



## FANNING THE FLAME

Wildfire Systems, Inc. founder and CEO Jordan Glazier has led his company to a massive three-year 479% growth in revenue. Photo courtesy Wildfire Systems

### FINTECH: Wildfire Systems' \$16M Raise Fuels Already Red-Hot Growth

By KAREN PEARLMAN

**SAN DIEGO** – Revenue growth at **Wildfire Systems Inc.**, the financial technology platform that powers loyalty and reward programs, shopping companions and content monetization, continues to blaze.

The fintech founded in 2017 is one of the region's fastest-growing companies, continually expanding its product offerings and

geographic reach. Wildfire also recently secured \$16 million in Series B funding. The most recent funding brings Wildfire's total raise to date \$36 million.

The current round is being co-led by **Intuit Ventures** and **Mucker Capital**, along with new investors **Cohen Circle**, **Samsung Next**, **Evolution VC** and **Gaingels**. Wildfire's existing investors **TTV Capital**, **QED Investors**, **B Capital**, **DLA Piper**, **Moonshots Capital** and

**Citi Ventures** also participated in the round.

The latest investment will accelerate the expansion of new features essential to the value-added services and benefits that Wildfire's clients extend to their customers, said Wildfire Systems founder and CEO **Jordan Glazier**.

Glazier said the company is in execution mode right now, with plans to leverage the new

➔ *Wildfire page 61*

### AlphaCore Expands Colorado Presence

**FINANCE:** All Season Financial Merger Adds \$200M in Assets

By KAREN PEARLMAN

**LA JOLLA** – U.S. Securities and Exchange Commission-registered investment adviser firm **AlphaCore Wealth Advisory** has put another feather in its cap with a new acquisition, adding **All Season Financial Advisors**.

The deal adds nearly \$200 million in assets under management. The transaction is expected to close in the fourth quarter of 2024, subject to closing conditions.

All Season Financial fits right into AlphaCore's mission to expand its wealth advisory services in



**Dick Pfister**  
Founder & CEO  
AlphaCore Wealth Advisory

➔ *AlphaCore page 30*

### Chula Vista Luxury Apartments Opening

**REAL ESTATE:** \$70M Project Aimed at 'Active Seniors'

By RAY HUARD

**CHULA VISTA** – A \$70 million apartment building would be a first for downtown Chula Vista, billed as luxury housing for "active seniors."

Due to open in November with 142 apartments, **Casa Estilo** is also a bit different with a marketing campaign directed, in part, at well-heeled Tijuana residents who own businesses on this side of the border, as well as U.S. homeowners planning to downsize.

"We have a lot of interested people coming from across the border," said **Wende King**, president and CEO of **Royal Property Management Group** – the company in charge of managing and marketing Estilo.

"Our team is actually going down to

➔ *Estilo page 61*

### Dot the I's, Cross the T's: Insurers Value Cyber Hygiene

**SECURITY:** Faulty Software Demands Quick Response; Resources Available

By BRAD GRAVES

**SAN DIEGO COUNTY** – A business benefits greatly from patching software vulnerabilities, those chinks in the company armor that bad actors are happy to exploit.

Patching is a habit that can help all organizations – not just businesses. **IBM**, which tracks the cost of specific types of data breaches, noted that the cost of



**Brendan Daly**  
CISO  
City of San Diego

a breach from a known and unpatched software vulnerability averages \$4.33 million.

Occasionally, unpatched software makes the headlines: a 2020 breach involving **SolarWinds** was a result of hackers targeting unpatched software. More recently, a faulty software update was blamed for the **CrowdStrike** outage.

Administrators should patch known software vulnerabilities

"as soon as possible," said **Brendan Daly**, chief information security officer (or CISO)

at the **City of San Diego**. Such software should not be left unattended.

It's best to adhere to a regular patching cycle, he said. Standard patching should occur on at least a monthly cadence. Critical patches should be applied within 24 hours.

➔ *Cybersecurity page 30*



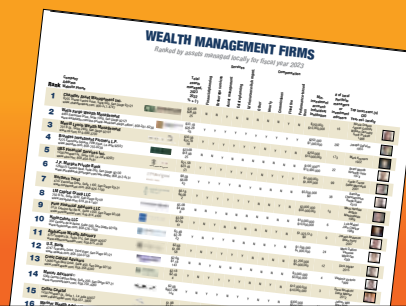
**P.21** **CYBER:** Congratulations to the 2024 Cybersecurity Stewardship Awards Recipients

**P.31** **LAW:** Meet the 2024 Leaders in Law Honorees

### THE LIST

**WEALTH MANAGEMENT FIRMS**

PAGE 12



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# PEOPLE ON THE MOVE

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## ACCOUNTING

New Hire



**Max Lewandowski**

### RJI CPAs Welcomes Max Lewandowski as Audit Partner in San Diego

RJI CPAs is excited to announce the addition of Max Lewandowski, CPA, to our team as an Audit Partner, based in San Diego. With over 13 years of comprehensive audit experience, Max has worked across a wide array of industries, including life sciences, technology, manufacturing, healthcare, and more. He specializes in complex financial transactions, such as revenue recognition, mergers and acquisitions, and SEC reporting. Prior to joining RJI CPAs, Max held significant roles at BDO USA, LLP and a Big 4 firm, working with both private and public middle market companies. To learn more, visit [www.rjicpas.com](http://www.rjicpas.com).



## REAL ESTATE

New Hire



**Rhonda Rasmussen**

Rhonda Rasmussen has joined Project Management Advisors, Inc. (PMA) as Project Director on the Hospitality Sector team. Based in San Diego, she will help drive PMA's growth in key markets, including Los Angeles, as the city prepares for major upcoming events like the 2028 Olympics, the FIFA World Cup in 2026, and the development around the LA Convention Center. With more than 25 years of experience in hospitality design and development, Rasmussen has earned accolades such as the ASID Award of Design Excellence. Previously, she served as Director of Interior Design at T2 Development, where she oversaw high-profile hotel projects.



# TABLE OF CONTENTS

October 28 – November 3 | Vol. 45, No. 44



**9 Glasses for golfers**



**10 Barefoot luxury**

## DEFENSE & AEROSPACE

**3 AEROSPACE: SAN DIEGO – Natilus Inc.** announced last week that it is developing a hyper-efficient blended-wing-body aircraft for commercial passenger use, with the goal of the aircraft entering service in the 2030s.

## FINANCE

**1 FINTECH: SAN DIEGO –** Revenue growth at **Wildfire Systems Inc.**, the financial technology platform that powers loyalty and reward programs, shopping companions and content monetization, continues to blaze.

**1 ADVISORY: LA JOLLA – U.S. Securities and Exchange Commission-**registered investment adviser firm **AlphaCore Wealth Advisory** has put another feather in its cap with a new acquisition, adding **All Season Financial Advisors**.

## LIFE SCIENCES

**3 BIOPHARMA: DEL MAR –** Clinical-stage biopharmaceutical company **Amplifica Holdings Group, Inc.** announced promising new results from its first in-human trial of its novel hair growth medication. The company's product – AMP303 – is injected into the scalp to treat androgenetic alopecia (AGA), the most common form of hair loss.

**4 BIOTECH: SAN DIEGO – Cellibre Inc.** closed the first portion of its current fundraising round this month, garnering nearly \$7 million in new funding.

## REAL ESTATE

**1 MULTIFAMILY: CHULA VISTA –** A \$70 million apartment building, **Casa Estilo**, would be a first for downtown Chula Vista, billed as luxury housing for "active seniors."

**4 MULTIFAMILY: LA MESA –** A \$20 million, four-story La Mesa apartment building, with plans for a ground-floor coffee shop, is meant to provide what developer **CityMark** is billing as "luxury living" for middle income tenants in a neighborhood that has historically been home to smaller projects.

**10 RESIDENTIAL: SAN DIEGO COUNTY –** Amid a slight uptick in interest rates, the median price of existing single-family homes in San Diego County was unchanged in September at \$1 million and sales fell by nearly 14% from August to September, according to the **Greater San Diego Association of Realtors**.

**10 HOSPITALITY: SAN DIEGO – Pacific Terrace Hotel** in Pacific Beach has completed a \$3 million renovation that took two years. The boutique hotel, a part of the **Bartell Hotels** chain, promises "sophisticated barefoot luxury" with the new look.

## RETAIL

**9 APPAREL: SAN DIEGO –** The **PGA Tour** has linked a course for the future with **Knockaround**, inking a multi-year official marketing partnership with the San Diego sunglasses brand, now named the Official Eyewear of the PGA Tour and PGA Tour Champions.

## SDBJ INSIDER

**3 A Bigger Circle**

## SPECIAL SECTIONS

**2 PEOPLE ON THE MOVE:** Hirings, promotions, board members and special announcements in San Diego

**11 WEALTH MANAGEMENT:** The San Diego Business Journal consults five financial experts for this roundtable feature.

**21 CYBERSECURITY STEWARDSHIP AWARDS 2024:** Meet the winners of the annual awards program, presented by the San Diego Business Journal in association with the **Cyber Center of Excellence (CCOE)**.

**29 COMPANIES ON THE MOVE:** Hirings, promotions, board members and special announcements in San Diego

**31 LEADERS OF INFLUENCE IN LAW 2024:** Profiles of San Diego's legal leaders

**63 MARKETPLACE**

**63 LEGAL NOTICES**

## TECHNOLOGY

**1 CYBERSECURITY: SAN DIEGO COUNTY –** A business benefits greatly from patching software vulnerabilities, those chinks in the company armor that bad actors are happy to exploit.

**8 EV TECH: SAN DIEGO –** Renewable energy tech company **Beam Global** has announced a suite of new products over the last two months, aiming to make it cheaper and easier to charge electric vehicles and bikes and desalinate water.

**8 CLEAN TECH: SAN DIEGO – ecoATM Gazelle** announced this month that it is expanding its kiosks to multiple grocery and furniture store chains in the northeast U.S., enabling more shoppers to turn in their old and unused mobile devices and immediately receive cash in return.

## TOURISM & HOSPITALITY

**6 TOURISM: SAN DIEGO –** The **San Diego Food + Wine Festival** is growing up in some of the sweetest and most savory of ways. Celebrating its 20th year, the annual event along San Diego Bay with the finale at **Liberty Station** has become a major player in the culinary scene.

