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AWARDS
2026

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The Los Angeles Business Journal Presents the 2026 CFO of the Year Awards

The most effective CFOs have their hands on much more than the financials. Technological trends like artificial intelligence, ever-advanced analytics tools and the looming concerns of supply chain and automation are just a few of the factors affecting modern CFOs’ day-to-day and future outlook. And with the various obstacles and challenges the last three years have presented us with, the role of the CFO has never been more critical.

For the Los Angeles Business Journal’s annual CFO Awards special post-event supplement, we are celebrating the efforts and achievements of those often unsung heroes of the C-suite.

In this, our 20th annual Los Angeles Business Journal CFO Awards special post-event supplement, we celebrate the efforts and achievements of some of the region’s greatest financial stewards of



JOE GRETO

the corporate space. This issue shines a much-deserved spotlight on the honorees and finalists we celebrated at our 2026 CFO Awards event on Thursday, September 17th at the InterContinental Los Angeles Downtown.

The wide range of superb nomina-

tions we received this year – each an example of excellence in the field of financial business stewardship – made it particularly challenging to single out the honorees. Those who were presented with awards are detailed in this section in 14 categories. You will also find

details on the also superb CFOs who were named as finalists as well.

We hope you enjoy this special section, which contains some insights on what it means to be a corporate financial steward in today’s business climate, including some very special contributions from our Diamond sponsors, **Fifth Third Bank; GCX Construction; Marsh McLennan Agency; and RSM**, and our Platinum sponsors, **Banc of California; BMO; City National Bank; Conexus; CSUN; PNC, POMS & Associates Insurance Brokers; PwC; Tutor Perini Corporation; Wells Fargo and Withum**. And again, congratulations to all the great CFOs who tirelessly contribute to the bottom lines of your businesses, and ultimately, our business community as a whole.

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PUBLIC COMPANY CFO OF THE YEAR (More than \$1 Billion) **HONOREE**

RYAN SOROKA

Executive Vice President; Chief Financial Officer
Tutor Perini Corp.

Serving alongside CEO Gary Smalley, and executive chairman, Ronald Tutor, Ryan Soroka has played an instrumental role as CFO of Tutor Perini Corporation, contributing to the company’s dramatic turnaround over the past several years. Soroka’s leadership has been centered on restoring profitability, driving disciplined execution, improving working capital management, and optimizing the company’s balance sheet.

Tutor Perini’s financial performance has improved significantly, from an adjusted loss per share of \$3.08 in 2023 to record adjusted earnings of \$4.29 per share in 2025. Under Soroka’s leadership, the company has generated successive record annual cash flows over the past four years and used that strength to reduce total debt by more than 50% (over \$500 million) since the end of 2023. These efforts have contributed to meaningful credit profile improvements and positioned the balance sheet in the strongest condition in the company’s history. Investors have recognized this turnaround, with the company’s share price rising from approximately \$9.00 in late 2023 to a recent all-time high of \$100.00.

Soroka’s leadership in repositioning the company’s investor relations strategy and external messaging has been a critical component of this transformation. He has led a proactive outreach effort with analysts and investors, refining the company’s narrative to clearly articulate the strength of its operating model, cash flow generation, and long-term earnings potential.

Through consistent, transparent communication and disciplined messaging, he has enhanced credibility with the investment community, broadened investor engagement, and helped ensure that the company’s improved performance and outlook are clearly understood and its value is appropriately reflected in the market.



CHAN BASHO
FINALIST

Chief Operating Officer; Chief Financial Officer
Astrana Health

As chief financial and operating officer of Astrana Health, Chan Basho plays a central role in driving both the financial performance and operational transformation of a complex, multi-state, value-based health-care organization. He oversees core functions spanning finance, corporate development, accounting, network and contracting.

Basho has implemented disciplined financial and operational frameworks to enhance transparency, accountability and scalability across the organization. This includes advancing a more rigorous forecasting and variance analysis process, strengthening internal controls and audit readiness, and driving toward a faster, more efficient close cycle. He has also led initiatives to improve profitability at the market and contract level, bringing a data-driven approach to evaluating payor relationships, capitation structures, and provider network performance.



CHRISTINA CHING
FINALIST

*Interim Chief Financial Officer;
Chief Accounting Officer*
Newegg Commerce Inc.

As CFO of Newegg Commerce Inc., Christina Ching has led one of the most notable financial turnarounds in the company’s recent history. Through disciplined financial management, strategic planning, operational efficiency initiatives, and rigorous cost controls, she helped transform Newegg’s financial performance during 2025 while establishing a strong foundation for continued success in 2026.

Under Ching’s leadership, Newegg increased net sales from approximately \$1.24 billion in 2024 to \$1.44 billion in 2025, representing growth of nearly 17%. Gross profit increased by more than 28%, rising from \$131.5 million to \$168.5 million. Most significantly, adjusted EBITDA improved by approximately \$34.3 million, turning from a loss of \$9.5 million in 2024 to positive adjusted EBITDA of \$24.8 million in 2025.

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PUBLIC COMPANY CFO OF THE YEAR (Up to \$1 Billion) HONOREE

SCOTT YESSNER

Chief Financial Officer; Executive Vice President
BRC Group Holdings FKA B. Riley Financial

B. Riley Corporation Group holdings experienced a significant expansion in acquired operating companies, investments and senior debt from 2021 and 2022 followed by a very large fraud-related loss in 2024 which drove business exits. These matters grew the financial operations complexity and capacity requirements far beyond the organization's infrastructure, leading two years of late filings and a declining financial outlook. In March 2025, Scott Yessner was hired initially as a strategic advisor to the board of directors as they evaluated the CFO role together which he started in May/June 2025. During this advisor time, he executed a cost reduction program and evaluated the financial operations of the company. Yessner re-organized financial operations processes, added external expertise, and structured a planning and communications process to manage the large project. Yessner's leadership led to the company's return to current filing status after filing three 10Qs in three months and filed its first timely filing since 2023 with the 2025 10K in March 2025. The company successfully negotiated and completed the NASDAQ Delisting Hearing filing plan, retaining the exchanging listing status. The company's financial performance improved significantly returning to profitability with \$299 million in net income and reduced total debt by \$347 million and net debt by \$437 million. Previously, as CEMCO's corporate chief financial officer, Yessner led an over \$40 million income and under 3% to ~15% EBITDA improvement turnaround through an end to end business transformation in two phases over two and half years. He also led the sale of the company on behalf of the shareholders.



HAROUT DIRAMERIAN
FINALIST
Chief Financial Officer
Hudson Pacific Properties

As CFO of Hudson Pacific Properties, Harout Diramerian plays a critical role in shaping the company's financial strategy, operational resilience and long-term growth. Since stepping into the CFO role in 2020, he has helped guide the company through one of the most challenging periods in commercial real estate history, marked by rising interest rates, capital market volatility and evolving office demand dynamics. Through disciplined leadership and strategic decision-making, Diramerian has strengthened Hudson Pacific's balance sheet, enhanced liquidity and reinforced investor confidence in the company's long-term vision. Diramerian oversees all aspects of the company's finance, accounting, treasury, capital markets and financial planning functions. He leads Hudson Pacific's approach to liquidity management, refinancing strategy and debt structuring while partnering closely with executive leadership.



