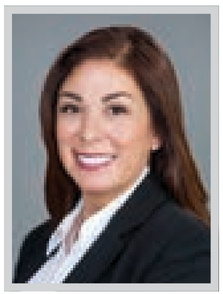
WOMEN OF INFLUENCE: FINANCE

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

There are some particularly stellar trusted advisors in the LA region – who happen to be women – and we've alphabetically listed some of the very best of them here, along with key information about their careers and relevant successes they've achieved.

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.

WOMEN OF INFLUENCE: FINANCE



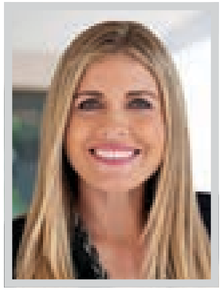
LAURA BARON

CFO

SDS Capital Group

Laura Baron oversees all aspects of the SDS financial management process, including software applications, project analysis, capital deployment, accounting and regulatory compliance and investor transparency, and helps guide the company's growth and strategic direction. She developed the proprietary operational infrastructure that effectively manages SDS-sponsored funds and SDS Advantage Services, which manages cumulatively over $1 billion of assets.

Baron's staff actively monitors the construction progress, financial performance and overall business health for each project under management. Baron is a CPA and previously spent 12 years as a finance and portfolio operations executive. Baron developed the internal operational infrastructure to manage SDS' National New Markets Fund, LLC.



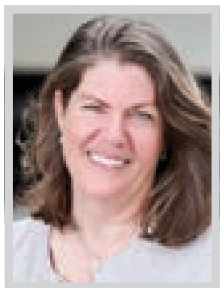
CAROL BATES

Private Wealth Advisor

Strategic View Advisors

Carol Bates has been in the finance industry for nearly two decades, bringing extensive experience in financial planning, investment management, and client advising. Clients trust Bates as their go-to resource for financial guidance and a compassionate, attentive presence. Her ability to empathize with each client's unique circumstances allows her to design personalized financial plans that align closely with their goals and values.

Bates' deep knowledge of market trends and investment opportunities ensures that her recommendations are both informed and effective. She is committed to continuous learning, regularly pursuing advanced coursework and training to keep her strategies current and innovative. Her transparent, approachable communication style helps clients feel grounded and confident.



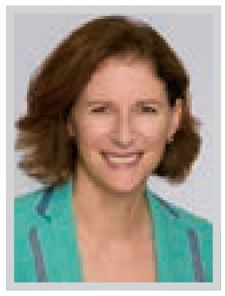
BARBARA BERNSTEIN

Wealth Management Advisor

Fortuna Wealth Management, Legacy Strategies and Insurance Solutions

Barbara Bernstein works closely with clients to articulate their goals and connect them to the tools that are available to bring those goals to fruition. With over a decade of experience in financial planning and client relationship management, Bernstein has honed her skills in guiding individuals towards their financial aspirations.

Bernstein understands that many people are overwhelmed by financial complexities such as investment management, and even with success in their field, integrating their goals and their finances can be daunting. She helps people identify their most important goals and helps them devise a roadmap for getting there. Bernstein follows a planning philosophy which ensures that all plans are well-tailored regarding risk tolerance, asset allocation, and long-term planning.



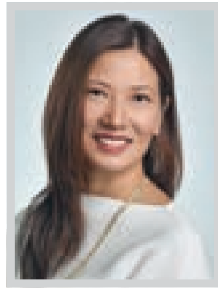
SHERRY CEFALI

Managing Director

Duff & Phelps Opinions Practice of Kroll, LLC

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

Cefali has significant experience in REIT roll-up and REIT internalization transactions. Cefali rendered fairness opinions in the four largest US REIT IPO transactions in history, including Lineage, Paramount Group, Douglas Emmett and Invitation Homes.



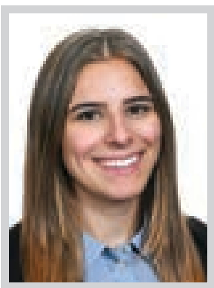
SANDRA CHO

President; Founder

Pointwealth Capital Management

Sandra Cho is the founder and president of Pointwealth Capital Management, a boutique wealth management firm specializing in comprehensive, generational wealth management. Her firm creates customized investment portfolios and financial plans for clients' unique situations. Cho and her team are clients' go-to financial concierge for every aspect of their life. Cho believes that every successful outcome begins with a plan, incorporates suitable strategies, and grows into a deep, dynamic relationship between advisor and client.

Cho has been a financial advisor since 2002 and started her own firm in 2016. She has grown the firm by over 400% since 2016. More recently, over the last 12 months, she has doubled her staff as she prepares to acquire two practices, growing the business by over 80%.



