

Raul Anaya
President, Bank of America Los Angeles

\$11.4B in loans to Los Angeles businesses

300+ business specialists in Los Angeles

233K volunteer hours in Los Angeles

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ROBERT LO

*Executive Vice President;
Head of Commercial Real Estate Banking
East West Bank*

Robert Lo began his banking career as a loan assistant, learning all aspects of lending and expanding relationships, from loan documentation through loan closings. Over a career spanning more than 3 decades, Lo progressed from branch manager to top relationship manager, and now serves as a top-performing team leader at East West Bank. In his current role, he oversees several teams, navigating them through bank’s commercial real estate portfolio, which includes nonprofit projects, affordable housing, low-income housing tax credits, bridge & value-add financing, and ground-up construction.

Lo leads teams that have consistently generated several billion dollars in low-income housing units across the nation. He personally banks dozens of nonprofit providers of transitional housing, permanent supportive housing and mental health organizations.



MICHAEL MAGHAKIAN

*Senior Banking Advisor, Los Angeles
Northern Trust*

Michael Maghakian serves as senior vice president for Northern Trust’s Los Angeles Region Wealth Management Group, and has over 20 years of expertise in providing tailored banking solutions for his clients. Prior to Northern Trust, Maghakian spent eight years with US Bancorp.’s Commercial Banking group, cultivating relationships with executives of both publicly held and privately owned middle market companies throughout the Los Angeles area.

Maghakian advises individuals, families, trusts, private equity firms, real estate funds, foundations and non-profit organizations, with a special emphasis on the unique credit and capital needs of ultra-high-net-worth individuals. His typical transactions include commercial real estate financing, aircraft loans, yacht lending, capital call lines of lines of credit, life insurance premium financing, investment secured lines of credit and residential mortgages.



HELEN MAH

*Executive Director; Banker
J.P. Morgan Private Bank*

Helen Mah serves as an executive director and banker at J.P. Morgan Private Bank’s Pasadena office, where she navigates the complex financial landscapes of successful business founders, real estate investors, and their families. As a founding member of the Pasadena office, Mah has played a pivotal role in expanding the bank’s reach among minority business owners and the Asian American community.

Mah’s approach is highly personalized, adding value across a wide range of financial areas. Her expertise includes business pre-sell planning, trust and estate strategies, tax planning, investment allocation, concentrated stock strategies, and retirement cash flow projection. In 2025, she was selected to join the JP Morgan Private Bank Advisory Council, an esteemed group of 30 employees who regularly meet with key executives from the bank’s operating committee.



CARL MILLER

*Managing Director, Investment Banking
Objective, Investment Banking & Valuation*

Carl Miller is a managing director at Objective, Investment Banking & Valuation, where he leads the Investment Banking Group for the Consumer practice, which focuses on sell-side advisory. With over 15 years of extensive experience in investment banking and transaction advisory, Miller has built a robust portfolio of transactions advising clients on mergers, acquisitions, capital raises, restructurings, strategic advisory, fairness and solvency opinions, litigation support, and valuations.

Previously, Miller excelled as a senior vice president at M.M. Dillon & Co. and founding member of the Energy Team, providing strategic advice on a wide range of financial transactions. His exemplary performance led him to W Partners as a managing director, before joining Objective in 2019 to continue to drive success.



JOEL MONTMINY

*President and CEO
Montminy & Co.*

A distinguished investment banker with over 25 years of leadership in mergers and acquisitions, Joel Montminy is the founder and driving force behind Montminy & Co. He has spearheaded over \$6 billion in middle-market transactions and \$2.8 billion in cross-border deals across 30 countries. His expertise in dealmaking has been instrumental in shaping Southern California’s financial landscape while also impacting global markets.

In 2024, Montminy completed several high-profile transactions, including the sale of Pizza Factory to Wonder Franchises, and the sale of Direct Solar to Solar Tech. Beyond transactions, Montminy is a recognized authority in the financial press and a frequent speaker on M&A trends. His leadership extends into philanthropic and community service, holding board positions across arts, education, entrepreneurship and medical research initiatives.



STEVE MOON

*Managing Director
Kroll Investment Banking*

Steve Moon has been with Kroll Securities for 25 years, and is managing director and deputy head of Mergers and Acquisitions for Americas. He is also the firm’s Los Angeles city leader and co-head of the firm’s Aerospace, Defense and Government Mergers & Acquisitions Group.

Moon has completed a range of investment banking engagements including mergers, acquisitions, sales, divestitures, recapitalizations, leveraged buyouts, debt and equity financings, strategic alternative reviews and fairness opinions on behalf of private equity firms, public corporations and private company clients. His engagements include advising on the sale of Magnetic Component Engineering to Dexter Magnetic Technologies; the sale of Citadel Defense, a portfolio company of Lightspeed Venture Partners to BlueHalo; and the sale of Busby Metals to Wieland Group.



CAROLINA MORERA

*Vice President; Relationship Manager
1st Century Bank*

For over 20 years in the banking industry, Carolina Morera has built a reputation for blending knowledge with a human-centered approach, ensuring that businesses receive tailored financial solutions that drive success. With expertise in asset-based cash-flow lending, Morera has sourced, negotiated and closed over \$500 million in commercial loans, showcasing her ability to fuel business growth even in challenging economic conditions.

In 2019, driven by the desire to create more connections and opportunities, Morera helped organize a committee of motivated women to launch 1st Century Bank’s Women Connection. This educational discussion group raises awareness to the challenges women face in their personal and professional development and fosters an inclusive environment where women can openly share their experiences in a safe space.



