Honoring the Valley Area’s top-achieving accountants, attorneys, bankers, insurance professionals and wealth managers.
Few things make managing a business more comfortable than knowing you’ve got professional advisors you can trust! So it is with gratitude that we announce the 2018 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 thrive here in the Valley area.

These professionals are recognized by the Business Journal for their commitment to high-quality client service, to ingenuity and to the greater community. That’s what makes them “Trusted Advisors.”

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 list of nominees and review each within his or her respective professional category. Within each category, there are individual awards criteria. But the key drivers are the client and referral testimonials. Reading through the submitted material is ultimately what steered us to select the individual honorees.

At our annual Trusted Advisors Awards event on Thursday, August 9 at The Garland in North Hollywood, we proudly announced the 2018 class of Trusted Advisors, whose stories are also detailed in the pages of this special supplement of the Business Journal.

Many thanks to our Presenting Sponsor: Wells Fargo; our Platinum Sponsor: Mission Valley Bank; and our Gold Sponsors: LBW Insurance, LightGabler, Ruth’s Chris and Valley Community Healthcare. And, of course, congratulations to each of our 2018 honorees!

Sincerely,

Charles Crumpley
Editor and Publisher
ProVisors congratulates all of the San Fernando Valley Business Journal’s 2018 Trusted Advisors Awards nominees.

ProVisors would like to specially acknowledge our members

WINNERS

Barry Cohn  
RGEB Inc.

Teri Frankel  
Leavitt Insurance Services of Los Angeles

Darryl Gross  
gish SEIDEN LLP

Terri Hilliard Olsen  
Terri Hilliard, PC

Barry Kurtz  
Lewitt Hackman

Jonathan Fraser Light  
LightGabler

Sarah Reznick  
Edward Jones

NOMINEES

Gary Barr | Karen Brown | Matthew Crisafulli | Garbriel Duarte | Cynthia Flynn

Don Lanson | Tom McCann | Tom Means | Doug Ridley | Joseph Seetoo
SASHA BALUKA
B & G Accounting Services and Consulting, Inc.

Sasha Baluka, CPA, is a director and a president of B & G Accounting Services and Consulting Inc. She has seven years of experience in accounting, auditing and taxation for large corporations and small entrepreneurial companies. Baluka has a nationwide firm’s experience of managing financial audit engagements for clients in apparel manufacturing, retail and distribution industries. She has advised companies on a number of financial matters related to year-end audit and financial projections to secure factoring and bank financing.

In addition, Baluka’s professional background includes providing litigation support services. She also provides a variety of accounting and audit-related services to her clients that sponsor various employee benefit plans. During her professional career she has helped numerous clients with taxation related issues.

Prior to practicing in public accounting industry, she worked in the accounting department of a food distribution company. She earned her Bachelor’s Degrees in Accounting and Finance from California State University - Northridge. She is a member of the American Institute of Public Accountants and California Society of Certified Public Accountants. Her previous community involvement includes volunteer income tax assistance for low income and senior citizens.

VREZHUI MISSAKIAN

Vrezhui Missakian has been practicing in the field of taxation for 14 years as a public accountant with nationally recognized firms. She is a generalist with experience in high net worth individuals, trusts and estates, sole proprietorships, partnerships, S and C Corporations, nonprofit organizations, multi-state and international taxation. Her experience includes industries such as retail and franchise, real estate, manufacturing, construction, technology and multimedia and entertainment. She also has experience in preparing and reviewing provisions for audit/review engagements.

Missakian recently left an expanding career with one of L.A.’s largest accounting firms to open her own shop. Her excellent relationships with a good half dozen of her clients allowed her to make this very bold move. Further, as the mother of two young children, this new career challenge allows her more flexibility and more time with her children.

She serves as Board Treasurer and Audit Committee Chair of Valley Community Healthcare. She has been actively involved on the board of VCH for the past three years. She brings a professional finance point of view to the complicated financial issues that face a medical services nonprofit.
Building a healthy community is magical.
You are the magic wand.

