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Trusted Advisors 2014

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Publisher’s Letter

We’re excited to announce the 2014 Trusted Advisors Awards honorees. Once again we have singled out and honored the outstanding accountants, attorneys, business bankers, insurance professionals and wealth managers helping their clients to thrive here in the greater San Fernando Valley region.

These individuals, all of them well-deserving of the “trusted advisor” mantle, are recognized by the San Fernando Valley Business Journal for their commitment to high-quality client service, their longevity as professionals in their chosen fields, and their commitment to overall excellence.

With the many great professionals providing services in our area, it’s not easy to single out a select few to be honored. We collect and examine a long list of nominees and review each within his or her respective professional category. Within each category, there are individual awards criteria. Certified public accountants and attorneys have annual billing requirements, business bankers have a portfolio threshold, insurance professionals are required to meet minimum annual premium revenue, and wealth managers have to maintain a minimum portfolio as well. While the size of the client account was certainly considered during the awards selection process, the key driver was client and referral source testimonials. Reading through the submitted material is ultimately what steered us in the direction of our honoree selections.

I want to thank the members of our advisory committee for helping us identify our honorees. It was no easy task by any means. It required each member to read through a few hundred pages of biographical information, statistics, client testimonials and professional experience.

At our annual Trusted Advisors Awards event on Wednesday, August 20 at the Universal Hilton Hotel in Universal City, we proudly announced the 2014 class of Trusted Advisors, whose stories are also detailed in the pages of this special supplement to the San Fernando Valley Business Journal.

Congratulations once again to each of our 2014 honorees!

Best regards,

Josh Schimmels
Associate Publisher
We are a proud sponsor of the San Fernando Valley Business Journal’s Trusted Advisors Awards and congratulate the nominees and winners on their outstanding achievements.

We are committed to helping mid-sized businesses across the San Fernando Valley achieve their goals. Just like you, your dedicated banker is a part of this Valley and understands the unique needs of the businesses that operate here. Through our partnership, we will deliver tailored financial solutions and first-class client service that will position you for success. We take pride in strengthening the communities we serve by helping local businesses thrive.

Robert Lagace, Middle Market Manager  
(213) 621-8102, robert.j.lagace@chase.com

Michele Grace, Business Banking Market Manager  
(805) 963-8010, michele.i.grace@chase.com
Jeff Bobrosky, Partner at CohnReznick LLP, has more than 20 years of accounting, auditing, and business advisory experience serving privately held and public companies in the emerging and middle-markets, as well as mature companies in the Fortune 100 marketplace. He has been with CohnReznick for more than seven years and in that time has exhibited consistently outstanding service in all aspects of the services he provides.

Bobrosky serves as CohnReznick’s Hospitality Industry Practice Leader and the Technology Industry Practice Leader in the West Region. Additionally, he is the Professional Practice Leader and Audit Division Leader for CohnReznick’s Woodland Hills and Los Angeles offices.

As Professional Practice Leader, Bobrosky serves as the critical connection between the local offices and the National Assurance Risk Management functions. He is responsible for communicating, implementing, monitoring, and assessing compliance with firm positions, policies, and practices. He serves as support to the Assurance and Risk Management functions by identifying practice issues as well as guidance on the implementation of policies to address those issues. He is also the primary focal point of contact for assurance matters related to engagement risk – both operational and technical – including client acceptance matters, assignment of Tier ratings, and collaboration on issues identified during fieldwork.

In his role as Audit Division Leader, Bobrosky oversees the offices’ joint audit department, including such matters as workflow and scheduling, assessment and professional development, ensuring efficient and economic processes.

Bobrosky is an expert in process risk and internal controls under Sarbanes-Oxley Section 404, having worked with both middle-market and large, public, multinational companies. He has worked with clients in a variety of industries, including hospitality (restaurants), entertainment (film, television, music, sports, and broadcasting), manufacturing and distribution, and technology.

“A trusted advisor, in my opinion, is someone who not only meets you where you are, but helps direct where you should be going and connects the dots to get you there. Jeff does that superbly.”

RAY LEON
Vice President, Finance & Corporate Controller
Defy Media

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Business Insurance

Here at Safecal Insurance we appreciate that you have worked extremely hard to get your business off the ground, and if you have a mind through the present economic turmoil and are still making a profit – congratulations!

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These are all insurance considerations that you need to take into account if you want you and your family to be secure and covered.

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There are far too many variables involved with business insurance to risk purchasing a policy that turns out not be right for your needs.

Take some time today and contact an experienced agent at Safecal Insurance Services to discuss your business insurance needs, to make sure they are absolutely right for you.