FARZAD MUKHI

*Managing Director
Kroll*

Farzad Mukhi is responsible for project execution and client management for a broad range of investment banking engagements, including sell-side and buy-side transactions, leveraged buyouts, divestitures, recapitalizations, debt and equity financings and strategic alternative reviews. Mukhi leads Kroll’s Western US Consumer M&A practice and its US Food, Beverage and Nutrition practice.

With 20 years of experience, Mukhi has served a diverse clientele ranging from entrepreneurs to multinational corporations to private equity funds. He has completed dozens of transactions for clients globally, with a practice that is focused on making a meaningful impact on mid-sized companies. Additionally, Mukhi is passionate about the consumer and food sectors, often speaking on panels, attending trade shows and advising industry participants in areas outside of M&A.

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OMID NOORI

Senior Vice President; Market Leader,
Greater Los Angeles
U.S. Bank

Omid Noori serves as the market leader for U.S. Bank Private Wealth Management in Greater Los Angeles. He oversees a team of specialists dedicated to providing comprehensive, tailored services that include investment management, private banking, wealth planning, and trust and estate strategies. To provide holistic support, the highly engaged team also collaborates with other client advisors, such as attorneys and accountants, and draws on expertise across the bank's business lines.

As the child of first-generation immigrants who balanced several jobs to get by, Noori witnessed the positive transformation of his family's financial situation as they became increasingly savvy with managing money. He has built his career on a fundamental appreciation of the value of financial education, providing clients the personalized knowledge and service they deserve.



STEVE O'CONNELL

President / CEO
California Credit Union

Under president and CEO Steve O'Connell's leadership for the past 12 years, California Credit Union has introduced numerous innovations to achieve significant transformation, growth, and member service enhancements across every area of operations. Through his guidance, the credit union has achieved the strongest financial performance in the organization's history, increasing assets to nearly \$5 billion and serving more than 200,000 members. In addition, consumer lending has reached all-time highs over the past two years.

At O'Connell's direction, an Innovation Department was created to launch industry-leading technologies to support members more effectively and efficiently as digital and mobile banking usage continued to be a primary service channel. Last year, the credit union was certified as a Community Development Financial Institution (CDFI).



SCOTT OLMSTED

National Technology Industry Executive
Bank of America

Scott Olmsted is the head of Bank of America's National Technology Industry within Global Commercial Banking. Since the inception of the business in 2013, Olmsted has been responsible for leading technology industry strategies across the US for finance teams that advise emerging growth to public companies.

Olmsted leads more than 50 bankers across the US in one of the fastest growing divisions of the bank, bringing solutions to market through financial and intellectual capital. Under his leadership, the business continues to grow at a double-digit pace and has more than doubled its multi-billion-dollar portfolio in the past four years. Olmsted previously served as lead banker for several companies including AEG, for which he led the financing of LA Live's construction.



RYAN PARK

Head of Real Estate Banking
Mizrahi Tefahot Bank LTD

Ryan Park created the real estate banking team for Mizrahi Tefahot Bank, a commercial bank based in Los Angeles. A UCLA graduate with a Bachelor of Science in mathematics/economics, Park has successfully established a commercial real estate banking platform that has grown the portfolio from \$40 million to over \$700 million in just three years.

The bank has never shut down and under Park's stewardship continues to actively support real estate investors and developers with lending services, even as many other banks have scaled back their origination programs.



CARLOS PAYAN

Senior Vice President; Relationship Manager
1st Century Bank

With a distinguished banking career exceeding three decades, Carlos Payan has established himself as a seasoned expert, particularly in the Commercial Lending sector. His clientele encompasses a diverse range, from family-owned businesses to middle-market companies, reflecting his adaptability and comprehensive understanding of various business models.

Payan has cultivated enduring client relationships, with many spanning over two decades, by consistently delivering customized commercial lending and depository solutions tailored to each client's unique needs. His proactive approach, characterized by meticulous attention to market trends and economic indicators, ensures he is well-prepared to address potential impacts on his clients' businesses. Additionally, he has made a positive impact on the community through his unwavering support of the USC Latino Alumni Association.



BENNETT POZIL

Executive Vice President; Head of Corporate Banking
East West Bank

Bennett Pozil leads East West Bank's US commercial banking business, encompassing many of the bank's specialized industries, including entertainment, new media, sponsor finance and cross border. He also oversees all of the bank's Asia-based branches and representative offices.

An established entertainment industry expert, Pozil has been named to the Variety 500 index of influential business leaders each year since 2017. He is a frequent speaker and panelist throughout Asia, appearing at numerous summits, including the BOAO Forum for Asia, the Beijing International Film Festival, Shanghai International Film Festival, the Silk Road Conference in Xian and the Asia TV Forum in Singapore. Pozil is also a regular lecturer and adjunct professor at the Beijing Film Academy.



JUDI PREJEAN

Executive Vice President; Executive Director
Customers Bank

Judi Prejean is a seasoned banking leader with over 40 years of experience, rising from college teller to senior leadership through unwavering commitment to her clients. Prejean spent nearly 30 years at Bank of the West, culminating in her role as senior vice president and business banking group manager, leading nine banking teams and working closely with small- to mid-sized businesses statewide. She later served as executive director of West Coast Banking Operations at Signature Bank.