For nearly 50 years, Valley Community Healthcare has been the trusted medical home for San Fernando Valley's low-income men, women and children — almost 25,000 in 2017 alone.

Building and sustaining a healthy community takes all of us. Join us to help continue this tradition!

Find out how you can help build a healthy and successful community Please contact Judi Rose at: 818.301.6321 or jrose@vchcare.org

Valley Community Healthcare, a private, non-profit 501(c)(3) charitable agency.
HONOREES

BANKING – CLIENT SERVICES AWARD

PAULA BAHAMON

Mission Valley Bank

Paula Bahamon is Vice President of Business Banking at Mission Valley Bank, based in Sun Valley. She is responsible for acquiring and retaining influential (large and small) business entities in the San Fernando and Santa Clarita valleys. She provides consultancy to current as well as prospective clients at the local and regional levels. Her responsibilities also include providing community outreach in an advisory capacity to business owners for financial literacy. She is also currently a mentor to aspiring leaders specializing in small business development and client relations through the Women’s Collaborative Mentoring Program.

Bahamon has spent her career specializing in the support and growth of small to mid-sized businesses. She has extensive commercial banking experience, specializing in small business, business development, and client relationship management. As a results-oriented banker with broad-based management skills, she has earned a solid reputation as a skilled and knowledgeable business banker. She possesses a depth of experience and clear vision of the local area business climate. This, coupled with her personal approach to identifying unique financial solutions, tailored to the needs of each client, make her a tremendous asset to her clients, her community and Mission Valley Bank.

Through her experience with clients, Bahamon realizes that when she connects with people emotionally, it is a lot easier to help them accomplish their financial dreams. This, she found, is the essence of a community bank. While the list of her professional successes is long, the value she provides through her creative and determined innovation is best described by the clients she serves, and they routinely sing her praises.

ACCOUNTING – TRAIL BLAZER AWARD

LAURA AZZALINA RIGALI

Illuminate

Laura Azzalina 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 quickly moved into private accounting at startups. She has served in CFO roles in startups across various industries, from travel, fashions, and lifestyle to renewable energy and technology. Today she’s a strategic advisor and coach to startups, growing companies, and executives.

Her greatest joy is working with people to help them achieve their goals and live fulfilling, rewarding lives. In her coaching, she specializes in financial empowerment for CEOs and entrepreneurs – helping leaders step fully into their CEO roles by understanding financial management, which seems to be the biggest gap in knowledge for leaders of growing businesses.

Rigali especially loves helping women. She has found that with women, lack of knowledge is coupled with shame, embarrassment, and fear and there is no safe space for them to have questions answered where they won’t feel judged. She’s been shocked about how successful women can so quickly feel so small and inferior. Rigali has taken it on as her personal mission, and it’s been her greatest joy to help women reclaim their self-worth, feel proud of their accomplishments, and feel empowered to run successful businesses and achieve the economic freedom and equality they so deserve.
Karen Brown is a senior banking officer who has enjoyed 30 years in commercial lending and finance to middle market companies in the greater Los Angeles area. She has worked with a wide variety of clients in numerous industries at various stages of development, to help grow their business. As Senior Vice President and Unit Lead, she also oversees a team of relationship managers for First Bank, and assists where needed to the group’s entire client relationship portfolio.

Brown is often called upon when a CEO, CFO or business owner of a privately held company reaches out to one their Centers of Influence in which CPAs, attorneys, insurance brokers and consultants may assist them with meeting an identified finance need. Working together with these Centers of Influence, Brown meets with the client and provides insightful reviews of their commercial banking of finance needs. This may include innovative loan structuring, borrowing capacity, pricing, regulatory concerns or service related issues with their current banking arrangement.

Part of Brown’s success in her profession surely stems from her education and early career, which emphasized innovative solutions to client needs. After graduating from California State University with a BS in Public Administration, Brown spent several years as a senior auditor and collateral manager and in various senior management positions for mid to large sized institutions including City National Bank, California United Bank, US Bank and Pacific Western Bank. In July 2014, she joined First Bank as SVP Team Lead of the San Fernando Valley Regional Office in Woodland Hills.

