Mother-Daughter Business Doing Swimmingly

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Mother, Daughter Immersed in 40-Year Labor of Love

Swimwear Maker Moves In Market In Its Own Way

**Felicia Madrigal** sees Laguna Beach-based Merrilee’s Swimwear returning to shelves at popular retail chains, including PacSun and Nordstrom.

“I’ve been romancing the idea of going wholesale again,” said Madrigal, whose mother, Merrilee Madrigal, opened the company’s first shop in 1977.

“My mom has worked so hard for so long, and I’d like to see this business grow in the near future—on a larger scale than what we’ve been doing— in hopes that one day she can sell and retire.”

Merrilee, meanwhile, enjoys the status quo, as “there is better control,” she said. The duo operates stores in Laguna Beach and Huntington Beach that carry the company’s swimwear collection, along with other apparel and home goods.

“Your are not as vulnerable to fluctuations in the market, and you are not dependent on other retailers,” Mercile said of their current business model. “You can do what you want.”

Mother and daughter “butt heads a lot” but also depend on each other’s strengths to create fabric patterns, source materials from Spain and Italy, design swimwear, and run manufacturing in the back of the Laguna Beach store. They also “beat the streets” of Los Angeles’ Garment District once a week to shop for women’s clothing, which accounts for about 58% of the company’s nearly $3 million in annual sales, based on a Business Journal estimate. Home goods and accessories—a relatively new category—contribute another 15%. Its swimwear line represents about 27% of the total.

Merrilee’s Isopération 13a 1% xqnt es in sales in 2015, and a 19% increase last year. Before it expanded store offerings, “It was a lot harder,” Felixia said, adding that if a customer walked in and wasn’t looking for swimwear, the pair would lose out “on a good opportunity.”

Felicia Madrigal, referring to pillows and blankets made with Kathmandu’s ikat fabric, whose yarns are tie-dyed before weaving.

The self-proclaimed “OC hipster” started making swimwear in the 1970s out of “Indian tapestry clothes” before stitch fabrics became the industry norm.

“I used to make my (bikini) patterns out of grocery store bags,” she said. “I put them in staff shops on consignment, and also sold them on street corners till I got my first shop.”

The Huntington Beach store was a success, enabling her to open a second, 5,000-square-foot location in 1986 in Laguna Beach. She also opened a sewing factory on Fifth and Fairview in Santa Ana to accommodate several retail accounts, including Pacific Sunwear of California Inc. in Anaheim and the now-defunct Wet Seal LLC.

Merrilee discovered by 1996 that her business could be more profitable and less stressful if she got out of wholesale. She brought 16 sewing machines and a 12-foot cutting table to the Laguna Beach location on Pacific Coast Highway, which also doubles as the company’s design studio and stockroom and where she now employs about 20 people.

“When you sell wholesale, everybody’s margins are much less,” she said. “I can go home at night, and I don’t have to worry about a lot … Who gets to design, sample and manufacture, all in a 5,000-square-foot space by the beach in Laguna—nobody.”

Merrilee started bringing her daughter to work when she was a baby, and as a little girl, Felicia modeled children’s swimwear and later helped her mom at trade shows. She worked at the store while in high school and eventually moved into management.

“I’ve been her right-hand man for years now—since college,” Felicia said. “It’s nice to work together and share some of the responsibilities around here, because definitely it’s not a one-man show.”

The pair focus on “sexier” styles that cater to a “niche market,” mostly from “where our roots are” in coastal Southern California.

“We get in here people who are in high school, women in their 20s who love our swimwear, moms,” Merrilee said. “The Laguna Beach trolley drops off loads of people at our corner every 15 minutes. That helps a lot in summertime.

Their current swimwear collection features about 20 tops and bottoms designs and another half-dozen one-piece suits. Most have “Moroccan prints and Middle Eastern overlays” and are lined with solid color fabrics so they’re reversible.

The Madrigals have also reimagined several of the brand’s original styles.

“Felicia has a finger on the pulse,” Merrilee said. “She told me, ‘Mom we should bring back the suit from the ‘Baywatch’ days’ of the 1990s, ‘so I did, and it was a hit. We redid the cut in the rear—it’s not as covering.’

The company’s design archives serve as its competitive edge, Felicia said, adding that “there isn’t very many authentic small businesses left that have a history. There are a lot of startups and emerging ideas, but we are one of the very few original brands with a story to tell.”

Allegro Targets Third-Phase Clinical Trial Early 2018

**Vicken Karageozian** plans to take their company to the exit sans venture capital. San Juan Capistrano-based Allegro Ophthalmics LLC, which develops drugs for vitreoretinal diseases—those that affect the back part of the eye, such as diabetic retinopathy and macular degeneration—is the third company that Hampar Karageozian have co-founded in vitreoretinal drug development.

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Glass Company Breaks With Traditions to Thrive

3rd-Gen Owner Nabs Big Accounts; Markets Online

Greg Wingert took the time to hear out the Mater Dei High School guidance counselor’s pitch for college, but the senior’s mind was already set on joining the family business.

“I kept telling her, ‘No. I’m going to work for my dad, and yes, I’m sure I’m going to want to do it forever—it’s wonderful.’ And here I am, 40 years later,” said Wingert, now the owner of Anaheim Glass Inc. “I enjoy my job nine and a half days out of 10.”

Yet there are no plans for his three children to follow in his footsteps.

“I kind of steered them away from the business because it’s changed so much,” Wingert said. “Back in the day, we were the only glass shop in Anaheim, and now there’s all these guys doing it out of their garages.”

Mr. Fixit

His grandfather Nick Wingert started the business in 1945 after arriving from Omaha, Neb., by freight train. He opened a wrecking yard in Long Beach with his brother, and after getting injured, set up shop in Anaheim, selling auto parts and windshields. Glass eventually prevailed.

“My grandpa was Mr. Fixit,” he said. “They used to say, ‘If Nick can’t fix it, you might as well throw it away . . . I had a shop uniform and was working here since I was 10 years old. After school, I just wanted to come here and hang out. I used to teach me how to do projects and work on things.”

Anaheim Glass was also where his father, Jim, worked until he passed the baton on to Greg in 1998.

“He’s 80 years old, and he still stops by every day, giving the guys a hard time and teasing them,” Wingert said.

The Money Trail

He expanded the business from auto and residential glass replacement to servicing commercial accounts, including Disneyland Resort, Honda Center, Angel Stadium of Anaheim, Anaheim Convention Center and local hotels and restaurant chains.

“We’re kind of going where the money is,” Wingert said, explaining that the diversification has also helped the company survive economic downturns because hotels and other customer-facing businesses “still have to replace that broken mirror or sliding glass door if they want to rent you that $400-a-night room.”

The Great Recession also nudged him to merge operations in 2010 with Brea-based Brandidge Glass, another long-standing family-owned business.

Future Thinking

Everyone was talking about the economy, and I was becoming somewhat concerned,” Wingert said. “I started meeting once a week with a group of Christian businessmen—Christian Business Men’s Connection of OC. We’d talk about different business strategies and what we can do to build our business without getting swallowed up by somebody. Some of my mentors recommended that I buy another company to get their book of business.”

Competitor Brundige Glass appeared to be the right fit. The founder’s son, Tim Brundige, and Wingert already “talked all the time and shared business secrets.” They also “borrowed each other’s employees” when a bigger job would come along.

After long consideration and lots of prayer, I asked him if he would consider merging the companies, make the same money he was making, and do outside sales—which he loves to do—and have no headaches,” Wingert said. “I thought he’d fall over in his chair, but he said yes. We merged [fleets] and put everything here in one shop. We also kept all workers.

Anaheim Glass employs 10 at its 10,000-square-foot facility. Wingert said he’ll finish the year with $1.5 million in revenue—the company’s best yet.

Future success will include leveraging digital-native millennials, some of whom are now buying homes and raising families.

“We don’t want to be a stagnant, 70-year-old company who’s depending on the good old boys coming in,” he said. “Customers now communicate via computer or texting. Money we spend on advertising goes to Yelp and Google.”

Allegro

Allegro’s lead drug candidate, Luminate, an integrin peptide therapy, is made to treat vitreoretinal diseases by regressing and inhibiting new blood vessel formation. It’s based on ALG-1001, an integrin peptide inhibiting new blood vessel formation. The current drug therapy using anti-VEGFs in macular edema; and diabetic retinopathy. Its most immediate targets are VEGF-mediated vision loss caused by diabetes: diabetic macular edema and diabetic retinopathy. Vicken noted that most available drugs require monthly injections, whereas Allegro’s has thus far shown that it can last up to four months before another injection is needed.