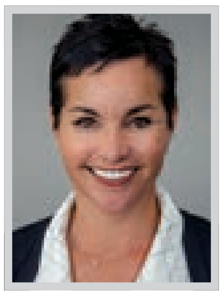
NICOLETTE COHEN

Associate

Buchalter

Nicolette Cohen is an attorney in Buchalter's Commercial Finance and Leveraged ESOP Finance Practice Groups in Los Angeles, and she has established herself as both a skilled practitioner and recognized thought leader in lending law. Cohen represents financial institutions, sponsors, and private companies in negotiating, structuring, and documenting financing transactions. These transactions include senior-secured, asset-based, syndicated, cash-flow, cross-border, and acquisition financing, as well as financing secured by real property.

Cohen's representative matters include serving as counsel to Bank of the West as administrative agent in the upsizing of the Duckhorn credit facilities. The transaction required coordination among multiple lenders and complex structuring of multi-asset collateral across multiple states.



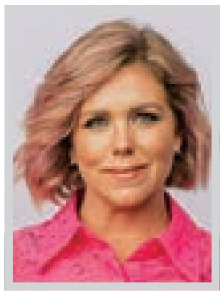
JENNIFER DAVIS

Senior Vice President, Business Development

TMC Financing

Jennifer Davis, senior vice president of business development at TMC Financing, stands as a transformative leader in the financial services industry. With over 35 years of experience, Davis has dedicated her career to empowering small businesses through education and access to capital, making a profound impact on the Los Angeles business community.

In the last year, Davis has spearheaded TMC Financing's growth in Southern California, helping secure over $2 billion in SBA 504 commercial real estate financing for nearly 600 small businesses. These projects have supported the creation or retention of approximately 5000 jobs, fueling economic development, and strengthening local communities. Her strategic leadership has expanded TMC's footprint across five states, including Hawaii, while maintaining a strong focus on Los Angeles.



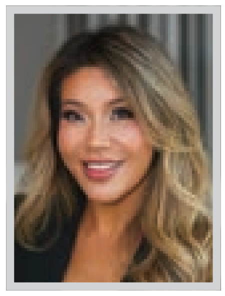
HAYLEY DICKSON

Founder; Wealth Management Advisor

Rippl

Hayley Dickson, who began her career in the entertainment business, now stands as a beacon of excellence, having amassed numerous internal awards at Northwestern Mutual and shattered multiple records, showcasing her dedication and skill. Beyond individual accolades, Dickson's leadership ethos is deeply rooted in inclusivity and diversity.

From the beginning, Dickson has fostered a vibrant tapestry of cultures and perspectives. Her ever-growing team of six proudly consists of 50% female members, 50% BIPOC backgrounds, and 50% of the LGBTQ+ community. What truly distinguishes Dickson's leadership is her unwavering commitment to collective empowerment. Every member of her team is not just an employee but a contributor to a shared ethos, forgoing the organization's mission collaboratively.



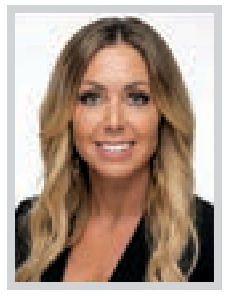
JACKY DILFER

CEO

Business Finance Capital (BFC)

Jacky Dilfer is a commercial and SBA lending expert—she's a dedicated leader and trusted advisor, helping each of her clients grow their businesses, create job opportunities and better serve their communities. Her 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's) 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, 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.



MELISSA DOWLER

Vice President;

West Coast Retail Market Manager

Enterprise Bank & Trust

Melissa Dowler is a distinguished leader whose influence extends far beyond her title. With over 20 years of experience in the banking industry, Dowler has built a highly successful career grounded in excellence, trust, and relationship-driven leadership. As the vice president of Retail Banking for the California market at Enterprise Bank & Trust, she oversees, coaches, and leads branch employees throughout Southern California and is widely recognized as a woman of influence and inspiration.

Dowler exemplifies exceptional leadership through her unwavering work ethic, integrity, and accountability. She leads by example, holding herself and others to high standards while consistently encouraging and motivating her teams to grow both professionally and personally.

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Once a client decides what they want their money to do, we at City National Bank can help do the rest. And we do it with the support of our parent company, RBC, one of North America's leading diversified financial services companies. Whether personal, for family or for business, we'll be by your side as your needs evolve.

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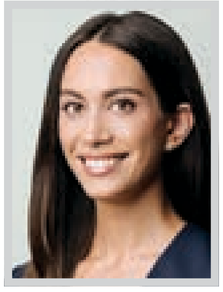
WOMEN OF INFLUENCE: FINANCE

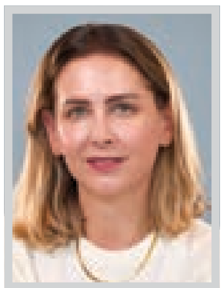


CAROLINE EPSTEIN

Partner
Paul, Weiss, Rifkind, Wharton & Garrison LLP

A partner in Paul, Weiss' Los Angeles office, Caroline Epstein is a rising star and member of an elite team of LA-based finance lawyers representing leading private equity sponsors, portfolio companies, and public and private borrowers in a variety of complex financing transactions, including acquisition financings, recapitalizations and refinancings.