Barry Cohn joined his wife in her employee benefits company. The name of his company was created by one of the customers saying, "You provide Really Great Employee Benefits." Cohn's positive attitude is infectious to anyone he comes in contact with – even during the challenging time when he was fighting leukemia. He genuinely enjoys and takes pleasure in helping his clients by providing solutions for their HR needs.

Cohn applies the MORE System to his company’s operations. The MORE system is Maximizing Organizational Return on Employees to help businesses achieve a number of goals, including maximizing the return on employee benefits and HR investments; achieving employee benefits and HR goals and objectives for the fewest dollars spent; becoming more attractive to potential employees and carriers; and being an employer of choice. Cohn sees himself and his team as employee advocates. They do not believe in call centers in other states or countries that do not understand your company, your employees and their needs.

The way Cohn has structured the company is such that RGEB’s Employee Advocates help clients’ employees and their families understand their benefits, navigate the health care system, obtain services they are entitled to under their health plan, and resolve claims issues.
INSURANCE – INNOVATION LEADERSHIP AWARD

TERI FRANKEL
Leavitt Insurance Services

Teri Frankel has been consulting with business owners and their families for three decades. Her experience spans a range of disciplines including employee benefits consulting, business and personal insurance planning and healthcare reform compliance. She has helped thousands of people protect their businesses, families, assets and financial future.

Frankel became the Co-Owner and Managing Principal of Leavitt Insurance Services of Los Angeles Inc. on Jan. 1, 2016 after spending 20 years as the President of Taking Care of Benefits Insurance Solutions. Prior to becoming a benefits consultant, she spent 15 years as a Medical Practice Administrator. She studied Health Administration at California State University - Northridge and has continued her education earning her Chartered Benefits Consultant (CBC) from the NAABC, is a Certified CoveredCA Insurance Agent and PPACA Healthcare Reform Specialist.

Frankel’s mission is to provide clients with innovative, cost effective insurance planning strategies to help them achieve the security and peace of mind that comes from knowing they have provided the best possible protection for their business, their employees, and families. Over the course of her long and illustrious career, Frankel has helped thousands of people protect their businesses, families and assets and secured their financial future. Frankel is an active member of the Los Angeles Association of Health Underwriters, the Valley Industry and Commerce Association, PIHRA and ProVisors. She is honored to be a member of Anthem’s Executive Leaders Broker Advisory Council and Kaiser Permanente’s Broker Advisory Forum.

INSURANCE – TRAIL BLAZER AWARD

BYRDIE LIFSON POMPAN
Clear Health Advisors

Byrdie Lifson Pompan has had a long career in client service and advocacy. For 20 years, she was an agent and partner at Creative Artists Agency, the world’s leading entertainment and sports agency. While an agent, she represented many of the entertainment industry’s most respected screenwriters and directors, including many Academy Award winners. Through a deeply personal journey, she grew passionate about the issues surrounding patients’ needs and health care quality. She transitioned out of entertainment and in October of 2013, Pompan and Dr. Valerie Ulene launched Clear Health Advisors, a venture dedicated to improving patient care and committed to excellence.

Clear Health Advisors provide clients with clear, comprehensive and objective medical guidance and case management for all health care issues, so that clients can focus on regaining their health and wellbeing. From identifying the most qualified doctors to providing an accurate and early diagnosis to procuring the best second opinion, researching cutting-edge treatment options and navigating medical emergencies, Pompan and Clear Health Advisors handle each client holistically, compassionately and individually. Accessing appropriate healthcare, especially for less common conditions, can be difficult even for the most savvy, and few are savvy when it comes to the declining health of a loved one.