The company completed enrollment for a 108-patient second-phase clinical trial for diabetic retinopathy and another 75-patient second-phase clinical trial for diabetic macular edema. It is analyzing data for the former indication. For the latter indication, Allegro said Luminate demonstrated safety and efficacy in an initial second-phase trial as a stand-alone treating diabetic macular edema. The company will now investigate the drug’s efficacy when injected with anti-VEGFs in a five-month multicenter trial.

Vicken said the company plans to move into phase three early next year, and he’s not ruling out acquisition or an initial public offering.

Allegro’s nine-member board of directors includes veteran healthcare investor Bill Link, co-founder and a managing director of Menlo Park-based healthcare investment firm Versant Ventures, which maintains a Newport Beach presence. The Karageozians and Park serve on the board.

Barry Kuppermann, professor of ophthalmology and biomedical engineering at the University of California-Irvine and chief of retinal surgery at UCI’s Gavin Herbert Eye Institute, sits on the company’s scientific board.
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ALL TIMES PACIFIC | *SUBJECT TO NFL’S FLEX SCHEDULING

PRESEASON 1
8/13 | 5:00PM

PRESEASON 2
8/20 | 5:00PM

PRESEASON 3
8/26 | 5:00PM

PRESEASON 4
8/31 | 7:00PM

WEEK 1
9/11 | 7:20PM

WEEK 2
9/17 | 1:05PM

WEEK 3
9/24 | 1:25PM

WEEK 4
10/1 | 1:05PM

WEEK 5*
10/8 | 10:00AM

WEEK 6*
10/15 | 1:25PM

WEEK 7*
10/22 | 1:25PM

WEEK 8*
10/29 | 10:00AM

WEEK 9*
11/12 | 10:00AM

WEEK 10*
11/19 | 1:05PM

WEEK 11*
11/23 | 1:30PM

WEEK 12
12/3 | 1:05PM

WEEK 13*
12/10 | 1:05PM

WEEK 14*
12/16 | 5:30PM

WEEK 15
12/24 | 10:00AM

WEEK 16
12/31 | 1:25PM
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8 Things a Small Business Should Do To Protect Itself From Employee Liability

Employee lawsuits are extremely active in California and small businesses are not immune. Understanding and complying with employment laws is more important than ever. To reduce the risk of an employee lawsuit, consider the following:

1. Understand the difference between exempt and non-exempt and pay employees according to their correct classification. Employees are not exempt from state or federal overtime laws unless an exemption applies. Become familiar with the Wage Order that pertains to your business and review employee job duties to determine whether an overtime exemption applies. Without an exemption, the employee must be treated as a non-exempt employee.

2. Provide legally-compliant meal and rest breaks to non-exempt employees and implement good timekeeping practices. California employers must provide non-exempt employees who work more than five hours in a workday with a minimum 30-minute unpaid, uninterrupted meal break, starting no later than the end of the fifth hour of work. Each day that an employer fails to make a required meal or rest break available, the employee is owed a premium equal to one hour of pay at the employee’s regular rate. Failing to make compliant meal and rest periods available exposes a business to potential litigation, including class action lawsuits and claims under the Private Attorneys General Act (PAGA). Keep good records of your employee’s time worked, including the time the employee began and ended the meal period. Overtime pay should be accurate and match the time records.

3. Know when to classify workers as employees and when they may work as independent contractors. If the business controls how work is performed, the location where work is performed, and supplies the tools to perform the work, this is a good indication the worker may not be an independent contractor. True independent contractors generally have an established business, perform work unrelated to the focus of your business, make their services available to other companies, and control the means and methods of their work. Potential liabilities for misclassification include liability for unpaid payroll taxes, unemployment benefits, disability insurance, workers’ compensation claims, and wage and hour claims. Significant civil penalties may be imposed by state and federal agencies as well.

4. Review pay practices, particularly when hiring new employees. The California Fair Pay Act applies to all employers and includes protections against wage discrimination based on sex, race or ethnicity for substantially similar work. Set salaries based on requirements, expectations, and qualifications of the employee and not solely on the employee’s prior earnings.

5. Check with state, city, and county governments for local ordinances, including minimum wage and sick pay laws that may impact your business. If you have employees working in Northern California, and some Southern California cities including Los Angeles, Long Beach, Malibu, Pasadena and Santa Monica, you may need to revise your policies. Post and provide to employees all required federal, state, and local employment notices. Posters must be conspicuously displayed and easily seen by employees and applicants. Many of the required posters and pamphlets are available in multiple languages on state and federal agency websites.

6. Consider implementing arbitration agreements with class action waivers if you employ non-exempt employees. Having an enforceable arbitration agreement in place can mean the difference between an individual arbitration and a class action lawsuit. While the company is responsible for paying the arbitrator’s fees, if it is determined that the employee waived the right to participate in a class action lawsuit the reduced risk to the employer generally outweighs those fees. The arbitration process is often confidential and may reduce the possibility of negative publicity that may occur with litigation.

7. Understand paid sick leave and other leave obligations. California law requires employers to provide paid sick leave in an amount that is the greater of three days or 24 hours each year, including providing paid sick leave to part-time and temporary employees. Employers may elect to use an accrual method providing at least one hour of paid sick leave for every 30 hours worked. Check local ordinances where your employees perform work, as paid sick leave laws under some ordinances provide even greater benefits. Other California leave obligations for small businesses include pregnancy disability leave, leave under the Fair Employment and Housing Act and/or American with Disabilities Act, time off for jury duty, voting time leave, military service leave, school appearance leave, and others.

8. Don’t ignore employee issues. Employee problems may appear to start small but they can escalate very quickly. When an employer learns of an employee complaint, address the issue and diffuse the situation; investigate where necessary. Ignoring the problem generally doesn’t make it go away, and you will likely find that when an issue is addressed early and sufficiently, it can be contained.

Resources for small business are available on federal, state and local websites such as the United States Department of Labor (DOL), the California Division of Labor Standards Enforcement (DLSE), the Employment Development Department (EDD), the Occupational Safety and Health Administration (OSHA), and the Small Business Administration (SBA). Competent employment law counsel can also interpret and serve as an additional resource for small business employers. Take steps to protect your business from employee lawsuits and learn the law. Prevention is key.

Colleen M. McCarthy, Esq. is a Partner and chairs the Firm’s Employment Practices Group. She has dedicated her practice to representing and protecting employers, through preventative counseling and sound practical advice. Ms. McCarthy has counseled employers about the complicated employment laws that impact their businesses to ensure that they are in compliance, and to reduce the chance of costly litigation.
Weintraub Tobin has a long history of helping family businesses grow and succeed. With more than 70 attorneys spanning five offices throughout the State, we’ve assisted entrepreneurs both large and small, with everything from routine legal services to bet-the-company litigation. We pride ourselves in providing exceptional legal assistance at competitive rates.

Some of our clients have opened restaurants, bakeries, printing shops and manufacturing facilities. Others have forged paths in media, agriculture, healthcare and technology. All of them began with a little money, a simple idea, and a big dream. While each family-owned business is different, they all face the unique challenge of synthesizing organizational charts with a family tree. They must overcome the difficulties associated with running any sophisticated enterprise, while navigating the often complicated relationships that are distinctly inherent in family-run businesses. All of these issues must be understood, considered and supported.

Our lawyers recognize that what distinguishes family-owned businesses is family. We know that adding family values – pride, loyalty, cohesiveness, trust – makes it a stronger, more resilient enterprise. Furthermore, our attorneys are leaders in the community, donating their time, energy, and effort to support philanthropic and community-service organizations throughout the state.

We are more than just experienced lawyers; we understand the multifaceted nuances involved in leading a family business and can be there as your seasoned business counselors. Our lawyers work with first-generation businesses to show them how to operate professionally while anticipating and avoiding problems. We also assist in the process of transferring the business to the second and third generations. Most importantly, we pride ourselves in providing creative and dynamic services that help our clients proactively address the legal challenges they face.

The most successful family businesses recognize the many challenges they will face, and they turn for help to professionals who know business and understand families. Weintraub Tobin offers its family business clients access to legal areas their companies need, allowing them to draw upon the experience of the lawyers throughout our firm in areas such as business structuring, finance, business contracts, federal and state taxation, estate planning, employment law, employee benefits, and all areas of dispute resolution and litigation.

Weintraub Tobin is located at 23 Corporate Plaza Drive, Newport Beach, CA 92660. Call 949.760.0204 for more information.