Epstein joined the firm in a mass lateral move in 2023 that transfixed the financial and legal press, and quickly established herself as a linchpin of the prolific LA-based team. Today her team regularly advises many of the biggest-name sponsors in the business on their most significant financing matters.

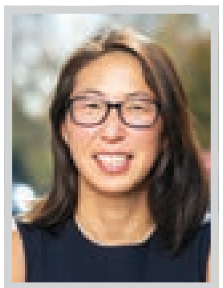


JESSIE HALE

Founder; CEO
Vita Wealth Advisors

With over 18 years of experience in wealth management, Jessie Hale is the founder and CEO of Vita Wealth Advisors, a boutique wealth management firm located in Manhattan Beach. Throughout her career, Hale has provided expert financial guidance to individuals and families, skillfully helping them navigate economic cycles and achieve their financial goals.

Before founding Vita Wealth Advisors in 2024, Hale held the position of Senior Portfolio Advisor at a leading global financial institution, where she managed over $650 million in assets. Today, at Vita Wealth Advisors, Hale's approach is centered on a client-first philosophy, offering an individualized, comprehensive wealth management experience that focuses on each client's best interests.



BRANDY HAN

Executive Vice President, Capital Markets
City National Bank

Brandy Han is executive vice president of Capital Markets at City National Bank and serves on the company's Senior Management Team. She oversees loan syndications, interest rate risk management sales, foreign exchange sales, global markets trading and risk, and international banking and trade finance. She is based in City National's Los Angeles headquarters and has worked at the bank for 15 years.

After more than a decade working at the highest levels on Wall Street, Han moved to Los Angeles in 2010 to create City National Bank's syndications team. Starting from scratch, she hired four colleagues in Los Angeles and New York, developed the team's credit processes and systems, and ultimately grew the business to more than $6 billion in managed commitments.

ALYSSA HEIM

Managing Director
Kroll, LLC

Alyssa Heim is one of the youngest managing directors within Kroll. Driving for success among her clients and building brand recognition within her expertise of regulatory compliance consulting.

Heim manages a book of business of approximately $5 million dollars per year of ongoing retained compliance support primary among private equity and hedge fund related clients. She consistently looks to collaborate with colleagues within Kroll driving referral internal business and has a strong network within the business community of Los Angeles. She is passionate about mentoring females within the organization to advance their careers. She also spearheads the LA volunteer efforts within Kroll raising over $100k to help bring individuals within the community out of homelessness.

KELLY HEINEN

Financial Advisor
Northwestern Mutual

With a mission to challenge the status quo in the finance industry, Kelly Heinen aims to redefine the narrative that financial advisory services are exclusively available to the high net worth. She firmly believes that everyone should have access to expert financial guidance, regardless of their financial standing. This unwavering commitment drives her to help clients take the necessary steps to build a secure and prosperous financial future.

Heinen's approach to financial advising is deeply rooted in empathy and a genuine desire to see her clients succeed. She promises to go above and beyond to provide strategic advice and support tailored to each client's unique needs and goals. Her comprehensive approach ensures that clients feel empowered and equipped to make informed financial decisions.

Congratulations to

JACKY DILFER, CEO

Business Finance Capital would like to congratulate **Jacky Dilfer, Chief Executive Officer,** for her inclusion among the *Los Angeles Business Journal's* **2026 Women of Influence.**

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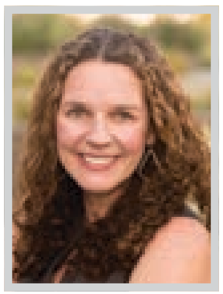
BFC BUSINESS FINANCE CAPITAL

Business Finance Capital has been helping small businesses **THINK BIG** since 1990.

WOMEN OF INFLUENCE: FINANCE



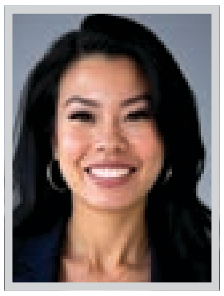
NEELA HUMMEL

CEO

Abacus Wealth Partners

Neela Hummel's trajectory within the finance industry is marked by a series of accomplishments that underscore her commitment to leadership, innovation, and inclusivity. Hummel's professional odyssey has been a testament to her unwavering dedication and exceptional leadership.