## THE LISTS

**15 WEALTH MANAGEMENT FIRMS**

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## SDBJ INSIDER

By JEFF CLEMETSON

### A Bigger Circle

**Fernanda Whitworth**, widow of the late Relational Investors co-founder **Ralph Whitworth**, announced last week she was opening up the **Curebound Whitworth Legacy Circle** to new philanthropist members. The Legacy Circle honors Ralph Whitworth's commitment to the fight against cancer, which took his life in 2016.

"The work happening here in San Diego and across the country will benefit not only our children, but also future generations who may face the same frightening diagnosis that we did," Fernanda Whitworth said, adding that the Legacy Circle is "seeking a unique kind of donor" – people who are committed to funding advanced cancer treatment studies.

The announcement for expanding the Legacy Circle was timed for last week's National Estate Planning Awareness Week, and suggested philanthropists establish gifts to the fund through will or living trust, IRA rollover, charitable remainder or lead trust, gift annuity, retirement plan or life insurance policy.

The Legacy Circle is the latest in the Whitworth's cancer philanthropy, which includes establishing the Advanced Cell Therapy Lab at UC San Diego in 2014 and founding the nonprofit **Immunotherapy Foundation** in 2015, which later merged with **Padres Pedal the Cause** to form **Curebound**.

Interested philanthropists are encouraged to contact Curebound Senior Director of Stewardship + Development Operations **Heather Dean-Presnell**.

+++

The **22nd District Agricultural Association** – the organization that operates the **Del Mar Fairgrounds** – last week announced it had repaid a \$4.7 million loan from the federal Paycheck Protection Program. The local DAA borrowed the money in 2020 after the pandemic closed operations due to the COVID-19 pandemic.

The PPP loan was initially forgiven by the **Small Business Administration**, but the U.S. Attorney's Office later questioned the standing on which the DAA could apply for the funds. A statement from 22nd DAA said there was "lack of clarity" in the 2020 CARES Act about "ill-defined 'state institutions' under the law" that led to it receiving the loan despite a clear explanation of the organization's "unusual structure" in the cover letter of its application.

The 22nd DAA paid back around \$5.6 million, without penalty, to cover the initial loan and interest. The DAA's statement also included insight to the organizations available cash in May 2020, around \$1.1 million, which was "far outpaced" by its accounts payable and deferred revenue. As of the end of August this year, the DAA reported a cash position of almost \$40 million.

+++

The editorial team at the **San Diego Business Journal** is celebrating honors received at last week's **San Diego Press Club Excellence in Journalism Awards**.

SDBJ won first place awards for non-daily newspapers in the categories of Business & Financial (**Karen Pearlman**), Science/Technology/Biotech (**Brad Graves**), Architecture & Design (**Ray Huard**), Health & Science (**Jeff Clemetson**) and Food (**Ray Huard**).

Graves also took both second and third place awards in Business & Financial, delivering the Journal a sweep in the category. Graves also silvered in the Military category. In addition to the top spot in the Architectural & Design category, Huard also took second; he also won second in the Real Estate category, as well third place ribbons in the Food and History categories. Reporter **Jennifer Kastner** won an honorable mention in the Food category and a second place showing in the competitive Wildcard: Artificial Intelligence category. Congratulations to us! ■

## Natilus Debuts Plans for Blended-Wing Commercial Jet

**AEROSPACE:** Aims for 2030s Launch of Highly Efficient Design

■ By ELI WALSH

**SAN DIEGO** – Aerospace manufacturer **Natilus Inc.** announced last week that it is developing a hyper-efficient blended-wing-body aircraft for commercial passenger use, with the goal of the aircraft entering service in the 2030s.

The Horizon aircraft will utilize a design that has no dividing lines between the fuselage of the plane and the wings. Blended-wing-body aircraft are significantly more fuel efficient than the common commercial aircraft design template, known as tube-and-wing aircraft.

According to Natilus, the Horizon is intended to serve the same market as the **Boeing 737** and the **Airbus A320**, with the ability to transport some 200 passengers with cargo across routes from Los Angeles to Boston and New York to London.

"With the blended wing body, it's, on average, roughly 30% more aerodynamic than your traditional tube and wing, because the shape of the fuselage generates more lift and



**Nolan Giblin**  
Natilus  
Head of Business  
Development

you don't need as much engine power and fuel burn," said **Nolan Giblin**, Natilus' head of business development.

Natilus was founded in the Bay Area in 2016 by **Aleksey Matyushev** and **Anatoly Star** before moving its headquarters to San Diego in 2021.



The 200-passenger Horizon is the latest addition to Natilus's family of blended wing body aircraft, which delivers exceptional fuel efficiency and higher payloads. Rendering courtesy Natilus Inc.

Since then, the company has attracted talent from defense giants like **General Atomics** and **Northrop Grumman**, including Giblin.

### Cargo Aircraft Development Continues

Up until now, the company has primarily focused its efforts on developing a blended-wing-body design to serve the cargo shipping industry. That aircraft, the **Kona**, will be an autonomous plane capable of carrying more than 9,000 pounds of freight.

Natilus is currently constructing the first full-scale Kona prototype after flight testing smaller scale versions of the craft and analyzing its efficiency at the **San Diego International Airport's** wind tunnel, which is already used by Boeing and other aerospace companies.

Giblin said the company's development of the Kona is informing the early stages of the Horizon by utilizing existing off-the-shelf

technology and adding vertical fins to the back of the aircraft in an effort to maximize stability and control.

"We are not trying to reinvent the wheel, the wheel just might look different," he said.

Natilus expects customer deliveries for the Kona to begin in late 2027 or early 2028 and has already received a \$134 million purchase order for 20 of the planes from the Texas-based cargo airline **Ameriflight**.

### Carbon Neutrality Goals Push Innovation

The Horizon is being developed on a twin track with the Kona, with the expectation of beginning test flights by the end of the decade and beginning deliveries to customers in the 2030s.

That timing will be key, the company said, to helping the airline industry meet their goal

➔ *Natilus page 65*

## Amplifica's Promising Hair Loss Meds

**BIOPHARMA:** Study Sheds New Hope for Hair Growth

■ By JENNIFER KASTNER

**DEL MAR** – Clinical-stage biopharmaceutical company **Amplifica Holdings Group, Inc.** announced promising new results from its first in-human trial of its novel hair growth medication. The company's product – AMP-303 – is injected into the scalp to treat androgenetic alopecia (AGA), the most common form of hair loss.

"The ability to demonstrate measurable improvements in hair regrowth with just one treatment cycle of AMP-303 is a breakthrough in addressing androgenetic alopecia," Amplifica Co-founder and Chief Scientific Officer **Maksim Plikus, PhD** told the Business Journal. "Advancements in hair loss treatment are challenging and have been extremely limited over many decades. In fact, since the approval of orally administered finasteride and topical minoxidil over 20 years ago, there have been no new FDA-approved medications to treat androgenetic alopecia. Additionally, these products require daily use by patients for many months before seeing any potential results hence why the ability of AMP-303 to demonstrate hair growth from one treatment cycle is significant."

Amplifica's randomized, double-blind, placebo-controlled multicenter study evaluated the safety, tolerability and efficacy of the injection in men aged 18 to 45 years old with both recent onset hair loss (3 to 5 years) and long-standing hair loss (more than 10 years). Findings revealed



**Maksim Plikus, PhD**  
Cofounder & Chief  
Scientific Officer  
Amplifica Bio



**Amplifica Cofounder and Chief Scientific Officer Maksim Plikus, PhD** assists a team researcher. Photo by Julie Kennedy, UC Irvine

that subjects showed more than a 15% increase in non-vellus hair (the longer, thicker darker that grows from the top of the head) from baseline compared to placebo at 60 days post-treatment, and a greater than 10% increase compared to placebo at 150 days post-treatment.

The study also showed that a single treatment cycle increased non-vellus hair count and sustained the hair and thickness in participants 150 days after treatment. The medication's potential for reversing hair loss was demonstrated in its ability to stimulate the transition of vellus hairs (the 'peach fuzz' that grows all over the body) into non-vellus hairs.

Amplifica says it identified natural signaling molecules that



**Frank Fazio**  
President & CEO  
Amplifica Bio

can activate hair follicle stem cells, helping them return to the growth phase. Think of hair growth like a 3D printer.

"In its normal state, the printer – your hair follicles – alternates between printing – growing hair – and taking breaks – resting," explained Dr. Plikus. "Hair loss happens when the printer gets stuck in the resting phase and stops working. Our technology works like a signal that tells the printer it's time to start printing

again."

### Large Potential Market

Androgenetic alopecia affects an estimated 50 million men and 30 million women in the U.S. It can start in a person's teenage years but increases in risk with age. According to the **American Osteopathic College of Dermatology**, it affects nearly 50% of males and 25%

➔ *Amplifica page 30*

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A \$20 million apartment project is under construction in La Mesa by CityMark, a North Park developer. Rendering courtesy of CityMark

## La Mesa Apartments Provide Middle Class ‘Luxury Living’

**REAL ESTATE:** CityMark's \$20M Textur Project Includes Commercial Space

■ By RAY HUARD

**LA MESA** – A \$20 million, four-story La Mesa apartment building, with plans for a ground-floor coffee shop, is meant to provide what developer **CityMark** is billing as “luxury living” for middle income tenants in a neighborhood that has historically been home to smaller projects.

Under construction by CityMark at the corner of Wilson Street and Grossmont Boulevard, **Textur** will have 49 apartments.



**Russ Haley**  
Managing Partner  
CityMark

“This project is in a part of La Mesa that is zoned for mixed-use, but it’s not a part of La Mesa that has seen much development of that,” said **Eric Naslund**, a principal of **Studio E Architects** which designed the project.

The name of the project, **Textur**, was chosen “to play off the multiple exterior finishes we are using, including siding accents,” said **Russ Haley**, managing partner of CityMark.

“We’re really excited about this one with just the level of different detailing

on the exterior, and we were able to incorporate that in the interior as well,” Haley said. “We always want our architecture to be compelling, and this project is definitely that.”

Due for completion in January 2026, **Textur** will have 27 one-bedroom apartments averaging 630 square feet and 22 two-bedroom apartments, averaging 1,000 square feet. Four of the apartments will be earmarked for low-income tenants.

“Most of the units are going to enjoy pretty nice views to Mount

Helix and out to the west,” Naslund said.

The project will also have 1,294 square feet of commercial space where Haley hopes to attract a coffee shop as a tenant, a 730-square-foot gym, and 24 parking spaces.

A 900-square-foot lounge at the building entrance connects to the coffee shop space.

Naslund, who has deep family ties to La Mesa, said that the design of **Textur** takes neighborhood sensibilities into account.