We will also be happy to provide the best rates for:

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Trustee Advisors 2014

SPECIALTY AWARD

CLIENT SERVICES AWARD

For Consistently Outstanding Service

Jeff Bobrosky
Partner
CohnReznick LLP

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As an accounting firm, we love numbers.

Here are a few of our favorites.

- 101 Years in business
- 10 California offices
- 97 Countries served (Through Praxity, AISBL)
- 5.0 Staff to partner ratio
- 33 Major industries served

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COMMUNITY SERVICE AWARD
For Making a Difference in the Community, Beyond Job Responsibilities

Greg Lippe
President
Gregory N. Lippe Accountancy Corp.

Upon graduating from Woodbury University in 1967, Gregory Lippe began a career in public accounting with Touche Ross & Co., predecessor of Deloitte & Touche. What began then was not only an illustrious career as one of the leading accountants in the region, but also one of the most generous.

Several years after he started his career, Lippe joined and spent 25 years at a local CPA firm, serving as president from 1988 until 1994. He formed Lippe, Helle, Hoffer & Allison LLP, Certified Public Accountants in 1994 and served as managing partner from its formation through 2009 when he retired from the firm. Lippe now practices as Gregory N. Lippe Accountancy Corporation providing outsourced CFO and consulting services for select clientele.

Lippe’s remarkable community involvement includes being a past chairman and current finance chairman for the Valley Industry and Commerce Association (VICA); trustee and chairman of the Business School Advisory Board at Woodbury University; board member of Val*Pac; Board Member and Treasurer of the California State Board of Pharmacy and Commissioner of the Los Angeles Fire and Police Pensions.

For his work with VICA, he dedicated over two very active years as chairman and four years as immediate past chair, sitting on all of the organization’s committees, chairing the board and executive committee as well testifying on behalf of businesses. He essentially worked two jobs for almost six years with everything he did on behalf of VICA and the business community as a whole. He still serves on the VICA Board of Governors to this day and has also served on commissions both for the state of California and the city of Los Angeles.

“Greg Lippe is the most perceptive, creative and strategic advisor I have ever known. I will not make an important business decision without first receiving Greg’s advice.”

PHILIP KNOWLES
CEO
Topaz Distribution, LLC
Great leaders inspire our communities

In every community, there are people who can inspire others to work for positive change. True leaders know how to forge a consensus and create a lasting legacy of success.

It’s an honor to recognize the 2014 Valley’s Trusted Advisors nominees.

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Member FDIC. (1206962_12884)
TRAILBLAZER AWARD
For Starting a New Enterprise, Being the First to Try
Something New and/or Leading the Profession Forward

Adam Grant
Attorney & Shareholder
Alpert Barr & Grant APLC

Adam D.H. Grant is a trusted advisor to his clients, his peers, his family and his community. His seemingly limitless energy, his thorough understanding of the law, and his genuine concern for his clients’ wellbeing have secured him a highly regarded and thriving practice. His clients are assured that he will exhaust all legal avenues available to find them a fair and reasonable solution to their concerns. He has earned a reputation for being a no-nonsense litigator who gets the job done. On many occasions opposing parties have been so impressed by his work that they have specifically sought out his services for other legal matters.

An innovator and trailblazer in his field, in the last two years Grant recognized the increased need and great potential of the mobile app law category. In this short amount of time, he honed his skills and expertise in this still developing and very specialized legal segment and has positioned himself as an expert in the category of mobile app privacy laws.

Grant understands that litigation can be a daunting, complex and costly exercise for any litigant. His thorough approach to resolving disputes is always crafted with the client’s perspective and company’s culture in mind. Clients know that with his over 20 years of legal experience, he is able to explain any aspect of the litigation process and address any concerns they may have. Furthermore, Grant understands the gravity of pursuing litigation, and what this means for the clients’ business and their personal wellbeing. With this in mind, he knows and counsels his clients on how best to proceed for an equitable and expeditious conclusion to their disputes so that they may move forward with their lives and their businesses.

“To say that Adam is a ‘trusted advisor’ doesn’t go far enough. My family has trusted Adam for a lifetime. My wife was mentored by Adam as far back as summer camp! Really, it’s true! About 10 years ago I needed to get a lawyer for our quickly growing small business. Camp is one thing, but my business is the culmination of a lifetime of work. So the decision to work with a lawyer who is a friend wasn’t taken lightly. I don’t work with Adam because he’s a friend, I work with him because he’s a great lawyer who I trust completely.”

MIKE WILLARD
CEO
Sportstec Inc.

