Trusted Advisors

SAN FERNANDO VALLEY BUSINESS JOURNAL

Honoring the Valley area's top-achieving accountants, attorneys, bankers, insurance professionals and wealth managers.

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PARKER BROWN
PUBLISHER’S LETTER

At our annual Trusted Advisors Awards event, which took place Aug. 8 at the Hilton Woodland Hills hotel, we singled out and honored the outstanding accountants, attorneys, bankers, insurance professionals and wealth managers who are making the most impact in the Valley area. This elite 2019 class of Trusted Advisors, whose stories are detailed in the pages of this special supplement, make truly important contributions to the businesses of our region as well as to the overall community.

With the many great professionals providing services in the Valley area, it’s not easy to single out a few advisors to be honored. We collect a list of nominees and examine each within his or her professional category. Several factors are considered, but the key driver is client and referral testimonials. Reading through the submitted material heavily influenced us to select the honorees.

These individuals, all of them well-deserving of the Trusted Advisor mantle, are recognized by the Business Journal for their commitment to high-quality client service, their longevity as professionals in their fields, their dedication to excellence and their contributions to the community.

Many thanks to our presenting sponsor, Wells Fargo, and congratulations to each of our 2019 honorees!

Best regards,

Charles Crumpley
Publisher
Congratulations to all of the San Fernando Valley Business Journal’s 2019 Trusted Advisors

ProVisors would like to highlight Our Member Winners & Nominees

WINNERS

Barry Cohn
Really Great Employee Benefits/ JorgensenHR

Barry Kurtz
Lewitt Hackman

Stephen Landsman
Squar Milner

Juan Ros
Forum Financial Management, LP

Brian Ross
Ross Legal Corporation

NOMINEES

Gary Barr
Alpert, Barr & Grant APLC

Matt Crisafulli
ACap Asset Management, Inc.

Cynthia Flynn
Hackler Flynn & Associates

Teri Frankel
Leavitt Insurance Services of Los Angeles

Darryl Gross
gish SEIDEN LLP

Terri Hilliard
Terri E. Hilliard PC

Don Lanson
Manfredi Levine Eccles Miller & Lanson

Jonathan Light
LightGabler

Douglas Ridley
Ridley Defense, APC

We also want to acknowledge our Valley Group Leaders

Aaron Belliston | Adam McArthur | Adam Treiger | Andrew Apfelberg | Andrew Goodman | Brian Ross | Brian Sullivan
Chris Bandouveris | Christine A. McDougall | Davis Blaine | Don Lanson | Donor M. Tisser | Douglas Ridley | E. Mark Fishman
Fred Arnold | Heath Goldman | Ian Corzine | Jacob Stein | Jeff Forster | Jerri Hemsworth | Jim Twerdahl | John Troxel
Joseph Teurlings | Ken Berke | Laura Withrow | Louis Ashamallah | Marc Honorof | Matt Kamin | Peggy Brady | Polina Bernstein
Rebecca Goldfarb | Rich Schuette | Robert Cohen | Robert Forouzandeh | Robert Klein | Sarah Reznick, CFP® | Scott Williams
Steven Martini | Terence M. Sternberg | Teri Frankel | Tim Gallagher | Tom Means

To learn more about ProVisors and the benefits of becoming a member please visit us at: ProVisors.com
ACCOUNTING – CLIENT SERVICES AWARD

STEPHEN J. LANDSMAN
Squar Milner

Stephen J. Landsman, CPA, is a Tax Partner with Squar Milner. His 25 years of experience features client-oriented tax planning, preparation, and compliance services for real estate, manufacturing, wholesale, distribution, retail, life science, tech, professional, entertainment and service industry clients. His tax planning and preparation expertise includes tax structuring and his financial reporting includes the audit, review and compilation of financial statements and governmental “yellow book” auditing, compliance testing, and reporting. As a leader and active participant in engagements of due diligence, agreed upon procedures, and forensic investigations, Landsman prepares and provides custom reports, court declarations, and expert testimony.

Over the years, Landsman has earned a reputation for his superb client service and for providing devoted, caring, vibrant and technical expertise. Clients also appreciate that Landsman and his firm, Squar Milner, can provide the high-touch, concierge services of smaller firms as well as the specialized compliance and value-added service offerings of the largest firms. Landsman routinely provides his clients with essential banking introductions, financial reporting assistance, tax planning strategies and implementation, as well as continuing business counsel. His comprehensive ability to understand and help clients articulate their initial, current and future needs, explain and provide options and solutions, and foresee future challenges are skills that go above and beyond the typical toolbox of a CPA. Landsman’s personal and professional integrity and abilities have helped businesses to grow more efficiently and without many of the missteps common to new and quickly growing entrepreneurial ventures.