“It’s near and dear to my heart



**Eric Naslund**  
Principal  
Studio E Architects

➔ *Textur page 62*

## Flush with Cash, Cellibre Focusing on Bringing Sustainable Chemicals to Market

**BIOTECH:** Company Raised \$6.7M at First Close of Funding Round

■ By ELI WALSH

**SAN DIEGO** – Biotech company **Cellibre Inc.** closed the first portion of its current fundraising round this month, garnering nearly \$7 million in new funding.

The company disclosed a fundraise of \$6.7 million, with the goal of garnering \$10 million in total by the middle of January, according to CEO **Ben Chiarelli**. The company also has the ability to flex the fundraising ceiling up to \$20 million, if necessary.

“I don’t know if our board is going to let us flex up that high, just given dilution and everything else,” Chiarelli said. “And I think our insiders would much rather participate in the round than allow others to come in and dilute them at this stage, given all we have going on.”

Cellibre focuses on programming cell DNA to produce enzymes that are more effective at producing chemicals to treat certain conditions while also maintaining a natural and sustainable chemical manufacturing process based on fermentation rather than chemical synthesis.

Whereas most other chemical production companies typically use *E. coli* or baker’s yeast cells for fermentation-driven cell engineering, Cellibre takes what Chiarelli calls an “organism-agnostic” approach.

“What we do that’s very, very different is we match whatever product we’re trying to make



**Ben Chiarelli**  
CEO  
Cellibre Inc.

with a cell that’s industrializable, that already makes the foundational chemistry that we care about,” he said.

Chiarelli said the current difficulty in the private market and a lack of immediate need for cash drove the decision to split the fundraising round into multiple closure dates. The private market will also get tighter around the winter holidays, he said.

“We’ve got pretty decent runway well into next year,” Chiarelli said. “As of right now, we have commitments from insiders to extend that even further if we need to. So not under a ton of pressure from a capital perspective, (we’re) really just trying to turn the business from an R&D organization to a commercial one.”

“We’ve got pretty decent runway well into next year,” Chiarelli said. “As of right now, we have commitments from insiders to extend that even further if we need to. So not under a ton of pressure from a capital perspective, (we’re) really just trying to turn the business from an R&D organization to a commercial one.”

### Multiple Platforms

Cellibre’s chemical production is generally divided into four platforms: minor cannabinoids, a replacement for the skin care vitamin retinol and two anti-inflammation compounds known as resveratrol and naringenin.

The company’s cannabinoid research and

development is largely focused on non-euphoric compounds that have been shown to have health benefits like treating inflammation, anxiety, obesity and weight gain, gastrointestinal disorders like IBS and Crohn’s disease and insomnia.

In June, the **National Institutes of Health** awarded Cellibre a \$2 million grant to hasten the company’s commercialization of its precision fermentation cannabinoid products, which the company could start providing to pharmaceutical companies as soon as 2025.

Cellibre argues its method of cannabinoid production is significantly cheaper and quicker than traditional agricultural methods.

“When you’re doing agricultural-extracted natural products, you have to wait for those plants to grow, you have to do the extraction, it’s a one-to-three-month process to create your chemical entity,” Chiarelli said. “Our fermentations run in four days.”

Beyond cannabinoids, Cellibre is producing a compound called bakuchiol, which has many of the same effects as retinol, a form of Vitamin A, but isn’t as harsh on the skin.

The company worked with researchers at the **Salk Institute** to develop the compound without using the agricultural source, typically the *Cullen corylifolium* plant native to India, and produced an in-house bakuchiol compound in fewer than four months for less

than \$100,000.

Chiarelli estimated that with the **European Union** heavily regulating the use of retinol in cosmetics that products like bakuchiol has the chance to become a significant skincare product in the near future.

“We may commercialize directly or partner with a large chemical company in some sort of way, since they already have distribution,” he said.

The other two compounds Cellibre focuses on, naringenin and resveratrol, are found in grapefruits and grapes, respectively, and both have potential uses outside of the health and beauty industry, such as being used in resins and polymers. ■

**Cellibre, Inc.**



**FOUNDED:** 2019

**CEO:** Ben Chiarelli

**HEADQUARTERS:** Sorrento Mesa, San Diego

**BUSINESS:** Chemical compound manufacturing

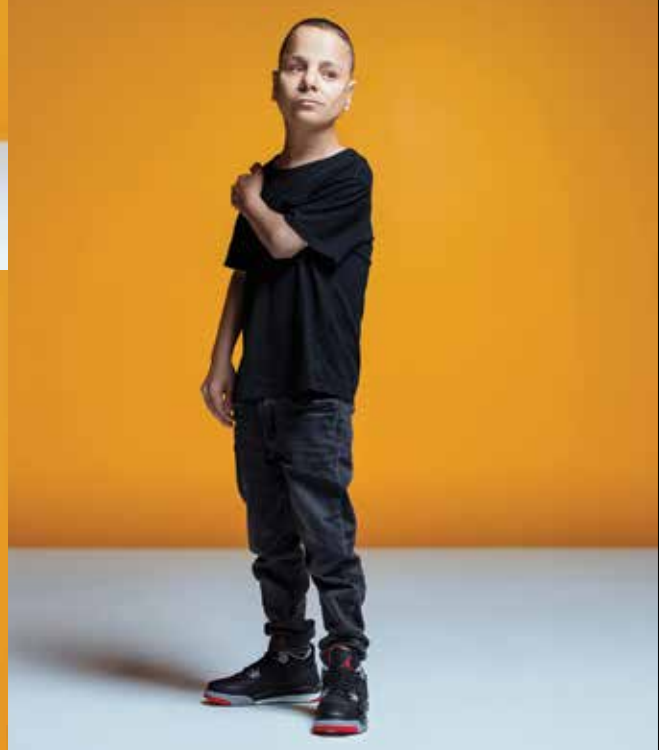
**VENTURE FUNDING:** \$25.8 million

**EMPLOYEES:** 21, including 10 with Ph.D.s

**WEBSITE:** cellibre.com

**CONTACT:** contact@cellibre.com

**NOTABLE:** Cellibre received a \$2 million grant from the National Institutes of Health for chemical research and development



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# Premier Foodie Event Increasingly Drawing Tourists

## TOURISM: San Diego Food + Wine No. 1 Culinary Fest in Nation

■ By KAREN PEARLMAN

**SAN DIEGO** – The **San Diego Food + Wine Festival** is growing up in some of the sweetest and most savory of ways.

Celebrating its 20th year, the annual event along San Diego Bay with the finale at **Liberty Station** has become a major player in the culinary scene, seamlessly meshing the region's wine, agriculture and epicurean worlds together – and bringing in an increasing number of out-of-town guests while drawing the locals who love it.

Since 2004, the weeklong festival has been a place to celebrate San Diego County's rich agricultural history, culinary diversity and award-winning wines along with the region's vibrant dining culture.

Funded in part with the city of **San Diego Tourism Marketing District** assessment funds, the SDFW is one of the largest of its kind in the United States. USA Today has awarded it the No. 1 wine and food festival in the country two years in a row.

This year's event is slated to run from Nov. 2 to Nov. 10 along the **Port of San Diego's** Embarcadero Marina Park North at San Diego Bay, with the Grand Fiesta on the last day of the event at Liberty Station's Ingram Plaza.

In 2023, the festival drew about 11,000 attendees – some of whom booked close to 6,000 hotel room nights. More of the same is expected this year.

The festival's partnership with hotels and airlines offers visitors convenient travel and accommodation packages, which encourages longer stays and higher spending per visitor.

"It's been an incredible journey to watch this event grow from its early days to what it is now – a truly iconic culinary experience," said **Michelle Metter**, co-founder and producer of the 20th Annual San Diego Food + Wine Festival.

"Over the past two decades, we've seen the San Diego Food + Wine Festival evolve into not just a destination event but a point of pride for the city. San Diego has always had a strong culinary identity, and this festival has helped showcase that on an international stage. The festival has played a significant role in shaping San Diego's reputation as a vibrant hub for culinary tourism, drawing enthusiasts from around the world to experience what our chefs, local farms and winemakers have to offer alongside some of the most dynamic domestic and international producers who join throughout the week."



**Michelle Metter**  
Co-founder  
San Diego Food +  
Wine Festival

### Festival Highlights

SDFW is supported by partnerships with corporations such as the **James Beard Foundation**, **KPBS** and **Southwest Airlines**. The sponsorships help offset event costs while providing companies branding opportunities. Businesses can engage directly with a targeted demographic of food lovers, wine aficionados and professionals in the culinary world.

The SDFW showcases a vast array of wine regions, beyond San Diego and local Southern California vineyards to international producers from Napa Valley, Italy, France, Spain and beyond. The culinary offerings are equally diverse, with cuisines from around the world represented.

This year's week-long lineup of events includes celebrity chef dinners, wine tastings and seminars, cooking classes, experts weighing in on wine tasting, food pairing and sustainable practices and interactive culinary panels. Hundreds of exhibitors, including wineries, craft breweries, spirit brands and gourmet



Last year's Grand Decant event at the San Diego Food + Wine Festival was one of many highlights of the week-long event. This year's festival is set for Nov. 2 to Nov. 10 along San Diego Bay and at Liberty Station. Photo by James Tran

food purveyors are joining.

The event's signature offerings are the Grand Decant; Grand Tasting; celebrity chef dinners featuring collaborative multi-course meals by the nation's top chefs; the SomCom summit for sommeliers and wine professionals offering master classes and certifications; and wine dinners/culinary showcases throughout the week with wine-paired meals and food showcases.

Friends of James Beard Foundation will present the Grand Decant on Nov. 8, showcasing top chefs and more than 800 wines and spirits, which will allow brands to gain exposure among wine enthusiasts, restaurateurs and influencers.

The Grand Tasting on Nov. 9 will offer hundreds of wines and spirits from local, national and international producers are available for sampling. Food from more than 60 chefs and restaurants, including many Michelin-starred and James Beard-nominated chefs, are also part of it.

The Grand Fiesta finale at Liberty Station on Nov. 10 will highlight Baja cuisine and feature a "Taco TKO" event. It will be a vibrant celebration of our border region's rich culinary heritage, Metter said.

"The festival partners with the Consulate of Mexico and culinary leaders from Baja to celebrate shared culture," she said. "It's not just about bringing flavors from Baja to San Diego, it's a deep cultural exchange that honors the multicultural essence of our region. The Grand Fiesta is the perfect culmination of our week-long festival. It's lively, colorful, and full of bold flavors, with some of the best chefs from both sides of the border coming together. It's a beautiful way to celebrate the ties between our communities and our shared passion for food."