WOODBURY UNIVERSITY
founded in 1884

Congratulates the San Fernando Valley Business Journal’s 2014 Valley’s Trusted Advisors nominees:

Marla Clemow
Gregg Lippe
Barry Kurtz
Bruce Munster
Congratulations

Valley's Most Trusted Advisors

2014 Selectees & Nominees, including our own:

Barry Kurtz, Chair, Franchise & Distribution Practice Group
Nicole Kamm, Employment Practice Group


16633 Ventura Boulevard, 11th Floor • Encino, California 91436
www.lewitthackman.com • 818.990.2120
Sostrin Immigration Lawyers LLP
Partner
Rita Sostrin

deserving recipient.”
sor, and the San Fernando Valley Business Journal could not have chosen a more devoted and
capable and committed advice to steer us through the choppy waters of entrepreneurship. Zahid not only understood and
“When we launched our company several years ago, we needed more than a steady hand
to assist in establishing long-term goals to protect assets and grow wealth.
His accounting career roughly spans over fifteen years in which he has specialized in all manner of economic advising and handling. His experience encompasses all phases of business management, estate and tax planning, real estate, and sophisticated investment strategies and wealth preservation techniques.
Aziz prides himself in working with numerous small businesses and has been a
frequent speaker at US Small Business Administration (USBA) program for new and
start-up businesses. He has served as a board member for various local nonprofit organizations and currently is co-chairing quarterly joint meetings of the California Society of CPAs and the San Fernando Valley Bar Association.

“When we launched our company several years ago, we needed more than a steady hand
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to steer us through the choppy waters of entrepreneurship. Zahid not only understood and
delved into his own capabilities to advise us. We could not have chosen a more capable and committed advisor,
and the San Fernando Valley Business Journal could not have chosen a more devoted and
deserving recipient.”
Rita Sostrin
Partner
Sostrin Immigration Lawyers LLP

Accountant
AZHID AZIZ
PARTNER
MILLER WARD & CO.

Aziz provides a level of service that gives him the ability to focus on the specific
necessities and desires of the individual or business he is working with. He encourages
clients to communicate with him throughout the year and to use him as a mentor
before making financial decisions. This type of relationship can be valuable for both
ever emerging and well-established businesses. He also uses his wealth management expertise to assist in establishing long-term goals to protect assets and grow wealth.

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Keeping small business growing.

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“At Mission Valley Bank, your success is our mission. We’re proud of our reputation as a Trusted Advisor and welcome the opportunity to earn your business.”
—Tamara Gurney, President/CEO
ACCOUNTANT

GREGORY HUTCHINS
TAX PARTNER
HOLTHOUSE CARLIN & VAN TRIGT LLP

Greg Hutchins has over 30 years of experience providing tax consulting and compliance services to high net worth individuals and business owners. His approach to planning encompasses addressing the needs of the business and business owner in an integrated manner. He keeps his clients up to date on tax law changes in order to proactively address potential tax consequences with the goal of providing planning opportunities to achieve tax savings.

Hutchins’ industry experience is broad and includes manufacturers, retail, distribution, real estate and entertainment and professional athletes. He is in a leadership position at the firm as a member of the Executive Committee, which guides the direction of firm’s initiatives and strategies. Hutchins is known for his technical expertise addressing the most complex tax issues facing his clients. More importantly, he is focused on building long-term relationships with his clients—to provide guidance and direction to help ensure that his clients realize their short-term and long-term goals. This is evidenced by his actions and attitude. First, he takes the time to understand his clients’ business objectives to make sure that planning opportunities are not missed. Second, he takes time to understand the personal needs of his clients—goals as it relates to retirement, sale of a business, and gifting and philanthropy goals. Third, he works in a highly collaborative manner with his clients’ other advisors including wealth advisors, bankers and attorneys. By working together, and keeping the clients’ goals as first priority, the service and results for the client are enhanced, due to the collective skills of the entire team.

One area that Hutchins takes great pride in is assisting his clients with the sale of their business. He provides guidance to optimize the valuation and deal structure so his clients can reap the rewards of a lifetime of work.

“Greg is a true professional in every sense of the word. His commitment and dedication to client service reflects his solutions-based approach to understanding and meeting the many challenges facing today’s executives. Not only has he become a trusted business advisor, the partnership that Greg has developed with the company has created an environment in which he is considered a highly respected and valued member of the Clay Lacy team.”

Brian C. Kirkdoffer
President
Clay Lacy Aviation, Inc.

ATTORNEY

RONALD CAMHI
LOS ANGELES OFFICE MANAGING PARTNER
MICHELMAN & ROBINSON LLP

Ronald Camhi is Managing Partner of Michelman & Robinson’s Encino office, Chair of the firm’s Advertising, Marketing & Media Department, and oversees the firm’s Commercial Real Estate Department. He also chairs the firm’s Conflicts, Ethics and Opinion Subcommittee and is a member of the firm’s Executive and Recruiting Committees.