ACCOUNTING – INNOVATION LEADERSHIP

JEFF NEUMEISTER
Neumeister & Associates Inc.

Jeff Neumeister is a well-educated, innovative and experienced forensic expert and consultant in tax and accounting advisory services. Always the avid learner, Neumeister has pursued multiple degrees throughout his impressive educational career – now holding three masters degrees including an MBA from Woodbury University, an MS in Accounting from Kaplan University and an MA in Criminal Justice from Arizona State University. Today, clients come to him from all walks of life including startups, privately-held organizations, holding entities, high-net-worth individuals, and middle market companies. Occasionally, they are referred directly to him through their retained counsel, where Neumeister has repeatedly identified problems, uncovered frauds and initiated defense against litigation. Clients range in size from giant international entities to smaller, regional practices.

Neumeister has been designated an expert from working on multiple cases, and clients praise him for the valuable deposition testimony he is able to provide. He has provided litigation advisory services to clients spanning across various industries including construction, entertainment, health care, investments, information technology, professional services, retail, oil and gas, real estate, education, food and beverage, transportation, pharmaceutical and manufacturing. He has provided business valuations for litigation and non-litigation purposes, and he has managed the financial due diligence process for both buy and sell transactions. Through the use of forward-thinking, innovative and sophisticated analytic solutions, investigative techniques, and a thorough understanding of accounting, he has found effective and efficient solutions for a range of problems that clients face, specifically around those related to tax strategies, operational efficiencies, and internal controls.
Parker Brown is in it for the long haul.

We know that by doing a good job for you today, you will be our customer for life. Our philosophy is simple. We base our relationship on trust and integrity. This is what good, honest customer service is all about.
ACCOUNTING – TRAILBLAZER AWARD

LAURA AZZALINI RIGALI
ILLUMINATE

A genuine trailblazer in the financial services field, Laura Azzalini Rigali is an enthusiastic finance leader with two decades of experience building and leading startup and hyper growth companies. She began her career in public accounting as an auditor with Deloitte and moved into private accounting at venture-backed startups. She served in corporate controller, M&A, and CFO roles in startups across various industries, from travel, fashion and lifestyle to renewable energy and technology. Today, she is a strategic advisor, external CFO, and coach to startups, middle market growing companies, and executives, combining her expansive finance career with her love of people to help people and companies achieve their absolute best. She serves in part-time and project-based CFO roles, and coaches entrepreneurs and CEOs in financial empowerment – helping them step fully into their roles as financial leaders of their organizations, and embrace rather than fear finance.

One of the many ways in which Rigali is a trailblazer is her passion for providing other women with financial services solutions. Though she is equally happy to serve both men and women, Rigali especially loves helping women entrepreneurs. She has found that with women, lack of knowledge (especially in finance) is often coupled with shame, embarrassment, fear, etc., and there is no safe space for them to have questions answered where they won’t feel judged. It’s a systemic problem, and Rigali has blazed a path by taking this on as her personal mission.

BANKING – CLIENT SERVICES AWARD

RACHEL CARRILLO VASQUEZ
Mission Valley Bank

Rachel Carrillo Vasquez has over 25 years of experience in the financial industry and has been with Mission Valley Bank for the past six years. Prior to Mission Valley Bank, she worked at Comerica as an Executive Assistant. A consummate client services professional, Vasquez is the “point person” for the entire Centre Pointe Office Commercial Loan portfolio in the Santa Clarita Business Banking Center. She serves as the liaison for the branch’s loan portfolio, totaling over $60 million. She has personally secured $7 million in loans and significant referrals. As the Administrative Credit Assistant for the Centre Pointe office, Vasquez wears many hats. In Business Development, she leads the office in referral business and has personally secured $7 million in commercial loans. In her capacity as Client Liaison, she walks all Centre Pointe clients through each stage of the loan process, explains processes and documents, answers client questions and facilitates loan signings.