Metter also said philanthropy has always been at the heart of the event.

"Over the past 20 years, we've awarded close to \$600,000 in scholarships to chefs, culinary students, and hospitality professionals," she said. "Our goal is to cultivate a vibrant, sustainable workforce right here in San Diego. The scholarships provide essential opportunities for young talent to gain education and experience, which in turn benefits the entire industry."

"These funds not only support individual growth but also enrich the local food scene by nurturing homegrown talent. We want San Diego to be a place where culinary professionals can thrive, and we're proud that the festival

can help foster that."

### Tempting the Tourists

The culinary world of San Diego has also grown up and **Kerri Kapich**, chief operating officer of the **San Diego Tourism Authority**, said that when SDTA officials talk to people across the country, they hear that San Diego's culinary scene "is really fantastic," from great restaurants and produce via the myriad farms that dot the county to the seafood-focused menus, countywide sustainability efforts, "and also the whole Cali-Baja thing, the vibe across border."

"It's something that is seen and recognized by people across the country," Kapich said. "And while culinary gets recognized for San Diego, we also have our craft breweries and the craft cocktail scene. We just have a great experience here. The festival is a perfect embodiment of the great things about San Diego and the whole Cali-Baja region in terms of the culinary experience."

Although the SDTA doesn't have specific statistics related to the fest, it says wine tastings remain a major pull for travelers.

SDTA reports that about 1.3 million visitors participated in a wine tasting in 2022 (similar to the number of people who came to watch a spectator sport or go on a whale watching or harbor cruise but slightly less than the 1.8 million who went to a craft brewery).

Additionally, travel parties that engaged in wine tastings spent significantly more in-market during their stay than other visitors. Visitors participating in a wine tasting spent on average \$1,930 per travel party per trip to San Diego – nearly double the average of \$1,052.

### Evolving Through the Years

Metter said the festival's journey began "with a mission to create an annual showcase that casts a national and international spotlight on the vibrant city of San Diego, our surrounding bioregion and its incredibly talented and passionate chefs, farmers, fisherman, winemakers and producers."

"We are evolving as a multi-genre, multi-cultural festival that is mission and value-led," Metter said. "A festival with soul that inspires and entertains, that is as diverse as it is delicious and where luminaries and innovators will converge in one truly epic week alongside our new partners like the James Beard Foundation and **Food Tank**."

In addition to tastings, the festival offers panels and educational sessions that discuss



**Kerri Kapich**  
COO  
San Diego Tourism  
Authority

broader issues like sustainability, food systems and the future of food.

The discussions attract thought leaders from the food industry, enhancing the festival's role as a platform for business innovation and sustainability initiatives. SDFW has become a platform for luminaries engaged in the good food moment to join forces to advocate for change in food systems.

This year's thought leaders at the festival include **Danielle Nierenberg**, president of the commu-

nity-drive think tank for food, the nonprofit Food Tank.

Nierenberg, an activist, advocate and author, is an authority on agriculture and issues relating to the food system in the United States and around the world. She founded Food Tank in 2013 with **Bernard Pollack** to focus on building a global community for safe, healthy and nourished eating – and eaters.

She said she likes what she sees in the region from the agriculture standpoint, and that among topics planned, she will speak on the "good food movement" and the importance of local farmers.

"Wonderful things are happening in San Diego in the food and agriculture space around organic and regenerative agriculture, around chefs who care about more than farm-to-table," she said. "They're thinking a nose-to-tail cooking and how to prevent food waste from vegetable scraps and that kind of thing... I think we need to put farmers at the center of these conversations and make sure that all decisions around food and agriculture systems are far more driven and far more centered where they have, literally, a seat at the table." ■

### San Diego Food + Wine Festival



**FOUNDED:** 2004

**CO-FOUNDER/PRODUCER:** Michelle Metter & Ken Loyst

**HEADQUARTERS:** San Diego

**BUSINESS:** Festival with ties to nonprofits

**WEBSITE:** sandiegowineclassic.com

**CONTACT:** metter@fastforwardevents.com

**SOCIAL IMPACT:** In the past two decades, the event has awarded nearly \$600,000 in scholarships to chefs, culinary students, and hospitality professionals.

**NOTABLE:** Local musician Manny Cepeda will play live at the Grand Fiesta at Liberty Station on the final day of the event, Nov. 10.



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# Beam Global Launches New EV Chargers, Desalination System

**EV TECH:** Innovation Spree Follows Company's Recent European Expansion

■ By ELI WALSH

**SAN DIEGO** – Renewable energy tech company **Beam Global** (Nasdaq: BEEM) has announced a suite of new products over the last two months, aiming to make it cheaper and easier to charge electric vehicles and bikes and desalinate water.

Beam said it will soon begin providing the company's **BeamWell** water desalination and e-mobility delivery system to areas of the world currently facing humanitarian crises that do not have reliable access to clean potable water.

**BeamWell** systems can intake salt water and remove salt and other contaminants, storing up to 3,000 liters of clean drinking water. The system is also deployed with four electric scooters and charging docks for each of them, making it easier to bring fresh water to areas that are hard or impossible to navigate with a car.

Both the desalination process and the electric scooters are powered by an array of solar panels affixed to the top of the **BeamWell** system, preventing the need for a generator or any type of fuel.



**Desmond Wheatley**  
CEO  
Beam Global

## Desalination Product in Warzones

Beam Global CEO **Desmond Wheatley** said the company's primary intention is to deploy **BeamWell** systems in Gaza, whose resident have been in



A rendering of Beam Global's **BeamWell** water desalination and electric bike charging system. Image courtesy Beam Global

an active warzone since the Oct. 7, 2023 attack on Israel by Hamas that ignited the current conflict.

According to the **United Nations**, those in Gaza are living on an average of 4.7 liters of water per person per day, far below the 15-liter minimum recommended during emergencies

by the **World Health Organization**. The vast majority of the territory's water and sewage treatment plants have also been shut down for months, according to **Oxfam**.

International charities including **UNICEF**, with the support of the Australian and Swedish governments, are providing clean water to

some 900,000 people, but the UN estimates 70% of the total population only has access to salty and contaminated water.

"This is really about saving lives," Wheatley said. "It's about enough water to drink,

➔ *Beam Global* page 62

# ecoATM Expanding Kiosks to Northeast States

**CLEAN TECH:** New Partnerships Ups Footprint to 6,000 Locations

■ By ELI WALSH

**SAN DIEGO** – **ecoATM Gazelle** announced this month that it is expanding its kiosks to multiple grocery and furniture store chains in the northeast U.S., enabling more shoppers to turn in their old and unused mobile devices and immediately receive cash in return.

The partnerships between **ecoATM**, **Price Rite Marketplace**, **Northeast Grocery Inc.** and **Aaron's** furniture stores will expand the mobile device recycling company's footprint to more than 6,000 locations, which also include **Kroger**, **Dollar General** and **Walmart** stores.



**Neil Fried**  
SVP, Corporate  
Development  
ecoATM Gazelle

According to research conducted by **ecoATM**, an average American adult has 2.4 unused phones gathering dust in their home, amounting to an estimated 150 million smartphones that could be exchanged for cash at one of the company's recycling kiosks.

**ecoATM** kiosks accept cell phones, MP3 players and tablets, according to the company, with 70% of cash payouts offered in exchange for old and outdated devices being spent in the same store where a kiosk is located.

"We're excited to expand our network and help our new retailers provide shoppers with a



Photo of a grocery store customer using an **ecoATM** kiosk to recycle an unneeded electronic device. Courtesy **ecoATM Gazelle**

turnkey, value-add experience that allows them to convert old phones into dollars that can be spent at the store," said **Neil Fried**, **ecoATM Gazelle's** senior vice president of corporate development.

The company's partnership with **Price Rite** and **Northeast Grocery Inc.** – which is the parent company of **Tops Friendly Market**, **Price Chopper** and **Market 32** – will lead to the installation of **ecoATM** kiosks at up to 150

supermarkets and grocery stores.

Rollout is expected to begin later this year and continue into 2025, according to the company.

➔ *ecoATM* page 65



# Knockaround Tapped as PGA Tour's Official Eyewear

## RETAIL: Sunglasses Sold in PGA TOUR Fan Shops, Select TPC Network Facilities

By KAREN PEARLMAN

**SAN DIEGO** – Who knows more about the sun and need for protective eyewear than people who spend hours on the golf course? Golf players, caddies and fans of the popular outdoor sport spend extended hours in the sun, making protective eyewear essential.

With that in mind, the **PGA Tour** has linked a course for the future with **Knockaround**, inking a multi-year official marketing partnership with the San Diego sunglasses brand, now named the Official Eyewear of the PGA Tour and PGA Tour Champions.

The agreement through 2029 will make Knockaround merchandise available starting at the beginning 2025 at PGA Tour Fan Shops throughout the FedExCup Season as well as at select **TPC Network** facilities – a collection of private golf courses, resorts and properties owned by the PGA Tour.

Specific financial details of the partnership were not disclosed, but the deal is another bonus for Knockaround, which continues to reap double-digit year-over-year growth.

As a part of the deal, Knockaround will also engage with fans through new content



**Jeff Hennion**  
CEO  
Knockaround

and ambassadorships with PGA Tour players, in addition to activations at PGA Tour events nationwide. Knockaround already had made an early entry into the golf ecosystem through partnerships with PGA Tour players **Joel Dahmen** and **Harry Higgs**.



**PGA TOUR** player Joel Dahmen, seen here with his caddie, is a long time Knockaround sunglasses customer. Now he will be joined by other golfers and golf fans thanks to a multi-year deal between the San Diego eyewear company and the TOUR. Photo courtesy Knockaround/PGA TOUR

“When you take a look at golf and sunglasses, it’s just a natural fit,” said Knockaround CEO **Jeff Hennion**. “The PGA Tour is a world-class organization and full of players, caddies, volunteers and fans who do nothing but chase the sun all year long, and we can’t

think of a better partner to launch the Knockaround brand into this world with.”

With the new PGA Tour relationship, Knockaround will further amplify its brand in the growing world of professional golf. The PGA Tour, headquartered Florida,

co-sanctions dozens of tournaments on the PGA Tour, PGA Tour Champions, Korn Ferry Tour, PGA Tour Americas and more. Tour members hail from 28 countries and territories. Virtually all tournaments are organized as nonprofit organizations to maximize charitable giving, and to date, tournaments across all Tours have generated more than \$3.93 billion.