One of Hummel's most notable achievements is her ascent from an intern to the CEO of Abacus in 2021. This rise through the ranks speaks volumes about her prowess in navigating the complexities of the financial landscape. Her journey is a beacon of inspiration for aspiring professionals, reflecting the possibilities that unfold with competence, hard work, and a strategic vision. Throughout her tenure at Abacus, Hummel has not only embraced leadership roles but has also actively shaped the company's culture through transformative initiatives.



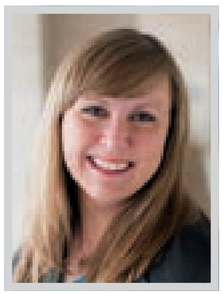
AMY JOHNSON

Vice President

Perennial Financial Services

Amy Johnson has distinguished herself as a rising leader in the financial services industry by combining technical excellence, strategic insight, and an unwavering commitment to empowering others – particularly women and families – through financial education and long-term planning. Her career reflects both professional achievement and a broader mission to elevate how financial advice is delivered in an industry where trust, empathy, and clarity are often underserved.

As a vice president and investment advisor at Perennial Financial Services, Johnson has built a reputation for delivering thoughtful, highly customized financial strategies across retirement planning, investment management, estate planning, and tax-aware wealth preservation.



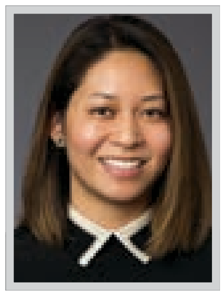
MOLLIE KAISER

Private Wealth Advisor

Strategic View Advisors

As a private wealth advisor, Mollie Kaiser develops customized financial strategies designed to protect, preserve, and grow wealth for the clients of Strategic View Advisors (SVA). With nearly 20 years of experience in the wealth management industry, she supports individuals and families through every stage of their financial journeys, from launching their careers to building lasting legacies. Through her unwavering dedication and tireless effort, she earned the opportunity to become a partner at SVA in 2025.

A passionate advocate for financial education, Kaiser brings her extensive knowledge to the center of every client interaction. She approaches each relationship with the care and attention she would offer a family member or close friend.



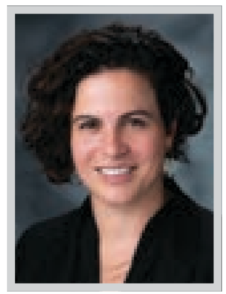
NISHA KANCHANAPOOMI

Partner

Kirkland & Ellis LLP

Nisha Kanchanapoomi is a corporate partner in the Los Angeles office of Kirkland & Ellis. Her practice focuses on all aspects of debt financing transactions, including the representation of private equity sponsors, hedge funds, public and private companies and financial institutions in secured and unsecured financings, cash flow and asset-based facilities, leveraged buyouts, recapitalizations, cross-border transactions, workouts and restructurings, and first-lien second-lien, mezzanine, subordinated and unitranche financings.

Kanchanapoomi is also part of the trailblazing elite group of Kirkland transactional attorneys who advise on novel, complex and high-profile liability management exercises. Her clients are some of the most notable California-based private equity firms and their portfolio companies.



NIKKI KATZ

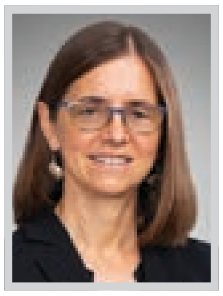
Head, Digital Banking

Bank of America

As head of digital at Bank of America, Nikki Katz leads the continuous evolution of the bank's digital services and channels, transforming the mobile and online customer experience while delivering leading-edge capabilities for its approximately 59 million digital banking clients.

Under Katz's leadership, her team has driven the continued development and growth of Erica, the industry's first and most widely adopted AI-powered virtual financial assistant. In 2025, Erica surpassed three billion total interactions since its 2018 launch, serving nearly 50 million clients and averaging more than 58 million interactions each month. Since launch, Erica has delivered more than 1.7 billion proactive, personalized insights to clients.

WOMEN OF INFLUENCE: FINANCE



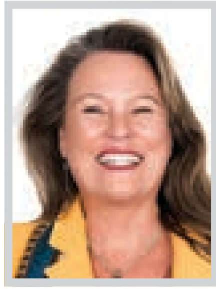
KATE KRAUS

Partner

Covington & Burling LLP

Kate Kraus is nationally recognized and has more than 20 years of experience in tax planning and structuring. She advises on a wide range of partnership, corporate, and real estate matters, including joint ventures, fund formations, financing transactions, mergers and acquisitions, restructurings, liquidations, debt workouts, bankruptcies, and REIT transactions.

Kraus has advised on numerous transactions involving professional sports teams and leagues, including Justin Ishbia's investment in the Chicago White Sox (the team is valued by Forbes at around $2 billion) with options to buy out the Reinsdorf family after 2028, and the buyout of the Miller family's remaining interest in the Utah Jazz (the team was valued at $3.55 billion by Forbes in October 2024).