ERIK NAKAMURA
FINALIST
Chief Financial Officer
The Daily Journal

When Erik Nakamura joined Journal Technologies as CFO, he inherited outdated financial infrastructure and no formal FP&A function. He moved quickly to address both, hiring team members he had worked with before to modernize the accounting function. In December 2025, Nakamura's scope expanded significantly when he became CFO of Daily Journal Corporation, the public parent company, following the retirement of a CFO who had held the role for 42 years. He stepped into a heavily regulated public company environment mid-fiscal year, building compliance infrastructure in real time as Journal Technologies continued to grow toward accelerated large filer status. In his first months, he improved SEC reporting, remediated a prior material weakness, and managed a full proxy season.



DAVID SACHS
FINALIST
Chief Financial Officer
ImmunityBio

David Sachs, ImmunityBio's CFO, has spearheaded the organization's AI implementation. This was driven by a launch of an internally developed multi-agent AI platform purpose-built for biotech. This effort included implementing across finance targeting the work that consumes the most hours each quarter, month-end close, journal entries, reconciliations, variance analysis, and SOX 404 testing. And the way Sachs designed it, it plugs into the systems the company already uses. Sachs also oversaw separately using platforms across the company including: in genomics/proteomics analysis as diagnostic including with neopeptide selection and manufacturing; and implementing robotics technology embedded with AI across the company's next generation cell therapy platforms to scale production and improve process science and commercial product and product candidate production.



PATRICK VILLANOVA
FINALIST
Chief Financial Officer
BlackLine

As CFO of BlackLine, Patrick Villanova plays a pivotal role in driving the company's growth, operational excellence, and long-term strategic vision. Having spent more than a decade with the organization, he has helped transform BlackLine from a rapidly growing pre-IPO company into a global leader in technology solutions that enable end-to-end digital transformation for the Office of the CFO. Villanova's impact is rooted in his ability to combine deep accounting expertise with a forward-looking approach to technology and business strategy. Throughout his tenure, he has championed automation across finance operations, streamlining critical accounting processes, accelerating financial close cycles, strengthening internal controls, and enabling finance teams to focus on higher-value strategic analysis rather than manual work.

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PRIVATE COMPANY CFO OF THE YEAR (Enterprise) HONOREE

SARLINA SEE
Chief Financial Officer
Penske Media Corporation (PMC)

During her seven years at PMC, Sarlina See has played a pivotal role in the company’s growth and transformation, helping guide the organization through a period of significant expansion and increasing operational complexity. During this time, PMC successfully completed 15 acquisitions, launched three new brands, and expanded into real estate development in the Bahamas, broadening both its geographic footprint and business portfolio.

Drawing on her Fortune 500 experience, See has led the integration and optimization of critical business functions, including finance, accounting, treasury, tax, payroll, procurement, and supporting technology platforms. She has been instrumental in building scalable processes, implementing new systems, and driving automation initiatives that have enabled the organization to absorb growth efficiently while maintaining strong financial controls and operational discipline.

Beyond integration efforts, See has consistently focused on improving organizational effectiveness and creating infrastructure capable of supporting long-term growth. Her leadership has helped streamline operations, enhance visibility into financial performance, and strengthen decision-making across the enterprise. As a result, PMC has achieved substantial financial gains during her tenure, with revenue, gross profit, and EBITDA all more than doubling.

Recognized as a trusted and influential leader across the organization, See’s responsibilities have continued to expand over time. Most recently, she assumed oversight of venue management operations, further demonstrating her versatility, business acumen, and ability to drive results beyond traditional finance functions. Her combination of strategic vision, operational expertise, and collaborative leadership has made her a key contributor to PMC’s success and a valued partner in shaping the company’s future.

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ROBERT DIKA
FINALIST
Chief Financial Officer
Primex Group of Companies

At a macro level, Robert Dika, CFO of Primex Group of Companies, has combined internal process improvements, technology and automation to enable continued double-digit revenue growth without the need for additional headcount.

Dika implemented formal quarterly board of directors meetings to help lay groundwork for any future succession plans. He also introduced budgets and three-year strategic plans, incorporating input from Operations, Sales, Logistics and HR. He has also implemented formal safety program in partnership with Operations and Workers Compensation Broker and Carrier. Among other improvements, Dika terminated an underperforming ERP partner, and switched over to a more efficient company.



ALEX HENDERSON
FINALIST
Chief Financial Officer; Senior Vice President
Bobrick Washroom Equipment, Inc.

As CFO and head of transformation, Alex Henderson has been instrumental in driving Bobrick Washroom Equipment's financial strength, operational excellence, and strategic growth. His impact extends far beyond traditional finance leadership, encompassing enterprise transformation, corporate development, technology modernization, strategic planning, and organizational development. In his role, in addition to leading the finance team, he leads the IT, Project Management, Data Operations, Corporate Development, and Legal teams.

Over the past three years, Henderson has led significant improvements in Bobrick's financial planning, reporting, and governance processes. He established more disciplined budgeting and forecasting practices that helped achieve operating profit targets.



DANIEL KANG
FINALIST
Chief Financial Officer
Mercury Technologies

Daniel Kang's impact on Mercury Technologies is best understood through the foundation he built and the scale he enabled. As Mercury's first finance hire in 2022, Kang established the company's finance function entirely from the ground up, putting in place the core systems, controls, and processes needed to support a fast-growing fintech business. His work laid the foundation for disciplined growth, and his success in doing so led directly to his promotion to CFO as the company entered its next phase.

In his current role, Kang oversees all financial and accounting operations while also leading the credit underwriting team, which plays an important role in expanding access to capital for Mercury's customers. His leadership has delivered clear, measurable results.



MICHAEL XU
FINALIST
Chief Financial Officer
Inter-Con Security

In just his first year as chief financial officer at Inter-Con Security, Michael Xu has profoundly impacted the company's trajectory, transforming the Finance & Accounting department into a "powerhouse of innovation and reliability." Arriving with a clear mission to modernize operations during a period of rapid organizational growth, Xu successfully elevated the department to an unprecedented level of maturity. He achieved this by optimizing core financial processes, hitting major internal benchmarks, and masterfully blending top-tier external recruits with existing "hidden stars" whom he empowered to step up and lead.

At the headquarters level, Xu has been a critical catalyst for synergy within Inter-Con's leadership team. He champions a high-performance, highly collaborative culture.



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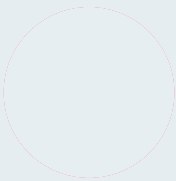
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PRIVATE COMPANY CFO OF THE YEAR (Large) HONOREE

JOYCE PAE

Chief Financial Officer
Verus Aerospace

Joyce Pae, the CFO of Verus Aerospace, has led the company’s executive team through five strategic acquisitions, directing financial due diligence, transaction execution, financing, integration planning, and post-close value creation. She successfully integrated all acquired businesses, realizing operational synergies while maintaining business continuity and customer satisfaction.

Pae also built the company’s Financial Planning & Analysis (FP&A) function from the ground up, transforming finance into a strategic business partner. Established forecasting, budgeting and KPI reporting processes that supported executive decision-making across supply chain management, business development, operations, pricing, and inventory optimization. She developed and delivered financial literacy, cash management, and cost accounting training programs for non-financial leaders throughout the organization. Pae has also increased operational managers’ understanding of profitability drivers, working capital management, and financial decision-making, creating greater accountability and alignment across the business.