The PGA Tour has long-term domestic distribution partnerships for broadcast coverage on **CBS**, **NBC** and **Golf Channel** and video streaming service on **ESPN+**, with coverage available across more than 200 countries and territories.

### The Beginnings of the Linkup

“The PGA Tour is aligned with Knockaround in its belief that the true value of golf is in the fun and the memories, and we are excited to debut their brand and ideals to PGA Tour fans at tournaments and venues throughout the year,” said **Brian Oliver**, PGA Tour executive vice president of corporate partnerships.



**Brian Oliver**  
EVP, Corporate Partnerships  
PGA TOUR

The partnership between the PGA Tour and Knockaround developed organically, driven by the natural synergy between golf and sunglasses, Hennion said, and built on shared values and strengthened by key existing relationships within both organizations.

Hennion said there were a number of different initial points of contact, but that the PGA

➔ *Knockaround page 65*



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## REAL ESTATE

Ray Huard | rhuard@sdbj.com

### Home Prices Hold Steady

**REAL ESTATE:** Average Single-Family Home Price Stays at \$1M; Condos Drop 22%

■ By RAY HUARD

**SAN DIEGO COUNTY** – Amid a slight uptick in interest rates, the median price of existing single-family homes in San Diego County was unchanged in September at \$1 million and sales fell by nearly 14% from August to September, according to the **Greater San Diego Association of Realtors**.

Condo and townhome prices took a hit, with the median price dropping 22% from August to September from \$675,666 to \$646,000.

A year ago, in September 2024, the median price of a resale single-family home was \$992,500 and the median price of condos and townhomes was \$660,000.

Condo and townhome sales were down 4% from August to September.



**Ryan Mathys**  
Broker Associate  
Compass

On the plus side, the inventory of single-family homes on the market has improved, according to Association President **Spencer Lugash**.

“We’re still bullish on the prospects of lower interest rates,” Lugash said.

**Ryan Mathys of Compass** said that the August-to-September drop in home prices is fairly typical for this time of year in a normal market as opposed to the overheated market of 2022 and 2023, when a shortage of homes for sale pushed the median price of single-family homes to more than \$1 million.

“What we’re seeing is a much more balanced market than it was in the last several years,” Mathys said. “It’s pretty balanced between buyers and sellers being in control.”

The rising inventory of homes on the market is encouraging, but Mathys said that uncertainty over where interest rates are headed is putting a damper on the market, both for sellers, who are reluctant to give up low interest mortgages, and buyers reluctant to make a commitment.

“We’ve had several buyers, they’re not completely stopping their search, but they’re hitting the pause button, waiting to see if interest rates come down,” Mathys said.

“A lot of families are in homes where they might need more space, but it’s hard to give up that low-mortgage rate,” Mathys said.

He predicted that rates would have to drop to about 5% to 5.7% to see a significant rise in inventory.

Looking ahead, Mathys said that he expects a modest rise in prices, at best.

“It’s going to be a balanced market and kind of steady. I don’t expect prices to go up dramatically. I don’t expect them to drop dramatically,” Mathys said.

The most expensive single-family home sold in September was a 5,000-square-foot Del Mar home with five bedrooms and five bathrooms overlooking the ocean that went for \$15.5 million.

#### Apartment Rents Relatively Flat

Apartment rents in San Diego County showed little change in October, with the monthly median rent county-wide for a one-bedroom apartment unchanged from September at \$2,400, according to Zumper, an apartment listing service.

The median rent for a two-bedroom apartment fell 1.2% in October to \$3,200, according to **Zumper**.

Coronado had the most expensive apartments, with a median rent of \$3,530 for a one-bedroom apartment and \$5,380 for a two-bedroom apartment.

El Cajon has consistently had the lowest rents in the county, settling at \$1,750 for a one-bedroom apartment and \$2,300 for a two-bedroom apartment. ■



**Pacific Terrace Hotel recently completed a \$3-million renovation that took two years to complete.** Photo courtesy of Pacific Terrace Hotel

### Barefoot Luxury is Promise of Renovated Pacific Beach Hotel

**HOSPITALITY:** Pacific Terrace Hotel Puts \$3M Into Extensive Refresh

■ By RAY HUARD

**SAN DIEGO** – **Pacific Terrace Hotel** in Pacific Beach has completed a \$3 million renovation that took two years.

The boutique hotel, a part of the Bartell Hotels chain, promises “sophisticated barefoot luxury” with the new look, which General Manager **Sandra Kauffman** said gives it an airy, contemporary feel with a brighter color palette of white and turquoise.

Prior to the renovation, the hotel décor was what Kauffman described as classic with earth tones predominating – a look that had become somewhat dated.

“It was important for us to refresh this space to meet the evolving expectations of our guests and maintain our reputation for providing exceptional stays,” Kauffman said. “Our first goal was to keep our repeat guests happy. Many have come with their parents or grandparents, and they return with their own children.”

Designed by **Liz Bartell**, the hotel owner and lead designer, every bit of the beachfront hotel was touched in the renovation, from all 73 guestrooms, suites and junior suites to the hallways, lobby and swimming pool.

The hotel, which opened in 1986, underwent a series of renovations in the past, but none were this extensive, Kauffman said.

The new look starts right at the entrance, with a refurbished lobby that has new rattan-style furniture replacing heavier traditional pieces.

The new front desk was custom built with a quartz top and front in shades of blue, lavender and gray with a backdrop of handcrafted woodwork in shades of light tan replacing a darker reception desk with a granite top.

The feel of the lobby is meant to convey that barefoot luxury that is the theme of the hotel to distinguish it from more formal hotels.

“Barefoot luxury is where our guests walk around in their robes to go to the beach or to go to the hot tub and they feel comfortable doing that,” Kauffman said. “Because we are so close to the beach and we are San Diego,



**Sandra Kauffman**  
General Manager  
Pacific Terrace Hotel

we are known for our warm hospitality where it is very personal.”

#### Small and Personal

Beyond the lobby, the walls and hallways were stripped bare, and the wallpaper was replaced, with an emphasis on lighter colors.

“It’s mostly light, woven wallpaper and gorgeous stone on the floor,” Kauffman said.

The renovation was just as extensive in the hotel’s **Terrace Café**.

“We literally gutted the kitchen. We created a beverage bar and it has a new espresso machine,” Kauffman said.

The café furniture was replaced with chairs that have a woven look to them and light wood tables with stone tops. “We went lighter and bright,” Kauffman said.

New furniture in the rooms includes combination dresser/desks with a 10-foot-long white stone tops and separate tables that tuck beneath the dressers

Stepping outside the hotel, iron gates leading to the pool were replaced with glass to add “that more open view looking out at the ocean from our patios,” Kauffman said.

All but one of the guest rooms and suites have balconies or patios, 33 have full ocean views, and 34 have partial views.

The rooms and suites range from 410 square feet to 850 square feet. Eight of the suites have whirlpool tubs.

Nightly room rates range from \$304 to \$1,599, depending on the season and type of room.

As extensive as the renovation was, Kauffman said that underlying it all was keeping the feeling of intimacy that the hotel has developed.

“Part of our story and our brand is, we are small,” Kauffman said. “People come here and there is that aspect of being more personal.” ■

#### Bartell Hotels



**FOUNDED:** 1967

**HEADQUARTERS:** Point Loma

**CEO:** Richard Bartell

**BUSINESS:** hospitality

**WEBSITE:** www.bartellhotels.com

**CONTACT:** 619-224-1556

**NOTABLE:** Bartell Hotels owns eight hotels, all in San Diego, and three marinas.

#### Pacific Terrace Hotel



**FOUNDED:** 1986

**LOCATION:** Pacific Beach

**GENERAL MANAGER:** Sandra Kauffman

**BUSINESS:** hotel

**EMPLOYEES:** 89

**WEBSITE:** www.bartellhotels.com/hotels/pacific-terrace-hotel

**CONTACT:** info@pacificterrace.com; 858-581-3500

**NOTABLE:** Pacific Terrace Hotel was acquired by Bartell Hotels in 1998.

# WEALTH

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# MANAGEMENT



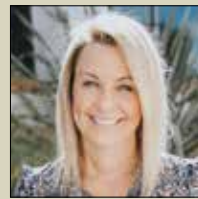
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## UBS' Hansen on Tax, Asset, Governance, Philanthropy Strategies

### What strategies should families consider for tax-efficient wealth transfer to future generations?

Families looking to transfer wealth tax-efficiently may want to explore estate planning strategies such as irrevocable trusts, family limited partnerships, and other wealth transfer vehicles that reduce estate and gift tax liabilities. These strategies can allow for the orderly passing of assets while minimizing tax burdens. It's essential to be well-versed in the latest tax regulations and to design a plan that fits the family's financial goals, ensuring that wealth is preserved over generations.

### How can families protect their assets across generations while minimizing exposure to potential creditors?

Asset preservation strategies, such as placing assets in irrevocable trusts or using family offices, can help safeguard wealth from potential risks, including creditor claims. In addition, risk management through insurance and legal structuring can provide an extra layer of protection. Establishing these structures early and regularly reviewing them is key to helping ensure that family's wealth remains for generations to come, regardless of future challenges.

### How can families ensure proper governance of their wealth to avoid conflicts and maintain family harmony?

Creating a well-defined governance structure is crucial to managing family wealth across generations. This might include drafting family constitutions, setting up advisory boards, or holding regular family meetings. These



**Matt Hansen, CFP, CEPA**  
Senior Vice President-Wealth Management  
Hansen Wealth Management  
UBS Financial Services

Matt Hansen, a San Diegan, is a Certified Financial Planner® and Certified Exit Planning Advisor® who helps business owners in every stage of their lifestyle. He strives to provide resources and capital to help business owners grow, and investment banking resources to help them merge, sell or go public. Matt offers personalized financial and wealth management advice along the way, coupling an owner's financial plan with their overall business plan to help maximize the value of their company and create a successful exit and liquidity event.



governance tools help clarify roles and responsibilities, prevent conflicts, and ensure that family values are passed down. Educating the next generation on financial stewardship and fostering open communication about wealth management can also help preserve family harmony.

### What role does philanthropy play in preserving family wealth and values for future generations?

Philanthropy can be an important aspect of preserving family values and fostering a sense of purpose across generations. Setting up private foundations, donor-advised funds, or charitable trusts can provide tax benefits while enabling families to make a lasting impact on causes they care about. Involving multiple generations in the philanthropic decision-making process also helps strengthen family unity and ensures that the family's values continue to guide their wealth management.

