

LEADERS OF INFLUENCE: Banking & Finance



BUSINESS BANKERS AND TRUSTED FINANCIAL ADVISORS DO MUCH MORE THAN PROVIDE FINANCIAL SERVICES and advice. Having the right banker or finance pro on your side can, in fact, be the difference-maker for your organization, preparing it – with the right resources, capital and guidance – for the next level of growth.

Leadership of the banking sector has faced many key challenges during the past few years. The good news locally is that many of the country's top banking industry thought leaders are based in the LA region.

With 2025 well into its second half, and businesses focused intently on fiscal planning and protecting the bottom line, bankers are perhaps more essential than ever. There are some particularly stellar bank and finance industry thought leaders in the LA region and we've alphabetically listed some of the very best of them here, along with key information about their careers, practice and some relevant recent successes they've achieved.

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

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

LEADERS OF INFLUENCE: BANKING & FINANCE



DEAN ALOE
*Senior Vice President,
Business Development
TMC Financing*

As senior vice president of business development at TMC Financing, Dean Aloe leads the firm's Los Angeles-based team and has firmly established himself as one of the top SBA 504 lenders in the country. Over the course of his 35-year career, Aloe has closed more than 1,600 SBA 504 loans, totaling over \$4.5 billion in commercial real estate financing. These projects have created or preserved over 29,000 jobs.

In 2024, Aloe authorized 56 SBA 504 loans totaling \$95.4 million in financing for small business owners across Southern California. Known for his ability to structure complex transactions and move projects forward with clarity and efficiency, Aloe consistently earns the trust of lending partners and borrowers alike.



RAUL ANAYA
*President; Co-Head, 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 eight lines of business, and is a member of the company's executive management team. In this role, Anaya 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. He 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.

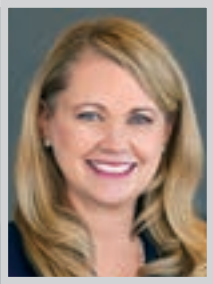
Anaya is the first Latino to represent one of the eight major lines of business at Bank of America and is the highest-ranking Latino at the bank. Additionally, has served as the Greater Los Angeles market president since 2012.



WARREN BIRO
*Partner
Manatt, Phelps & Phillips, LLP*

Warren Biro is a financial services partner in Manatt, Phelps & Phillips, LLP's Los Angeles office. His practice focuses on representing clients in a variety of commercial lending and financing transactions, including asset-based and cash flow credit facilities, venture debt financings and leveraged acquisitions.

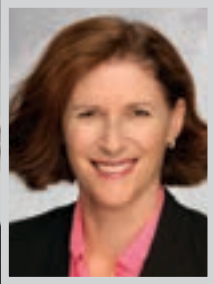
Biro works with financial institutions, private equity firms, investment banks, commercial banks and other sources of debt capital across the entire venture debt and commercial lending spaces and within the technology, fintech and life sciences sectors. He also works with lenders and production companies in the entertainment industry. Biro recently represented one of the country's top-performing banking companies in connection with the closing of multiple million-dollar senior secured syndicated credit facilities.



KATHERINE BLAIR
*Partner
Jones Day*

Jones Day partner Katherine Blair is an esteemed practitioner with three decades of experience advising clients in Los Angeles on capital markets, corporate governance and transactional matters. She has managed all aspects of a wide range of securities transactions, including public offerings for both debt and equity, tender and exchange offers, registered direct and at-the-market offerings, and private transactions. She also advises clients on navigating stock exchange listings and related governance requirements.

Working primarily with middle-market companies, Blair brings a deep understanding of the challenges posed by client uncertainty and the demands of rapid growth, particularly in meeting capital-raising needs within a complex regulatory landscape. She regularly partners with executive teams on complex legal disclosures.



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

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

Cefali is known as a leader in providing transaction opinions in REIT and real estate transactions, working regularly with firms such as Blackstone and KKR. She and her team rendered fairness opinions in the four largest US REIT IPO transactions in history, including Lineage Logistics, Paramount Group, Douglas Emmett and Invitation Homes. Additionally, Cefali is a director on the board of RF Industries and chairs its compensation committee.