Pompan offers research, guidance and care management to those most vulnerable, often on a 24/7 basis. Medical care/crisis is not a 9-5 issue. Her patients depend on her care management which has made a life and death difference for almost 100 clients since the inception of her business.
LEGAL – CLIENT SERVICES AWARD
BARRY KURTZ
Lewitt Hackman

Barry Kurtz is the Chair of Lewitt Hackman’s Franchise and Distribution Practice Group, currently one of the largest law departments dedicated to that practice area in 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 franchise 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 is certified as a mediator by the Pepperdine University School of Law, Straus Institute for Dispute Resolution. He is rated 5.0 AV Preeminent, Martindale-Hubbell’s highest award for legal ability and ethics, and has been listed in the directory’s National Bar Register of Preeminent Lawyers since 2008.

LEGAL – INNOVATION LEADERSHIP AWARD
JONATHAN FRASER LIGHT
LightGabler

Jonathan Fraser Light has more than 30 years of experience in the field of employment law. He is AV Preeminent-rated by Martindale Hubbell, the highest peer-review rating possible. As managing attorney at LightGabler, he consults with over 750 companies throughout California regarding their day-to-day employment law needs.

Light has successful jury trial, court trial, appellate, Labor Commission and binding arbitration results in lawsuits and administrative claims involving wrongful termination, sexual harassment, race discrimination, class action, wage and hour, and other employment related matters. He has also appeared on behalf of employers with the federal EEOC and Labor Department, the state Department of Fair Employment and Housing, the National Labor Relations Board, and other government agencies. Light frequently speaks to employer and human resources groups, lecturing on topics such as avoiding sexual harassment, wage and hour issues, business and employment law pitfalls, diversity in the workplace, supervisor strategies, employment law updates, and preparing employee handbooks.

With his more than three decades of legal experience, Light’s clients know that he will always provide them with clear and accurate counsel when they need advice on employee and workplace issues. He offers sound and innovative employment counsel and training programs to companies of all sizes to reduce liability and protect against lawsuits. Light shares his expertise with clients through periodic employment law updates and free roundtable discussions for small groups; sex harassment avoidance training for managers and staff; management strategies for hiring, layoffs, reviews, discipline and terminations; and strategies for protection of proprietary information and trade secrets. Light also enjoys a stellar and long-standing reputation as a skilled trial attorney.
HONOREES

LEGAL – TRAIL BLAZER AWARD

TERRI HILLIARD
Terri Hilliard, PC

Terri Hilliard is the principal of Terri Hilliard, PC. Her practice centers on advanced estate and business succession planning, asset protection, special needs trusts, and family protection planning for seniors. She is also a private mediator focused on helping families, elders, individuals and businesses resolve disputes. She earned her law degree from Loyola Law School in 1989, following her successful business career as an investment advisor. While at Loyola, she was a contributing author of the Loyola Entertainment Law Journal.

Today, she is an admitted member of all California State and Federal Courts, the California State Bar, the Ventura County Bar Association, Estates section, Elder Counsel and Wealth Counsel. Hilliard is accredited with the Veterans Administration and skilled in Medi-Cal Planning. She also trained as a mediator at The Straus Institute, Pepperdine School of Law and Loyola Law School. She is currently a court-approved mediator and has served on Los Angeles Court civil and probate panels.

Elders and people with special needs are among the most vulnerable in the community, and Hilliard is dedicated to helping them, as well as preventing abuse and fraud. She has given her time for many years to the senior and special needs communities, making a significant impact. The creative solutions she helps develop assist elders and their families with finding programs and resources that help older people stay in their homes longer and avoid nursing or care homes. She helps elders find and keep veterans benefits or Medi-Cal benefits, and helps assist seniors financially.

WEALTH MANAGEMENT – CLIENT SERVICES AWARD

SHAWN SHAFER
UBS Financial Services

Shawn Shafer has been a financial advisor for more than 20 years, working the entire time in Valencia and the San Fernando Valley. He entered the industry upon graduation from California State University - Northridge, and has built his business from the ground up over the past two decades. Shafer works with his clients and their other advisors (tax, legal, financial, etc.) to ensure that he has the full picture of their lifestyle and their investment objectives so that he may make the most prudent investment proposals and minimize risk for his clients. He develops financial plans for clients and prospects in order to illustrate where they are and where they will be going in their financial future given their current lifestyle.