Currently, Prejean leads Customers Bank's West Coast teams across California and Nevada. Her career is marked by a long list of businesses that have grown from small ventures into industry leaders, with many attributing a significant portion of their success to her guidance.

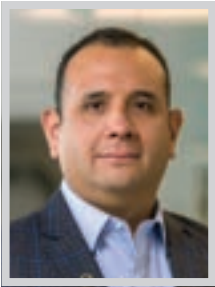


ERIC RACUSIN

Senior Vice President;
Business Banking Regional Executive
U.S. Bank

Eric Racusin currently serves as senior vice president and business banking regional executive for U.S. Bank, where he leads over 200 employees who serve the needs of businesses across the state. Before transitioning to the financial services industry, Racusin spent significant time at a private manufacturing firm where he led the marketing group responsible for the company's brand positioning, go-to-market strategy and government contracting program.

Currently, Racusin's business banking segment provides the banking needs of medium-sized businesses, while offering access to a wide range of services and solutions to help them grow. These include not only business accounts, credit cards and loans but also full-scale payments solutions and customized industry expertise for verticals like healthcare and agriculture.



CARLOS RAMOS
*Executive Vice President;
Middle Market Banking Group Leader
Banc of California*

Carlos Ramos is executive vice president for Middle Market Banking at Banc of California. He has a proven track record serving global middle market and large corporate clients, and a wide range of financing experience, including with working capital, acquisition, dividend recapitalization and asset-based and general corporate financing solutions.

Throughout his career, Ramos has developed deep experience across diverse sectors, including cross-border trade finance, and has successfully financed transactions for high-profile global companies and several ultra-high-net-worth individuals. He currently leads a high-performing commercial banking team that provides a range of products and services to middle-market clients.



MATTHEW RECHNER
*Senior Banking Director,
Los Angeles and Santa Barbara
Northern Trust*

Matthew Rechner is the senior banking director for Northern Trust in Los Angeles. In this role, his primary responsibility is to lead, develop and help execute on wealth management strategies involving several banking teams across California. In 2022 and 2023, his role was further expanded to include San Diego and Santa Barbara region management support. He and his managed teams advise high-net-worth individuals, families and their businesses, trusts, foundations and non-profit organizations from a capital management perspective.

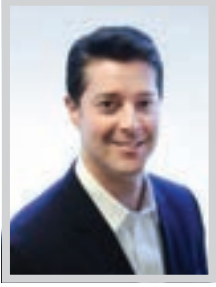
Prior to moving to Los Angeles, Rechner led Northern Trust's banking practice in San Diego for four years. Before joining Northern Trust, he was a senior relationship manager for a real estate and commercial banking group.



EDYTHE REPOFF
*President; Chief Operating Officer
New Omni Bank, National Association*

Edythe Repoff initially joined New Omni Bank as executive vice president and general counsel. Her dedication and vision quickly propelled her to senior executive vice president, COO, and eventually, president. Her strategic influence has extended across every facet of the bank, serving as a member of the Board of Directors since 2011 and actively contributing to critical committees, including the Asset Liability, Directors' Loan, Risk Management and Compliance, and Corporate Governance Committees.

Under Repoff's guidance, New Omni Bank has grown from \$150 million to \$550 million in assets. She has been instrumental in securing nearly \$50 million in Tier 1 Capital through a mix of public and private funding, empowering the bank to expand its lending capabilities and better serve the community.



DANIEL ROGERSON
*Managing Director; Co-Head of Commercial Finance
SMBC MANUBANK*

Daniel Rogerson is managing director and co-head of Commercial Finance at SMBC MANUBANK, managing the Diversified Industries, Loan Participation, and SBA groups. His experience financing transactions across diverse industries enables both organic and acquisition-driven growth for middle market clients, whom he serves with a consultative approach.

Rogerson began his commercial banking career as a relationship manager at Citibank in 1998 where he went through formal credit training as a top performer. In 2012, he moved to OneWest Bank to help build out the commercial business in Southern California. When OneWest merged with CIT Bank, Rogerson moved into a role as managing director in the Corporate Banking division, focusing on event-driven financing, M&A, dividend recaps, and family office lending.

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We're proud to congratulate Charles Claver and Dahlia Gutierrez for being named among the Top 100 Bankers by the Los Angeles Business Journal. Their recognition reflects not only their deep expertise, but also the strength of the relationships they've built with clients and communities across Southern California.



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Senior Vice President
Director, Private Wealth Advisors
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Charles.Claver@fbol.com



Dahlia Gutierrez
Senior Relationship Manager
Nonprofit Banking
(347) 510-4018
Dahlia.Gutierrez@fbol.com



STEPHEN ROSSI
Managing Director, Investment Banking
Palm Tree LLC

Senior managing director Stephen Rossi leads the investment banking service line at Palm Tree, which helps clients position their businesses, structure acquisitions, and divestitures, run targeted strategic processes, and raise capital. Over the course of his nearly three-decade career, Rossi has led M&A deals, business operations, and capital markets and investment banking solutions — a unique range of experience that gives him multifaceted perspectives on strategic business events.

Rossi is the co-founder of Palm Tree’s Investment Bank, Palm Tree Securities, which received its broker-dealer license in November 2020. Over the past 5 years, Palm Tree’s investment bank has consummated many transactions across a variety of sectors. The firm’s total closed transaction value has grown to nearly \$1 billion since 2020.



BONNIE RUBIN
Executive Vice President; Regional Director
1st Century Bank

Bonnie Rubin is a distinguished leader in commercial banking, bringing over 35 years of expertise to the industry, including the last two decades at 1st Century Bank, where she now serves as executive vice president. As one of the bank’s earliest team members, she played a pivotal role in its expansion into a premier private and business bank.