DEBORAH LA FRANCHI

CEO

SDS Capital Group

Deborah La Franchi is the founder and CEO of SDS Capital Group, a national leader in impact investing with over $1.9 billion of active assets under management. La Franchi founded SDS with the express vision of engaging the private sector in the battle against poverty. Each impact fund on SDS' platform serves a different geography and employs a unique investment strategy, but they all generate positive impacts for low-income communities and people.

La Franchi's core role is to ensure each fund is supported by a team with the key expertise needed to execute the specific investment strategy. La Franchi leads the structuring of each fund's investment strategy, spearheads fundraising, oversees the senior managers of each fund and division, and participates on each fund's investment committee.

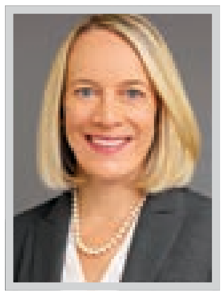
VERONICA LAH

Partner

Manatt, Phelps & Phillips, LLP

Veronica Lah is a partner in Manatt'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 and board advisory services, and other corporate and financial transactions. She represents clients in corporate transactions spanning numerous industries, including financial services, entertainment, technology, consumer products, health care and real estate.

Lah co-leads Manatt's team as counsel to CVB Financial Corp., a bank holding company which owns Citizens Business Bank.



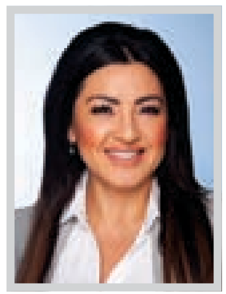
MARIANNE MARTIN

Corporate Finance Partner

Jeffer Mangels Butler & Mitchell

Marianne S. Martin is a corporate finance partner at Jeffer Mangels Butler & Mitchell LLP in the firm's Los Angeles office, specializing in borrower-side representations for founder-owned, sponsor-backed and private credit fund companies. With a focus on complex syndicated, distressed/special situations and fund financing transactions, Martin has built a reputation as a trusted advisor to businesses navigating their financing needs. Her practice spans industries including business services, industrials, and private credit, reflecting her ability to tailor strategies to the unique challenges and opportunities of each sector.

In the past 18 months, Martin has successfully advised on over $800 million in financing transactions, addressing the needs of borrowers in bespoke and often high-pressure scenarios.



MILLIE MIA

Vice President; District Manager

U.S. Bank

Millie Mia is a vice president and district manager for U.S. Bank. Mia began her banking career in 2002 as a branch manager for Downey Savings and Loan, which was acquired by U.S. Bank in 2008. During her 12-year branch manager tenure, she managed multiple offices in multiple markets, all of which became award winning, top performing offices under her guidance and leadership.

Mia was promoted to vice president and district manager in 2014. She is responsible for leading 18 retail branches across the Ventura and Santa Clarita markets. She works strategically on initiatives to drive robust financial results as well as enhance customer centrality and employee engagement. Mia has developed successful teams by promoting employee advancement and leveraging partnerships across all channels of the bank.

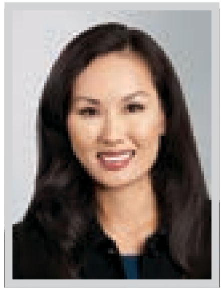
WOMEN OF INFLUENCE: FINANCE

SYDNIE MILLS

Director of Operations
EFC Wealth Management Firm, Inc.

Sydnie Mills has emerged as one of the most impactful operational leaders in EFC Wealth Management Firm's history, driving transformational change in under two years while learning an entirely new industry. As director of operations, Mills has been the driving force behind some of the most significant improvements to the firm's profitability, efficiency, and organizational structure—demonstrating a rare ability to blend strategic vision with disciplined execution.

When Mills joined the firm less than two years ago, she quickly became one of the most trusted leaders in the company. Her ability to take big-picture direction and convert it into repeatable processes, measurable outcomes, and sustainable systems is a defining strength.

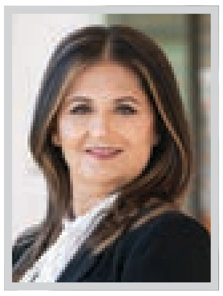


SANDRA LEE MONTGOMERY

Partner
Proskauer Rose LLP

Sandra Lee Montgomery, a trailblazing partner at Proskauer and former member of the firm's Executive Committee, is one of the most influential figures in the private capital and finance landscape. She has built an extraordinary reputation as a premier advisor to private credit institutions, consistently steering complex, high-value transactions that shape today's financial markets. In 2025 alone—well before year-end— Montgomery closed more than $5.5 billion in private credit transactions across the US, with several additional matters still expected to close.