In addition, Pae sponsored and led the implementation of a financial consolidation and reporting system, improving the accuracy, timeliness and transparency of financial information while reducing manual processes and strengthening internal controls. She established and institutionalized the company’s financial policies, reporting frameworks, and performance management processes. Over a 13-year tenure, she successfully partnered with and supported eight different CEOs, adapting reporting and analytical tools to each leader’s management style while ensuring focus on continuous improvement, growth opportunities, acquisition strategy, and long-term value creation. Notably, she led the successful separation of the organization into two independent companies in 2023 and served as CFO for both entities during a 20-month transition period.

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Bobrick proudly congratulates the 2026 Los Angeles Business Journal CFO of the Year finalists.

We are especially pleased to celebrate **Alex Henderson, Chief Financial Officer of Bobrick**, whose financial leadership and strategic discipline continue to strengthen our organization and shape its future.

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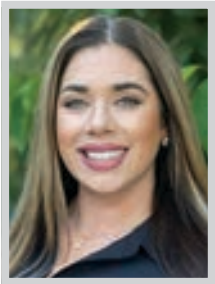
FELIX DANCIU
FINALIST
Chief Financial Officer
Ecrypt

One of the key recent success stories for Felix Danciu, Ecrypt’s CFO, was the merger with Preferred Payments. On September 30, 2025, BankCard USA Merchant Services merged with Preferred Payments, Inc., unifying operations under the Ecrypt Inc. brand. The combined company positions itself as a premier integrated payments partner, offering end-to-end payment solutions with a concierge-level service model, dedicated US-based account managers, and advanced security features like AI-driven fraud protection, proprietary tokenization, and PCI Level 1 compliance. Danciu spearheaded last year’s move to a new headquarters at Agoura Hills. The relocation, is one of the largest office leases in the Agoura Hills area and is designed to support both staff and technology infrastructure.



MIKE HALL
FINALIST
Chief Financial Officer
Resolution Economics

As CFO of Resolution Economics, Mike Hall serves as a strategic business partner to the firm’s executive leadership while overseeing finance, accounting, information technology, human resources, billing, and operational infrastructure. Since joining in 2022, Hall has played a critical role in supporting ResEcon’s growth from a domestic consulting firm to an international organization with offices throughout the US and Canada. Hall has led numerous initiatives to strengthen the firm’s financial and operational foundation. He has implemented enhanced financial reporting and forecasting processes, improved project and profitability analytics, modernized internal systems, and developed greater visibility into key business metrics that drive decision-making across the organization.



JENNIFER LAIRD
FINALIST
Chief Financial Officer
Miller Castings Inc.

Since Jenny Laird has been with Miller Castings Inc., the team has properly insured the organization and its shareholders, developed environmental and safety initiatives, updated corporate and benefit plan documents, negotiated vastly better credit structures with lenders, amended the ESOP plan for future stability, implemented an ERP, reengaged the ESOP committee, improved Board governance, amended bylaws, implemented AP and payment automation, and began to teach financial acumen to all levels of the organization. Laird believes her most significant business accomplishment over her career has been her ability to learn technical business operations, know the numbers, and help operational managers make better financial decisions in fast growing companies.



ARIANNA OZZANTO
FINALIST
Chief Financial Officer; Chief Operating Officer
SAG-AFTRA

Arianna Ozzanto joined Screen Actors Guild in 2004 and became the CFO in 2009 and is now in a recently created dual role of CFO and COO in 2026. Ozzanto received a promotion as CFO and also a chief operating officer this year. This dual role gives this talented executive an incredible opportunity to deepen service in ways that further support the union and community. Ozzanto’s new dual role and promotion signify her exemplary talent, confirming her sterling reputation in the industry, and the leadership she brings in this new role for the future ongoing success of SAG-AFTRA and the 160,000 members this organization supports. Her commitment to protect members’ rights and creative output makes her a standout.



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PRIVATE COMPANY CFO OF THE YEAR (Mid-Sized) HONOREE

ASHUMI SHIPPEE

Chief Financial Officer
Haus Labs by Lady Gaga

Ashumi Shippee has served as CFO of Haus Labs by Lady Gaga since the company's pre-launch phase, and her financial leadership has been instrumental in enabling one of the most dramatic growth stories in the beauty industry. Between 2021 and 2023, the company underwent a complete brand reinvention, reformulating its product line, rebranding, and transitioning its retail strategy from Amazon to Sephora, resulting in 400% year-over-year revenue growth. While these were company-wide strategic decisions led by the CEO and founder, it was Shippee who built and executed the financial infrastructure that made this transformation possible.

As the company scaled from a single-channel US startup to a global brand operating across 25+ countries through Sephora North America, Sephora UK, 12 European markets, Sephora at Kohl's, and seven Asia-Pacific markets, Shippee managed the exponential growth in financial complexity that came with it. She personally oversees all budgeting, forecasting, capital structure management, and investor relations with lead investor Lightspeed Venture Partners. She built out the finance department from scratch, hiring a VP of finance and assembling a lean team that manages the financial operations of a rapidly scaling global brand.

On the tax and compliance front, Shippee has navigated the company through a dramatic expansion of its tax obligations, growing from a handful of state filings to multi-state compliance across 10+ jurisdictions as Haus Labs established nexus in new states. She personally manages complex technical tax matters, including a UNICAP accounting method change, which required detailed analysis of the company's production activities, payroll allocation, and cost capitalization.

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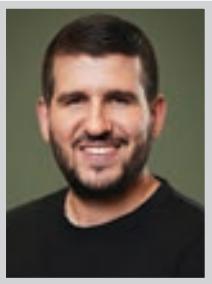
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ADAM EPSTEIN
FINALIST
Chief Financial Officer
Boosted Commerce

Adam Epstein joined Boosted Commerce as employee number two, with the company operating out of a founder's home during the early days of the COVID pandemic. Hired initially as SVP of M&A, Epstein built the entire mergers and acquisitions function from the ground up – the company had completed just one acquisition before his arrival. Over the next three to four years, he led approximately 25 acquisitions across the beauty, personal care, and wellness verticals, with acquired businesses ranging from \$500K to \$25 million in revenue.

Epstein assembled a team of roughly 15 people spanning business development, due diligence, and deal execution. He also helped raise more than eight figures in equity and structuring an acquisition credit facility of up to \$250 million.



AVI GOLAN
FINALIST
Chief Financial Officer
THE RIDGE WALLET

Avi Golan's impact as CFO of The Ridge (since 2024) is closely tied to the company's transition from a fast-growing startup into a more scaled, financially disciplined consumer brand. Under his fiscal stewardship, the company has reached tens of millions in annual revenue (approximately \$31 million in 2025) and has expanded product lines beyond wallets to now also include rings, luggage and accessories. He has also overseen the build out of formal financial systems and reporting structures.

Golan stays current and participatory in the finance and business professional community and maintains ongoing interaction with peers, executives, and industry networks.



VIKASH JHUNJHUNWALA
FINALIST
Chief Financial Officer
Hatch Fertility

Vikash Jhunjhunwala, the chief financial officer for Hatch Fertility, is an operations and finance executive that brings to his work at Hatch a remarkable track record of ten years of dynamic leadership in driving corporate transformations in middle market and large corporate settings. He has extensive experience working in private equity-backed, publicly traded, and privately held environments with a proven track record of revenue and EBITDA growth.

Jhunjhunwala has diverse experience in industries like healthcare, environmental service, logistics and B2B and is skilled in team building, account management, leadership, and business intelligence. He has led teams to deliver business-focused results, whether the challenge is a complex transaction, financial modeling or strategy planning.