Camhi has a unique practice in Advertising, Marketing and Media law. His areas of expertise also include business and commercial real estate law. Practicing in these areas has enabled him to have a uniquely insightful perspective when advising clients. He often represents clients in a capacity similar to that of a general counsel of a company and plays an integral part in advising his clients’ “inner-circle” decision makers.

Camhi represents many of the nation’s largest media agencies in numerous aspects of their operations, including negotiating and drafting agreements with advertisers, agencies and media outlets. He is one of the few legal experts in this field. He is routinely called on to advise clients relative to traditional media, branded entertainment, online advertising, social media, mobile marketing, privacy issues, marketing and sales practices, and licensing, amongst others. He utilizes this expertise to navigate his clients through the evolving legal landscape, while proactively advising them on new business opportunities. To that end, he is called on by leading trade associations as a participant on panels as a speaker and moderator, and to serve in an advisory capacity.

In his real estate and business practice, Camhi represents clients in multi-million dollar sales and acquisitions, financing, and commercial leasing matters. He regularly negotiates a broad range of business and commercial transactions including business purchase and sale transactions, secured transactions, and personal property leases.

“I have had the pleasure of working with Ron as legal counsel for many years. He is highly knowledgeable about the technology industry, especially the legal issues surrounding our marketing needs and advertising technology and services. His professionalism and thoughtfulness to our legal and business issues are unparalleled. He is highly practical, yet always has long-term goals in mind when counseling on a business or legal issue. He is a genuine trusted advisor.”

Ron Vaisbort
SVP & General Counsel
Good Technology Corporation

LEADERSHIP. STRATEGY. SUCCESS. THAT’S FORWARD THINKING.

CohnReznick applauds the 2014 Trusted Advisor Awards nominees.

Congratulations to Jeff Bobrosky for his nomination in the Client Services Award category.

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Business Banking Director
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ProVisors Congratulates All Members Recognized as Trusted Advisor Nominees and Winners

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ProVisors is a community of over 4,000 experts in a wide range of professions, including attorneys, accountants, bankers, insurance, financial services, real estate, and consultants, from international, regional and small firms, who have the common goal of sharing knowledge and resources to provide exceptional, multi-disciplinary solutions to clients.

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Keystone Business Advisors
President
Dave Richards, CBI

Most ethical lawyers I know."
result for the client, which of course, makes him extremely tough to beat. He’s also one of the
He has the ability to analyze a case, take it apart, and find the opposing side’s pressure points.
Ian has incredible litigation skills. I’ve never known another lawyer more prepared or focused.
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client. His work ethic is one of the aspects of his practice that continually inspires confi-
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insurance carriers and policyholders. He represents every client with full attention to
achieve clients’ goals. He always takes time to understand and evaluate each case to
determination how to best strategically pursue client objectives.
Corzine makes time to teach others. He believes part of a law firm’s responsibility is to educate the public on hot topic legal
problems. He has the ability to analyze a case, take it apart, and find the opposing side’s pressure points.
Ian has a broad range of litigation skills. He has never known another lawyer more prepared or focused.
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Dave Richards, CBI
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Corzine is the Managing Partner at the law firm
West Corzine LLP
Los Angeles and Camarillo. Corzine focuses his practice on complex litigation cases involving construction defect, bad faith, and insurance
coverage as well as business, transportation, and gen-
eral liability litigation.
From liability issues to contract disputes, Corzine represents local and national clients with complex
insurance defense, construction law and business litiga-
tion matters throughout Southern California. He is
known throughout the region for his dependability. A
lawyer that has proven time and time again that he can be counted on, many of his cli-
ents come to him with legal emergencies. He also always makes sure that every client he
works for is fully informed on legal options and the available courses of action.
Corzine is also well known for his creativity. He provides innovative solutions to achieve clients’ goals. He always takes time to understand and evaluate each case to
determine how to best strategically pursue client objectives.
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most ethical lawyers I know."

Linda Northrup has been the attorney for Armstrong Associates for seven years. During that
time, she has exceeded our expectations and steadily transformed us into a much better com-
pany by reviewing everything from basic documents to providing us sound legal direction. Linda
Northrup’s approach benefits both her clients, who reap the benefits of excellent and
cost-effective legal services, and the Northrup Schlueter attorneys, who are encouraged
to learn, grow, and expand their legal expertise while maintaining a balance that insures
their ability to foster strong family and community ties.

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pany by reviewing everything from basic documents to providing us sound legal direction. Linda
is not only a great attorney, but she is also a good friend to all of our employees. We have been
blessed to have her friendship and expertise."
Bill Shields
Director of Operations
Armstrong Associates

A Partnership for Your Client’s Banking Needs
Community Bank has been providing banking solutions to our business
customers for nearly 70 years. Our comprehensive suite of products
and team of business banking experts make us a top referred bank of
attorneys and financial professionals.
With more than $1.4 billion in assets, Community Bank has the resources
to help your clients while still providing the service of a premier
community bank. Let us help both you and your client grow their
businesses today and for many years to come.