With nearly three decades of experience, Montgomery's practice encompasses the full spectrum of sophisticated financing transactions.

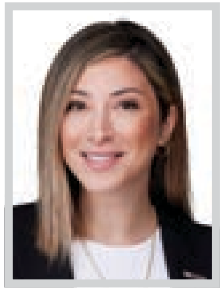


SHARON NASSIR

President; Co-Founder
AIRE Advisors

Sharon Nassir brings over 32 years of experience in wealth management, specializing in guiding high-net-worth clients through all aspects of their financial planning. Her approach is highly personalized, designing strategies that integrate tax planning, investment management, legacy objectives, and family goals. She believes that wealth management goes beyond the numbers—focusing on the human side of finance to ensure clients' values and visions are preserved for generations.

As the co-founder and president of AIRE, Nassir plays a key role in leading the firm's growth and marketing strategies. Under her leadership, AIRE has continued to evolve and address the complex needs of its clientele. Prior to founding AIRE, Sharon held leadership positions at top firms like Merrill Lynch, Stock-Cross, and TD Ameritrade.

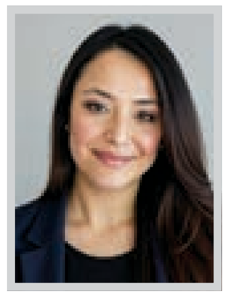


SHAHRZAD PANAHI

District Manager, Branch and Small Business Banking
U.S. Bank

Shahrzad Panahi is a vice president and district manager in the Branch Banking Group in Los Angeles, where she is known for her dynamic leadership and deep expertise in managing high-performing teams across affluent and complex markets. With more than 15 years of experience in banking, she has built a reputation for operational excellence, strategic execution, and a strong commitment to delivering exceptional customer experiences.

Panahi currently leads the Los Angeles Metro District, a diverse and high-impact market that includes 19 branch locations spanning from Larchmont to Hermosa Beach. Throughout her career, she has held multiple leadership roles in banking, successfully guiding teams in some of Southern California's most competitive markets.



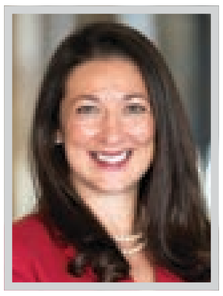
MELISSA PEREZ

Senior Vice President, Operations
Arixa Capital

Melissa Perez has demonstrated exceptional leadership and operational expertise throughout her career, culminating in her current role at Arixa Capital, one of the nation's leading private real estate lenders. Perez oversees client relations, underwriting, processing, closing, and post-closing functions at the company. Since joining Arixa in 2024, she has transformed the company's operational framework, leveraging her more than 20 years of banking expertise and mortgage operations leadership to standardize workflows, implement robust training programs, and foster cross-departmental collaboration.

Under Perez's guidance, Arixa has achieved record-breaking growth, surpassing $7 billion in loan originations since inception and setting a new annual record of nearly $2 billion in 2025 alone.

WOMEN OF INFLUENCE: FINANCE

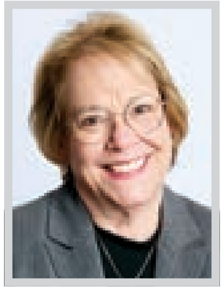


ELANA PIANKO-GINSBURG

Managing Director
Merrill

Elana Pianko-Ginsburg is a managing director and private wealth manager at Merrill Private Wealth in Century City. She advises complex multigenerational families with more than $25 million in assets, delivering high-touch guidance across investment strategy, estate and legacy planning, balance sheet oversight, and major financial decisions.

Known for her analytical rigor and compassionate leadership, Pianko-Ginsburg is a trusted partner to families navigating intricate decisions, major transitions, and long-term planning. She also served more than seven years on the Board of the National Women's History Museum, playing a key role in expanding the Los Angeles division. She remains committed to empowering future generations.

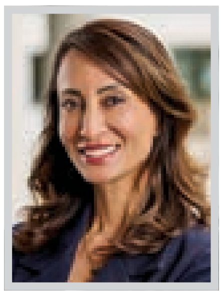


JUDI PREJEAN

Executive Vise President;
Executive Director
Customers Bank

Judi Prejean is a distinguished leader in the banking industry with over four decades of experience, known for her integrity, strategic insight, and unwavering dedication to clients, colleagues, and communities.

A pioneer in the field, Prejean was among the first women to hold senior leadership roles in West Coast banking at a time when female executives were rare. More than breaking barriers, she built pathways for others—creating mentorship programs, leading women's leadership initiatives, and advocating for diverse talent throughout her career. Her influence continues to shape the next generation of financial professionals. What sets her apart is her extraordinary commitment to her clients' success.