FELIX POMERANTZ
FINALIST
Head of Finance
Neros Technologies

Felix Pomerantz, head of finance for Neros Technologies, brings a proven track record of building and scaling high-growth companies, with a consistent pattern of joining organizations early and leaving them significantly larger and more operationally mature than when he arrived.

Since joining as the company's first finance hire, Pomerantz has been instrumental in building the financial and operational foundation from the ground up, including all financial systems, processes, and internal controls entirely from scratch. He led the company's Series B financing in fall of 2025, securing \$75 million from Sequoia Capital – a milestone that has positioned the company for substantial growth. He also spearheaded a \$47 million real estate deal for a 251,000 square foot manufacturing facility.

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Congratulations, **Ryan Soroka!**

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PRIVATE CFO OF THE YEAR (Emerging) HONOREE

JEREMY FERRELL

Chief Financial Officer
Caelux Corporation

Jeremy Ferrell joined Caelux as a consultant in November 2022 and came on full-time as chief financial officer a year later, in November 2023. In that time, he has helped turn the company from a research-stage venture into a real manufacturer with product in the market. A big part of that came down to capital. Ferrell led the fundraising effort that brought in more than \$115 million: over \$100 million in equity plus a \$15 million debt facility. That money is what allowed Caelux to move past R&D and actually start building and shipping product.

Scaling a manufacturing business burns cash, and Ferrell has managed the treasury and runway carefully through that stretch. He oversaw the build-out of the first commercially viable perovskite manufacturing facility outside of China, which matters well beyond Caelux given where most of this supply chain currently sits.

He was also closely involved in negotiating the five-year, three-gigawatt partnership with Solx, the largest production agreement of its kind for perovskite energy-producing glass in the Western Hemisphere. The result is a fully domestically manufactured solar module, built on a 100% US-based supply chain, a meaningful milestone for American energy independence. He also built the finance organization itself. Today Caelux runs as a global business, headquartered in Baldwin Park, with offices in Taiwan and India and expansion underway into Saudi Arabia and Singapore. Beyond finance, Ferrell oversees audits, investor relations, Treasury, HR, IT, Finance Operations and the company's AI integration efforts.



Congratulations
Sandra Grujić

HUGE CONGRATULATION TO
SANDRA GRUJIĆ, MBA, CPA, ON
BEING NOMINATED FOR THE LOS
ANGELES BUSINESS JOURNAL'S
2026 CFO OF THE YEAR AWARD!

Yusen Terminals proudly congratulates Sandra Grujić on her nomination for the CFO of the Year Award. This recognition reflects Sandra's exceptional leadership, strategic vision, and unwavering commitment to the success of Yusen Terminals and the maritime industry. For more than 15 years, Sandra has been a driving force behind positive financial change, helping organizations strengthen their financial performance, navigate complex challenges, and invest in long-term growth. As a forward-focused CFO, she continues to champion innovation, technology modernization, strategic capital investments, and strong financial stewardship, positioning Yusen Terminals for future success. This nomination is a well-deserved recognition of her outstanding contributions, leadership, and lasting impact on both the company and the industry. Congratulations, Sandra, on this remarkable achievement and honor.





MALICK DIOP
FINALIST
Chief Financial Officer
HOORAE

When Malick Diop joined HOORAE Media, there was no finance function. What existed was accounting and bookkeeping — no KPIs, no goals, no infrastructure for measuring performance across business units. Building that foundation became his first order of business, and he built it while simultaneously learning the entertainment industry during the strikes.

The infrastructure Diop, along with his executive team, put in place includes an expense management platform (Concur), a payroll and benefits system (ADP), revenue targets and performance milestones for each business unit, and the enhancement of Excel-based processes that couldn't scale. Diop also oversees the financial operations across all of HOORAE's portfolio. That breadth alone is significant, as each business line has a different revenue model, cost structure, and capital cycle.



HADAS SPARFELD
FINALIST
Partner; Chief Financial Officer;
Chief Operating Officer
Group 11

Hadas Sparfeld has played a central role in shaping Group 11's growth into a top-performing venture capital firm, driving both strategic and operational excellence across the organization. During her tenure, the firm has experienced approximately five times growth in assets under management and portfolio value, alongside the successful launch of multiple funds and the addition of leading institutional investors.

Sparfeld oversees the firm's financial strategy, fund structuring, reporting, and compliance, while also acting as a key thought partner in broader business decisions. She has implemented disciplined financial processes and reporting frameworks that provide transparency and rigor to both internal stakeholders and LPs, strengthening trust and long-term relationships. Sparfeld is also a highly respected leader known for her ability to balance precision with strategic vision.



**CONGRATULATIONS,
CHARLIE BORSHEIM!**
2026 CFO OF THE YEAR
TURNAROUND ACHIEVEMENT HONOREE

Keslow Camera proudly congratulates **Charlie Borsheim**, our **Chief Financial Officer**, on being named the Los Angeles Business Journal's **2026 CFO of the Year Turnaround Achievement Honoree**.

Charlie's strategic leadership and financial expertise have been instrumental in strengthening **Keslow Camera**, a **premier motion picture camera rental company** serving the **film and television industry** and positioning the company for continued success.

We are proud to celebrate Charlie and this well-deserved recognition of his leadership and impact.

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NONPROFIT CFO OF THE YEAR HONOREE

VIRGINIA BERGMAN LOO

Chief Financial Officer
Child Care Resource Center

A passion for helping children and giving back to the community drew Virginia Bergman Loo to CCRC and now, as Chief Financial Officer, she works to support families in a bigger way. Prior to coming to CCRC, Loo worked for 13 years a role as vice president of transformation. Before that, she was a director of finance in hospitality. In her previous experiences working for private and public corporations, she has driven strategy focused on accelerated growth, improved profitability, managed costs, created efficiencies, and mitigated risk.

Loo has brought her perspective of a for-profit mindset from larger companies to CCRC, a non-profit. This includes putting rigor around internal controls, monthly balance sheet reconciliations, regular month end financial close and reviews, strengthening AR collection and uses of cash. This also includes better support and transparency for the organization with a more robust and resourced finance and accounting team in the areas of FP&A, AP, accounting and leadership roles.

Under her stewardship, the finance team at CCRC has added team members, which included restructuring to align the work functionally. Workday was implemented for financials as was Adaptive for financial planning and reporting. These changes were made to support the growth of the organization but also continue to innovate, allowing us to reduce time to complete tasks, optimize decision making and align the work to continue supporting the community CCRC serves.

Loo's financial leadership has also allowed CCRC to explore other possible services to the community and more opportunities to collaborate with LA County and the State of California on much-needed services.



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SCAN ME

CONGRATULATIONS

TO OUR CFO OF THE YEAR NOMINEES

The Financial Executives International – Los Angeles Chapter proudly congratulates our four members on being nominated for the Los Angeles Business Journal's CFO of the Year Awards.



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HEATHER BRIGGS
FINALIST
Chief Financial Officer
Motion Picture Industry Pension & Health Plans

Heather Briggs leads finance and operations at the Motion Picture Industry Pension and Health Plans, a fund dedicated to serving below-the-line union members working in the film and television industry. Briggs provides financial oversight for more than \$14 billion in investments and over \$2 billion in annual pension and health benefits serving more than 100,000 current and retired industry workers.