With every transaction with a client or prospect, Vasquez follows up on behalf of the lenders with the client to obtain information, deliver it to the credit department and stay on top of the process to make sure nothing falls through the cracks and that the Bank meets all of its deadlines. She has a true heart and passion for Mission Valley Bank’s clients and for helping them achieve success. Her clients know they always have a live person to assist them who is attentive to their banking needs. She loves being part of the Mission Valley Bank family and the Santa Clarita Valley community.
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BANKING – COMMUNITY SERVICE AWARD

PETROS ALTUNYAN
First Republic Bank

Petros Altunyan had been developing himself for his career path when he graduated with a Masters Degree in Business Management. Altunyan had been with Comerica Bank for over 10 years with majority of his time spent in Wealth Management in the Greater Los Angeles area. He was a Senior Private Banker and brought over 17 years of experience in the financial service industry. He manages portfolios of high net worth and ultra high net worth people. He was responsible for developing new and existing client relationships with high net and ultra-high net worth clients to gain a comprehensive view of their unique financial situation. He has just recently accepted a new job as Managing Director at First Republic Bank. He has assisted many individuals and companies in helping to organize a portfolio that will provide the client the best financial solution. He has helped partner with other organizations to help struggling businesses apply for loans or provide an in-depth analysis of their financial situation.

Altunyan is an active director of the Valley Economic Alliance, the well-known nonprofit whose mission is to engage and unite Valley stakeholders to raise standards of living and economic vitality.

INSURANCE – CLIENT SERVICES AWARD

SHERRY MARTIN
Plan Member Services

Sherry Martin works as an independent adviser with Plan Member providing clients with custom savings and investment plans so that they can reach their retirement goals. She goes over programs and options that would best suit each individual client by providing them a personalized experience. She has worked with educators and employees of organizations, both nonprofit and for-profit. She has worked with clients that are both preparing for retirement or enjoying retirement currently, always delivering a level of service and advice that exceeds expectations.

Martin has spent many years evaluating and assisting clients with future financial goals. She provides information on investment options, including how to professionally manage mutual fund accounts and insurance programs. In addition, she helps to provide programs that allow clients to gain a comprehensive understanding of retirement planning systems to help address concerns and questions most clients have regarding future financial planning. Martin has been known to work with clients by providing them with the benefits and programs that would best suit their personal financial needs. Martin is an active board member at the Valley Economic Alliance, a nonprofit organization that assists businesses in the San Fernando Valley. With a passion to assist all of her clients as well as her entire community, she provides both her time and personal resources to assist the Alliance in helping to restore the economic vitality of the Valley region.
INSURANCE – COMMUNITY SERVICE AWARD

BARRY COHN
Really Great Employee Benefits

Barry Cohn began his career by attending UCLA from 1972-1976, receiving his Bachelors Degree in Economics. Five years later, he received his MBA in Economics at Pepperdine University. Since then, Cohn has had a decorated career as a trusted advisor to clients as well as a steward for the community. He spent 17 years at 1st Business Bank, where he managed a middle market corporate group. He then became responsible for Southern California middle market banking at Imperial Bank. He now is the President and CEO of Really Great Employee Benefits, advising over 400 companies in employee benefits and insurance needs. Within the past 19 years at RGEB, he has established connections through the San Fernando Valley and now advises more than 10,000 of his clients’ employees. He has received praise from both colleagues and individuals who have received his services about his dedication and commitment to providing outstanding service. He also has received praise for providing his customers with money-saving alternatives and highest level of protection for his clients.

Beyond his work assisting thousands of client employees, Cohn is also a passionate provider of community service. In fact, he has dedicated more than 40 years of his life to extensive volunteerism in the community. He is involved in multiple nonprofit and charitable organizations, including serving on the board of the West Valley Warner Center Chamber of Commerce, and is an active member in the Leukemia and Lymphoma Society, the Valley Industry and Commerce Association and the Valley Economic Alliance.

INSURANCE – INNOVATION LEADERSHIP AWARD

BRIAN CHU
Epic Insurance

A genuine innovator in the insurance field, Brian Chu has worked in the insurance industry for over six years, rising from a risk management advisor and insurance broker to his highest ranking to date in June 2018 as Vice President of Epic Insurance Brokers & Consultants. Speaking both Chinese and English, he has been able to assist members of the San Fernando Valley community by providing additional help regarding retail property and casualty insurance, as well as employee benefit consulting.

Chu rose through the ranks in the insurance industry by becoming the Vice President of Epic Insurance Brokers & Consultants, the 26th largest commercial insurance broker globally. Working for such a large company, Chu quickly established his credibility and expertise in the industry through innovative practices and a strong understanding of client needs and trends. He now handles new business development and workers’ compensation insurance programs, and he provides risk management strategies and solutions for mid-market and large clients across a variety of industries. He has been praised by his colleagues for his ability to execute the company’s short-term goals while simultaneously helping to aid the company’s long-term goals. Chu is active on the board of governors for the Valley Economic Alliance, a nonprofit that assists local businesses in the San Fernando Valley region. Chu helps to provide additional assistance to businesses by providing his professional expertise regarding their individual concerns.
LEGAL – CLIENT SERVICES AWARD

BRIAN ROSS
Ross Legal Corp.