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Sherry S. Bragg
Sherry is a shareholder in the firm’s Litigation Practice and Employment Law Groups; the firm’s former co-Managing Partner; and a former member of the firm’s Board of Directors. As an AV-rated attorney, Sherry has represented both plaintiffs and defendants in a wide variety of business disputes and tort cases for 30 years. Sherry can be reached at sbragg@weintraub.com.
As we head into the second half of the year, taking time to identify key issues you are facing and tackle your biggest challenges will be the best way to finish this year strong, and develop next year’s plan. At Haskell & White, we see many business owners and executives try to tackle too many issues or have difficulty separating the strategic issues from the day-to-day noise.

Consistently focusing on the right goals and objectives will bring about the maximum growth and profit. An interactive diagnostic tool is available on the Haskell & White website to help you get started: www.hwcpa.com/resources/mindshop.php. Results of the diagnostic are immediate and a copy is emailed to you.

The data collected from completed surveys during the past 12 months have identified the top three business factors as profit, sales/marketing and people/team. In the personal development area, the most common areas that need improvement include time management, life balance and health. Are your issues the same?

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- **Learn** the three main issues that present the greatest overall business impact.
- **Understand** the financial and non-financial consequences of problem resolution.
- **Discover** the magnitude of your company’s primary problems and opportunities.
- **Identify** key issues that require immediate attention so you can reach your goals.

Please visit www.hwcpa.com to access the diagnostic and identify your top three business issues. If you need help in completing the diagnostic or implementing solutions to address your top three issues, please call Wayne Pinnell 949.450.6314 or Pat Ross at 949.450.6362.

**Wayne R. Pinnell**
Wayne R. Pinnell, CPA is the managing partner of Haskell & White LLP, one of the largest independently owned accounting, auditing and tax consulting firms in Southern California, servicing public and private middle-market companies. Haskell & White works with companies in a broad range of industries including real estate, manufacturing, distribution, life science, technology and retail. The firm provides solid expertise and services to its clients in the tax and audit disciplines, including advising SEC registrants and consulting on mergers and acquisitions. He can be reached at wpinnell@hwcpa.com.

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**What Are the 3 Biggest Issues Limiting the Growth and Profit in Your Business?**

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<th>Personal Development Questions</th>
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In today’s world, one of the most critical and complex decisions is when and how to sell your business. It is also the one decision that business owners are often least prepared to make. For many, this decision is only encountered once in a lifetime. Business owners have managed or run their businesses for decades, but have little to no experience with the process surrounding his or her own exit. There are many considerations to evaluate when developing your own exit strategy, therefore starting early and planning in advance will optimize your experience.

Before you begin the process of selling, there are several factors to consider including: when should the business be sold? How should I structure the deal? What value do I need, and is my business set up for that pricing? How does the process work?

Key Areas to Consider When Deciding to Sell:

Should I Sell?

There are many reasons one might consider selling their business. Among those could be retirement, reduced corporate profitability, financial or health concerns personally, or simply a desire to diversify and try something new. It is important that no matter what the reason, a sale should be thought out and actively planned versus being a reactionary process. Maximizing your value begins with a well-thought-out plan. That plan should include your clear set goals, objectives and who’s involved or at risk (employees, stakeholders, family, etc). How and when a deal is set up will greatly depend on this plan and what strategic direction you would like to see your business go. Family considerations, employee considerations and succession of your legacy all go into the decision to sell and how to sell.

Value ultimately becomes a key deciding part of whether the timing to sell is right. Numerous factors go into your value, and talking with a valuation expert may help with this decision process. Factors that are considered can include: customer relationships, brand name and recognition, tangible assets being acquired, cash flows and profitability, market segments, market share and synergies to be obtained through a transaction, and quality of your employees and management team. Due to emotional and personal attachments to the company, it may be hard to separate the business facts from the perceived value of a company. Having an outside expert perspective can help with properly assessing value and coming up with a plan to increase that value if needed. It is important to get the right value for your company for you to continue to have the lifestyle you are accustomed to.

Structuring the Deal

Once the decision has been made to sell, the planning will be key. There are many ways to structure your deal, all of which have very different outcomes. Knowing what is important to you, your family and your employment team will affect how you structure your deal. Remember there is no perfect deal, you will need to evaluate all your options and decide on what has the overall best outcome.

Exit strategies can include: selling or transfer of ownership to a family member; setting up an ESOP and selling a portion or all of the company to the employees; sale to a third party, either through private sale or through acquisition by a public company; taking your company public through an IPO and so on. Each of these options require special consideration and planning. Knowing what your clear objectives are and realistically understanding your company’s strengths and weaknesses will help you make the right choice.

Once your method of exit has been determined, the planning process can begin. You will need to make sure your finances are in order, your exit objectives are clear, you have a strong handle on the value of your company and your strategic plan is in place.

The Process

This can be a highly emotional process for some, and that emotion can influence judgment. Owning and operating one’s business for decades is very personal and can lead to missteps during the process. Revisit if all the facts you’ve contemplated above in the planning stages are still holding true. Ensure your objective is clear, you have considered all potential stakeholders and you are clear on your options and alternatives. Look for similar benchmarks or sales in your business segment to compare yours to. Given what you see, is your definition of value consistent with the current market conditions and definition of value?

It is critical to surround yourself with quality, trusted advisors to help guide the way. At a minimum, you will need legal representation, corporate finance and tax assistance, valuation support, broker/dealer and sell side due diligence. Once you have decided that selling is inevitable, it is important to bring these teams together early in the planning phase. Synergies develop early and can save you time on the back end. A specific timeline, deal structure and value proposition will come from these meetings and will set you up for realizing the maximum profit potential possible. Developing income tax strategies early in the selling process is critical to maximize profits and to defer personal taxes. Items that should be discussed with your Tax CPA during the selling process are: Alternative Minimum Taxes, Estimated Tax Payments and Timing of Charitable Gifting.

Strategic buyers will need to be identified and courted. There are many ways to handle this process, and depending on the number of potential suitors, your process may be adjusted. You may choose to break the potential buyers into groups in order to position your value propositions in a way to optimize exposure. There is a great deal of back and forth in data transmission during this phase, so data rooms are often the best way to manage access and information flow.

Once the offers are on the table, a decision will need to be made. Money isn’t always everything. One must consider the price, as well as terms and conditions to close before deciding on the best offer. Once you have settled on a final bidder, you’ll typically draft a letter of intent to set out the key terms of the sale. Once the sale is done, ensuring the operations continue smoothly during the transition phase is key. When the timing is right, communicate clearly and quickly with your employees. Keeping them informed will keep the gossip mill at bay and will keep anxieties to a manageable level.

After your business is sold, there are a whole new set of challenges you will face. Personal wealth managers become highly important and effective at helping you to maintain and manage your wealth to achieve your personal needs and goals. As you turn toward the future, what is best for you and your family is ultimately up to you.

Kathy Lawson
Kathy Lawson, CPA, is a partner in the Irvine office of SingerLewak LLP. Her industry focus is on privately held organizations and nonprofits in Orange County. Kathy can be reached at klawson@singerlewak.com or by phone at 949.261.8600.
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Affluent individuals may find that the demands of work, family and other responsibilities can leave little time to manage their day-to-day financial affairs. A “Family Office” is an organization that assumes the day-to-day administration and management of a family’s affairs. The capabilities provided by a Family Office can include a wide range of functions, such as recordkeeping services, expense management, bill paying, bookkeeping services, tax compliance work, access to private banking and private trust services, document management, family member financial education, family support services, risk management, philanthropic planning and family governance.

Of course, true expertise in such a wide range of functions is not commonly found under one roof, as well as the fact that there can be regulatory issues for a single firm to legally provide this spectrum of services. As such, a Family Office firm typically provides a core group of services and works with the client to select a team of professional advisors to handle the remaining needs. The Family Office firm can sometimes perform centralized management and oversight of those services.

**How We Can Help**

At HMWC CPAs & Business Advisors, our Complete Financial Office Solutions group provides Family Office services to wealthy families and individuals. These clients recognize that our CPA firm is well-equipped to handle accounting and financial matters, while offering unbiased insights and expertise in working with investment managers, attorneys, insurance agents and other service providers. Clients value our expertise in rendering the following services:

- Cash flow and budget management
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- Bank reconciliations
- Personal financial statement preparation
- Tax return compliance for family members, trusts and estates
- Household employee payroll
- Interactions with professional advisory team

Since these activities can be very time consuming, and complicated, for families with a wide range of assets, clients value our expertise in simplifying the process for them. This allows clients to spend their time on the things that matter most to them, minimizing mundane financial issues. HMWC’s Complete Financial Office Solutions group is a cost-effective alternative for clients who desire exceptional service, objective guidance and integrity. Contact us to learn more about our Family Office services.