### How can families leverage investments and alternative assets to grow their wealth while minimizing tax liabilities?

Investing in a diversified portfolio can provide growth opportunities while helping to mitigate risk. Families can also implement tax-efficient investment strategies, such as pre-liquidity planning or using tax-advantaged accounts. A comprehensive understanding of investment options, risk management, and tax planning is crucial for optimizing long-term financial growth.

Each of these strategies are best executed with the assistance of a highly competent wealth planning team, who collaborates with your legal and tax advisors while tailoring solutions to the family's specific financial landscape. ■

## Northern Trust Takes Research-Based Approach to Wealth Management

### What makes Northern Trust uniquely equipped to help their clients?

Northern Trust offers holistic wealth management services for individuals and families, family offices, and foundations and endowments. We are recognized for service excellence, expertise, and integrity across all aspects of wealth management. For more than 135 years, we have advised generations of wealthy families. We have seen an unimaginable variety of wealth management challenges and have successfully worked with our clients to craft solutions for them.

In addition to serving our clients with hands-on support and guidance, our advice is also driven by our research institute, The Northern Trust Institute. With contributions from more than 175 experts in over 40 specialty areas such as family education and governance, cybersecurity, real estate, philanthropy, tax strategy, art, business advisory and divorce, the Northern Trust Institute brings the breadth and depth of our firm to your unique situation.

### What is a challenge your clients are facing, and how do you help them overcome it?

For wealthy families, a top concern is often the impact their success will have on loved ones. The well-known business adage "shirtsleeves to shirtsleeves in three generations" portrays a cautionary tale of how successful wealth creators risk having their life's work squandered by heirs, leaving grandchildren and other relatives left to start the process of building wealth all over again. However, new data has called into question the accuracy of this premise, finding that such fear-based planning can hinder the ability of future generations to build on past success and even lead to family tension. Behavioral research finds that building confidence and trust is more effective in equipping future generations for the responsibilities of protecting and growing wealth rather than rigid and overly restrictive estate plans. Studying the behavioral patterns of thousands of families, The Northern Trust Institute has found five clear patterns among enterprising families, and we use these strategies to help guide our clients through successful wealth transfer.



**Ali Nafii**  
Senior Managing Director, San Diego  
Northern Trust

Ali directs the wealth management business serving high-net-worth individuals and families, driving strategic growth in San Diego. He leads a team that provides best-in-class investment management, trust, banking and advisory solutions. Ali joined Northern Trust in 2015, and has held several leadership roles including serving as Client Development Market Lead & Senior Portfolio Advisor in Orange County.

Prior to Northern Trust, Ali worked for Jarislowsky Fraser Limited, a global management investment firm. He earned a Bachelor of Commerce with Finance specialization from Concordia University in Montréal, Canada and a Master of Business Administration from Hult International Business School.



### What do you tell investors who are anxious about market volatility?

Financial market volatility often undermines an investor's willingness to stick with their long-term investment strategy. Unfortunately for many investors, historical data shows this lack of confidence tends to happen at precisely the wrong time

and manifests in investors being underinvested during strong market reversals.

Decades of stock market research reveal that the biggest gains over the lifetime of a portfolio come in the short window after a trough, making it extremely costly to miss these few days. An investor who sat out the best 10 days of the last 10 years – less than half a percent of the 2,500 trading days in the period – would have lost more than \$42,000 on each \$100,000 invested. Being out of the market for the 40 best days in that period – or just four days from each year – would have yielded negative returns. These are the market conditions that emphasize why you have a plan and the importance of sticking to it – through good times and bad.

Using our proprietary Goals Driven Wealth Management process, we collaborate with our clients to build a plan that is not left to chance, allowing them to be better prepared and achieve their individual goals.

### How should people prepare for a changing tax landscape?

Current estate tax exemption rates are the highest they have been in history, allowing individuals an unprecedented \$13.61 and married couples \$27.22 million to give away during life or death tax free. The temporary exemption, however, is scheduled to sunset on December 31, 2025 – at which point, barring action by Congress, it will revert to approximately \$7 million per individual, adjusted for inflation.

Current exclusion levels represent a significant opportunity. In similarly fluctuating tax environments, however, we have observed some families acting precipitously as deadlines approached. Potential planning missteps may include gifting to an irrevocable trust with liquid, rather than harder-to-value assets due to time pressures, resulting in insufficient liquidity later in life; or, gifting retirement assets to trust without a complete understanding of the structure, resulting in more restricted access and control than anticipated. Our experts can help you optimize your plan by modeling how tax changes and potential gifting will impact your goals, liquidity and complete tax picture, both during your lifetime and for your beneficiaries. ■

# AMM on What to Look for in the Right Financial Advisor for You

## What is the fiduciary duty and how does it help clients?

The fiduciary duty is a requirement to act in the best interest of one's client, to give advice that is prudent and loyal, and to eliminate or disclose any conflicts of interest. In the context of wealth management, registered investment advisers (RIAs) are always fiduciaries when working with their clients.

Not all financial advisors are required to uphold the fiduciary duties of loyalty and care in their interactions with clients. It is important to ask any financial advisor you are considering working with whether or not they uphold the fiduciary standards at all times.

## How do I compare wealth advisors?

A wealth advisor should always provide you with their Form ADV, which explains how they get paid, their investment philosophy, and whether they have been subject to any disciplinary actions. It is important to determine what potential conflicts of interest they may have.

Conflicts of interest are always possible in the wealth advisor landscape so any responsible advisor will be able to explain the potential conflicts simply and easily. They should also tell you how they plan to reduce or mitigate these conflicts as they arise.

Fiduciaries are required to disclose conflicts of interest as they arise so that they are transparent and can be taken into consideration along with their advice. Any professional working for compensation who claims there are no conflicts of interest is not representing themselves accurately.

## What is the best way to make charitable donations?

The best way to make charitable donations depends on your tax situation. If you are over 73 and are currently taking RMDs (required minimum distributions), donating directly from your IRA may provide the most tax benefit. If you are in a high tax bracket, donating shares of appreciated stock may be the best way.

Setting up a donor-advised fund can also provide

you with greater tax benefits than making direct donations. Any contributions you make to this type of account are no longer yours but you can direct when the money is sent to your designated charities. You can then claim the deduction in the year you fund the donor-advised fund, whether or not you send all of the money out in a single year.

## How does your firm handle complex financial situations like mine?

Our team has experience helping clients from a variety of professions and backgrounds. We have a team of CFP® practitioners and financial professionals, plus a CPA to answer just about any question you have. We believe that more knowledge makes for better financial decisions so we like to provide our clients with as much financial education as they want or need.

Our firm, AMM, is independent from any brokerage firms. We are fee-only, which means that we do not accept commissions. This helps us eliminate a large part of the potential conflicts of interest that could arise.

Each of our clients is unique and so each client receives personalized investment management and financial planning.

## How can I set my children and grandchildren on a good financial path?

Teaching your children and grandchildren about responsible money management is a great first step. Additionally, talking to a professional financial planner can help you explore options like gifting to the next generation, funding 529 accounts, or tax-efficient estate planning.

If you are comfortable, bringing your adult children to your meetings with us or other wealth managers can help them learn about the complexities of investing and financial planning. Our team of advisors are happy to help clients' children and grandchildren by talking to them about investing, building credit, saving for goals, making a budget, and using money appropriately for their needs. ■



**Marnie Baird, CFP**

Financial Advisor

American Money Management, LLC

Marnie Baird, CFP® has been a financial advisor since 2014. First with Wealth Quest Partners, Inc., and now with American Money Management, LLC. After completing her financial planning education at San Diego State University, Marnie earned the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification in April 2017. She is excited to continue to grow with American Money Management, LLC. in the years ahead.

Education is important to Marnie and she enjoys assisting those nearing retirement with their financial planning as well as helping younger generations understand the importance of planning early for financial goals, including retirement.

Marnie is skilled in all aspects of technology and is eager to suggest new ways for our clients to leverage technology to better their financial lives. She is especially conscious about cybersecurity risks and strategies and is happy to consult with interested clients.



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## Lucia Capital Group on Preparing for Future Market Opportunities

### What should investors consider doing right now to protect their wealth and prepare for future opportunities?

We've had a nice run up in the markets this year and let's not get over our skis. Protecting your wealth should be a priority and one of the key techniques our financial advisors use with clients is value averaging. What this does is help create the discipline to sell risky assets at a profit and reallocate to less risky assets for the purpose of investing in more attractive assets when opportunities arise. And while waiting, you can still comfortably earn around 5% or so with taking little to no risk. Today, the opportunity cost of taking money off the table is low. However, for investors that want to remain fully invested while adding additional risk management to their portfolio, I am seeing our advisors using option strategies and allocating to alternative investments for their clients.

### With short-term interest rates in decline, what strategies are your portfolio managers considering now?

This really is a yield curve discussion. With the Fed cutting rates and looking like that may continue for the foreseeable future, asset managers are trying to figure out where the opportunity is in fixed income. Keeping in mind bonds prices have an inverse relationship with interest rate movements. At the same time, a normalized yield curve is when longer term bonds pay a higher yield than shorter term bonds. The yield curve has been inverted for some time and is starting the process to normalize. And while that is happening, there still is inflation that is making the asset manager's jobs more difficult because the greatest opportunity when rates fall is typically on the longer end of the yield curve. But that's where the most pain can be if you get it wrong. Our asset management team



**Ray Lucia Jr.**  
Chairman & CEO  
Lucia Capital Group

Ray Lucia Jr. is the Chairman and CEO of Lucia Capital Group (LCG), guiding both the firm's vision and its financial strategies. Anchored primarily by The Bucket Strategy® retirement approach, LCG has been helping individuals, families, and business owners manage their wealth for decades. Ray began his career at Deloitte and Touche as a tax accountant and has over 20 years in the financial services industry. He has since held roles as an investment advisor, executive VP, and CEO. Ray graduated from Loyola Marymount University with a B.S. in accounting, holds a CPA and a PFS designation from the AICPA, along with FINRA Series 7, 24, 63, 65, held through LPL Financial, and a California insurance license.

**LUCIA**  
— CAPITAL GROUP —

believes positioning in the 2- to 4-year maturity range offers the best balance of return and risk.