Brian Ross has gone through extensive schooling to become a credible and trusted partner at Ross Legal Corp. He graduated from the UCLA with a Bachelor’s degree in Political Science. Thereafter, he graduated from UCLA School of Law where he obtained his law degree. Finally, he received his Juris Doctorate from UCLA School of Law where he concluded his academic career. After his schooling, he worked at Baker & Hostler, and then Mitchell, Silberberg & Knuff. He then served as General Counsel for Social Project and Edgecast Networks where he was responsible for legal affairs that dealt with global content delivery and media services. Now with over 20 years of experience, Ross is Partner at Ross Legal Corp where he represents companies in the new media, technology, networking, social media, apparel, and energy industries.

Ross regularly utilizes his more than 20 years of experience to provide the best possible service for his clientele. He has experience working for large corporations and has also worked with smaller law firms that dealt directly with individual clientele. He has an extensive background in over 10 specified legal matters ranging from data privacy, risk mitigation, and corporate governance. Ross continues to assist emerging industries by providing his expertise and counsel to assist new technology companies, with attentive, high-touch service. Ross is also an active board member at the Valley Economic Alliance, a nonprofit that helps businesses throughout the San Fernando Valley by connecting them to the necessary resources to help them succeed.

INSURANCE – TRAILBLAZER AWARD

BRIAN LACHER
Montage Insurance Solutions

Brian Lacher joined the Montage Insurance Solutions team in 2016. Prior to his arrival, he began his group insurance career with Unum as a Senior Group Benefits Consultant focusing primarily on group disability, group long-term care, and voluntary worksite benefits. In 2012, he joined Assurant Employee Benefits (now Sun Life Financial) where he expanded his ancillary health knowledge in the fields of group dental and vision. His extensive knowledge of ancillary group health products and benefits administration, combined with his passion for building meaningful relationships and coming up with solution-oriented approaches have made him a trusted partner and friend to his clients as well as a trailblazer of innovative trends in his industry, blending his skills with all the things that make up Montage’s DNA - customer service, HR tools, enrollment technology and a consultative orientation.

Lacher is methodical and able to truly dive into learning and keeping abreast of current trends in the industry. He has long been vested in Life, Disability and Dental and has learned medical and the best practices from the broker end. If a client requires a special project, he dives into the project doggedly researching to obtain the best products or fit. In one case, his client wanted to re-create an old Kaiser Permanente program – inclusive with flyers and strategies for employees to be inspired by. He brought this to Montage’s attention, he and the team went to Kaiser to gain approval and Montage used much of the information and created customized monthly flyers and incentives.
LEGAL – INNOVATION LEADERSHIP AWARD

KAREN L. GABLER
LightGabler

With over 27 years of experience counseling businesses in all aspects of employment law, Karen L. Gabler has earned the reputation for developing proactive and innovative strategies to enhance workplace productivity and avoid employment disputes. Gabler co-founded LightGabler in Camarillo in 2011. She was instrumental in the law firm’s unprecedented growth, building the firm from seven to 25 employees and from 287 to over 1,530 clients in less than eight years. Clients span the state of California, but the majority are located or have branches primarily in Los Angeles and Ventura counties.

Today, Gabler serves as an employment law expert for over 700 businesses of all sizes and industries, providing forward-thinking counsel to management and conducting training programs for both management and employees. She performs internal audits of clients’ employment practices to ensure strategic compliance with current laws and conducts client investigations of employee allegations regarding harassment, discrimination, employee theft or other misconduct.

When litigation is unavoidable, Gabler aggressively defends her clients against employment law claims in state and federal courts as well as in administrative hearings, arbitrations and mediations. Her skill as a litigator and negotiator shows by her record of accomplishment – she has successfully resolved hundreds of claims on behalf of her clients. Gabler graduated from the University of Hawaii with a Bachelor of Arts degree in psychology. She then earned her Juris Doctor degree from the University of Hawaii’s William S. Richardson School of Law. She practiced law at Honolulu’s largest law firm for several years before relocating her practice to California in 1996.

LEGAL – COMMUNITY SERVICE AWARD

DONALD WEISSMAN
Weissman Law Firm

Donald Weissman specializes in litigation protecting the rights of individuals in areas of negligence, business issues, product liability and insurance related matters. He has also litigated extensively in areas including complex business matters, malicious prosecution, personal injuries and in representing victims of violent crimes.