Perhaps the most significant achievement of her tenure has been the successful implementation of Microsoft Business Central as the organization’s new ERP – a project that had been started and abandoned six times by her predecessors. The implementation was completed on budget, while also incorporating modernization of the organization’s invoice approval process.



YUG FON CHIQUITO LAMA
FINALIST
Chief Financial Officer
Para Los Niños

As CFO of Para Los Niños (PLN), Yug Fon Chiquito has played a critical role in strengthening the organization’s financial and operational foundation while supporting its mission to empower children, youth, and families throughout Los Angeles County. A seasoned financial and operations executive, she oversees key organizational functions including finance, facilities, information technology and logistics, ensuring that resources are strategically aligned with long-term sustainability.

At Para Los Niños, Lama serves as a key member of the executive leadership team, providing financial guidance and oversight for an organization that now operates across 16 locations and serves more than 10,000 children, youth, and family members annually.



GILBERT MURO
FINALIST
Chief Financial Officer
Homeboy Industries

As chief financial officer of Homeboy Industries, Gilbert Muro plays a critical role in supporting the financial health, sustainability, and continued growth of the world’s largest gang rehabilitation and reentry program. Homeboy Industries provides hope, training and support to formerly gang-involved and previously incarcerated individuals, helping them redirect their lives and become contributing members of their communities. Each year, the organization serves more than 10,000 people through comprehensive services that include workforce development, mental health support, tattoo removal, education, legal services, and social enterprises.

As CFO, Muro oversees the organization’s financial operations, including budgeting, financial reporting, resource allocation, and long-term fiscal planning.



KEVIN WONG
FINALIST
Chief Financial Officer
The Lundquist Institute

As chief financial officer of The Lundquist Institute, Kevin Wong serves as a key architect of the organization’s transformation and long-term growth strategy. During his one-year tenure at the organization, Wong has played a central role in developing TLI’s new multi-year strategic plan and establishing the financial framework necessary to support the Institute’s future growth. TLI is one of the nation’s largest independent biomedical research institutes, supporting more than 150 principal investigators and hundreds of research professionals.

In an increasingly complex funding environment for research institutions, Wong has helped position TLI for sustainable growth by orchestrating several key changes that will work together. These include upgrading and improving accounting processes.

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PUBLIC SERVICE CFO OF THE YEAR HONOREE

GREG RAMIREZ

Chief Financial Officer
Pepperdine University

Greg Ramirez was elevated to CFO of Pepperdine just two months before COVID-19 hit, immediately facing one of the most challenging financial environments in higher education history. With students off campus for nearly a year and a half, the University had to find ways to meet payroll, protect margins, and maintain positive cash flow. Under Ramirez’s leadership, Pepperdine came through that period, and each period since, without missing budget or conducting any furloughs or pandemic-induced layoffs. The strategic framework he designed prioritized an initial liquidity assessment, scenario planning, and expense optimization.

Ramirez’s background is in FP&A rather than public accounting, and accordingly, an analytical mindset shapes how he operates. He built a University-wide forecasting process from scratch that combines automation and predictive analytics with collaborative input from institutional stakeholders – replacing a system that was outdated and entirely backward looking. The process, a component of a broader enhanced University budget process, has become embedded in how Pepperdine plans and operates, and was formally recognized during the University’s most recent accreditation reaffirmation, where it served as a primary highlight among the accreditor’s institutional commendations.

On the capital side, Ramirez led the financial planning for the Mountain, a new student center and sports arena, opening this fall on Pepperdine’s Malibu campus. He structured a bond issuance to help fund the project – the most cost-effective debt transaction in the university’s history – and ensured the project carried no tuition funding. He also managed the financial execution of Pepperdine’s acquisition and renovation of a 300-year-old chateau in Switzerland.

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EMERGING LEADER OF THE YEAR HONOREE

MATTEO BASTREGHI

Head of Finance
Machina Labs

Matteo Bastreghi is the only finance professional at Machina Labs, meaning he owns all financial operations for the company. His work over the past 18 months has centered on two things: building out the financial infrastructure and leading a \$124 million fundraise. The fundraise was a combination of equity and debt. Bastreghi worked alongside the CEO on the equity side and led the debt financing independently. The process was complex – he engaged a broad range of lenders spanning equipment financing, venture debt, and sale-leaseback structures. Many lenders were hesitant given the company’s stage of growth and the scale of the planned manufacturing expansion. Working with a well-connected broker, Bastreghi narrowed the field to a small group of contenders who visited Machina’s facilities before ultimately selecting a financing partner. The structure they landed on was venture debt, which covered both the equipment needs and the operational cash flow required to run the new facility. It also offered an interest-only period in the early years with the ability to pay down principal later – important given where the company is in its growth cycle. The debt financing specifically funds a new production facility dedicated to production-scale aerospace and defense manufacturing. A major focus of Bastreghi’s tenure has been helping Machina transition from a company primarily focused on research and development projects to one supporting production-scale aerospace and defense manufacturing. Under his financial stewardship, the company is now opening a new manufacturing facility dedicated to supporting its first major production program, marking an important milestone in the commercialization of its technology.

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JAMES\$ McGeHEE
CFO OF THE YEAR NOMINEE

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BELLA HOVANESIAN
FINALIST
VP, Finance & Accounting
Phonexa

Bella Hovanesian has spent eight years building the financial infrastructure that underpins Phonexa’s growth. As VP of finance and accounting, she oversees the full scope of financial operations not just for Phonexa, but across its four sister companies as well, spanning budgeting and forecasting to reporting, compliance, and day-to-day accounting. The scale and complexity of managing finance across multiple entities makes her contributions all the more significant. But her greatest impact has been transformational rather than transactional: when Hovanesian joined, Phonexa’s finance function needed significant organizational and operational restructuring, and she delivered exactly that.

Under Hovanesian’s leadership, the department evolved into a more organized, efficient, and highly structured operation.



JOSEPH MURRAY
FINALIST
Head, Finance and Accounting
Glendon Capital Management, L.P.

Joseph Murray joined Glendon Capital after there was significant turnover and instability on the finance team. The firm had three CFOs in the span of five years and also had a recent departure at the controller level. Glendon had just closed its third fund and reached \$5 billion of assets under management so the finance team needed to be positioned to support that growth.

During Murray’s first year, he hired a new controller and developed new processes to review the fund administrator’s deliverables, enhancing the quality and timeliness of the team’s reporting. At the start of his second year, he shifted focus to more strategic initiatives outside of the day-to-day accounting responsibilities.



AYAKO OKOSHI
FINALIST
Chief Financial Officer
Jinya Holdings Inc.

Ayako Okoshi’s primary mandate upon joining JINYA was to position the company for an IPO within a few years. Over the past year, she has been actively engaging with US private equity firms, investment banks, and professional advisory firms, to bring on a strategic partner. Meanwhile, on the financial infrastructure side, she has transformed the company’s internal operations.

Given Okoshi’s Japanese heritage and the company’s focus on authentic Japanese cuisine, she has also played a critical role in building strategic business development. She has launched several initiatives from the ground up. Under her leadership, the company began selling its own private label products at grocery stores and secured the company’s first in-flight meal partnership with Japan Airlines.



LIANA POGOSYAN
FINALIST
Chief Financial Officer
XOS Inc.

Since joining XOS, Inc. in January 2022 as corporate controller, Liana Pogosyan has been promoted twice – first to vice president of finance and then to CFO, a role she assumed officially in March 2025 after serving as acting CFO for approximately two years. Her tenure has coincided with one of the most challenging periods in the electric vehicle industry.