"Congratulations
David Adelman
Andrew Goodman
Yi Sun Kim
G&B’s 2014
Trusted Advisor Nominees"

G&B’s 2014
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RPNA salutes Gary A. Nye and Jesse B. Levin on their nomination as “Most Trusted Advisor”

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Representing business . . . every step of the way.
Robert Amaro is a Vice President with JPMorgan Chase Middle Market Banking in the San Fernando Valley. He provides comprehensive financial solutions to commercial clients with revenues between $20 million and $500 million in North Los Angeles and Kern County. He has 14 years of experience in the financial services industry.

When it comes to customer service, Amaro always strives to work with clients to provide them with value-added solutions to support the growth needs of their businesses. Whether a solution encompasses credit, treasury services, or other offerings at the firm, Amaro always recommends the solution that aligns with the clients’ best interests.

Amaro has been a cornerstone to JPMorgan Chase’s banking team in the San Fernando Valley. He currently manages 23 client relationships with a combined portfolio of loan outstanding and deposits of more than $60 million. Amaro is also considered to be among the best-versed bankers in the region with regard to Know Your Customer (KYC)/Anti Money Laundering (AML) banking regulations. Given the heightened regulatory environment in which banks operate, his knowledge has become an asset to both JPMorgan Chase and the clients they serve.

Amaro started his career strong right from the start, having graduated summa cum laude from California State University, Fresno with a Bachelor’s of Science in Business Administration before launching his professional career at Bank of America in the Middle Market Banking group. He also holds a Master’s of Business Administration degree from the UCLA Anderson School of Management.

Amaro co-chairs the California chapter of JPMorgan Chase’s Business Resource group, Adelante. He is also a board member for the Valley Industry & Commerce Association (VICA) and previously worked a sub-committee within the UCLA Anderson Alumni.

“We have thoroughly enjoyed our relationship with Robert. Robert took the time to learn and understand how our business is structured and operates. I consider Robert an asset to the company. He has provided us guidance and advice that is unmeasurable. We consider our success in part to the relationship and work of Robert.”
Richard Turner
CFO
MP Environmental Services

Lola Forbis joined Mission Valley Bank at its inception in 2001 and now serves as Vice President/Relationship Manager of the Sun Valley Office. Prior to joining Mission Valley Bank, she was with Independence Bank, American Pacific State Bank and City National Bank. Along the way growing a multitude of client relationships that have lasted throughout her long and successful career.

As a trusted advisor, Forbis continually looks for opportunities to tailor the right deposit services needed for each business to run smoothly in addition to assisting with various credit needs to support growth.

She feels it is crucial that her clients understand the story behind the numbers and enjoys the opportunity to enlighten them in the areas of liquidity and cash flow, which are necessary to position them for a sound financial future.

Despite the fact that she manages a very large portfolio, Forbis believes in taking the time to learn as much as she can about each of her many clients’ businesses as well as their financial goals. She makes it a priority to meet with clients regularly in order to stay up-to-date with any changes occurring within their company or industry. This ‘hands-on’ style and dedication insures that she provides her clients with options and answers that are right for them and their unique situation.

Forbis recognizes each client with a sense of urgency and is committed to the prompt return of phone calls and e-mails. Demonstrating attention to detail, knowledge and concern she is professional, personable and always pleasant to work with.

“We’ve been in business since 1968 and I know first-hand the importance of having a banker that you can count on. Lola has been that banker for us for more than 20 years (and three banks). She has great integrity and I know that I can rely on her to do what she promises to do, when she promises to do it. That, coupled with her honest advice and dedication to working with us to develop sound solutions for both our business and our family’s financial needs goes a long way to defining a ‘trusted advisor.’”
Bruce Jones
President
Technical Heaters / Thermolab
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business banker

Debra Gentz
Vice President
Bank of the West

Debra Gentz is a seasoned banker, having started her career out of the UCLA MBA in Europe in middle market banking. After completing her assignment in Europe, she accepted a position in Latin America for the World Corporate Group with Citibank, working with diverse multinationals operating in the Andean Region. While in Ecuador, she later worked for the Corporate Banking/Capital Market division of ING Barings, which at the time was a newly established financial entity in the country.

With this experience, she felt it was time to return to Southern California, where her parents lived and where she was raised. She has been working in the middle market local banking market since. She relishes the ability to put her international and corporate bank experience to work to help her clients strive to reach their goals.