MAY CHAN
*Senior Vice President; General Counsel;
Sustainability Officer
Cathay Bank*

May Chan serves as the senior vice president, general counsel and sustainability officer at Cathay Bank. Chan represented the bank in its successful purchase of the west coast retail operations of HSBC. She has successfully managed and resolved several legal disputes, minimizing financial and reputational damage to the bank and its executive management. She also develops and implements robust compliance programs to ensure adherence to all relevant laws and regulations.

Under Chan's direction, Cathay has significantly improved its ESG score and produced its first corporate responsibility report in 2021. Additionally, she organized a "Power Up" event to address societal barriers to gender equity, foster personal leadership development, and engage allies in empowering women in the workplace.



NICK CIPITI
*Managing Director
CriticalPoint*

Nick Cipiti joined CriticalPoint in early 2020. His technology and communications expertise has been additive to the CriticalPoint team and has helped the firm win mandates over the last five years in those sectors. Cipiti has expanded upon his expertise in other industries, including consumer products and business services, where he has helped CriticalPoint source and execute sell-side transactions.

Cipiti has continued to grow his practice at CriticalPoint and become better known in the Southern California community. He has a wealth of experience representing family and founder-owned businesses seeking institutional capital or going through an M&A transaction for the first time. Additionally, he is an active member of the Association for Corporate Growth Los Angeles, regularly participating in events and conferences.



JACKY DILFER
*Chief Executive Officer
Business Finance Capital*

Chief executive officer of Business Finance Capital (BFC), Jacky Dilfer is a commercial and SBA lending expert, dedicated leader and trusted advisor. Her vast experience in commercial lending extends two decades in the San Francisco Bay Area and Southern California where she's led BFC's rapid growth 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, Dilfer has arranged more than \$5 billion in commercial and SBA loans, cementing her position in the lending community as a go-to business consultant, strategist and adviser. BFC has been consistently ranked among the top SBA 504 lenders in California and in the United States.



GEORGE DULGERYAN
*Vice President; Banker
JPMorgan Private Bank*

Currently serving as vice president and banker at JPMorgan Private Bank, George Dulgeryan provides strategic financial guidance to high-net-worth individuals, family offices and major nonprofit institutions across Greater Los Angeles. His role goes beyond traditional banking — he advises clients on complex financial planning, investment strategies and philanthropic structures, ensuring both long-term growth and meaningful impact.

Dulgeryan is recognized for his ability to translate sophisticated financial concepts into actionable strategies for clients, ranging from business succession planning to endowment management. His legal and tax education further enhance his ability to deliver well-rounded financial solutions in a highly regulated and dynamic environment.



JOSEPH DUNN
*Partner; Chair, Bankruptcy and
Restructuring Practice
Covington & Burling LLP*

As a seasoned restructuring, bankruptcy and creditor rights attorney, Joseph Dunn is a partner at Covington & Burling LLP, and chair of its Bankruptcy and Restructuring Practice. Dunn's broad-ranging restructuring and litigation practice draws on his significant experience with complex bankruptcy cases, creditor rights litigation and other work in insolvency scenarios.

Dunn has a long track record of successfully representing institutional creditors, private funds, indenture trustees, liquidating trustees and other fiduciaries in insolvency matters, as well as investigating and pursuing complex asset recovery matters. Dunn has served in various leadership roles in local and statewide insolvency organizations.



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Co-Founder & CEO
Amir Monsefi,** CEPA, CPFA, SE-AWMA™, CPWA®

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**2025 Leader of Influence:
Banking & Finance**
by the Los Angeles Business Journal!

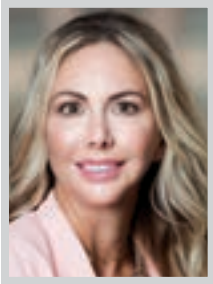


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LEADERS OF INFLUENCE: BANKING & FINANCE



MICHELLE GASAWAY
Partner
Skadden, Arps, Slate, Meagher
& Flom LLP

Skadden partner Michelle Gasaway is highly sought after for her extensive experience in handling complex global capital markets transactions, encompassing both debt and equity. Her experience spans the full range of capital markets transactions. Gasaway has been instrumental in establishing Skadden's leading full-service global capital markets practice in California and has worked on more than 500 capital markets-related transactions. Additionally, she is dedicated to pro bono work, contributing nearly 650 hours to over 25 cases at Skadden. She participated in a nonprofit compliance clinic for California nonprofits and a name change and gender marker clinic for transgender clients, organized with Bet Tzedek.