Despite these pressures, Pogosyan has been instrumental in the company’s survival and forward momentum. She served as the lead finance executive on the acquisition of Electra Mechanica, a fellow public company, navigating the full transaction lifecycle – including due diligence, post-acquisition integration, accounting and valuation. The transaction generated approximately \$48 million in net cash proceeds.



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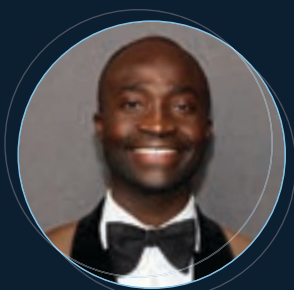
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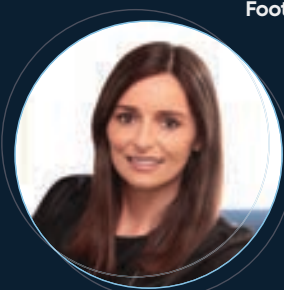
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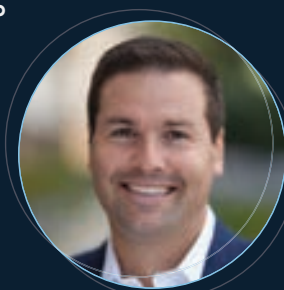
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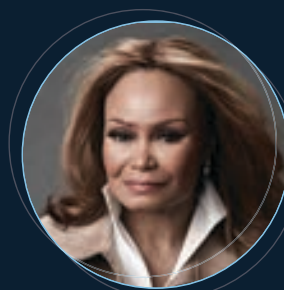
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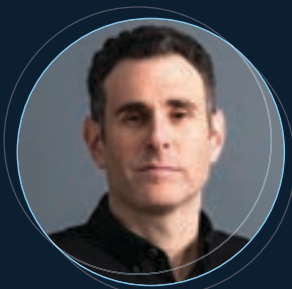
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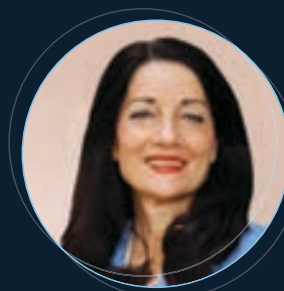
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TURNAROUND ACHIEVEMENT CFO OF THE YEAR HONOREE

CHARLIE BORSHEIM

Chief Financial Officer
Keslow Camera

Charlie Borsheim joined Keslow Camera in January 2016 as its chief financial officer, stepping into a company that needed strategic financial leadership. Since 1990, Keslow Camera has been providing camera equipment for motion picture, television and commercial productions throughout North America and around the globe but sustaining and growing that legacy required more than great equipment. It required a CFO who could build the financial infrastructure to match the company’s ambitions.

From day one, Borsheim created a long-term discipline the company needed. He developed the first-ever five-year projection model inclusive of the capital expenditures needed to maintain a robust and diverse inventory base. This was a defining moment that signaled a shift from reactive financial management to intentional, forward-looking leadership.

His impact on growth has been equally significant. He implemented an acquisition strategy program that led to multiple acquisitions of strategic targets, and also implemented a program to acquire properties used by the company to control long-term operating costs. One of the most consequential of those acquisitions came in March 2023, when Keslow acquired Sim Camera, a Canadian camera rental company. The deal meaningfully expanded Keslow’s North American footprint, adding offices in Vancouver, Toronto, and North Bay. The deal deepened the company’s reach into one of the continent’s most active production markets.

On the balance sheet, Borsheim has been equally disciplined. He has taken the company through more than five debt restructurings, leading to a material decrease in balance sheet debt and cost of capital.

CONGRATULATIONS

AYAKO OKOSHI

CHIEF FINANCIAL OFFICER
JINYA HOLDINGS

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BRETT ABBEY
FINALIST
Chief Financial Officer
realtime

As chief financial officer of realtime (Real Time Technologies), Brett Abbey has built one of the most disciplined, transparent, and forward-leaning finance organizations in LA's enterprise SaaS sector. realtime's technology now powers more than 13,000 wireless retail locations nationwide, and the company was named to the 2024 Inc. 5000 list of America's fastest-growing private companies. Abbey's leadership has been pivotal to executing the company's rebrand to realtime, cementing the company's place as the leading provider of enterprise point-of-sale and payments solutions to the US wireless retail industry.

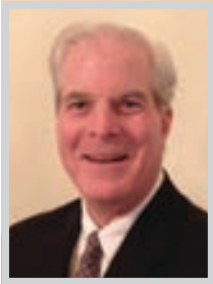
Recently Abbey has executed of an ambitious three-year financial transformation plan that includes the rollout of a new accounting system.



REY del VALLE
FINALIST
Chief Financial Officer
Everest Advisors LLC; RdV Consultants LLC

As managing director at Everest Advisors, Rey del Valle leads the firm's interim and fractional CFO practice, stepping into private equity-backed and high-growth Los Angeles companies at the moments that matter most – periods of turnaround, restructuring, and transaction readiness. In 2025, del Valle built a playbook that prepares companies to be “fundable, scalable and saleable,” redesigning financial infrastructure to accelerate close cycles, leading strategic pivots through market disruption, and securing tens of millions in growth capital across multiple rounds.

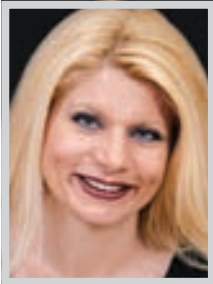
At OpenX (AdTech) and The Lift MX (Production Services), del Valle's turnaround interventions have already delivered millions in identified cost savings while strengthening reporting discipline, capital structure, and investor communications.



KENNETH McCORD
FINALIST
Chief Financial Officer
Elizabeth's Food Company, Inc.

Ken McCord has been CFO for Elizabeth's Food Company, Inc. in Los Angeles from 2022 to present. EFC was heavily impacted by the war in Ukraine in 2022 and was losing over \$50,000 per month.

McCord was instrumental in acquiring an east coast manufacturing plant and negotiating significant favorable terms which increased total company production capacity by over 200%. McCord sourced and obtained new financing, increased lines of credit, and financed the east coast plant and an additional \$12 million expansion of the California plant increasing production capacity by over 25%. He achieved a full turnaround of EFC from an operating loss in 2022 to significant profitability. Projected sales for 2026 are \$55 million. Shareholder value has increased in excess of 400%.



CHRISTINE WINTER
FINALIST
Chief Financial Officer; Personnel Officer
Barbaras Development, Inc.
(DBA DirecSource and DirecTex)

Christine Winter's financial leadership at Barbaras Development is unique in terms of the measurable impact she makes across many functions with a broad remit and span of control.

In a global company that is privately held with long tenured key management, Winter has been successful in navigating the challenges of change management in an entrenched, legacy culture. She strengthened the company's financial resilience, capital structure, and long-term strategic positioning by leading a complex refinancing and banking transition during a period of financial stress. The initiative enhanced liquidity, expanded financial flexibility, and secured more favorable credit terms while ensuring covenant compliance and reinforcing balance sheet stability.



CONGRATULATIONS

Virginia Bergman Loo for her recognition as the 2026 Chief Financial Officer Honoree!

This honor reflects not just financial expertise, but a genuine commitment to the mission behind every budget line.