For Gentz, going above and beyond the call of duty is an everyday occurrence. She is not only a top-notch commercial banker (she was ranked #1 in the country by her bank for 2014) but she always finds a way to get her clients what they need.

When Gentz is not helping make real estate deals happen, she spends time giving back to the communities she cares about so deeply. She volunteers her time in a number of charities with underprivileged, abused and abandoned youth both here in Southern California and abroad. With no limits on her caring, her compassion and her heart, Gentz is a tireless advocate for her clients, a committed and dedicated volunteer and a loyal friend to many.

"Debbie is not an ordinary banker; she is like a partner in our business. She has consistently provided outstanding research and advice related to loans and other commercial banking issues that have proven crucial to our success. We are very grateful to have found a banker who values our business, understands our needs, and consistently works to safeguard our best interests."

Robert Nio
Chief Operating Officer
Hula Post Production

insurance professional

Jennifer Burnham-Grubbs
CEO
Quantum Insurance Services

Jennifer Burnham-Grubbs began her career as a broker working at a small but reputable firm, under the guidance of an established broker with over 30 years of experience in the industry. Within three years of joining, she had tripled the company’s revenue. Burnham-Grubbs attributes this to her ability to combine good listening and learning skills (which allowed her to ‘soak up’ the experience offered by her mentor) with a more efficient, contemporary understanding of how to run a business. She continued to grow the firm’s reputation, even without spending a single dime on advertising.

Burnham-Grubbs decided to launch her own firm when she noticed that most other brokers knew and/or worked with didn’t seem to put the client’s needs truly first and foremost. Too often, she saw shortcuts taken, or small white lies told in the pursuit of commissions. This dismayed her and seemed like an abuse of power, since in her view, clients rely on a broker to understand products inside and out, and help find the very best deal available at any given time. She decided to turn the ‘insurance salesman’ stereotype on its head, and design a company that operates more as an insurance consulting firm, providing recommendations without self-interest in regard to commissions, by setting herself and her firm apart in this way. She has earned the trust of countless clients and developed an excellent reputation that continues to grow her business.

"Jennifer is very knowledgeable and very helpful. She provides the best service. It’s an honor to work with her. She goes above and beyond to make sure she helps her clients and she always does it with a smile on her face. She has a great personality, very respectful. I have so much trust in her and her work. I really enjoy working with Jennifer! She is the BEST!"

Violeta Davidyan
Business Manager
David Weise & Associates

USI congratulates the Trusted Advisor Award nominees, including our own Ross Pendergraft.

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TIMOTHY GASPAR
CEO
GASPAR INSURANCE SERVICES, INC.

The year after graduating CSUN in 2007, Timothy Gaspar started Gaspar Insurance Services, Inc. in Woodland Hills. Gaspar Insurance went from one employee in 2008 to 30 employees in 2014 with offices in both Woodland Hills and Cherry Hill, NJ. Gaspar Insurance is recognized as writing the largest amount of new business in the San Fernando Valley for companies like Mercury, Hartford and others.

Gaspar’s knowledge of the different types of insurance that his clients need in their businesses is remarkable and his ability to respond quickly and capably to questions is exceptional.

Robert Cohen of law firm Cohen Law reports that right before his firm began with Gaspar Insurance, Gaspar took a detailed inventory of the insurance that Cohen Law did have and investigated how the business operates and what its true needs were. Cohen had been involved with other insurance agents before and felt disappointed that they were constantly trying to fit every client into the same model. Gaspar understands that every client is different, with different expectations and different needs.

Despite his relative youth, Gaspar has established himself already as a leading expert in his field. Cohen explains that when he first met Gaspar, he was with another firm and was unable to utilize Gaspar’s services, but he kept in touch with him in the event he could engage him as an advisor. He says that once they started working together, Gaspar didn’t try to sell Cohen on “this program or that program,” but made sure that he understood Cohen’s needs before making any presentations or recommendations.

This is how Gaspar treats all his clients and explains why he has become such a trusted advisor so quickly in his career.

“Tim embodies the trust, peace of mind and security that we look for in the insurance he provides. Tim watches over and protects the things that are most important to us. We are confident that Tim will always be there whenever we need him.”

Howard & Karlene Weg
Sherman Oaks, CA

CHIP HUMPHRIES
SENIOR VICE PRESIDENT
MERRILL LYNCH
THE PEPPERMANN HUMPHRIES GROUP

Coe Humphries’ career in wealth management began in 1996, when he joined Merrill Lynch. As a Portfolio Manager in the Merrill Lynch Personal Investment Advisory Program, he can manage proprietary model portfolios and tailor investment strategies to your unique needs and goals. In addition, he specializes in intergenerational wealth transfer strategies, using a holistic approach. He earned a Certified Financial Planner designation awarded by the Certified Financial Planner Board of Standards, Inc., and also holds a CIMA (Certified Investment Management Analyst) designation.