Rubin leads banking teams across the Westside of LA and the San Fernando Valley, ensuring businesses and high-net-worth individuals receive tailored financial solutions that support long-term growth. Her expertise spans private banking, commercial banking and financial planning, backed by an MBA in Financial Planning Certification from UCLA. Her customized, high-touch financial guidance is bolstered by her expertise in professional service firms and the entertainment industry.



KATHLEEN SALMONS
Chief Risk Officer; Executive Vice President
Farmers & Merchant Bank

As Farmers & Merchant Bank’s (F&M) first chief risk officer and its second female EVP, Kathleen Salmons has been instrumental in ensuring the bank’s stability and growth. She has implemented robust risk methodologies and fosters a risk-aware culture across the organization. Under her leadership, F&M’s capital and liquidity metrics remain exceptional, supported by strong processes for risk management, stress testing, early warning indicators and issue resolution. Her efforts have contributed to the bank’s growth from \$5 billion to over \$12 billion in assets, along with significant increases in net income and stock price.

Before joining F&M, Salmons spent ten years with Ernst & Young, focusing on the automotive and financial sectors, handling strategic planning and accounting processes as well as process redesign and optimization.



JOSEPH SANTOS
Director; Regional Executive Greater Los Angeles,
Consumer Banking
Bank of America

As consumer retail bank regional executive, Joe Santos oversees 144 financial centers from Santa Monica to Paso Robles, managing \$100.7 billion in deposits and 2.4 million client household relationships. He does this with his team of more than 1,000 associates.

Santos’ career success is rooted in his steadfast belief that financial knowledge equips people for success and his unique ability to move the corporate needle from transactional to relationship-based banking. He has trained thousands of bankers over the years to develop authentic and trusted relationships with their customers and has used this formula to spearhead and grow several of the bank’s essential programs, including the Merrill Edge division and Youth and Young Adult Banking.



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Chris Baron
President, Commercial and Community Banking

Michelle Coberly
VP, Business Development Officer, National Small Business Lending

Lisa Kaskel
EVP Regional Manager, LA Real Estate and Construction

Carlos Ramos
EVP, Middle Market Banking Group Leader

Our standout professionals are changing the landscape of banking.

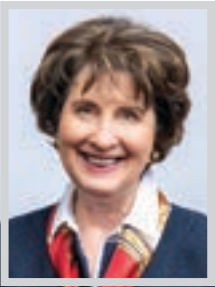
Congratulations to Chris Baron, Michelle Coberly, Lisa Kaskel and Carlos Ramos for being recognized as Top 100 Bankers by the Los Angeles Business Journal.

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



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KIMBERLY SCHUGART
Chief Financial Officer
New Omni Bank, National Association

Since rejoining New Omni Bank management team in 2018, Kimberly Schugart has taken on crucial responsibilities, from financial planning and analysis to strategic planning and corporate finance, positioning the bank for sustainable growth and resilience. Schugart secured nearly \$40 million through the US Treasury’s Emergency Capital Investment Program in 2022, empowering New Omni Bank to increase lending to underserved, low- and moderate-income businesses and consumers. In 2023, Schugart capitalized on market volatility surrounding the US debt ceiling to restructure the bank’s investment portfolio, doubling profits on \$80 million in US Treasuries by securing high yields on these fixed-income securities. Schugart recently closed a deal acquiring \$5 million in consumer loan debt at a fixed rate of 8.125%, ensuring high returns in a declining rate environment.



KAREN SESSIONS
Pacific Southwest Region Executive for Global Commercial Banking
Bank of America

Under Karen Sessions’ leadership, her division has been one of the fastest-growing regions in Global Commercial Banking for Bank of America. As Pacific Southwest region executive of global commercial banking, Sessions leads 250 commercial banking teammates across California, Arizona, Nevada and Utah. Under her leadership, they serve more than 1,000 commercial clients with annual revenues of \$50 million to \$2 billion, and specialize in entertainment, gaming/casinos, consumer and retail, agriculture, aerospace and defense, distribution, general industrials and private equity sectors. Sessions previously served as head of Bank of America Business Capital and Asset-based Financing, where she led an international team of 350 asset-based lenders.



DAVID SHAHEEN
Managing Director; GCB Group Manager
JPMorganChase

As the head of J.P. Morgan’s Media & Communications business within the Global Corporate Bank, David Shaheen leads a team of experts across sports, media, entertainment and communications. With over 15 years at the helm of J.P. Morgan’s Entertainment Industries Group, Shaheen has driven the firm to become the leading arranger of financings in the content landscape, boasting a market share of over 90%. His strategic leadership has been instrumental in supporting the film industry through challenging times, including the pandemic and the 2023 writer’s strike. He also serves as chair of the firm’s Market Leadership Team in Southern California. Additionally, Shaheen is known for his willingness to mentor colleagues and emerging industry talent, imparting valuable lessons and experiences.



DAN SHEA
Managing Director, Investment Banking
Objective, Investment Banking & Valuation

Dan Shea is a managing director at Objective, Investment Banking & Valuation, where he leads the firm’s Manufacturing & Distribution practice. With over 30 years of experience in investment banking, Shea has become a trusted advisor in the industry, specializing in private and public company sales, corporate divestitures, mergers, acquisitions and capital raises. His expertise spans multiple sectors, including manufacturing, distribution, health and wellness, technology, and consumer markets. Shea has executed over 100 successful transactions with an aggregate valuation exceeding \$4 billion. Recently, he has advised on several high-profile deals, including the sale of Fluid Components International to Process Sensing Technologies, an award-winning transaction.