Shafer truly lives the UBS mission statement of providing “Advice Beyond Investing” showing every day that he is available to be a resource and provide his expertise in financial planning and wealth management. He has spent the entirety of his career guiding his clients through their respective journeys and enabling them to plan and enjoy their standard of living through their retirement.

Shafer truly lives the UBS mission statement of providing “Advice Beyond Investing” showing every day that he is available to be a resource and provide his expertise in financial planning and wealth management. He has spent the entirety of his career guiding his clients through their respective journeys and enabling them to plan and enjoy their standard of living through their retirement.

Shafer has built his business around one concept – his clients come first. He is there to help, be it by helping circulate a petition to help a client retain custody of a child, helping another client sell his business by facilitating meetings with investment bankers, or any number of life-changing events. He proves to his clients on a daily basis that he is here, listening, understanding, and working for them to help them achieve both their financial and non-financial goals.
WEALTH MANAGEMENT – COMMUNITY SERVICE AWARD

JAKE FURLOW
Wells Fargo Private Bank

After graduating from UCLA with a Bachelor of Arts in History, Jake Furlow began his career in the financial services industry working as a clerk on the floor of the Chicago Stock Exchange. It was here that a fascination with the capital markets began to blossom. In September of 2002, he returned to Los Angeles and accepted a position at Jefferies & Co. working in Institutional Equity and Fixed Income sales. Furlow spent the next decade developing and maintaining relationships with the portfolio management teams of several mutual fund companies and hedge funds. Through this experience he acquired both a strategic and tactical institutional style approach to investing and asset allocation.

He continued in this role at Jefferies & Co. before leaving to join Imperial Capital in Century City. At Imperial he began to take a holistic view of the corporate capital structure to better identify opportunities and inefficiently priced securities across the market for his clients. In 2013 he joined Morgan Stanley as a financial advisor and last year, he joined Wells Fargo Private Bank.

Furlow believes that a balanced life is the essence of happiness. As such, he makes service to the community as much a part of life as possible. He volunteers as a coach through American Youth Soccer Association, Conejo Youth Basketball Association, 101 Rams Pop Warner Football, and serves on the Board of Directors of the Make a Wish Foundation Tri Counties Chapter and Westlake Baseball Association. He is also a member of the UCLA Alumni Association, the Ventura Chapter of the Surfrider Foundation, and volunteers as a mentor with Stoked LA.

WEALTH MANAGEMENT – TRAILBLAZER AWARD

SARAH REZNICK
Edward Jones

Sarah Reznick has been in the financial services industry for just shy of a decade and has operated one of the fastest growing Edward Jones offices in Southern California. Reznick runs a thriving, client-friendly office and is truly committed to helping not only her clients but also her colleagues and her community.

Reznick has paved her way and become a legitimate trailblazer in her industry, successfully targeting working with other women and building her practice through developing strong relationships with some of the most trusted advisors in the San Fernando Valley. She volunteers on behalf of her company to mentor and develop all the female financial advisors in her region of 54 advisors and has made dramatic and significant impact on many of their careers.

Reznick blazes a significant trail after hours as well. She is the GLA for her ProVisors Group Westlake 8, is co-founder of the West Valley Women’s group of ProVisors, President of Women to Women Westlake, started Camarillo Women in Business, was the previous founder of Pro Talk Toastmasters, teaches networking to various chambers throughout the Valley and Ventura County, is a Rotarian, and is on the Board for Big Brothers Big Sisters.
When it comes to employment law, this is not a good idea:
1. Paula Bahamon speaks after she was announced as a winner.
2. Karen Brown accepts her award.
3. Argishti Avetyan of Wells Fargo, left, presents an award to Barry Kurtz. Charles Crumpley is at right.
4. Teri Frankel, center, gets her award from Tamara Gurney of Mission Valley Bank and Charles Crumpley.
5. More than 100 attended the Trusted Advisors luncheon at The Garland in North Hollywood.
7. Michelle Rodriguez, Irma Amarillas, Sherri Goodman, Veronica Omer, Diana Reyes, Marian Sanchez and Heather Hoffman, all of Wells Fargo.