CCRC's Board of Directors and staff are proud of your steady hand behind the numbers and turning that into real impact for children, families, and care providers.



Virginia Bergman Loo

CCRC Vice President & Chief Financial Officer

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CONGRATULATIONS, JOYCE!

2026 LOS ANGELES BUSINESS JOURNAL

CFO OF THE YEAR

PRIVATE COMPANY — LARGE



JOYCE PAE

CHIEF FINANCIAL OFFICER, VERUS AEROSPACE

Your leadership, financial vision and commitment to excellence continue to drive the growth and success of Verus Aerospace.

As we advance the future of aerospace and defense through world-class manufacturing and engineering excellence, this recognition also reflects the talented team behind our continued success.

Congratulations, Joyce, and the entire Verus Aerospace team!

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TECH DISRUPTOR CFO OF THE YEAR HONOREE

LOOKMAN OLUSANYA

Chief Financial Officer
Metropolis Technologies

Lookman Olusanya has served as the chief financial officer at Metropolis Technologies – an artificial intelligence company focused on enhancing transactions in the physical world – since June 2025.

Olusanya’s expertise spans FP&A, capital allocation, enterprise systems, M&A, data analytics, and business model innovation, with a strong focus on clarity, performance and scale. Known for his ability to connect strategic vision with operational execution in a high-tech environment, Olusanya builds finance organizations that are not just accurate, but insight-driven, business-focused, and built to lead at pace.

At Metropolis, Olusanya leads the finance and accounting teams. His work supports the company’s growth in the “Recognition Economy”—an infrastructure model that uses AI to anticipate user needs. He helped guide the company through major financial milestones, including a large \$1.6 billion funding round.

Previously, Olusanya held the CFO position at Block Inc.’s Square from August 2023 to May 2025, overseeing finance and operational strategy for a multi-billion-dollar ecosystem. Prior experience includes serving as Vice President of FP&A and Strategic Finance for Google Cloud, where he directed financial initiatives for a \$30 billion business. He also held various finance leadership roles at Amazon Web Services, contributing to enterprise planning and financial systems transformation. Early career experience includes finance management positions at American Airlines, focusing on financial analysis and restructuring efforts.



Caelux Corporation Congratulates
Jeremy Ferrell

on Being Named a 2026 CFO of the Year!

Caelux Corporation celebrates our CFO, Jeremy Ferrell, on being recognized by the Los Angeles Business Journal as a 2026 CFO of the Year in the Private Company – Emerging category. Jeremy’s financial leadership, expertise, and steadfast commitment to Caelux’s continued growth embody the innovation and excellence at the center of this well-deserved honor.

CFO OF THE YEAR

Jeremy Ferrell
CFO, Caelux

About Caelux Corporation

Headquartered in Baldwin Park, California, Caelux is a developer and manufacturer of advanced energy materials. The company's proprietary breakthrough Energy Producing Glass technology enables powerful next generational double power layer solar modules that provide fast cost-efficient new power generation.



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STRATEGIC TRANSACTIONS CFO OF THE YEAR HONOREE

DAMIAN GANCMAN

Chief Financial Officer; Chief Operating Officer
Cityview

Damian Gancman has spent 21 years helping build Cityview into the most active multifamily developer in Los Angeles. As CFO, COO and a member of the firm’s investment committee, he sits at the intersection of every major decision the firm makes – financial, operational and strategic – and his fingerprints are on virtually every milestone Cityview has reached.

Under his financial leadership, Cityview has invested more than \$7 billion across more than 150 projects. Since 2024, as debt expirations converged with one of the most volatile capital markets in recent memory, Gancman led the execution of new loan originations, refinancings, and loan modifications totaling \$1.75 billion while simultaneously expanding joint venture and investor relationships to position the firm for the opportunities ahead.

His approach to leadership is forward-looking by nature. Gancman has embraced technology and AI, developing a library of AI prompts that streamline everything from reforecasting business plans to cash flow analysis. He has sourced a suite of business intelligence and market analytics platforms to sharpen portfolio management and built partnerships with outside firms to drive accounting efficiency.

In his CFO/COO role, he oversees Cityview’s operations, serves as a bridge that strengthens the collaboration between departments, and supports the strategic growth of its finance, acquisition, asset management and property management functions. In 2023, he was instrumental in the closing of Cityview’s seventh discretionary fund focusing on multifamily value-add and development opportunities in gateway markets throughout the US. He also helped launch Cityview’s opportunity zone fund platform, which raised \$300 million from more than 150 high-net-worth investors.



JULIANNA BALICKA
FINALIST
Chief Financial Officer
Hope Bancorp

Julianna Balicka, the executive vice president and chief financial officer at Hope Bancorp, has expanded the organization’s footprint and diversified funding through acquisitions. For example, Balicka completed the Territorial Bancorp acquisition in April 2025, adding Hawaii operations and a lower-cost deposit base. This improved funding mix and reduced deposit costs, supporting margin expansion and diversification.

Balicka assumed her role in 2023 and is responsible for the company’s financial strategy and performance, capital and liquidity planning, consolidated financial reporting, balance sheet management, financial risk oversight, and investor relations. She has extensive experience in financial leadership, investor relations, mergers and acquisitions, balance sheet strategy, and enterprise forecasting.



OZAN PAMIR
FINALIST
Chief Financial Officer
Niagen Bioscience

Under Ozan Pamir’s financial leadership, Niagen Bioscience has continued to strengthen its financial performance, operational discipline, and long-term growth strategy. During 2025, the company recognized \$130 million of revenue and \$17.4 million of net income, which was followed by \$31.5 million in net sales in Q1 2026, and \$6.3 million in net income.

As CFO, Pamir oversees the company’s financial strategy, capital allocation, forecasting, operational planning, and investment priorities. He also supported the financial and operational execution of several strategic initiatives, including the launch of the company’s clinician-directed telehealth platform, growth of the 503B compounding network, divestiture of the reference standards business, acquisition of a comprehensive patent portfolio and leading the company’s drug development strategy.



Congratulations



Arianna Ozzanto

SAG-AFTRA Chief Financial Officer & Chief Operating Officer

Private Company CFO of the Year Finalist

and all of the
Los Angeles Business Journal
CFO of the Year Awards Honorees



RSM MIDDLE MARKET AWARD HONOREE

JAMES McGEHEE

Chief Financial Officer
Dave's Hot Chicken

Starting from store #1 in 2019 to a valuation of billion dollars, James McGehee has helped build a restaurant four-wall economic model propelled franchisee growth. With over 500 projected opening by 2026 year end, 1.5 billion in systemwide sales, with seven countries represented, Dave's Hot Chicken has had unprecedented growth within the restaurant industry.

In 2025 Dave's Hot Chicken gained the attention of the finance community and is now part of Roark Capital, the world's largest restaurant PE group owning brands such as Dunkin Donuts, Nothing Bundt Cakes, Carl's Jr, Sonic Burger, Jimmy John's and Subway, to name a few.

McGehee is a 33-year industry executive specializing in system implementations for growth companies, financial analysis, debt restructuring and implementation of business intelligence systems to improve reporting and profitability. As CFO, he provides financial advisory and systems implementation services for high growth Private Equity funded restaurant groups. McGehee has spent his career in the restaurant industry, growing brands such as Mendocino Farms, Blaze Pizza and Wetzel's Pretzels.

McGehee sits on the boards of directors of several emerging restaurant companies but is most proud of his CFO mentorship programs. He is currently mentoring four CFO candidates, ensuring they have both the technical skillsets, vision for the position and soft skills to be successful in their current position and future accomplishments.