Congratulations to our three winners of the Top 100 Bankers award
Their dedication to clients exemplifies our commitment to excellence.



Bryan Flores
Dir., Area Manager
Commercial Banking



Daniel Rogerson
MD, Co-Head
Commercial Finance



Subbu Viswanathan
MD, Head of
Franchise Finance



KENDALL SIMMONDS
SVP; Managing Director
PNC Bank

Kendall Simmonds' banking career has been one of steady growth and evolution, with relationship management at the core of his approach. His spans fund finance, aerospace defense, multi-industry portfolio management, having worked with banks such as JPMorgan, Union Bank and Wells Fargo.

Simmonds joined PNC Bank during a pivotal moment — the bank's acquisition of BBVA USA in 2021. With this expansion, PNC aimed to strengthen its presence on the West Coast, and Simmonds was tasked with building a team to grow the bank's influence in Los Angeles. Drawing on his years of experience, Simmonds has played a key role in growing PNC's regional footprint, focusing on delivering tailored financial solutions to mid-sized and large corporate businesses.



AARON SOLGANICK
CEO & Founder
Solganick & Co.

Aaron Solganick founded Solganick & Co. with the vision of building a firm that provides operational, financial and strategic guidance to help clients increase valuations and successfully close M&A transactions. operates within the crucial realm of investment banking, advising software and technology services companies and PE firms on mergers and acquisitions, capital raises and strategic advisory.

Solganick's career began at Bear Stearns, working on technology companies' public offerings and M&A transactions. He then worked in progressively senior roles with investment banks, including KPMG Corporate Finance and B. Riley Securities, among others. This experience honed his expertise in software and technology services M&A, further solidifying his reputation as a rising star in the industry.



MONIKA SUAREZ
Managing Director, Municipal Finance, Nonprofit Finance and Multifamily Housing Finance
Western Alliance Bank

As managing director of the Municipal Finance, Nonprofit Finance and Multifamily Housing Finance groups at Western Alliance Bank, Monika Suarez is a driving force behind innovative financing solutions that support communities in LA and nationwide. With nearly 30 years of experience in public finance, she leads a team of 20 professionals managing a \$3.5 billion portfolio of loans, investments and credit facilities for state and local governments, school districts, public agencies, nonprofit organizations and affordable and workforce housing developers.

Suarez's work spans high-profile transactions, including credit enhancements for office-to-residential conversions in Koreatown, financing for affordable housing projects.



KEITH SULTEMEIER
President & CEO
Kinecta Federal Credit Union

President & CEO of Kinecta Federal Credit Union for 8 years, Keith Sultemeier has approximately 30 years of experience in financial services, public accounting and technology start-ups. Sultemeier earned a BBA in Accounting and an MBA from the University of Texas at Austin. Kinecta is a \$5 billion full-service financial institution headquartered in Manhattan Beach, CA serving members throughout Southern California and across the country.

Sultemeier and his leadership team are dedicated to providing a comprehensive array of financial services and constantly strive to improve the services, convenience and support they offer to its member-owners and communities.

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SVP, Regional Manager of Greater Southern California West

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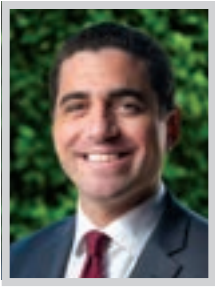
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AN TRAN
SVP; Managing Director, PNC Public Finance
PNC Bank

An Tran has spent his entire career with PNC Bank, joining immediately after college in the wake of the 2008 financial crisis, as PNC was expanding through its acquisition of National City Corporation. This pivotal moment in the bank’s history gave Tran early exposure to high-level client interactions, allowing him to develop his expertise as a young relationship manager in public finance.

Tran built his career in the east coast, providing tailored financial solutions for public-facing entities. He relocated to Los Angeles in 2022 following the bank’s acquisition of BBVA USA, taking on the responsibility of expanding PNC’s public finance presence. His work has played a key role in financing critical infrastructure projects, including transportation, utilities, affordable housing, government complexes and education.



VINCENT VANACORE
SVP; Market Manager
CalPrivate Bank

Vincent Vanacore began his career at a community bank as a teller, learning quickly and excelling at top-tier service. Management quickly identified him as a potential leader in the industry, and he was offered an opportunity to learn relationship management from top bankers in the South Bay. Vanacore quickly grew from apprentice to leader, being recruited to CalPrivate Bank as a market leader in 2020.

Vanacore has been a top-producing banker for his entire tenure with CalPrivate Bank, leading his team to profitable growth. He approaches each relationship as a true partner, taking time to learn the language of each business he banks, quickly identifying opportunities where his expertise and network can help his clients’ businesses grow.



ROBERT VILLASEÑOR
VP, Business Banking Specialist
First Citizens Bank

Robert Villaseñor’s career in banking began over 45 years ago when he started as a teller while supporting his wife and two children and furthering his education. His dedication and perseverance allowed him to climb the corporate ladder, ultimately becoming a respected business banking specialist with a focus on nonprofit organizations.