ROBERT GILLISON
Shareholder
Buchalter

Robert Gillison is a shareholder in the Los Angeles office of Buchalter PC and chair of the firm's Commercial Finance Practice — one of the largest practice groups in the Western United States dedicated to secured lending transactions for institutional lenders, commercial banks, and non-bank credit providers. With 25 years of experience, Gillison has led hundreds of lending transactions involving billions of dollars in aggregate commitments. His practice spans a wide range of industries and debt structures, and he is known for his ability to negotiate and close complex, highly structured credit facilities. Gillison is distinguished by his ability to navigate complex deal dynamics and competing interests among multiple loan parties, while applying sound commercial judgment across a wide range of debt structures.



AUSTIN GLASSMAN
Partner
Kirkland & Ellis LLP

Austin Glassman is a corporate partner in Kirkland & Ellis' Los Angeles Debt Finance Practice Group and focuses primarily on financing transactions for private equity sponsors. He has become the go-to lawyer for a range of complex transactions including mega-acquisitions, take-private financings, recurring revenue software facilities, \$1 billion+ unitranche facilities, corporate and public company financings, bond issuances, IPO-related facilities, liability management transactions, and in-court and out-of-court restructurings. Glassman has advised clients with financings ranging in size from several million to nearly \$20 billion, including some of the most complex financings of recent years. His expertise during the past 18 months ranged from high-profile multibillion-dollar transactions to first-time financings for smaller, venture-backed tech companies.



GREG HADDAD
First Senior Vice President;
Los Angeles Bank Executive
1st Century Bank

With nearly two decades at 1st Century Bank, Greg Haddad has built a reputation as a dynamic leader and trusted advisor, growing from a relationship manager into his current role leading the LA private banking division. Haddad oversees one of the bank's largest and most high-performing teams, with a focus on delivering highly personalized service and tailored financial solutions to high-net-worth individuals, business owners, and nonprofit organizations. Haddad's team manages a portfolio of client relationships with deposits and loans totaling more than \$2.5 billion. In 2023, he was promoted to lead the bank's private banking consumer lending division. The team is now originating, processing and servicing approximately a half a billion dollars in mortgage loans annually.



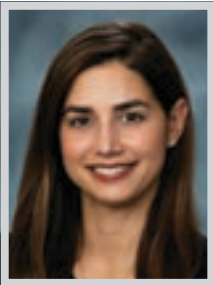
JENNIFER HARRIS
Partner
Ropes & Gray LLP

As an experienced lawyer and partner in Ropes & Gray's finance group, Jennifer Harris advises creditors and borrowers on lending and debt restructuring strategies both in and outside of bankruptcy. She has guided clients across a variety of industries including health care, aviation, apparel, gaming, hospitality, telecommunications, shipping and sports. Harris' thoughtful approach to intense situations was apparent when she advised Hearthside Food Solutions in connection with its restructuring process. Harris was able to significantly reduce Hearthside's debt from approximately \$2 billion to a \$725 million exit term loan facility and an approximately \$200 million ABL facility. The transactions were implemented through prearranged chapter 11 cases filed in the US Bankruptcy Court for the Southern District of Texas.



GREG HEBNER
Managing Director
Arixa Capital

Greg Hebner is managing director of Los Angeles-based Arixa Capital, one of the country's fastest-growing private real estate lenders and alternative investment managers with over \$1.8 billion in assets under management. In 2023, Hebner acquired majority ownership of the company, alongside a select group of investors, and has since transformed Arixa and significantly accelerated its growth. In the past two years, Hebner has helped launch a \$400+ million joint venture with Oaktree Capital Management, a \$600+ million loan sale program with a leading institutional buyer, and secured \$750+ million in warehouse credit lines to fuel Arixa's expansion. These moves powered a record-breaking \$1.4 billion in loan originations in 2024, 84% of which came from repeat clients and referrals.