Susan Levinstein, CPA, is a partner with HMWC CPAs & Business Advisors (www.hmwccpa.com) in Tustin. She heads the firm’s Complete Financial Office Solutions department. Susan can be contacted at 714.505.9000.
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As family business owners near retirement age, they face many difficult decisions: Will they be able to support their retirement needs? Should they pass down the business to the next generation or sell to a third-party? Are they going to be able to truly let go of the business?

Helping business owners clarify their retirement goals, plan ahead for the tax impact and loss of recurring income due to the sale, and navigate through complex family dynamics is key to successfully advising these clients. The following is an overview of these issues and concerns.

Using Cash Flow Modeling to Organize and Assess Goals

The first critical step in the planning process is for a business owner to determine and organize their goals. It is a challenge to create a financial plan if the ultimate end goal is not defined. Many times though it is difficult for business owners to articulate their goals. This is often due to the concern of not knowing all of the possible options available or an overall lack of clarity as to the impact (both positive and negative) of their financial decisions. If they are provided clarity as to their options and the impact of these decisions, they will likely be more definitive as to their desired financial direction and the actions they need to take to achieve it.

One way to provide this clarity is to develop different what-if cash flow scenarios. For example cash flow models can be created to show the impact of selling or not selling the business, of selling the business for less than what was initially expected, of taxes incurred from a sale, and other possible what-if scenarios. By illustrating the impact of these decisions on their ability to obtain their desired retirement lifestyle, the owner will be better equipped to make decisions and determine goals.

Keeping the Business – Family Dynamic Concerns

The statistics regarding family businesses does not provide optimism regarding their long-term sustainability.

- Estimated that 40.3% of family business owners expect to retire. 1
- 70% of family businesses would like to pass their business on to the next generation, of which only 30% will actually be successful. 2
- Nearly 43% of business owners have no succession plan in place. 3

The lack of success in transitioning the business from one generation to another results from the difficulty in balancing the personal well-being of the founder/patriarch-matriarch and maintaining family harmony, while continuing the prosperity of the business.

Sustaining this balance is difficult because these goals will often seem to conflict with one another. But, if the founder/owner is able to address the following issues as they transition the business it will help maintain this balance:

- Founder’s transition – what do I do now?
- Ownership, today, tomorrow and over time
- Effective governance, to maintain long-term decision making
- Management of day-to-day operations
- Family employment that is based on merit rather than entitlement

If any of these issues are not properly addressed it could cause considerable family disarray. For example, if the owner’s retirement depends on receiving cash flow from the business, he or she will likely never truly retire and let go. This can cause friction among the subsequent generation who desire to run the business free of the founder’s influence and create their own identity. Ultimately, family harmony may have been better preserved by selling the business in the first place.

Even if these issues are addressed, planning is still needed to transfer ownership of the business while minimizing any possible gift or estate taxes. This is especially the case if the value of the business is substantial.

Selling the Business – Increasing Value and Minimizing Taxes

Ultimately, a business owner may determine the best thing to do for the family is to sell the business. If this is the case, the two primary goals are likely to be to obtain the highest possible sale price and minimizing the amount of taxes incurred from the sale.

Increasing the value of the business is often directly linked to increasing the overall profitability. The owner of the business should consider hiring professional advisors who could help increase business efficiencies and take other measures that could help increase the value.

To minimize taxes, planning will likely need to be done well before there is binding agreement to sell the business. Most times this plan should be developed years before a possible sale. One area to examine is how the business is incorporated. Often a potential buyer wants to purchase the assets of the company instead of it’s stock for various tax reasons, typically to benefit the buyer. In that situation, an owner of a corporation that has made an S-corporation election will likely incur substantially less taxes than an owner of a C-corporation. The selection of corporation entity and the structuring of the purchase (asset sale vs. stock sale) can have significant tax consequences which should be analyzed before the sale is finalized.

If the owner is philanthropically minded, making charitable gifts of company stock could be a viable option to minimize their tax exposure, while also fulfilling their charitable wishes. In this situation, a gift of S-corporation stock to a charitable entity could have adverse tax consequences. Therefore, even though an S-corporation is more beneficial if the sale is structured as an asset sale, it actually is not as beneficial as a C-corporation if the desire to make charitable gifts of stock.

As has been outlined, what an exiting business owner ultimately does with their family business is often a very difficult decision. In addition to the complicated tax issues involved, there are often underlying family dynamic concerns that, if not dealt with properly, could result in significant family disarray. It is important for a business owner to seek the expertise of advisors who can help navigate through these various complex and difficult issues.

Daniel Fan, Director of Wealth Planning, First Foundation Advisors

Daniel Fan serves as the Director of Wealth Planning for First Foundation Advisors. In this role, he oversees the firm’s Wealth Planning department and advises clients on sophisticated wealth strategies. Mr. Fan has over 15 years of experience as a Wealth Planner and specializes in evaluating and optimizing all clients’ wealth plans to meet their financial needs. Mr. Fan is a Certified Financial Planner™ and holds his Juris Doctorate and Master’s in taxation from Pepperdine University School of Law and Golden Gate University respectively. He earned his Bachelor’s degree from the University of California, Los Angeles. Please contact Daniel Fan at dfan@ffinc.com for additional information.

First Foundation Inc.
First Foundation provides personal banking, business banking, private wealth management, trust, and insurance services. The Company has offices in California, Nevada, and Hawaii with headquarters in Irvine, California.
Business and family often do not mix well. It is easier to start a family business than it is to end one. When disputes arise, ground rules are necessary to resolve the disputes or chaos ensues. Accordingly, if you go into business with family members, follow the same formalities you would expect in any other business: (1) retain competent counsel (not your cousin in law school) to draft the formation documents and (2) hire a solid accountant. Regardless of what type of entity you create, ensure the formation documents clearly indicate titles, ownership interests, responsibilities, how much money each person is contributing, grounds for termination of employees, what information is considered a trade secret owned by the entity and how profits and losses will be distributed. The more detail, the better.

Once the formation documents are signed, follow them. Frequently, family members treat a family business like a piggy bank. If one family member needs money to pay a personal bill, he asks for a company distribution or simply takes the money without asking permission. This begins a snowball effect. Soon, other family members are using company money for personal expenses. Records of who spent how much on what are not kept. Inevitably, one family member feels the “distributions” are inequitable and cries foul. Litigation follows. The lawyers make money, and the family business withers.

Litigation involving family members is overly contentious. Many times, the lawsuits stem from a misunderstanding about family members’ rights or roles, neither of which were explained in the formation documents. Childhood wounds are reopened, and the case becomes more about the unkind things said at Thanksgiving dinner than the dispute at hand. Family members wrongly believe they can “throw out” misbehaving members and take away their interest in the company. The members exercising control act hastily and without counsel. When counsel is finally hired, members are surprised to learn how many mistakes they made and that the consequences for these mistakes are severe.

When starting a family business, do not assume you can ignore business formalities. If you treat the family business like a real business, you will reduce the chances for messy litigation if things go south.

Call us when you have a family business dispute – an area where we have significant experience. We will evaluate the dispute, provide you a strategy, and execute it. 949.631.3300, wilson@kleinandwilson.com

Mark B. Wilson
Mr. Wilson, a trial attorney, has won nearly every case he has tried or arbitrated. He lost only one jury trial but then obtained a complete reversal on appeal. This year, Mr. Wilson was listed in the Super Lawyers® Top 50 Orange County list, and he is a past Chair of Orange County Bar Association’s Business Litigation section.
Are You Socially Responsive?

by Ed Hart, Director of the Center for Family Business, Cal State Fullerton Mihaylo College of Business and Economics

Each year, I have the honor and privilege of teaching a group of International Sports MBA students at UC Riverside. These students spend a portion of their time studying in their home country, and then a year here in the United States, where they have time in the classroom, and eventually an internship in the world of sports. Over the past four years, I have had students from places like France, Germany, Russia, Brazil, Korea, Japan, China, Taiwan, Spain, Italy, Mexico and even some from as far away as San Diego, California.

In the early stages of the Sports Leadership course that I teach, we have a lecture on social responsibility in sports. In a recent discussion, we talked about how all individuals and companies have a responsibility to their communities.

In the textbook that we use, Applied Sport Management Skills by Robert Lussier and David Kimball, it talks about four stages of social awareness and involvement for companies. In our recent discussion, I used the example of my previous career as a general manager in minor league baseball.

Built into the contract of my players was the requirement that they each spend one day per month involved in some sort of community outreach program. We provided options, such as speaking at Little League ceremonies, building homes with Habitat for Humanity, visiting kids at children’s hospitals and speaking at elementary schools, just to name a few. Most of our players loved these events, and rarely did we have anyone unwilling to participate or get involved. Typically those not willing to engage in these events were not on our team very long. We always tried to not only win games, but more importantly our biggest goal was to make a positive and lasting impact in our community.