Humphries prides himself on being disciplined when it comes to monitoring outside investment managers. In addition to his own performance monitoring efforts, he and his team utilize the vast research and oversight capabilities of Merrill Lynch’s professional due diligence group. Should performance or other indicators (such as a shake-up in an investment fund management team) signal the need for a change, Humphries can help clients move quickly. By reviewing the strategy and approach of a pre-screened universe of managers with clients, Humphries can help each client make informed decisions.

In Humphries’ view, diversification has become increasingly more important, making Merrill Lynch’s open architecture platform a significant client asset. Leveraging the intelligence provided by Boa Merrill Lynch Global Research, Humphries can identify and screen many types of products and services from hundreds of available institutional and professional options.

Sandy Samuel
President & CEO
Biet Teedek

WILLIAM HOLDEN
VICE PRESIDENT, TERRITORY SALES MANAGER
BW INSURANCE AGENCY

Bill Holden’s experience in the insurance industry spans over three decades on both the carrier and brokerage side. In June of this year, Holden continued an illustrious career with some of the nation’s leading insurance organizations to open the insurance operations for Bank of the West, through its wholly-owned brokerage BW Insurance.

One quality that makes Holden a stand-out in his field is that he takes the time to ask questions and fully understand client businesses and exposures, before he speaks with the carriers to arrange a deal. He also reads and studies the clients’ policies and financial reports, so he can design and implement a program that will work, not just sell them an insurance policy. He often says, “The best time to resolve a claim is before it occurs by getting the policy wording right.”

Holden’s attention to detail, coupled with his innate curiosity about people and businesses allows him to offer strong guidance to his clients. Consequently, they trust him completely and remain with him for many years. He will always put his clients’ interests, as well as his teammates and company’s interests ahead of his own, understanding that if he takes care of them, they will remain loyal. Clients will often come to him for advice and counsel on a variety of business and personal issues, trusting that he will listen to their challenges, ask insightful questions, and offer well-considered recommendations.

Holden is a very active referrer of business. His clients trust him to give them good advice, and to recommend superior investment advisors, accountants, lawyers and service providers. He also enjoys connecting people with shared interests and needs, to help them grow their businesses and make new friends.

“Bill Holden is the consummate trusted advisor. He is a tireless advocate for his clients and is always laser-focused on the best way to help them achieve their goals. Everyone who works with Bill knows he will move mountains to protect his clients and he contributes meaningfully to their professional success.”

Matthew D. Heller
Managing Partner
Willner Heller, Private Wealth Management

ARAL OGHORIAN
PRESIDENT
ACAP ASSET MANAGEMENT

Aral Oghorian, CFA, CPF is the founder and president of ACap Asset Management, Inc. He has over 20 years of experience in the financial services industry. He has a unique set of experiences, including having worked overseas for the US Department of the Treasury as an advisor to the Ministry of Finance and Economy in the Republic of Armenia. He also conducted work in the Republic of Georgia and the Republic of Latvia. He also spent nine years at the Federal Reserve Bank of San Francisco examining foreign and domestic banks and bank holding companies.

Oghorian has a significant background in international affairs, having taken his expertise overseas on behalf of our government in attempt to stabilize the economies of third world countries. With this global economic experience he has been able to adapt significant concepts and theories into personal attention. His clients are consistently pleased by the success of his plans and see significant results when compared with other financial advisors.

“I have known Ara personally for over three years and have always been impressed with the way that he communes a room, his wealth of knowledge and insight and the clear and logical way that he presents ideas. The financial world can be complex and confusing, but Ara makes it tangible for the uninherited and uneducated.”

Robert Cohen
Partner
Cohen Law, APLC

BRIAN BUI
VICE PRESIDENT, TERRITORY SALESMANAGER
BW INSURANCE AGENCY

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Matthew D. Heller
Managing Partner
Willner Heller, Private Wealth Management
Barry Pinsky has worked in the financial services industry since 1997, as an advisor to business owners, professionals, retirees, and families. He came to the enterprise later in life, after a successful career in science and business. As a result, he brings a level of real world experience in commerce, taxes, personal finance, and investing to the benefit of his clients and colleagues. As a leader in the non-profit community, he has also developed a deep appreciation for the emotional and spiritual needs of his clients, as well as the importance of a charitable outlook towards others.

Soon after entering the financial services sector, Pinsky began the challenging course of study leading to the highly respected Certified Financial Planner designation. His commitment to continual growth and development eventually led to further certification as a Chartered Financial Consultant and as a Chartered Life Underwriter, all with the objective of providing unparalleled service to his clients. As a result, they have relied on his advice and judgment for decades in order to make intelligent economic decisions as they pursue their unique lives and goals.