In his current role, Villaseñor plays a vital part in community development and outreach, ensuring that nonprofits receive the financial guidance and support they need to thrive. He leads with a hands-on approach, consistently meeting with clients and identifying both strengths and areas that need attention to ensure businesses can optimize their financial operations and long-term success. Beyond traditional banking services, Villaseñor provides education on financial sustainability, governance and development.



SUBBU VISWANATHAN
Managing Director; Head of Franchise Finance
SMBC MANUBANK

Subbu Viswanathan heads the Franchise Finance vertical for SMBC MANUBANK, managing a \$600 million franchise portfolio. Since joining the bank, he has been instrumental in growing its Franchise Finance book of business across some of the most well-known Quick Service Restaurant brands. He has successfully expanded the bank’s franchise footprint from a regional lender to a nationwide lender, helped his team achieve double-digit portfolio growth, and achieved an all-time high for loan bookings and profitability.

Viswanathan began his career as a credit analyst in 1998. He worked in credit roles supporting various business verticals. With a keen interest in franchising, he helped establish and grow the vertical at various financial institutions from 2008 to 2022.

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WAYNE WARD

Senior Vice President; Regional Manager, Greater Southern California West Region
California Bank & Trust

Senior vice president Wayne Ward is a well-known industry expert with broad leadership experience in financial services in both government and private sectors. For over 35 years, he has driven revenue growth and profitability in sales and commercial banking organizations.

Ward joined California Bank & Trust as a business center manager in 2007. After one year, he was promoted to manage fourteen business banking offices throughout the Greater Southern California West Region of the bank. Junior executives and seasoned bankers in the region work together as a team under Ward's leadership to maximize individual and team performance, achieve high customer service levels and customer retention, and to maximize financial returns on assets, returns on investments and efficiency ratios.



MIKE WAXBERG

Director, Investment Services
Fortify Capital Wealth Management & Insurance Services

Michael Waxberg is the founder and private wealth advisor of Fortify Capital — member firm of the Northwestern Mutual Private Client Group. Waxberg has spent nearly three decades building a nationally recognized investment and financial planning practice. He is deeply rooted in the legal, entertainment and business communities advising on comprehensive retirement, investment and estate planning strategies.

Waxberg has in-depth knowledge of tax-efficient and business planning, working with both individuals and businesses helping to navigate the ever-changing financial landscape. Along with his CFP, he holds his Chartered Financial Consultant, Chartered Life Underwriter and Retirement Income Certified Professional designations.

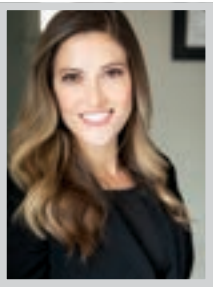


DAVID M. WEISS

Senior Vice President & Regional Manager
Commercial Bank of California

David Weiss's professional journey began at Wells Fargo Bank, where he advanced through the bank's training program to become an installment loan officer at the Santa Monica office. His career has spanned both large and independent financial institutions, providing him with a comprehensive perspective on the diverse strengths inherent in each. In 2012, he joined Commercial Bank of California, bringing with him a wealth of experience and a relentless focus on customer service and business development.

With over three decades of experience, Weiss currently oversees the Fairfax Regional Office, emphasizing personalized banking solutions and fostering strong client relationships. His leadership is characterized by a deep understanding of client needs, informed by his personal experience in real estate investment and previous business ownership.



CARLY WHITNEY

Senior Vice President
Business Finance Capital

Carly Whitney's journey with Business Finance Capital began as an underwriter, and she quickly worked her way up the ladder in business development. She has since then closed more than 400 SBA transactions, helping businesses and communities throughout Southern California grow and create jobs in their local communities. Her client interactions are always met with eager determination to ensure each client is afforded the best possible outcome as it relates to the Small Business Administration's 504 Loan Program.

Prior to her tenure at BFC, Whitney graduated Magna Cum Laude at the University of San Diego. She worked for three years as an auditor at Grant Thornton, where she also obtained her CPA license.



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Steve O'Connell, *President & CEO*
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MARIA HUNTER**

Recognized as one of *Los Angeles Business Journal's* Top 100 Bankers



As the Enterprise Bank & Trust Market President, Maria Hunter leads our LA team with a steadfast commitment to helping our clients reach their business and financial goals.

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TODD WILSON
*Regional President, Greater Los Angeles
PNC Bank*

Todd Wilson is the PNC Bank regional president for Greater Los Angeles, overseeing business development and client relationships across all PNC businesses, in addition to leading the delivery of the bank’s local philanthropic initiative. Wilson has 30 years of financial sector leadership experience serving in a variety of senior executive roles that span private equity, leverage lending and general corporate finance.

Prior to PNC, Wilson served as chief operating officer at Fortifi Financial, where he oversaw secured financing in the Property Assessed Clean Energy (PACE) sector for residential and commercial properties. He also served as a managing director for the City of Los Angeles, where he developed and implemented a small business strategy and built the city’s first effort dedicated exclusively to supporting small businesses and entrepreneurs.



MAZ YAFEH
*Managing Director, BofA Securities
Bank of America*

Maz Yafeh is the longest-tenured member of Bank of America’s Emerging Growth and Regional Coverage (EGRC) group, which now consists of more than 200 bankers nationwide and represents one of the fastest growth areas across all the bank’s institutional businesses. He is a managing director in Bank of America’s Investment Banking Group and leads BofA Securities’ Los Angeles Investment Banking office.