MICHELLE ITURRALDE
Market Executive,
Global Commercial Banking
Bank of America

Michelle Iturralde is market executive for Global Commercial Bank (GCB) at Bank of America in Los Angeles, overseeing a team of 12 specialists to provide banking solutions and capital services to global companies with annual revenues between \$50 million and \$2 billion. As a female banker in a male-dominated specialty, she heads up the bank's 75-year-old Aerospace & Defense practice for the Western United States and general industries for the Los Angeles and Inland Empire market. Iturralde has led her business peers in achieving double-digit growth, doubling the number of new client relationships and overseeing nearly \$10 billion within her portfolio. She is the primary relationship banker for notable brand names such as OSI Systems, Joint Bookrunner, and Total Terminals International.



NISHA KANCHANAPOOMI
Partner
Kirkland & Ellis LLP

Nisha Kanchanapoomi is a corporate partner in the Los Angeles office of Kirkland & Ellis, with a practice focusing on all aspects of debt financing transactions. She is also part of the trailblazing elite group of Kirkland transactional attorneys who advise on novel, complex and high-profile liability management exercises. Kanchanapoomi's clients include some of the most notable California-based private equity firms and their portfolio companies, including Brentwood Associate, Gryphon Investors, Industrial Growth Partners, Luminate Capital Partners, Nexus Capital Management, as well as rapidly growing firms like Coral Tree Partners. She also represents several industry giants including, Anywhere Real Estate Group, Harbor Freight Tools, The Neiman Marcus Group, Saks Fifth Avenue, Claire's and Equinox Group.



VERONICA LAH
Partner
Manatt, Phelps & Phillips, LLP

Veronica Lah is a partner in Manatt, Phelps & Phillips, LLP's Cross-Industry M&A, Private Equity, Capital Markets and Finance practice. She is a highly sought-after adviser representing public and private companies, investors and financial institutions in a wide range of corporate matters. Lah focuses her practice on capital markets, securities, M&A, joint ventures, corporate governance services, and other financial transactions. Lah recently represented Perfect Moment Ltd, a high-performance, luxury skiwear and lifestyle brand, in a private placement of \$6.4 million of 12% Series AA convertible preferred stock. The company will utilize the new capital to support strategic growth initiatives and eliminate all outstanding convertible debt.



SAMYR LAINE
Managing Partner; GP
Freedom Trail Capital

Samyr Laine is the co-founder and managing partner of Freedom Trail Capital, an LA firm that backs talent-led consumer brands and empowers underrepresented founders. In just under two years, Laine has helped lead the firm to invest in over a dozen high-profile, culturally relevant companies, including Sienna Naturals (Issa Rae), Oh Norman! (Kaley Cuoco), Ten to One Rum (Ciara), Kudos (Gwyneth Paltrow, Mark Cuban), VitaHustle (Kevin Hart), and Renais Gin (Emma Watson). Drawing from his experience as former SVP of operations and strategy at Westbrook and director of operations at Roc Nation, Laine brings deep operational expertise to portfolio companies. He advises on a range of areas, from supply chain diversification and retail strategy, to managing viral spikes in live commerce.

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JACKY DILFER
BUSINESS FINANCE CAPITAL

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LEADERS OF INFLUENCE: BANKING & FINANCE



DAN MILLER

Partner
Miller Barondess, LLP

Dan Miller, a founding partner of Miller Barondess, excels in representing banking and private equity clients in complex, high-stakes disputes. Miller secured a \$20 million recovery for The Gores Group in federal court (Southern District of New York) and won over \$11 million in an international arbitration for a global private equity affiliate. He also delivered a decisive victory for Cathay Bank in a fraud and breach of contract case, achieving summary judgment on all claims and securing over \$1 million in attorneys’ fees.

Miller is currently leading multiple high-impact cases, including representing Wave Investments in a \$25+ million lawsuit against SecurCapital for breach of a non-circumvention agreement and fraud, having defeated a demurrer and a motion for judgment, with trial set for 2025.