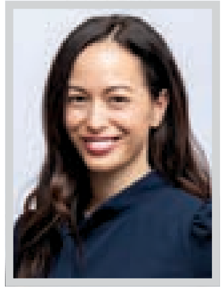


HEATHER QUINN

Wealth Management Advisor
Fortuna Wealth Management, Legacy Strategies and Insurance Solutions

Heather Quinn's ultimate goal is to help individuals live their lives to the fullest potential while ensuring the security of their families and the longevity of their financial resources. She skillfully guides her clients through the complexities of managing their income and optimizing their benefits. As a financial advisor, Quinn remains committed to professional growth and excellence.

Quinn understands that many people are overwhelmed by financial complexities such as investment management, and even with success in their field, integrating their goals and their finances can be daunting. She helps people identify their most important goals and help them devise a roadmap for getting there.

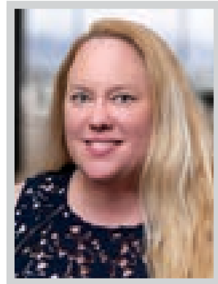


EDYTHE REPOFF

President; Chief Operating Officer
New Omni Bank, National Association

Edythe Repoff has been instrumental in shaping New Omni Bank's growth and community impact through her transformative leadership as president and COO. 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.

Under Repoff's guidance, New Omni Bank has grown from $150 million to $550 million in assets, a testament to her ability to drive sustainable growth. 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. Her leadership also brings a focus on community-centered banking, introducing innovative products settling in California.



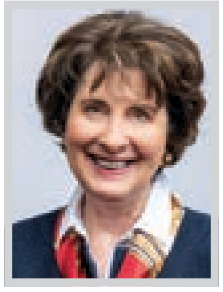
KIMBERLY RIETFORS

Director, Investment Services
Fortify Capital - Northwestern Mutual

Kim Rietfors has played a pivotal role in the financial planning industry, particularly through her contributions to her firm's success. Since joining the firm in 2003, she has been instrumental in the financial planning practice's remarkable growth. As the director of investment services, she oversees the Investment Operations Department, managing portfolio construction, attribution analysis, asset movement, and the implementation of planning and distribution strategies. Her expertise ensures that client portfolios are optimized to achieve their financial goals.

Rietfors is known for her client-centered approach. She builds strong, long-term relationships, gaining a deep understanding of each client's unique financial needs.

WOMEN OF INFLUENCE: FINANCE

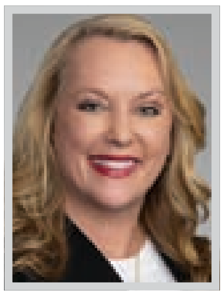


KIMBERLY SCHUGART

Senior Vice President;
Chief Financial Officer
New Omni Bank, National Association

Kimberly Schugart, senior vice president and CFO of New Omni Bank, has significantly impacted both the bank's growth and its community-oriented mission through her expert leadership in finance.

One of her standout accomplishments is securing nearly $40 million through the US Treasury's Emergency Capital Investment Program in 2022. This award, made possible by her keen understanding of the bank and the community's needs and her skill in developing a compelling proposal, has empowered New Omni Bank to increase lending to underserved, low- and moderate-income businesses and consumers. By securing this vital capital, she has not only facilitated New Omni Bank's growth but also strengthened its capacity to drive positive economic change in the community.

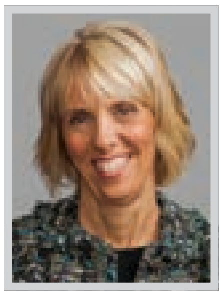


MONICA SHILLING

Partner
Kirkland & Ellis LLP

Monica Shilling has always taken full advantage of the changing transactional playbook. Her vast experience in corporate, mergers and acquisitions and securities law, along with her unique legal insight in the evolving deal market has made her a go-to adviser for clients eyeing complex deals.

Shilling's diverse practice and her understanding of the financial markets and industry expertise have propelled her as one of the leading women attorneys steering asset management firm's demand for sophisticated advice related to structuring and managing investment vehicles, including business development companies (BDCs). Shilling continues to be at the forefront of a cutting-edge growth area for asset management firms working with them on retail focused products that allow them to expand and diversify their investor base.

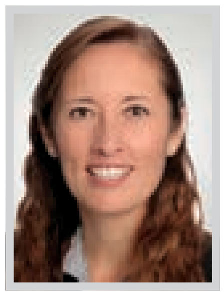


MARY ANN SIGLER

Chief Financial Officer
Platinum Equity

Mary Ann Sigler is partner and CFO for Platinum Equity, and executive vice president & treasurer for Platinum Equity Advisors. Based in the Office of the Chairman, Sigler has broad responsibility for finance and strategic planning functions across Platinum Equity and its global investment platforms, including its management company, its private equity funds, and broader non-fund initiatives.