As you look at yourself, and your organization, ask yourself which of these four categories best describes you, and what can you, or your company, do to become more socially responsible and committed to your community.

A few years ago, in my role working with family businesses, we held a workshop called “Does Your Community Know You Are There?” The focus was on giving back to our communities through our time, our talent and/or our treasure. Wing Lam (Wahoo’s Fish Taco), Dennis Kuhl (Los Angeles Angels), and Annemarie Dillard (Dillard’s Department Stores) were our guest speakers. These organizations are the epitome of social responsibility and are well-known for how they give back to the community.

Over the past six years, I have observed dozens of family businesses, and the ones that stand out, that are elite, and the most profitable, all have one thing in common that I can see. They are very generous – with their employees, with their customers and vendors, and in their communities. To me, they appear to be extremely socially responsible.

My challenge to all of us is to look for ways in which we can become more socially responsive. There are so many foundations, schools, children literally battling to survive, and countless other ways in which we can become more involved. We don’t have to look far.

Give back. You have a lot. Give some of it to someone else. We have a little bit of extra time. We have a little bit of extra money. And we all have a lot of talents. Let’s find ways in which we can be more charitable and more giving. One act of kindness towards someone else will never be forgotten. I will always remember the charitable attitudes of my former players much more vividly than anything they ever did on the playing field.

For more information about the Center, contact edhart@fullerton.edu, visit www.csuffamilybusiness.com or call 657.278.7431.
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The mission of the Center for Family Business is to assist you with growing your family business today, tomorrow, and for generations to come. For information about the Center for Family Business, call 657-275-7431, or email edhart@fullerton.edu.

City National Bank Senior Vice President Joe Hernandez addresses the packed East Wing of the Richard Nixon Presidential Library to kick off the 3rd Annual Family Business Hall of Fame.
FAMILY-OWNED BUSINESS AWARD NOMINEES

Baldwin & Sons, Newport Beach
Al Baldwin, Chairman
Ron Baldwin, President of Pacific Coast Communities
Steve Baldwin, President of Heritage Building & Development
Shawn Baldwin, President
Randall Bone, President of Sunrise Co.

Al Baldwin has been in the real estate development and home building business for more than 50 years, and has built 20,000+ homes. Baldwin & Sons, Pacific Coast Communities, Heritage Building & Development, and Sunrise Co. are owned and operated by Al and his three sons and his son-in-law. Their planning and design have earned them many prestigious awards over the years including, Pacific Coast Builders Gold Nugget Awards, the LA County Beautification Award, the American Building Awards, and the National Association of Homebuilders Home of the Year Award. In 2016, they celebrated the grand opening of The Oaks in Portola Hills, located in Trabuco Canyon which will be comprised of 304 distinct luxury homes priced over $1 million.

Balloonzilla, Irvine
Marie Borokoff, CEO
Bryan Borokoff CFO/COO
Jacob Borokoff, Staff
Noah Borokoff, Chief Upper Cleaner

Balloonzilla provides balloon decoration for parties and events, including balloons, bouquets, balloon delivery, balloon arches and helium tank rentals in the Orange County area. Founded in 2004, the company has endured many challenges. Bryan and Marla Borokoff and their sons have survived the recession, and the company suffered a massive fire in 2013 that threatened its survival, but the family persisted and came back stronger than ever. In October 2015, Balloonzilla moved out of the Borokoffs’ garage with two employees and into a new Skylark shop. The Borokoffs are active members in the Association of Bridal Consultants Orange County and National Association of Women Business Owners. The family also donates balloons for many community events and volunteers to help with others.

Bayside / Bistango, Newport Beach
John Ghokassian, Owner
Marc Ghokassian, Co-Owner
Karyn Ghokassian, Co-Owner

The Ghokassian family is one of the most respected forces within the Orange County dining landscape. Their restaurants, Bistango for fine dining in Irvine and Bayside in Newport Beach, have earned legions of loyal guests through the years by continually reinventing. Bayside is a contemporary dining establishment with an extensive menu emphasizing fresh seafood. The 246-seat restaurant overlooks the Newport Harbor and features design elements that showcase an ever-evolving fine art exhibition. Among its many unique features include an open-air dining room, wrap-around patio with built-in heaters and sun drapes, comfortable wicker chairs, Japanese screens and large windows. Live entertainment is offered nightly in the bar and lounge. Bistango has been in business for 28 years, and within these years, has gained a significant following throughout the community. Bistango has been host to many charitable events and activities.

BEST-VIP Chauffered Worldwide, Huntington Beach
Robert Vaughan, President/CEO
Jill Vaughan, Controller

Beginning in 1995, BEST-VIP Chauffered Worldwide has grown from a one-person, one limousine business, to an award-winning, first-class transportation provider with a fleet of more than 140 vehicles and 200+ employees. Starting with the purchase of one limousine, and in 2016 acquiring a highly respected competitor, VIP Limousines & Coaches, BEST-VIP Chauffered founder Robert Vaughan has led the company through an impressive expansion. The company’s commitment to providing guests and clients with the freedom to make the most of their time – and their life – whether for business or leisure travel, has earned Best Chauffered an enviable reputation within the premium transportation services industry. In addition to serving an array of Fortune 500 executives, VIPs, celebrities and leisure travelers, the company continues to distinguish itself by its involvement within the community. Organizations such as Make-A-Wish Foundation, CHOC Children’s Hospital and Living the Dream Foundation are just of few nonprofit organizations that have benefited from Best Chauffered and its volunteer efforts.

Burba Hotel Network, Costa Mesa
Jim Burba, Co-Founder
Bob Hayes, Co-Founder

Burba Hotel Network (BHN) was founded in 2000 on the guiding principle of shared success and BHN’s efforts have demonstrated its commitment to the global community that it serves. Each year, BHN produces the most hotel investment events globally, the guiding principle of shared success and BHN’s efforts have demonstrated its commitment to the global community that it serves. Each year, BHN produces the most hotel investment events globally, and attracts the largest number of industry delegates. The company has a 30+ year history of excellence in producing the world’s most prominent gatherings of the hotel and tourism industry leaders and the global travel community. BHN has successfully completed more than 133 conferences in 22 countries.
Why Do Family-Owned Businesses Matter?

90% of US businesses are family owned.

64% of US GDP is generated by family-owned businesses.

62% of US population is employed by family-owned businesses.

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where nearly 100,000 delegates from around the world have come together to network, conduct business and learn about the latest trends. BHN’s goal is to help hospitality businesses grow by connecting them to upcoming events and the important players who are active in the investment equation – investors, developers, lenders, financial advisors, consultants and more. BHN’s network includes more than 25,000 hotel industry leaders in 140+ countries. Recently, Burba Hotel Network was bought by Northstar Travel Group in Secaucus, N.J., on undisclosed terms.

Café Tu Tu Tango, Orange
Jim Hall, Owner/CEO
Heather Hall, Owner/CFO
Kevin Hall, Manager
Joseph Curto, Investor/Partner
Deborah Curto, Investor/Partner
Tim Applen, Investor
Linda Applen, Investor
Jameson, Hudson and Greyson Hall, Proprietors

Café Tu Tu Tango was established in 1998, and acquired by Jim and Heather Hall in 2008. Jim and Heather loved the concept of tapas and art, and rescued Café Tu Tu Tango. Currently, they employ 60 employees, including several that have been there since day one of their purchase. The restaurant serves Spanish American tapas with an international flair. On any given day, customers can see local artists creating and selling their masterpieces on location. Café Tu Tu Tango has hosted more than 1.25 million people since the Halls purchased the restaurant. Café Tu Tu Tango also provides full-service banquet and off-site catering options for weddings, corporate events and social functions. Jim has also developed a new restaurant concept which will incorporate tapas, entertainment, art and mixology. The first location is in lease negotiations at The Garden Walk in Anaheim.