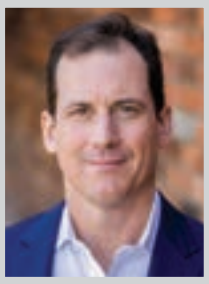


AMIR MONSEFI

Co-Founder; CEO
AIRE Advisors

As co-founder, CEO, and CIO of AIRE Advisors, Amir Monsefi has led the firm from inception in 2020 to managing nearly \$1 billion in client assets within just four years. Prior to launching AIRE, Monsefi held senior leadership roles at Merrill Lynch, UBS, and TD Ameritrade.

A defining achievement is Monsefi’s creation of AIRE One, a bespoke family office platform for ultra-high-net-worth clients that integrates investment strategy with advanced planning — including estate, tax, philanthropic, and business succession advisory. The service offers clients the sophistication of a multi-family office with the personalization of an independent boutique. Monsefi is also an active member of the Investment & Wealth Institute, Exit Planning Institute, and National Association of Plan Advisors.



JOEL MONTMINY

President; CEO
Montminy & Co., LLC

Joel Montminy, the founder and driving force behind Montminy & Co., is a distinguished figure in the field of investment banking with over 25 years of leadership in mergers and acquisitions. Montminy has led more than \$6 billion in middle-market transactions. Additionally, he has executed cross-border transactions totaling more than \$2.8 billion.

In the last year, Montminy bolstered the firm’s international reputation with several transactions, including the sale of Glasgow’s Rangers Football Club to 49ers Enterprises, the sale of Grab Green to Grove Collaborative, and the sale of Pizza Factory, Inc. to Wonder Franchises. In January 2025, serving as a chair of the Village School in Pacific Palisades, Montminy led the relocation and rebuilding of the K-6 school during the Palisades wildfire.



STEVE MOON

Managing Director;
Deputy Head, M&A, Americas
Kroll Investment Banking

Steve Moon has been with Kroll Securities for 25 years, and is managing director and deputy head of mergers and acquisitions. He serves as the firm’s Los Angeles City leader, and is co-head of the Aerospace, Defense and Government M&A Group.

With over two decades of investment banking and corporate finance experience, 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. Moon previously served as a financial analyst in the Financial Planning and Treasury Group at Guess Inc.



FARZAD MUKHI

Managing Director,
Food and Consumer M&A
Kroll Investment Banking

With 20 years of experience, Farzad leads Kroll’s Western US Consumer M&A practice and US Food, Beverage and Nutrition practice. He 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 serves a diverse clientele ranging from entrepreneurs to multinational corporations to private equity funds. His practice is focused on mid-sized companies where he can make a meaningful impact of the lives of his clients. Mukhi is recognized for the successful sale of Humboldt Creamery to Foster Dairy Farms.



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ABIGAIL O'BRIENT
Partner
Covington & Burling LLP

Partner at Covington & Burling LLP, Abby O'Brien's wide-ranging restructuring and creditor rights litigation practice focuses on representation of secured and unsecured creditors in insolvency cases and other proceedings nationwide. She routinely represents parties in litigation related to insolvency and distressed debt in state and federal court, as well as purchasers and sellers of distressed assets and fiduciaries in bankruptcy cases and other matters.

O'Brien currently represents Mode Eleven Bancorp, the holding company for a nationally chartered bank, in a chapter 11 bankruptcy case to effectuate the sale of the bank. She is also representing one of the world's largest venture capital funds in defending claims brought by the trustee of a bankrupt fintech lender to recover hundreds of millions of dollars.



JOE ONWUEGBUSI
*Managing Director;
Head, Deal Origination*
CriticalPoint

At CriticalPoint, managing director Joe Onwuegbusi is responsible for leading the Deal Origination division, managing sponsor/non-sponsor client relationships, and broadly originating and executing M&A transactions. He leverages his extensive M&A experience to help buy-side clients construct theses and outreach strategies to accelerate capital deployment and to aid sell-side clients craft an effective exit strategy yielding the best outcome.