### What year-end tax planning opportunities should business owners be aware of?

There are several strategies to consider for year-end tax planning. Here are a few of my favorites. 1) Tax loss harvesting - everyone has some losses in their portfolio, realize those losses to offset your realized gains. 2) Charitable Contributions - Don't donate cash, instead donate your appreciated stock. You'll get full benefit of the value for the deduction and avoid paying taxes on the gain. 3) Max fund your retirement plans - Remember, every dollar you contribute to your 401(k) reduces your taxable income. 4) Fund your Health Savings Account - You get the deduction today, tax free growth and tax free withdrawal for qualified medical expenses.

### What advice would you give business owners about managing their personal wealth?

For most business owners, their business is their largest financial asset and their investment portfolio is more like their side hustle. A skilled financial advisor can help business owners bridge the gap between their business and personal wealth. There are many research studies that state hiring skilled financial advisors can add up to 3% in additional net returns. I argue that the value can be significantly higher when working with advisors that focus on helping business owners with maximizing their business valuation. 1) Start with a plan. Solidifying your financial goals gives you a target to strive for. 2) Get a business valuation; it's not as expensive as you think. 3) Get advice on the things that will improve your valuation over time like implementing new technologies, diversifying your customer base, increasing your recurring revenue. ■

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Call, click, or visit us in Rancho Bernardo to schedule your appointment.

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There is no guarantee that any investing strategy will be profitable or provide protection from loss. The investment professionals are registered representatives with, and securities and advisory services offered through LPL Financial, a registered investment advisor and member FINRA/SIPC. The investment professionals are affiliated with LPL Financial and are conducting business using the name Lucia Capital Group, a separate entity from LPL Financial.

# PNC Private Bank Offers Unique Wealth Strategies for Unique Family, Business Dynamics

**After the increase in the federal tax standard deduction and decrease in the SALT deduction, some individuals have not been able to take a tax deduction for charitable deductions. What are PNC Private Bank clients in similar situations doing?**

The current standard deduction of \$14,600 for an individual and \$29,200 for a married couple may exceed an individual's standard deduction and thus eliminated the income tax benefit of charitable gifting. There are several strategies to explore but options may include doing a Qualified Charitable Deduction ("QCD") from a Traditional IRA account or possibly making larger gifts less often to were hopefully lumping charitable gifts could allow you to accumulate deductions and itemize in some years. PNC Private Bank Wealth Strategists can work with a client's tax professional to offer custom solutions.

**Families are unique and seem to be getting more complex each year. What solutions are available for the complicated and diverse family situations?**

Family dynamics and wealth goals and objectives are deeply personal and unique to each family and individual. Partnering with a wealth strategist can help guide you in creating a vision that creates not only tax efficiency but more importantly an efficiency of purpose and objective. Planning should include an independent review and harmonizing of your full strategic plans and objectives including your Trust and Estate, Insurance protections and resolution to complex family issues.

**PNC Private Bank works a lot with business owners. Are there any potential changes that co-owners should be considering?**

We believe that all business owners should have a succession plan for management as well as financial stability. In 2024,



**Marcy Mackless**  
SVP, Wealth Director  
PNC Private Bank

As a senior vice president and wealth director, Marcy Mackless oversees the client's team of private bank professionals, striving to achieve the highest level of client satisfaction. Her top priority is that the team not only meets, but also exceeds the client's expectations. Through Marcy's leadership and commitment, she helps ensure that the client benefits from a full complement of investment, trust, financial planning and private banking services to help them achieve their financial goals. As a Wealth Director for the Private Bank, she plays a key role in helping our team provide personal wealth solutions for high and ultra-high net worth individuals and families.



the U.S. Supreme Court decided that the value of a company increased by the value of the death benefit received from corporate owned life insurance but not reduced by the company obligation to redeem the deceased shareholder's shares. In short, this ruling is a reminder to have a succession plan but to also review the plan periodically to insure that it continues to satisfy your objectives.

**How does the sale or transition of a family business present unique challenges and opportunities for a family?**

At PNC Private Bank, we work with families and their advisors to guide and explain options and opportunities in the transition of a family business. We offer consultation regarding whether a business succession either to family, employees or third-party purchasers. We help guide our clients in weighing different sales or transfer options and subsequently aid the family in fulfilling their goals post sale. Pre or post sale, PNC Private Bank clients seek advice regarding financial and retirement forecasting, investment and liquidity management as well as philanthropic structuring.

**As we begin thinking about the year-end holidays, what should we also think about year-end tax planning?**

As we near the end of 2024, the basic exclusion amount for the federal estate and gift tax is \$13.61 million. Unless Congress takes further action, on Jan. 1, 2026, the exclusion amount will be approximately halved (to 2017 levels, indexed for inflation). We are very close to that expiration date. Now may be a good time to talk to your attorney about planning to use the increased exclusion amount. If you intend to use the increased exclusion amount, I suggest not waiting until 2025 to meet with your attorney. I also encourage you to consult with your tax and financial advisors with respect to your year-end plans. ■

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## WEALTH MANAGEMENT FIRMS

Ranked by assets managed locally for fiscal year 2023

Rank	Company Address Website Phone	Logo	Total assets managed: 2023 2022 % + (-)	Services						Compensation				# of local portfolio managers or investment advisers	Top local exec.(s) CIO Year est. locally	Photo	
				Financial planning	Brokerage services	Asset management	Estate planning	Life insurance/risk mgmt.	Other	Hourly	Commissions	Fixed fee	Performance-based fees				Min. investment account: Individual Institution
1	<b>Chandler Asset Management Inc.</b> 9255 Towne Centre Drive, Suite 600, San Diego 92121 www.chandlerasset.com; 800-317-4747		\$35.8B \$28.6B 25	N	N	Y	N	N	N	N	N	Y	N	\$250,000 \$1,000,000	16	Nicole Drago Jayson Schmitt William Dennehy Scott Prickett 1988	
2	<b>Wells Fargo Wealth Management</b> 4465 Executive Drive, Suite 1000, San Diego 92121 www.wellsfargo.com/the-private-bank/san-diego-office/; 858-261-6230		\$33.1B \$26.2B 26	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	\$250,000 \$1,000,000	202	Joseph DeFalco 1855	
3	<b>Merrill Lynch Wealth Management</b> 701 B St., Suite 2400, San Diego 92101 www.ml.com; 619-699-3700		\$30.3B \$25.7B 18	Y	Y	Y	Y	Y	Y	N	Y	Y	N	\$250,000 \$10,000,000	173	Mark Kremers 1922	
4	<b>Brandes Investment Partners L.P.</b> 4275 Executive Square, Fifth Floor, La Jolla 92037 www.brandes.com; 858-755-0239		\$23.6B \$18.9B 25	N	N	Y	N	N	N	N	N	N	N	\$100,000 <sup>(1)</sup> \$10,000,000	22	Brent Woods Kenneth Little 1974	
5	<b>UBS Financial Services Inc.</b> 1200 Prospect St., Suite 100, La Jolla 92037 www.ubs.com; 858-454-9181		\$21.5B \$23.1B (7)	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	\$1,000,000 \$1,000,000	99	Justin Frame Solita Marcellini 2001	
6	<b>J.P. Morgan Private Bank</b> 12860 El Camino Real, Suite 200, San Diego 92130 www.privatebank.jpmorgan.com/san-diego; 858-812-6131		\$8.5B \$6.0B 42	Y	Y	Y	Y	N	Y	N	N	N	N	\$5,000,000 \$0	38	Bambos Charalambous Breda Blake 2019	
7	<b>Northern Trust</b> 4747 Executive Drive, Suite 1100, San Diego 92121 www.northerntrust.com; 858-824-1200		\$6.1B \$6.0B 2	Y	Y	Y	Y	Y	Y	N	N	Y	N	\$3,000,000 \$50,000,000	10	Katie Nixon Angelo Manioudakis 1989	

**Sources:** The firms and CPA/CFO-attested statements. To the best of our knowledge, this information is accurate as of press time. While every effort is made to ensure the accuracy and thoroughness of the list, omissions and typographical errors sometimes occur. Please send corrections or additions to the Research Department at the San Diego Business Journal at sdbjlists@sdbj.com. This list may not be reprinted in whole or in part without prior written permission from the editor. Some

companies have declined to participate or did not return a survey by press time. It is not the intent of this list to endorse the participants or to imply a firm's size or numerical rank indicates its quality. <sup>(1)</sup> Through approved programs.