Pinsky’s expertise in many aspects of financial planning and investments has led to the publication of numerous articles on topics of concern and interest to his clients. His publications have covered areas as diverse as Principal Protected Securities, Exchange Traded Funds (ETFs), and Long-Term Care Planning. Despite his wide range of knowledge, he has the ability to clearly communicate complex concepts to those outside of the profession. Years of experience as a teaching assistant in chemistry have afforded him the techniques to present difficult concepts plainly and comprehensively.

“Barry Pinsky has been our financial advisor since 2000. In the ensuing fourteen years, Barry has taken my husband and I from the working world to retirement in 2009. Without Barry’s knowledge and sound financial advice we would not have a secure retirement. Barry’s education, his financial credentials, and his attention to each individual client’s needs makes Barry a trusted financial advisor.”

Dorothy Wahl
Agora Hills, CA

As CEO of Steel Peak, Reza Zamani combines his two great passions: providing clients with world-class service and empowering other talented advisors to do the same. In overseeing Steel Peak’s business strategy as well as the firm’s operations and resources, Zamani draws on deep professional experience including serving as a top advisor at major Wall Street firms. Right from the beginning of his career, Zamani envisioned an independent advisory firm dedicated to providing a higher level of value to clients, and he began scouting potential team members early on. His vision of a uniquely talented and dedicated team providing distinguished fiduciary service to clients is embodied in Steel Peak.

Zamani has built Steel Peak to be uniquely separate from the traditional Wall Street firms by focusing on a fiduciary responsibility to his clients, and not to act as “big brother.” As independent advisors, Zamani and his team at Steel Peak have the freedom and the flexibility to align their guidance with client objectives, investing clients’ assets in their best interest.

A graduate of UCLA Anderson School of Management, with an emphasis in Entrepreneurship, Zamani holds the prestigious Certified Portfolio Manager (CPM) designation from the Academy of Certified Portfolio Managers and Columbia University. He also holds the Certified Fund Specialist (CFS) credential from the Institute of Business & Finance.

Also passionate about giving back, Zamani serves on the board of trustees for the Academy of Certified Portfolio Managers and he has served as a board member of non-profits including Providence Saint Joseph Medical Center, The Wellness Community of West Los Angeles and Athgo International.

“In my mind, the Trusted Advisors Award should be awarded solely to a person who meets the dual requirements of (i) superbly competent as a financial advisor and (ii) highly trustworthy in a crisis and in everyday activities. Reza Zamani exceeds each requirement. Thus, I rely upon his and his firm’s financial and estate planning advice in connection with investing a large part of my net worth on a daily basis. Even more importantly, my estate planning documents provide that Mr. Zamani be called immediately upon my passing, as I want only the most trusted advisor to look after my wife, my children’s, and my grandchildren’s needs. Reza Zamani is that trusted advisor!”

Wilford D. Godbold Jr.
CEO
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</tr>
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<tbody>
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<td>Partner, Greenberg &amp; Bass</td>
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<tr>
<td>Anie N. Akbarian</td>
<td>Attorney, Law Office of Anie N. Akbarian</td>
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<td>Vice President, Client Services &amp; Public Affairs, Pacific Federal Insurance Corp.</td>
</tr>
<tr>
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<td>Vice President, Bank of America</td>
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<tr>
<td>Jamie Chen</td>
<td>Senior Relationship Manager, Wells Fargo Bank</td>
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<tr>
<td>Steven B. Chroman</td>
<td>Attorney, Law Office of Steven B. Chroman, P.C.</td>
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<tr>
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<td>Regional President, Wells Fargo Bank</td>
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<td>Agency Owner, Lifeline Employee Benefits</td>
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<td>Attorney, Marshall A. Glick, APC</td>
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<td>Andrew Goodman</td>
<td>Attorney, Greenberg &amp; Bass</td>
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<td>Vice President, US Bank</td>
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<td>Founding Partner, Hoffman Patent Group</td>
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<td>Attorney, Hughes &amp; Dunstan LLP</td>
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<td>Garry A. Jones</td>
<td>CPA, Garry A. Jones &amp; Associates</td>
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**CONGRATULATIONS!**

I am proud to congratulate Timothy Gaspar

CEO of Gaspar Insurance Services, Inc.

For being recognized by the San Fernando Valley Business Journal as a 2014 Trusted Advisor

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- Silverio Robledo, President

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Nearly 400 attendees were on hand for the San Fernando Valley Business Journal’s Trusted Advisors Awards reception at the Hilton Los Angeles/Universal City hotel.