Onwuegbusi leads a team of nearly 30 professionals that he's helped grow by almost 20% as he's continued to build out the organization to better serve CriticalPoint's rapidly expanding client base. Before joining CriticalPoint, Onwuegbusi spent 18 years in various execution and leadership roles within Platinum Equity.



BROMLEY PALAMOUNTAIN
Financial Advisor
Northwestern Mutual

With over 13 years of experience in the enterprise sector and a growing influence in the financial planning world, Bromley Palamountain has transformed adversity into advantage—not only for himself, but for his clients, community, and the next generation of wealth builders. Raised in a single-parent household, Palamountain experienced firsthand the stress and uncertainty of financial instability.

As a financial advisor at Northwestern Mutual, Palamountain helps his clients—from entrepreneurs to real estate investors and high-earning professionals—navigate financial complexity, build horizontal income streams, and leave enduring legacies. His work is driven by a deep understanding of how personal history can shape financial behavior.



NEAL ROBB
Partner
Stradley Ronon Stevens & Young, LLP

With four decades of experience, Stradley Ronon Stevens & Young LLP partner Neal Robb has distinguished himself as a nationally recognized and highly regarded litigator in high-stakes financial services and securities litigation. Robb defends his clients in a variety of forums, including state and federal courts (both jury and bench trials) and private arbitration forums, such as the Financial Industry Regulatory Authority, JAMS, and the American Arbitration Association.

Robb has led the defense in several landmark cases, including a global investment bank in a high-stakes, closely contested arbitration involving allegations by the founder and CEO of a major company. The plaintiff claims losses exceeding \$500 million resulting from aggressive trading strategies.



PRESTON SAM
Wealth Management Advisor
Meliora Wealth Management
& Insurance Solutions

Preston Sam is a standout figure in modern financial advising, known for a financial planning practice that serves entrepreneurs, business owners, and high-net-worth individuals with sophistication and clarity. As a certified financial planner, chartered financial consultant, and retirement income certified professional, Sam brings a powerful blend of credentials, real-world insight, and client-focused service that distinguishes him as a leader of influence in banking and finance.

At Meliora Wealth Management, a Northwestern Mutual-affiliated firm, Sam co-leads a dynamic team delivering comprehensive, tailored strategies that help clients create, preserve, and transfer wealth. He excels at translating complex financial concepts into actionable plans.



2025 *Los Angeles Business Journal*

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DAN MILLER

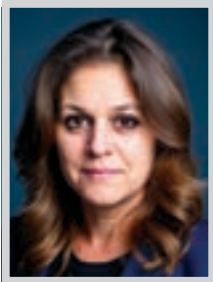


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TIFFANY SEGURA
Owner
AVP Solutions

With over 35 years of experience in the payments industry, Tiffany Segura is a trailblazer and recognized expert in underwriting and risk management. She founded American Credit and Debit in 1997, and in 2000, established AVP Solutions, which now manages over \$40 million in monthly processing. As one of the first women pioneers in the high-risk merchant space, Segura has played a critical role in shaping industry standards and practices. She was honored with the Business of the Year award by the National Association of Professional Women, recognizing her leadership and achievements. Additionally, Segura actively supports and sponsors nonprofit organization PayTech Women and maintains a strong presence in women-led merchant services forums.



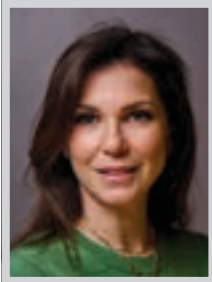
PAUL SEVERIN
Partner
Holland & Knight

Holland & Knight partner Paul Severin is a distinguished leader in the field of banking and finance law with a career spanning over two decades. His national practice focuses on commercial finance, general corporate, mergers and acquisitions, and securities matters. One of Severin’s most significant career milestones is his involvement in a \$2 billion partner loan program for the partners of a major private equity fund. This pivotal deal helped him establish a multifaceted practice in finance, private equity and securities, allowing him to serve clients with broad needs. Additionally, he has extensive experience handling M&A, private placements, venture capital transactions, joint ventures and general corporate representation of clients in a variety of day-to-day matters.