Weissman is an outstanding community leader who practices law with a fierce determination to right things that can go so very wrong sometimes. He endlessly and generously volunteers his time and expertise to all who need it and the Valley community is certainly better for his efforts. He is on numerous boards and committees, most notably the Metro Service Council and as President of the West Valley Warner Center Chamber of Commerce. Weissman also happens to be an expert attorney who is driven to protect the innocent and to fight for justice when necessary. Deeply committed to serving his community, Weissman serves a number of additional organizations beyond the METRO Service Council and West Valley Warner Chamber of Commerce. He is a former officer of the board of directors of the Chatsworth/Porter Ranch Chamber of Commerce. He is a member of the San Fernando Valley MTA Governance Council, a member of the board for the Boys & Girls Club of the West Valley, and a member of the board of directors for the Stroke Association of Southern California.
WEALTH ADVISORS – CLIENT SERVICES AWARD

JUAN C. ROS
Forum Financial Management

Juan C. Ros is a financial advisor with Forum Financial Management, an independent fee-based wealth management firm. Ros works closely with legacy-minded families and business owners to enhance, protect, and help transfer their wealth, particularly when charitable planning is involved. Most recently, he was a partner and Vice President at Lamia Financial Group Inc., which joined with Forum in January 2019. Ros held various gift planning and major gift positions at the Ronald Reagan Presidential Foundation, Occidental College, and the ALS Association, helping to raise millions of dollars in current and deferred gifts.

There is no question that Ros is committed to serving his clients. Not only does he take an active interest in their personal lives, he demonstrates that interest through the careful, detailed planning he does for them. When a prospective client comes to meet with him, Ros spends upwards of two hours in an initial meeting, getting to know the prospective client’s values, goals, relationships, and interests at a very deep level. Ros believes that it is critical as a trusted advisor to get to know what’s most important to the client, so that his advice can be tailored specifically to the client’s dreams and desires. Ros’ passion for, and expertise in, charitable giving strategies gives him a unique set of skills to help guide his clients who are charitably inclined, and he has facilitated a significant number of charitable gifts using creative planning techniques that are tax efficient. This is all part of the outstanding level of service Ros provides to his clients.

LEGAL – TRAILBLAZER AWARD

BARRY KURTZ
Lewitt Hackman

Barry Kurtz is the Chair of Lewitt Hackman’s Franchise and Distribution Practice Group, currently one of the largest franchise law departments in California. His many years as a trailblazing leader in franchise law have helped Lewitt Hackman grow in the last five years to one of the largest franchise law groups in Southern California. A Certified Specialist in Franchise and Distribution Law designated by the State Bar of California Board of Legal Specialization and a Certified Franchise Executive under the auspices of the International Franchise Association, Kurtz also has a wealth of experience in franchise-related business matters, including corporate, mergers and acquisitions, business transactional law and commercial real estate leasing.

Kurtz represents franchisors, manufacturers, franchisees and distributors. His familiarity with franchising – as an attorney, a franchise executive and franchisee developer – spans decades, and provides both domestic and international clients with a unique perspective on the issues and demands that franchised and independent business owners face in the expansion, sale, purchase, financing and operation of their companies. His practical, hands-on experience includes: Outside General Counsel, Chief Operating Officer and Vice President of National/International Expansion for a national retail franchisor with 100+ units; the development and administration of 22 franchised quick-service restaurants and serving as an officer and a director of his franchisor’s franchise advisory council and independent franchisee association. Kurtz regularly represents clients regarding the preparation of domestic and international franchise registration and disclosure documents; structuring franchisors, franchisees, management teams and affiliated companies; development and enforcement of franchise system-wide standards; and many other related matters.
Nearly 150 attended the Trusted Advisors Awards dinner Aug. 8 at the Hilton Woodland Hills hotel. In all, 14 awards were given to top performers in five professions: accountants, attorneys, bankers, insurance professionals and wealth managers.

1 Members of ProVisors celebrate victory of Juan Ros, center.


3 Tobias Kennedy and Brian Lacher of Montage Insurance Solutions.

4 Rachel Carrillo Vasquez and Jose Soto, both of Mission Valley Bank.

5 Usha Devalia, Veronica Omar, Irma Amarillas and Heather Hoffman, all of Wells Fargo.

6 Robin Choi of Wells Fargo, left, presents award to Barry Kurtz of Lewitt Hackman.

7 Lilia Altunyan of Kaiser Permanente with Petros Altunyan of First Republic Bank.

8 Stephen Landsman of Squar Milner accepts his award.

9 Kenn Phillips of Valley Economic Alliance with Natasha Hadarian of ProHealth Medical Group.


11 Donald Weissman of the Weissman Law Firm with Miri Rossitto and Nicola Staples, both of Cowe Consulting.