With over 20 years of investment banking experience, Yafeh has led more than \$80 billion of large-cap and mid-cap M&A advisory transactions for public and private companies, as well as financing including IPOs, private equity capital raises and syndicated debt. He leads a team of 30 bankers, serving companies across industrials, consumer & retail, technology, media & entertainment, business services, and healthcare sectors.



ANGELA YIM-SULLIVAN
*Market Executive
Wells Fargo*

After graduating from UCLA in 2001, Angela Yim-Sullivan began her banking career with Wells Fargo in 2001 as a banking analyst before taking a position as an associate relationship manager. Over the following 24 years, she continued to gain broad banking exposure at Wells Fargo through roles in both commercial and global banking – as a credit approver, loan team manager and regional vice president – in addition to serving clients throughout California.

Yim-Sullivan currently serves clients with annual revenues ranging from \$20 million to \$2 billion, and manages a team of 21, including relationship managers, business development officers, and commercial banking leaders. As the commercial banking market executive for the LA Metro market, she oversees business relationships with companies across a broad range of industries.



JOE YUROSEK
*President of Commercial Banking
City National Bank*

City National Bank recently announced the appointment of Joe Yurosek as president of Commercial Banking. He brings more than 30 years of financial services industry experience and a solid track record of delivering results.

Yurosek leads the line of business that drives commercial & corporate banking, specialty banking, capital markets, commercial real estate, consumer and commercial products, credit products, and middle market banking for the bank. Most recently, Yurosek served as the regional president western markets for Fifth Third Bank, where he oversaw the middle market expansion in California and Texas. He supported many lines of business including commercial banking, regional sponsor coverage, healthcare coverage, commercial real estate, treasury management, private banking and wealth & asset management.

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CARL JORDAN
*Executive Vice President
Small Business and Branch Banking
Regional Executive*



ERIC RACUSIN
*Senior Vice President
Business Banking
Regional Executive*



OMID NOORI
*Senior Vice President
Wealth Management
Market Leader*



LIZBETH DA BROY
*Assistant Vice President
Business Access Advisor*



BANKING ICON HONOREE

SHERRY CEFALI

Managing Director, Transaction Opinions
Duff & Phelps Opinions Practice of Kroll, LLC

When Sherry Cefali started her career at Houlihan Lokey back in 1986, there were almost no women in this field. In fact, Cefali was the second professional woman to join Houlihan Lokey since their inception. She made her way up the ranks and by the time she left the firm in 1990, she was a vice president in the organization.

Today, Cefali is a managing director in the Duff & Phelps Opinions Practice of Kroll, LLC. In addition, she is a member of the firm's Fairness and Solvency Opinion Senior Review Committee. She has now been with that firm for over 30 years, advising companies and boards, rendering fairness opinions and solvency opinions and determining valuations of companies and securities. When she joined in July 1990, she also found out she was expecting her first child only weeks after she joined the firm! Cefali continued to build her network in the Los Angeles community and was promoted to senior vice president and then to managing director in 2000. Cefali was asked to head the Los Angeles office of Kroll. She established a new Century City office location for the team and started the OneLA team, comprised of volunteers in the Kroll LA office to give back to the community in LA.

Known as a leader in providing transaction opinions in REIT and real estate transactions, Cefali also serves as part of the steering committee of Nareit's Dividends Through Diversity and Inclusion initiative to promote the recruitment, inclusion and advancement of women and other diverse groups in the industry.



COMMUNITY IMPACT AWARD HONOREE

DAVID M. WEISS

Senior Vice President & Regional Manager
Commercial Bank of California

David Weiss is a prime example of an impactful banker inside and outside of the bank. With a long and successful career spanning several decades, he has consistently demonstrated the qualities of leadership, expertise and dedication that make him a standout figure in the banking industry. As senior vice president and regional manager at Commercial Bank of California, Weiss has played a pivotal role in the growth and success of the bank, building strong, lasting relationships with clients and providing tailored financial solutions that meet their unique needs.

Beyond his professional achievements, Weiss' impact extends deeply into the community. He is deeply committed to supporting nonprofit organizations, particularly within the Jewish community, where he has dedicated his time and resources to causes that uplift and strengthen those in need. His ability to bridge the gap between business success and social responsibility sets him apart as a true leader. His personal commitment to helping others is also evident in his work with individuals recovering from substance abuse. Through his individual mentorship, he has made a meaningful impact on people's lives, helping them rebuild and find stability. This dedication to community service and individual empowerment underscores his genuine desire to make a difference beyond the banking world.

Weiss' remarkable career, coupled with his profound community involvement and commitment to helping others, makes him richly deserving of this year's Community Impact Award. His legacy in both the banking industry and the community solidifies his place as an example for others in the field.



SMALL BUSINESS ADVOCATE HONOREE

TAMARA GURNEY

CEO | President
Mission Valley Bank

As the founder, CEO and president of Mission Valley Bank for the past 24 years, Tamara Gurney has been a pioneering force in the banking industry, particularly for small-to-medium size businesses. Recognizing a critical need for financial servicing tailored to this segment, she established the Bank with a vision of providing personalized and accessible banking solutions.

Starting from humble beginnings in a trailer in Sun Valley, Gurney’s dedication and strategic leadership have propelled Mission Valley Bank to remarkable growth, expanding to three branches and increasing her team from just 10 employees to over 100. Under Gurney’s stewardship, the Mission Valley Bank provides comprehensive banking solutions tailored to companies’ unique requirements. She and her team have developed a full suite of business solutions and services that redefine relationship banking.