CGPR LLC, Newport Beach
Chris Goddard, President
Craig Davis, CEO
Dijon, Noel and Chloe, Mascots

Through public relations agency, CGPR, is new to Orange County, the company has established strong connections with local companies that want to tell their stories: Emerald Expositions in San Juan Capistrano is playing a national role in the public lands discussions; Adidas, the outdoor division in LA, is working to encourage fitness through indoor climbing; and SafariLand in Ontario is launching its first auto-activated body-worn camera for law enforcement. CGPR brings more than 40 years of international business expertise, including experience in the White House and at City Hall in New York. CGPR has nationwide presence in terms of clients and locations, in Newport Beach and Marblehead, Mass. Craig Davis, a former investment banker handles the company’s finance, operations and takes care of the couple’s three labs, Dijon, Noel and Chloe. His wife, Chris Goddard, travels 180K miles year for the business.

clubDetox, Laguna Niguel
Lenka Koloma, Founder/President
Rod Schaerfer, Vice President of Operations

clubDetox was born out of a desperate need to find health and energy, when busy mom Lenka Koloma was juggling a demanding career, business, family and kids. clubDetox is a revolutionary facility aimed to provide people the ability to harness their own natural healing powers. clubDetox aims not to fix symptoms, but rather to treat and prevent the root cause of sickness and fatigue: a toxic body. Lenka envisions a future where doctors prescribe detox programs and proper nutrition in the place of medications. Lenka and her team have helped hundreds of clients to heal chronic diseases such as arthritis, diabetes, heart disease, high blood pressure and cancer. Lenka conducts seminars to educate people about health and disease prevention, and inspires others to live a healthier, happier life.

Communications LAB, Orange
Arianna Barrios, CEO
Brian Lochrie, President

Arianna Barrios is communications veteran and, with her husband, Brian Lochrie, they lead an award-winning team of professionals at Communications LAB, a full-service public relations and community outreach firm. Communications LAB was launched in 2013, but its roots and history go back nearly 20 years. Arianna sought to expand her successful public relations and marketing consulting business, which had run under her own banner of Barrios Associates. In 2012, she and Brian began negotiations with Faubel Public Affairs (FPA), where Brian had been president for more than a decade, to acquire a portion of that company’s clients. In 2013, Barrios & Associates purchased the media relations and marketing portfolio of FPA to create a new community outreach and marketing agency. The partnership has proved tremendously successful, growing nearly 30% in its first full year of operation.

CosmetiCare, Newport Beach
Michael Niccole, Founder/Medical Director
Devon Niccole, CEO

CosmetiCare was founded in 1982 by double-board-certified Orange County plastic surgeon, Dr. Michael Niccole. Since then, CosmetiCare has become one of the most recognized names in aesthetic services – not just in Southern California, but throughout the nation. Thought by his patients to be one of the best plastic surgeons in the area, Michael founded and is the
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Baldwin and Sons has been building quality homes for three generations since 1956 and is proud to have built over 20,000 homes and created successful, thriving neighborhoods and communities throughout Southern California. Al Baldwin, CEO of Baldwin & Sons, has been recognized numerous times for his decades of service with the city and other charitable organizations. Such recognitions include Distinguished Citizen Award from Los Angeles County Boy Scouts of America, the National Human Relations Award from the American Jewish Committee and Distinguished Community Service Award from the Anti-Defamation League. He has also served as Chairman and Board Member of Futures for Children, Treasurer and Board Member for the Orange County Performing Arts Center, and President of the City of Hope Construction Alliance.

Baldwin & Sons is proud to announce their nomination for the 2017 Family Owned Business of the Year Award by the Orange County Business Journal. This award recognizes family-owned businesses in Orange County for their business accomplishments as well as their contributions to the local community. The winner of the 2017 Family Owned Business of the Year Award will be announced on Wednesday, June 14th at the 18th Annual Family Owned Business Award Ceremony.

For final floor plans, design and location of homes units may change due to a number of circumstances, including governmental requirements and market demand. Dimensions are approximate in nature and are not intended for final reference. We reserve the right to change home sites, house plans and specifications at any time without prior notice. Home prices will automatically be members of a Homeowners Association (HOA) for which monthly dues will be charged. Check with sales agent for additional information regarding HOA dues. Effective March 2017.
Enzo DeVita is a third-generation designer in the family’s flower business. The family originally started the kebana Flower Shop in 1955 in Naples, Italy. In 1975, the DeVitas moved to Rome and started another successful location called, The Devita Flower Shop. Enzo came to the United States in 1987 with little money and very limited English. In 1999, Enzo opened Floral Creations. Since then, he has coordinated special events and weddings for Orange County’s most prestigious businesses including, The St. Regis, The Ritz Carlton, Pelican Hill Resort, The Montage, The Hilton Waterfront, The Balboa Bay Club, Orange County Performing Arts Center, Pacific Symphony, Disneyland Entertainment and South Coast Plaza. His innovative designs are recognized and admired for their uniqueness and beauty. All the while, his wife Linda is by his side making sure the administrative duties of the business are attended to so he can be free to create and grow the company.

Floyd’s 99 Barbershops, Brea
Bill O’Brien, Owner
Paul O’Brien, Owner
Rob O’Brien, Owner
Anne O’Brien, Marketing
Founded by brothers, Paul, Bill and Rob O’Brien, the first Floyd’s 99 Barbershop opened in downtown Denver in 2001. Employing talented stylists and barbers and offering a full range of services for men and women, their mission was to provide new styles and on-trend cuts with an old school approach to client service. Focused on providing a reasonable experience for every client that comes through the shop doors, the O’Brien brothers’ passion for service and experience has shaped Floyd’s 99 and its staff, creating the magnetic vibe that draws its loyal clientele back time and time again. Floyd’s 99 was named LA Weekly’s “Readers’ Choice: Best Barber Shop” in 2015. The company also contributes greatly to the community, donating time and money to various nonprofits and organizations, including Children’s Hospital OC and Ronald McDonald House.

Fresh Brothers, Irvine
Adam Goldberg, CEO
Scott Goldberg, Executive Chef
The first Fresh Brothers was opened in 2008 by Adam and Debbie Goldberg. Their goal was to take their traditional Chicago-style family recipes, originally created by Adam’s older brother, Scott, and give them a fresh California twist. Fresh Brothers’ signature blend is packed with 100% fresh tomatoes, not concentrate. The mozzarella is all-natural, with no colors, additives or preservatives. Fresh Brothers has been voted the LA Times “Best Pizza in the South Bay,” and the “Best Pizza Restaurant” in the Easy Reader’s Best of the Beach. In addition, Fresh Brothers has received national accolades such as “Best Independent Pizzeria” from Pizza Today. As a nine-year-old company, Fresh Brothers has been able to build a solid brand and culture in 18 communities throughout Southern California. In 2016, Fresh Brothers opened five new stores in Orange County and San Diego, and raised 440,000+ for local schools during its “Pay What You Want” grand opening events.

Granby Studios, Costa Mesa
Jeff Granbery, Owner
Julie Granbery, Partner
Gary Granbery, CFO
Peggy Granbery, Editor
Granby Studios, a multimedia production company, opened in 2008 during challenging economic times. The company’s clients needed different solutions for creative and specialty projects. Granby Studios’ approach to still images and video projects is different than most. Working directly with the artist, and Jeff Granbery’s network of highly experienced talent, ensures that clients’ messages are heard. The firm’s award-winning work showcases advances in the medical, fashion, automotive and technical industries. Every year, Granbury Studios’ family-based staff has helped customers reach their goals by producing an ever-increasing portfolio of stunning imagery, ranging from small projects to full turn-key productions.

Happy Photos, Costa Mesa
Xuong Do, Owner
Margie Lin, CFO
Award-winning photographer Xuong Do and the staff at Happy Photos strive to provide clients with the best in customer service. Xuong has photographed more than 1,000 events and charity functions for more than 13 years with organizations like Harvesters of OC, CASA, Girls Inc., Costa Mesa Chamber of Commerce, Huntington Beach Chamber of Commerce and many others. Xuong has also photographed people and places all over the world from California to Florida, and all over Asia. Creating wonderful memories for families has always been a passionate commitment for Xuong and his family, knowing that when they came to America as immigrants, they had to leave all their photos and memories behind.