Prior to joining Platinum Equity in 2004, Sigler was senior partner at Ernst & Young. Sigler's 25-year career at EY began in January 1980 and she was named partner in 1987. While at EY, Sigler's clients included Lockheed Martin Corporation, AOL Time Warner, TRW, Northrop Grumman, Amgen Inc, Allergan Inc, Teledyne Technologies, Rustic Canyon, and the Los Angeles Dodgers.

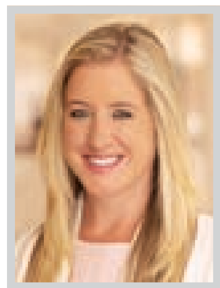


ROSE SORENSEN

Partner
Snell & Wilmer

Rose Sorensen is a corporate and securities partner in Snell & Wilmer's Los Angeles office. Sorensen's law practice includes mergers and acquisitions, divestitures, reorganizations, commercial finance, private placements, venture capital, corporate governance, telecommunications services, joint ventures, licensing, and entity structure and formation. She has extensive experience handling large-scale mergers and acquisitions, project and corporate financings, and restructurings in a variety of industries.

Sorensen's background includes serving as general counsel of a private cable operator and internet service provider, which helped shape her balanced pragmatic approach in advising businesses on the complexities and functional considerations of their operations.



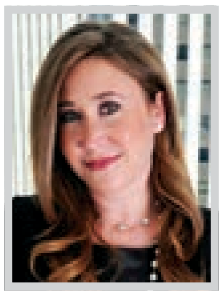
ERIN VOISIN

Managing Director;
Wealth Management Services
EP Wealth Advisors

In the last year, Erin Voisin has continued to be a driving force behind EP Wealth's mission to elevate and empower. As an active leader of the Investing in Women Initiative, she's championed the growth of women within the firm and ensured that women clients receive thoughtful, tailored financial guidance. Voisin serves on EP Wealth Advisors' Management Committee.

Voisin's vision for comprehensive wealth management has taken shape in big ways. She's been instrumental in expanding both the Tax Planning and Estate Planning teams, reinforcing EP Wealth's commitment to holistic client care. With her guidance, the team has grown to more than 60 talented professionals—a testament to her strategic hiring, hands-on leadership, and dedication to nurturing top-tier talent.

WOMEN OF INFLUENCE: FINANCE

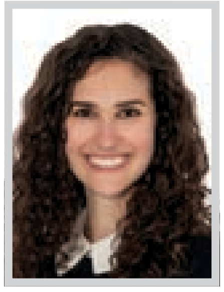


ALYSSA WEINBERGER

President, Family Office Advisory; Chief People Officer
Lido Advisors

Alyssa Weinberger is a third generation CPA who started her career at Rothstein Kass & Co. (now KPMG). She joined Lido Advisors, LLC in 2004 and became a CFP in 2005. Working in a male dominated industry, Weinberger became the first female partner of Lido Advisors. She successfully ran the Operations and Marketing team, leading to her current role as president, family office advisory and chief people officer. Weinberger also serves as president of Lido Consulting Group, LLC.

Weinberger created the Annual Family Office Investment Symposium, now in its 19th year, which is a national conference that brings together family office attendees interested in networking with their peers and learning best practices in the family office arena.



AMANDA WOLIN

Partner
Cox, Castle & Nicholson

Amanda Wolin is a partner at Cox Castle and a seasoned commercial real estate finance attorney. She specializes in representing different types of lenders, including national and regional banks, insurance companies, and private lenders, in connection with real estate financing transactions.

Wolin possesses extensive experience with a wide variety of real estate finance transactions, including acquisition and development loans, bridge loans, construction loans and mezzanine loans. Her expertise extends to a broad range of product types, including commercial, multifamily, hotel, and retail projects. She also has experience with secondary market transactions, such as "loan-on-loan" deals, as well as asset management work, including loan assumptions and loan modifications.

LYDIA WU

Partner
Greenberg Glusker LLP

Throughout her nearly three decades of practicing law, including 13 years at Greenberg Glusker, Lydia Wu has cemented her status as one of the leading attorneys in the real estate financing space. As Partner, Wu's practice involves all aspects of real estate transactions, including financing, restructuring of distressed real estate, and purchase and sale with 1031 exchanges.

Wu regularly handles major multi-state and multi-property transactions as well as local, single-property deals for institutional investors, real estate funds and individuals involving most categories of real estate asset such as industrial, warehouse, storage, data centers, multi-family, retail, office, resort/hotel, student housing, and senior housing properties. Wu's extensive work in the burgeoning data center sector has become a cornerstone of her practice.

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2026 WOMEN OF INFLUENCE: FINANCE