Her relentless commitment to serving the needs of local business has established Mission Valley Bank as a trusted partner to businesses of all sizes. With assets totaling \$588 million as of September 2024, Mission Valley Bank stands as a foundational enterprise of the community, boasting three branches and divisions with a focus on specialized lending, accounts receivable, specialty banking, community development and merchant services, catering to the needs of over 6,000 clients.

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COMMUNITY IMPACT BANK OF THE YEAR HONOREE

ENTERPRISE BANK & TRUST

With a strong belief that its role in the community goes far beyond banking transactions, Enterprise Bank & Trust seeks out unique and impactful ways to improve the communities it serves. This includes efforts from individual team members and larger companywide initiatives. All employees are encouraged to join together for company initiatives that include a recurring fall fundraising drive for local United Way chapters, the annual Pedal the Cause cycling event to support cancer research, and volunteer partnerships with organizations including Ronald McDonald House locations in Los Angeles.

Staying true to this commitment to giving back, our Southern California region has put an emphasis on partnerships with community and nonprofit organizations throughout 2024 and leading into 2025. Enterprise’s community efforts include affordable housing projects, economic development, diversity and inclusion, education, philanthropy, volunteerism and green initiatives that make a tangible and measurable impact in Los Angeles and the surrounding region.

To support these initiatives, Enterprise partners with organizations whose efforts and values are aligned with its own. For example, Enterprise employees regularly volunteer for Beyond Blindness, an organization providing early intervention services to visually impaired children, including speech and physical therapy, education programs and monthly family enrichment activities. Beyond Blindness serves approximately 500 children in Southern California and Enterprise has become a consistent partner of the organization. Enterprise also demonstrates its commitment to economic empowerment through key partnerships such as its collaborations with Working Wardrobes, supporting its career success events and assisting individuals with professional attire for job interviews.



MOST INNOVATIVE TEAM OF THE YEAR HONOREE

PALM TREE LLC

Palm Tree’s integrated approach to investment banking, financial consulting and operational advisory have led to it being known as “the modern M&A advisor.” Unlike traditional firms that focus solely on either investment banking or consulting, Palm Tree brings these critical disciplines together under one roof, offering a seamless, full-service solution for M&A, growth initiatives and value creation.

This collaborative structure allows Palm Tree to provide comprehensive, end-to-end support, from transaction execution to post-merger integration and operational improvements. The team’s multidisciplinary expertise ensures that clients receive not just financial insights but also strategic guidance and hands-on operational support, leading to superior outcomes and long-term value creation.

By fostering deep collaboration between investment bankers, financial advisors and operational consultants (which is not often easy to do), Palm Tree is uniquely positioned to help companies navigate complex transactions, maximize efficiency and drive sustainable growth. This innovative “one stop shop” approach delivers a significant competitive advantage to clients, making Palm Tree a standout contender for this award.

Additionally, Palm Tree’s commitment to innovation includes its use of AI, which is deeply embedded in both client services and internal processes. Leveraging proprietary AI structures and advanced data analytics, Palm Tree enhances decision-making, streamlines workflows and uncovers insights that drive superior outcomes. By utilizing AI, Palm Tree increases efficiency, reduces risk, and delivers tailored, data-driven strategies that create lasting value.



BEST NEW PRODUCT OR SERVICE LAUNCH HONOREE

POLAM FCU

A new commercial loan initiative has been developed POLAM FCU, led by the credit union’s president/CEO Jennifer Audette, a Credit Union Advocate of the Year for California, one of 20 nationally designated “Credit Union Rock Stars,” and the first non-Polish employee at a Polish Credit Union. Audette overcame the inherit desire that the credit union be led by a Polish individual with her enthusiasm, commitment to her members, and absorbing the Polish culture by attending countless events. When she isn’t volunteering at Polish events, she assists with mock interviews at her local middle and high schools in her area, has taught courses in financial education for children and women who have left abusive relationships. She volunteers at the California Credit Union League on a committee that assists small credit unions, she joined the local Larchmont Business Association so that she could assist the local community and made POLAM’s first commercial loan to a building a few doors down from POLAM.

Audette listens to the needs of POLAM’s members, and she treats each individual with respect and listens to their story. No loan can be denied unless she signs it. She feels that everyone deserves a chance, and she bends over backwards to try and assist everyone that wants a chance to change.

A specific need was presented – commercial loans. Audette and her team at POLAM have made it happen. In fact, POLAM is now working on its second commercial loan, also needed quickly by a member.



LEADERSHIP IN EMPLOYEE DEVELOPMENT HONOREE

JPMORGANCHASE

JPMorganChase and its divisional director of the Consumer Bank for California, Maria Garcia, prioritize employee development, fostering a culture of growth and opportunity. Garcia’s leadership philosophy, “I didn’t get to where I am by myself... someone helped me get there,” drives her commitment to mentoring colleagues and leaving a “ladder” for others to climb.

Garcia co-chairs and serves as an executive sponsor for several internal resource groups, promoting diversity, inclusion and professional development. Her involvement extends beyond the company, as she serves on the boards of NEW and the YWCA, further demonstrating her dedication to empowering individuals and advancing the banking profession.

JPMorganChase is committed to employee development and community engagement, ensuring branches meet client needs while fostering team growth and job creation. Garcia’s leadership philosophy emphasizes empowerment and support, creating a nurturing environment for both clients and employees. Garcia also leads by example, serving as a board member of NEW and the YWCA, along with her role in internal resource groups, underscores her commitment to community engagement and the advancement of diversity and inclusion within the banking industry.