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MOST INNOVATIVE FINANCE TEAM HONOREE

CREATORIQ

Under Dan Murray’s leadership, the CreatorIQ finance team has launched a structured modernization program that blends targeted training, stronger governance, and new tooling — earning its place among the most innovative finance teams in the Los Angeles technology sector.

Murray spearheaded the design and implementation of a six-week module AI curriculum to shift the team from ad-hoc LLM use to repeatable, integrated AI-enabled workflows, and established eight internal “power users” to codify and spread those practices across the company. Their stack includes agentic solutions built with N8N and Claude and Wispr-flow-driven dictation, deployed to automate routine work, increase insight, and speed execution across FP&A, accounting, and contract review.

When the initial AI rollout stalled, Murray took personal ownership, emphasized the long-term urgency for both the company and the well-being of his employees, and re-launched the program with a formal training cadence that drove measurable adoption and collaboration.

Alongside these technology and process improvements, Murray has built a disciplined talent development model: he prioritizes hiring “A-players,” then pairs and develops “B-players” with top performers — accelerating mentorship, reducing managerial overhead, and raising overall output quality. The result is a finance team that has moved from back-office support to a strategic engine, directly enabling CreatorIQ’s growth to roughly \$70 million ARR while delivering improved productivity, higher execution quality, deeper employee engagement, and excellent staff retention.



Congratulations, Yug Fon Chiquito, Chief Financial Officer, on your nomination for the Los Angeles Business Journal 2026 CFO of the Year Award!

Your leadership helps power the work of Para Los Niños staff, who support 10,000+ children, youth, and families in breaking down barriers and building pathways to success.

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Congratulations!



Beyond the Numbers

What today's most effective CFOs teach us about leadership, risk and growth

By BRIAN HEGARTY

There was a time when the role of the chief financial officer could be described primarily through the numbers: financial reporting, capital allocation, forecasting, controls and stewardship of the balance sheet.

Those responsibilities remain essential. But spend time with today's most accomplished CFOs and something quickly becomes clear: the role has become much bigger.

Through our involvement with the Los Angeles Business Journal CFO of the Year Awards, we have had the privilege of meeting and speaking with some of Southern California's most impressive financial leaders. Their industries, organizations and career paths may differ, but a common theme emerges. The best CFOs are no longer simply stewards of financial performance. They are enterprise leaders helping shape where their organizations are going next.

That evolution matters, particularly in a business environment where leaders are simultaneously confronting economic uncertainty, rising costs, emerging technologies, changing workforce expectations and an increasingly complex risk landscape.

The CFO increasingly sits at the intersection of all of it.

SEEING THE WHOLE ENTERPRISE

One characteristic consistently stands out among exceptional CFOs: they understand the business well beyond the finance function.

They understand customers. They understand operations. They understand their people. They understand risk. And perhaps most importantly, they understand how decisions in one area of the organization can create consequences in another.

Consider employee health and benefits. Historically, benefits might have been viewed primarily as an HR responsibility. Today, sophisticated CFOs recognize that the conversation is much broader.

Healthcare represents a significant investment for employers. But simply asking how to reduce that expense misses the larger opportunity. The better questions are: What is driving our costs? What risks are emerging within our population? Are we investing in the right programs? Are employees actually using and valuing what we provide? How does our benefits strategy affect our ability to attract and retain talent? And ultimately, are we getting the appropriate return on our investment?

Those aren't simply benefits questions. They are business questions.

The same principle applies across an organization. Risk, talent, technology, insurance, healthcare and capital strategy cannot always be managed effectively in separate silos. The CFO is often uniquely positioned to connect those conversations.

TURNING DATA INTO DECISIONS

Today's organizations have no shortage of data. The challenge is determining what to do with it.

The strongest CFOs we encounter are



relentlessly curious. They don't simply want another report or dashboard. They want to understand what the information is telling them, what it may be missing and what action should follow.

That distinction is increasingly important in employee benefits and risk management.

At Marsh Agency, we bring together analytics, actuarial acumen, clinical insight, benchmarking and pharmacy intelligence to help organizations look beneath the headline numbers and understand what is actually driving cost and risk. More importantly, we help translate those findings into action.

That may mean challenging an existing funding arrangement, identifying an emerging claims trend, reevaluating a pharmacy strategy or modeling the financial impact of different plan decisions. In other cases, the right answer may be investing differently rather than simply spending less.

Our role is to help organizations move from information to insight, and from insight to decisions that can improve both financial performance and the employee experience.

The CFO's role in these conversations is invaluable because great financial leaders bring discipline to the question every organization should be asking its advisors: What are we learning, and what are we going to do differently because of it?

RECOGNIZING THAT PEOPLE STRATEGY IS BUSINESS STRATEGY

Another lesson from today's leading CFOs is the increasing connection between financial performance and people.

Employees remain one of an organization's greatest investments and one of its most important competitive advantages. Decisions about healthcare, well-being, compensation, workplace experience and benefits influence far more than an annual budget. They can affect recruitment, retention, productivity, engagement and ultimately organizational performance.

'At Marsh Agency, we bring together analytics, actuarial acumen, clinical insight, benchmarking and pharmacy intelligence to help organizations look beneath the headline numbers. More importantly, we help translate those findings into action.'

That creates a delicate balance.

Employers cannot simply absorb escalating costs indefinitely. At the same time, aggressively reducing benefits can create consequences elsewhere in the business. The answer requires understanding both sides of the equation.

This is where the partnership between the CFO and HR leadership can be particularly powerful. HR brings an essential understanding of the workforce and employee experience. Finance brings financial rigor, forecasting and an enterprise perspective. When those disciplines come together, organizations can move beyond managing an annual renewal and begin building a long-term strategy.

THE VALUE OF THE RIGHT PARTNERS

The expanding CFO mandate also makes another leadership skill increasingly important: knowing when and how to leverage outside expertise.

The best advisors should do more than deliver information or execute transactions. They should bring perspective. They should challenge assumptions. They should understand the client's business well enough to iden-

tify opportunities the organization may not see on its own.

That is how we define our role at Marsh Agency.

We work alongside CFOs, HR leaders and executive teams to understand the business first, then bring the right expertise to the table. That can include employee health and benefits, analytics, actuarial strategy, pharmacy, compliance and global benefits, as well as access to the broader risk capabilities of Marsh.

But the real value isn't simply having more resources. It is connecting those resources around the needs of the organization.

For a CFO, the question shouldn't be whether an issue belongs to finance, HR, risk or another function. The better question is what the issue means for the business and what should be done about it. Our job as an advisor is to help answer that question.

LOOKING AHEAD

The CFOs recognized through this year's Los Angeles Business Journal CFO of the Year Awards represent the evolution of financial leadership. They are navigating complexity while continuing to create opportunity. They are balancing short-term performance with long-term resilience. And they are helping their organizations make difficult decisions without losing sight of the people, customers and communities behind the numbers.

At Marsh Agency, we are proud to support this year's CFO of the Year Awards and to celebrate the remarkable financial leaders who make the Los Angeles business community stronger.

Their leadership offers an important reminder for all of us: exceptional financial leadership isn't defined simply by understanding where the numbers have been.

It's about understanding where the business needs to go next.

Brian Hegarty is president, Los Angeles / Employee Benefits Division for Marsh McLennan Agency.