Hardy & Harper Inc., Santa Ana
Daniel Maas, CEO/Owner
Fred Thomas Maas Jr., President
The third generation Maas family ownership began in July 1979 when Fred Thomas Maas Sr. purchased Hardy & Harper from the Caliva family. At the time, Hardy & Harper was a small patch and repair company with six field employees. By 1984, Fred and his two sons,
Tom and Tim, were working together to transform the small business into a large-scale asphalt paving company. In 1981, Mark Beamish, Founder

Megan Tsuyuki, Co-Owner/President

Eric Wong, Printing Manager

Megan and Rob Tsuyuki founded INKnBURN in 2008 with their vision of creating wearable art on athletic apparel. They have a passion for introducing new art into the world and creating a unique and high-quality product their devoted followers love to wear. They make limited edition runs of their designs because they are a small company and choose innovation over mass production. All of their products are carefully hand-crafted in their warehouse in Orange County. The art is applied by hand to each panel of white performance fabric before sewing. They use a process of heat and pressure that allows the art to stain the fibers of the fabric, ensuring the artwork does not fade, crack or peel. The art they choose has meaning designed to empower and inspire athletes to push for new personal bests. Strength, power, beauty and peace are themes that are webbed into the very fabric of their clothes through the art they portray.
Mayfair Concrete Restoration Inc., Rancho Santa Margarita
Edward May, CEO
Kathleen May, Operations Manager
Mayfair Concrete Restoration started in January 2010 when the economy, and in particular the construction industry, was in a deep hole. Edward and Kathleen May’s aim was to raise $45,000 to get the enterprise started, but they could only raise $25,000 through contributions from family and friends. The Mays decided to launch the business anyway, starting it out of their garage with just two employees in addition to Edward and his wife, Kathleen. For the first six months, the Mays both worked in a restaurant at night as the business couldn’t afford to pay them a wage. After that, Edward was able to quit his restaurant job and began taking a small salary. Today, Mayfair Concrete Restoration has a revenue base of approximately $750,000 per year with six employees. The company continues to grow and the outlook is very positive for the foreseeable future.

Meathead Movers, Santa Ana
Aaron Steed, President/CEO
Edward Steed, Director of Operations
Erik Steed, Chief Strategy Officer
In 1997, Aaron and Evan Steed helped a friend’s parent move and started developing a way to earn money around their high school sports and academic schedules. The brothers’ vision of young and energetic student athletes delivering a unique customer service experience kept them relentlessly striving to start a full-fledged business. Soon their enterprise was fielding as many moving jobs as they could possibly handle, and Meathead Movers Inc. became a full-time occupation for both brothers. Now, the largest independent moving company in California, Meathead Movers is the go-to student athlete movers for anyone looking for high-quality services from clean cut guys. Outside of the great work they do for their customers, they also donate free moving services to victims of domestic violence fleeing abusive situations.

New American Funding, Tustin
Rick Arvelo, CEO/Co-Founder
Patty Arvelo, President
Tom Briggs, Branch Manager
Rob Briggs, Branch Manager
Jim Golea, Building Management
Marci Gregonis, Senior Loan Officer
Tara Briggs, Marketing Assistant
Drew Haberl, Loan Consultant
Tanner Haberl, Post Closer
New American Funding is dedicated to helping families and individuals improve their quality of living. The company is a Fairway Mae, Freddie Mac and Ginnie Mae direct lender, and even though they have thousands of employees, they’re a family. Founded in 2003 by Rick and Patty Arvelo, the company is licensed in multiple states across the nation, funds more than $1 billion in home loans every month and maintains a servicing profile of $17 billion. New American Funding currently has 130+ retail branches and 2,300+ employees nationwide. The Arvelos remain active in the housing industry and community, fulfilling their passion of advocating for homeowners and underserved communities. They are active in multiple organizations, including the Mortgage Bankers Association, the National Association of Hispanic Real Estate Professionals and other organizations in the housing industry. They serve their community through a variety of nonprofit initiatives, including sponsoring community involvement among employees with their in-house Lending a Helping Hand program.

Newport Rib Co., Costa Mesa
Fran Ursini, Founder
John Ursini, Co-Owner/Operator, Newport Rib Co.
Dave Ursini, Co-Owner/Operator, Naples Rib Co.
Laura Ursini Marroquin, Community Relations & Catering Manager
Rob Marroquin, Talent & Staff
Angelo Ursini, Busboy
In 1984, Fran Ursini had the goal of bringing a traditional barbecue restaurant to Orange County. After months of research and development led by his cousin, Chef Ronald Bianco, Newport Rib Co. was established. By 1992, Fran’s two sons, Dave and John joined the family business and together, they purchased a second location in Long Beach, Naples Rib Co. Since the restaurants’ founding, the Newport/Naples Rib Co. have become recognized not only for delicious barbecue, but also for their dedication to supporting the community. Incorporating philanthropy giving into the business model came naturally to the Ursini family. Fran credits his wife of 54 years, Karen, for instilling this important principle in their three children. Early on and to this day, the restaurant’s community involvement is reflected in frequent gift certificate donations to be auctioned at local events.

Physicians Center For Renewal, Newport Beach
Zara Ceri, Aesthetic Director/Patient Liaison
Dr. Michael Ceri, Medical Director
Zara Ceri is currently aesthetic director and patient liaison at Physicians Center For Renewal, which she co-founded with her husband, Dr. Michael Ceri. As a certified aesthetic consultant, it was Zara’s vision to provide wellness through nutrition and lifestyle modifications, combined with cutting-edge aesthetic procedures to optimize health, wellness and appearance. Currently, Physicians Center For Renewal has locations in Newport Beach and Laguna Niguel. A family practice physician in Orange County for 36 years, Dr. Michael Ceri was a founder and medical director for Primary Care Associates and a founding partner of Pro Care Medical. A significant part of Dr. Ceri and Zara’s outreach includes providing information on the latest breakthrough trends in healthy lifestyle and fitness. Zara has been published in Newport Beach Lifestyle magazine on two separate occasions in January 2016 and May 2016.

PizzaRev La Habra, La Habra
Ron Lieberman, Owner
Jason Lieberman, Co-Owner
David Lieberman, Co-Owner
Ron, Jason and David Lieberman have more than 30 years of experience running the successful Southern-California-based, restaurant design company, Design Development. Having worked with big names like Flamingo’s, PizzaRev and Hard Rock Cafe, the obvious next step for the Liebermans was to franchise one of the restaurants they designed. Today, Liebermans own two PizzaRev locations in Orange County – La Habra and Santa Ana. Giving back to the local community has always been the biggest priority for the Liebermans, and they have been focused on supporting various restaurants since opening their first PizzaRev location. In an effort to build stronger community relations, the Liebermans just kicked off a six-month “Pay It Forward” campaign at PizzaRev La Habra, where 100% of the proceeds will be donated to the La Habra community.

Playground DTSA, Santa Ana
Jason Quinn, Founder/Chef
Hilary Quinn, Pasta Master
Brett Quinn, Finance
Lisa Quinn, Design
Jason Quinn, founder and chef of the downtown Santa Ana restaurant Playground, is one of the most talked-about chefs in Orange County. His chef-driven menu reflects impressive culinary talent with creative flair. Playground is one of the most innovative restaurants in Orange County, changing what it does and makes on a daily basis. Playground relies on its team’s elite talent to create new menus based on the day’s ingredient haul. The team puts this talent on display while also focusing new menus based on the day’s ingredient haul. The team puts this talent on display while also focusing new menus based on the day’s ingredient haul.

Plethora Businesses, Orange
George Lanza, Founder/President
Dora Lanza, Co-Founder/Principal
Niki Lanza, Vice President
Plethora Businesses is a leading M&A firm for the lower-middle market. The company specializes in mergers, acquisitions, appraisals and consulting. Plethora Businesses has been successfully advising business owners for more than 17 years. Over the years, the firm has appraised more than 500 businesses and has guided hundreds of business owners to successful closings. Plethora’s success spans a wide variety of industries, including but not limited to, manufacturing, distribution, logistics and retail. In 2015, Plethora brought in more than $120 million in enterprise value for California business owners. George Lanza also guided the organization’s largest deal to date, the sale of a Costa Mesa transportation/logistics company.

R.J. Noble Co., Orange
Michael Carver, President/Owner
Brenda Carver, STM Trucking Co. President
KaSonda Carver, Sales & Marketing
Austin Carver, Sales Manager/Operations Manager
R.J. Noble Co. has been one of the leading general contractors and producers of asphalt in Southern California for more than 65 years. R.J. Noble Co.’s owners have always placed great emphasis on family, starting in 1950 with the Noble family, then in 1985 with the Cleary family, and now with more than three generations of the Carver family currently owning and working for the company. The Carvers have owned the organization since 1999. R.J. Noble Co. services a wide area with multiple types of materials including asphalt, rubberized asphalt, recycled aggregate base and sand. Environmentally conscious, R.J. Noble Co.’s facilities utilize recycled asphalt product, which also lowers material production costs. In addition, the Orange facility recently went through a major renovation which increased production up to 500 tons of asphalt per hour, making the plant more environmentally friendly.