ASHLEY SIMONSEN
Partner
Covington & Burling LLP

As a partner in Covington & Burling LLP’s Class Action and Mass Torts practices, Ashley Simonsen has successfully represented clients in the financial services, technology, and consumer products industries – including Aristocrat Technologies, OpenSea, Microsoft, PayPal, JPMorgan Chase, Meta, among others – through all stages of litigation, with a strong track record of success on early dispositive motions. Through her work defending clients against “true lender” class actions, Simonsen has become one of the nation’s leading experts on “true lender” issues and the related “valid when made” doctrine. Simonsen recently co-led a team of Covington lawyers in securing dismissal of a class action against Capital One.



SINDY SPIVAK
Senior Vice President; Community Development Bank, West Region Executive
Bank of America

Sindy Spivak is senior vice president, West Region executive for Bank of America’s Community Development Bank, overseeing the financing of affordable housing. With over 30 years of commercial real estate and finance experience, Spivak leads a team of community development bankers who provide financial solutions to create and preserve quality affordable multi-family housing developments. Spivak’s team provided \$675 million in financing to create or preserve 800 affordable housing units for working families, lower-income and vulnerable individuals such as seniors, veterans, and formerly homeless. Over the past five years, the team has also provided more than \$2.1 billion in construction financing and low-income housing tax credit equity.



JOHN TROTT
Partner
Cox, Castle & Nicholson LLP

John Trott is a leading California commercial finance and transactional attorney and partner at Cox, Castle & Nicholson. He has extensive experience in representing financial institutions, real estate developers, and institutional investors in complex commercial credit facilities and real property acquisitions, dispositions, financings, and restructuring the financial arrangements of troubled assets. Trott regularly counsels borrowers, institutional investors, and lenders in connection with acquisition, development, construction, and long-term financing of retail, office, multi-family and industrial properties. Trott recently represented an institutional investor in connection with obtaining a \$1.0 billion master line of credit. He also recently represented the borrower in connection with a hybrid/core credit facility of over \$2 billion.

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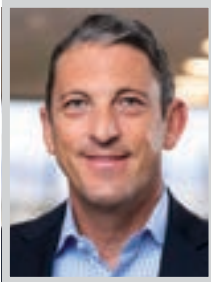
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LEADERS OF INFLUENCE: BANKING & FINANCE



MIKE VEHASKARI
Managing Director
CriticalPoint

Mike Vehaskari joined CriticalPoint in 2023 and is responsible for originating and executing merger and acquisition transactions at the firm. He brings over 25 years of experience in investment banking and management consulting across various industries and geographies. Vehaskari continues expanding his network and growing his business at CriticalPoint, primarily focused on the Industrials and A&D sectors. Vehaskari has significant experience advising on transactions involving privately held and family-owned companies, whether as a client or a counterparty. This gives him invaluable perspective when advising his clients who may be navigating an M&A transaction for the first time. Before joining CriticalPoint, Vehaskari worked at Fredericks Michael & Co.



MIKE WAXBERG
Director, Investment Services
Fortify Capital Wealth Management
& Insurance Services

Michael Waxberg is the founder and private wealth advisor of Fortify Capital, a member firm of the Northwestern Mutual Private Client Group. Waxberg has spent over two and half 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. He 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, Waxberg holds his chartered financial consultant, chartered life underwriter, and retirement income certified professional designations from the American College.



ERIC WEDEL
Partner; Head of Los Angeles Office;
Global Co-Chair,
Finance and Capital Markets
Paul, Weiss, Rifkind, Wharton
& Garrison LLP

With his West Coast roots, Eric Wedel, one of the country's most successful private equity finance lawyers, envisioned launching a top-tier Los Angeles office to service blue-chip private equity clients. Today, he is realizing that vision at Paul, Weiss, Rifkind, Wharton & Garrison LLP, where, as head of the LA office and global co-chair of the finance and capital markets group, he has driven the firm's success. Over the course of his 20-year career, Wedel has built a high-profile private equity client roster, advising on 200+ completed financings exceeding \$150 billion in the aggregate.

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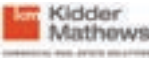
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