RMI – Airdyne Refrigeration, Cerritos
Tom Bedi, President
Ruth Bedi, Vice President
Dawn Bedi, Project Manager
Brittany Bedi, Accounting Manager
Tom Bedi was a finance and design engineer for a refrigeration manufacturing company when he decided along with his wife, Ruth Bedi, to begin their own manufacturing company in 1996. Airdyne Refrigeration began designing and manufacturing refrigeration equipment for commercial kitchens and the hospitality industry. In 2012, Refrigerator Manufacturers Inc. approached...
Tony to purchase the struggling company. Known in the industry as RMI, the organization had been manufacturing high-quality cold rooms since 1945. The company merged in November 2012 and Tony was able to combine operations to include not just cold room panels and doors, but also the design, engineering and manufacturing of walk-in coolers/freezers with refrigeration and complete installation. Today, Tony and Ruth are joined at the company by their son, Devin and their daughter, Brittany. RMI-Airdyne has more than 500 employees and revenues of more than $10 million.

Russell Fischer, Huntington Beach
Chase Russell, President
Jeanie Russell, Partner
Russell Fischer is the longest-standing car wash chain in Southern California, operating for more than 30 years. Russell Fischer was founded by his father, Roy. With RHC’s vision, the company became the first to combine oil change, fuel and car wash services, ultimately creating the Car Care Center model. Today, Russell Fischer provides car care services to more than 500,000 cars each year. Managed by Chase and Jeanie Russell, Russell Fischer operates seven car care centers across Orange County. As the company continues to grow, the focus remains on providing the highest quality of services. With an employee retention rate of 95%, Russell Fischer provides opportunities for continuing education in car care services, promoting advancement within the company. In addition, Russell Fischer is an avid supporter of local high schools and organizations in Huntington Beach. Since 2010, Russell Fischer has doubled in size.

SKYCO Skylights, Costa Mesa
Ryan Mathura, CEO
Robert Marshall, President
Debra Marshall, Secretary
Wanting to set a future for himself, his father, Robert; and his brother; Ryan Marshall set out to conquer the skylight world. Started in 2014 with more than 150 years of combined experience, Skyco creates innovative skylight designs for a full range of industrial and commercial applications. With Ryan’s ambitions and visions, along with Robert’s experience and connections in the industry, they knew they could take over the competition. Today, Skyco is doing well thanks to all of Ryan’s hard efforts. The company has grown exponentially, with $120,000 in sales in 2014 to $4.5 million in 2015. In the beginning, Ryan did everything — from sales to estimating to helping manufacturing when deadlines needed to be met.

StaffRehab, Newport Beach
Sara Palmer, Founder/CEO
Lindsay Joseph, Director of Talent
Greg Palmer, Board Member
Founded in 2002, StaffRehab is a provider of excellent candidates for school districts and health care facilities. StaffRehab’s mission is to align candidates’ and clients’ values as the company’s own. As experts in staffing, the firm places physical therapists and physical therapy assistants, occupational therapists and occupational therapy assistants, speech-language pathologists, psychologists, counselors, school nurses, special education teachers, social workers, BCA/PE teachers, O&M specialists, VI teachers, and DHH teachers in direct hire or travel assignments. StaffRehab has grown to employ more than 120 internal and contract employees. The company has served 5,000+ students in 70 school districts across the U.S. StaffRehab is an active supporter of Taller San Jose Hope Builders’ Healthcare Training Program that prepares underprivileged youth for employment in clinical medical assisting and administrative billing and coding.

Tom Ferry International, Irvine
Tom Ferry, CEO
Kathy Funk, Co-Founder
Steve Belmonte, President
Dov Silberman, V.P. of Sales
Joe Belmonte, Sales Manager
Anthony Belmonte, Sales Representative
Tom Ferry is founder and CEO of Tom Ferry International, a results-driven coaching company committed to raising the level of success and sophistication for real estate agents all over the world. Tom Ferry International is a group of experts led by master coach Tom Ferry, who truly believes that everyone deserves to achieve their greatest desires and goals. The team consists of top-producing agents who have experienced success, are fully immersed in the Tom Ferry system and are passionate about helping others take their business and their life to the next level. Tom Ferry is a New York Times bestselling author who has been named the #1 Coach for four consecutive years, a world-renowned speaker and one of the most influential people in real estate. His experience spans decades of professional development and sales training, as well as influencing more than 500,000 agents through his training system.

Trade American Card Corp., Irvine
Michael Ames, Founder
Kathryn Picquelle, President
Kim Ames, Vice President
Since 1970, the Ames family has owned and operated Trade American Card Inc. (TAC) — a barter services company. Since the company opened, more than 5,700 businesses have joined TAC as trade network members. Today, Michael Ames’s two daughters continue to run the business from the main office at 14600 Harbor Freeway. TAC is the longest continuously-running barter services network in the USA. TAC enjoys support from every professional sector including law, accounting, medical, optometry, dental and professional education. Trade American Card is active in 33 chambers of commerce, several professional associations and supports many nonprofit organizations.

WAXIE Sanitary Supply, Santa Ana
Charles Wax, Chairman/CEO
David Wax, Executive Vice President
Bryan Wax, Data Analytics Manager
Andy Vandeven, VP/Strategic Accounts Director
Katie Vanderwell, Sales Representative
WAXIE Sanitary Supply is a company rich in family history, strong in company values and rooted in industry commitment. WAXIE is a story of success, of three generations achieving the American dream, and the result of hard work and dedication. WAXIE prides itself on the legacies of its founders, and in the loyalty, hard work and steadfastness of its employees. The Wax family history begins in the early 1900s, when Isaac Wax and his wife, Sadie, immigrated to the United States from Russia. Soon after settling in Utah, Isaac opened several merchant supply stores in the Salt Lake Valley. The Wax family was known for going above and beyond to care for their customers, and many people in the Utah communities still tell stories of their extraordinary customer service. In addition to being the chairman and CEO of WAXIE, Charles Wax was also the past chairman of Network Services, a member-owned, Chicago-based, $6.7 billion distribution organization.

West Alliance Injury Lawyers, Newport Beach
West Seegmiller, Attorney
Former California State Pro-Tem Judge and Attorney West Seegmiller has earned a sterling reputation for seeking justice for all — including the underdog, the powerless, the disenfranchised and those who otherwise have nowhere else to turn. His courtroom opponents during his 30+ year career have included such titans as Coca Cola, Southern California Edison and Rockwell International. Justice requires that an attorney invest his time, energy, experience and thoroughness so that no stone is left unturned. By adopting that philosophy, West says clients enjoy the best outcome, whether that means he is litigated in the courtroom or a settlement is reached pre-trial. West has even built an actual courtroom in his law offices, where he hires mock “juries” to hear his cases pre-trial, gaining their feedback and insight. He then shapes his arguments, so that when he tries the case in front of an actual jury, little is left to chance.

Whittaker & Co., CPAs, Seal Beach
Shelley Whitlacker, Partner/CPA, CGMA
Dan Whittaker, Managing Partner, CPA
Whittaker & Co. was founded by Shelley and Dan Whittaker, a husband-and-wife team of CPAs who wanted to provide their clients with a more effective way to purchase CPA services. They saw that many business owners were frustrated with paying their accountants by the hour for reactionary service and only meeting with their CPA once or twice a year. As a result, they implemented a fixed price model customized to each client based on the specific services they need, and level of ongoing support they desire. This model allows their clients to budget for their annual accounting services, and to meet and communicate freely with their CPA without being billed separately for their time. In 2014, Whittaker & Co. established the Southern California chapter of the Exit Planning Institute, a think tank to help business advisors collaborate as a team when helping their business owner clients successfully transition their business.

WJK Development Co., Irvine
Grant J. Keene, CEO
Barry Keene, COO
John Paul Keene, VP of Marketing
Ariana Keene, VP of Sales
WJK Development Co. was ranked as the Orange County Business Journal’s No. 1 fastest-growing small company with over 1,200% revenue growth over two years. Since its inception, WJK has successfully built more than 20 brand new, luxury homes in Orange County and Los Angeles, and has sold select homes for record-breaking price tags in their respective neighborhoods. Started by Grant Keene in 2015, siblings, Barry, John Paul and Ariana soon came on board to keep up with high demand. Grant maintains oversight of various projects, while making plans for future builds and Barry manages the production of each house every day. John Paul runs the company’s Marketing Division and Ariana is in charge of the Sales Division. Not much has changed since they built their first treehouse together in 1996. The teamwork, the camaraderie and the bond they share are what has kept them motivated and what keeps the business successful.

wunderdojo, Costa Mesa
James Currie, Owner/Partner
Melanie Currie, Customer Support
wunderdojo builds bespoke websites and develops custom code for clients ranging from national brands to local institutions. The company has particular expertise in custom WordPress development, but is platform agnostic; picking the best tools and tailors solutions to its clients’ needs. The wunderdojo team has extensive design and development experience, combined with real-world business experience working with companies ranging from mom-and-pop shops to Fortune 500 firms.
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