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Rank	Company Address Website Phone	Total assets managed: 2023 2022 % + (-)	Services							Compensation				# of local portfolio managers or investment advisers	Top local exec.(s) CIO Year est. locally	
			Financial planning	Brokerage services	Asset management	Estate planning	Life insurance/risk mgmt.	Other	Hourly	Commissions	Fixed fee	Performance-based fees	Min. investment account: Individual Institution			
8	<b>LM Capital Group LLC</b> 750 B St., Suite 3010, San Diego 92101 www.lmcapital.com; 619-814-1401	 \$5.0B \$4.6B 8	N	N	Y	N	N	N	N	N	N	N	\$10,000,000 \$10,000,000	6	Luis Maizel John Chalker 1989	
9	<b>Pure Financial Advisors LLC</b> 3131 Camino del Rio N., Suite 1550, San Diego 92108 www.purefinancial.com; 619-814-4100	 \$3.5B \$2.2B 61	Y	N	Y	N	N	N	N	N	Y	N	\$1,323,510 \$0	9	Joseph Anderson Brian Perry 2007	
10	<b>HoyleCohen LLC</b> 350 Camino de la Reina, Suite 500, San Diego 92108 www.hoylecohen.com; 858-576-7300	 \$3.4B \$2.7B 22	Y	N	Y	Y	N	N	N	N	Y	N	\$1,000,000 \$1,000,000	24	Mark Delfino Vanessa Wieliczko 2001	
11	<b>AlphaCore Wealth Advisory</b> 875 Prospect St., Suite 315, San Diego 92037 www.alphacorewealth.com; 858-875-4100	 \$2.6B \$1.6B 58	Y	N	Y	Y	Y	Y	N	N	N	N	\$1,200,000 \$5,000,000	12	Dick Pfister 2015	
12	<b>U.S. Bank</b> 4747 Executive Drive, Third Floor, San Diego 92121 www.usbank.com; 858-334-0758	 \$2.6B \$1.1B 143	N	N	Y	N	N	N	N	N	N	N	\$3,000,000 \$3,000,000	4	Vladimir Victorio 1999	
13	<b>Crest Capital Advisors</b> 12680 High Bluff Drive, Suite 450, San Diego 92130 www.crestcapadv.com; 858-356-6340	 \$2.1B \$2.1B 4	Y	N	Y	Y	Y	Y	N	N	Y	N	\$10,000,000 \$10,000,000	3	Drew Nordlicht David Molnar 2012	
14	<b>Mercer Advisors<sup>(1)</sup></b> 5348 Carroll Canyon Road, Suite 200, San Diego 92121 www.merceradvisors.com; 858-750-4200	 \$2.0B \$807.2M 144	Y	N	Y	Y	N	Y	Y	N	Y	N	\$300,000 \$500,000	21	Jeffrey Witt Brad White David Askew David Allen 1993	
15	<b>Callan Capital</b> 1250 Prospect St., Suite 1, La Jolla 92037 www.callancapital.com; 858-551-3800	 \$1.9B \$1.5B 28	Y	N	Y	N	N	N	N	N	Y	N	\$5,000,000 \$5,000,000	7	Trevor Callan Ryan Callan Tim Callan 2007	
16	<b>Mariner Wealth Advisors</b> 11512 El Camino Real, Suite 370, San Diego 92130 www.marinerwealthadvisors.com; 858-795-9000	 \$1.3B \$1.1B 22	Y	N	Y	Y	Y	Y	N	N	N	N	\$0 \$0	9	Kyle Quinn Katrina Scott 2011	
17	<b>WestPac Wealth Partners</b> 5280 Carroll Canyon Road, Suite 300, San Diego 92121 www.westpacwealth.com; 619-684-6400	 \$1.3B \$845.6M 52	Y	N	Y	Y	Y	N	N	Y	Y	N	\$10,000 \$25,000	33	Nash Subotic 2012	
18	<b>Weatherly Asset Management</b> 832 Camino del Mar, Suite 4, Del Mar 92014 www.weatherlyassetmgmt.com; 858-259-4507	 \$1.2B \$1.0B 22	Y	N	Y	Y	Y	N	N	N	Y	N	\$1,500,000 \$1,500,000	9	Carolyn Taylor 1994	
19	<b>Telos Capital Management Inc.</b> 13480 Evening Creek Drive N., Suite 250, San Diego 92128 www.telosinc.com; 858-271-6350	 \$1.2B \$474.0M 153	Y	N	Y	N	N	N	N	N	N	N	\$250,000 \$250,000	12	Stefan Meierhofer Andy Weld 1986	
20	<b>Aspiriant</b> 12481 High Bluff Drive, Suite 110, San Diego 92130 www.aspiriant.com; 858-755-8899	 \$1.1B \$1.0B 10	Y	N	Y	Y	Y	Y	Y	N	Y	N	\$1,500,000 \$1,500,000	18	Mark Petrie Paul Hynes John Allen 1987	
21	<b>Christopher Weil &amp; Co. Inc.</b> 11236 El Camino Real, Suite 200, San Diego 92130 www.cweil.com; 858-724-6040	 \$782.0M \$1.1B (26)	Y	N	Y	Y	Y	Y	N	N	Y	N	\$1,475,433 \$0	10	John Wells 1995	
22	<b>Blankinship &amp; Foster LLC</b> 420 Stevens Ave., Suite 250, Solana Beach 92075 www.bfadvisors.com; 858-755-5166	 \$780.4M \$690.0M 13	Y	N	Y	N	N	N	Y	N	Y	N	\$1,000,000 \$1,000,000	8	Stefan Prvanov Mengxi (Monica) Ma 1989	

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companies have declined to participate or did not return a survey by press time. It is not the intent of this list to endorse the participants or to imply a firm's size or numerical rank indicates its quality.

(1) Private Asset Management (PAM) joined Mercer Advisors in August 2023.





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SINCE 1865<sup>SM</sup>**

# WEALTH MANAGEMENT FIRMS

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				Financial planning	Brokerage services	Asset management	Estate planning	Life insurance/risk mgmt.	Other	Hourly	Commissions	Fixed fee	Performance-based fees				
23	<b>Marine Street Financial</b> 7777 Fay Ave., Suite 305, La Jolla 92037 www.marinestreet.org; 858-405-4969		\$664.0M \$525.0M 26	Y	Y	Y	Y	Y	Y	N	N	N	\$100,000 \$500,000	5	Perry Bacon Daniel Racicot 2013		
24	<b>Centura Wealth Advisory</b> 12255 El Camino Real, Suite 125, San Diego 92130 www.centurawealth.com; 858-771-9500		\$640.0M \$621.7M 3	Y	N	Y	Y	Y	Y	Y	N	Y	N	\$2,000,000 \$2,000,000	6	Derek Myron Christopher Osmond 2018	
25	<b>Stolper &amp; Co.</b> 2305 Historic Decatur Road, Suite 100, San Diego 92106 www.stolperco.com; 619-231-9102		\$615.6M \$580.9M 6	Y	N	Y	Y	N	N	N	N	Y	N	\$500,000 \$500,000	2	Barbara Malone Tyler Rowe 1975	
26	<b>American Money Management</b> PO Box 675203, Rancho Santa Fe 92067 www.aminvest.com; 858-755-0909		\$615.0M \$535.0M 15	Y	N	Y	Y	N	Y	Y	N	N	Y	\$100,000 \$100,000	10	Michael Moore Gabriel Wisdom 1999	
27	<b>Creative Capital Management Investments LLC</b> 6265 Greenwich Drive, Suite 201, San Diego 92117 www.mycmmi.com; 619-298-3993		\$586.1M \$488.3M 20	Y	N	Y	N	N	N	N	N	N	N	\$500,000 \$500,000	4	Brian Matter Matt Showley 2017 <sup>(1)</sup>	
28	<b>Rowling &amp; Associates LLC</b> 8889 Rio San Diego Drive, Suite 202, San Diego 92108 www.rowling.com; 619-295-0200		\$525.0M \$513.0M 2	Y	N	Y	N	N	Y	Y	N	Y	N	\$0 \$0	6	Juan Aguilar Lorenzo Sanchez 2020	
29	<b>Financial Alternatives Inc.</b> 7825 Fay Ave., Suite 210, La Jolla 92037 www.financialalternatives.com; 858-459-8289		\$496.4M \$460.3M 8	Y	N	Y	N	N	N	Y	N	Y	N	\$2,000,000 \$2,000,000	5	Jim Freeman Chris Jaccard 1991	
30	<b>Ariston Services Group LLC</b> 750 B St., Suite 2630, San Diego 92101 www.aristonservicesgroup.com; 619-241-2326		\$466.9M \$455.5M 2	Y	N	Y	Y	N	N	N	N	Y	Y	\$2,000,000 \$2,000,000	2	Peter Shenias Peter Shenias 2008	
31	<b>Symbio Financial Partners</b> 7777 Fay Ave., Suite 315, La Jolla 92037 www.symbiofinancialpartners.com; 858-551-8770		\$420.0M \$425.0M (1)	Y	N	Y	N	Y	N	N	Y	N	N	\$500,000 \$500,000	4	Shari Miller Michael Dorvillier 1992	
32	<b>Wilsey Asset Management</b> 10620 Treena St., Suite 100, San Diego 92131 www.wilseyassetmanagement.com; 858-224-0004		\$406.5M \$365.2M 11	Y	N	Y	N	N	N	Y	N	Y	N	\$100,000 \$0	2	Brent Wilsey Brent Wilsey 1995	
33	<b>Clelland &amp; Co. Inc.</b> 5151 Shoreham Place, Suite 130, San Diego 92122 www.clelland.com; 858-587-8700		\$399.8M \$357.0M 12	Y	N	Y	Y	N	N	N	N	Y	N	\$500,000 \$1,000,000	2	Matthew Medeiros Matthew Medeiros 1989	
34	<b>Aldrich Wealth LP</b> 1903 Wright Place, Suite 180, Carlsbad 92008 www.wealthadvisors.com; 760-431-8440		\$343.3M \$311.6M 10	Y	N	Y	Y	N	Y	Y	N	Y	N	\$1,000,000 \$1,000,000	3	Carl Pinkard Darin Richards 1998	
35	<b>Platt Wealth Management</b> 3838 Camino del Rio N., Suite 365, San Diego 92108 www.plattwm.com; 619-255-9554		\$309.0M \$288.0M 7	Y	N	Y	N	N	N	N	N	Y	N	\$500,000 \$500,000	3	Jeff Platt 2018	
36	<b>Allworth Financial</b> 2305 Historic Decatur Rd, Suite 100, San Diego 92106 www.allworthfinancial.com; 858-263-1677		\$300.0M \$300.0M 0	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	\$500,000 \$500,000	4	Russell Hall Russell Hall 2015	
37	<b>Copley Financial Group Inc.</b> 2650 Camino Del Rio N., Suite 350, San Diego 92108 www.financialplannersandiego.com; 619-294-6008		\$261.9M \$232.6M 13	Y	N	Y	Y	Y	Y	N	N	N	N	\$100,000 \$100,000	5	Matthew Copley Matthew Copley 2013	

Sources: The firms and CPA/CFO-attested statements.

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companies have declined to participate or did not return a survey by press time. It is not the intent of this list to endorse the participants or to imply a firm's size or numerical rank indicates its quality.

<sup>(1)</sup> Founding firm was established in 1975, but successor firm was founded in 2017.

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# WEALTH MANAGEMENT FIRMS

Ranked by assets managed locally for fiscal year 2023

Rank	Company Address Website Phone	Logo	Total assets managed: 2023 2022 % + (-)	Services							Compensation			# of local portfolio managers or investment advisers	Top local exec.(s) CIO Year est. locally	Photo	
				Financial planning	Brokerage services	Asset management	Estate planning	Life insurance/risk mgmt.	Other	Hourly	Commissions	Fixed fee	Performance-based fees				Min. investment account: Individual Institution
38	<b>Illumination Wealth</b> 11622 El Camino Real, Suite 100, San Diego 92130 www.illuminationwealth.com; 858-246-6855		\$250.0M \$200.0M 25	Y	N	Y	Y	Y	Y	N	N	Y	N	\$450,000 \$500,000	3	Matt Rinkey 2009	
39	<b>Silvia McColl Wealth Management</b> 600 W. Broadway, Suite 2625, San Diego 92101 www.silviamccoll.com; 619-637-9920		\$228.0M \$218.0M 5	Y	N	Y	Y	N	Y	Y	N	Y	N	\$750,000 \$2,000,000	2	William McColl Brandon Silvia 2018	
40	<b>Guide My Finances</b> 1265 Carlsbad Village Drive, Suite 201, Carlsbad 92008 www.guidemyfinances.com; 760-547-7585		\$198.2M \$161.1M 23	Y	N	Y	N	N	N	Y	Y	Y	N	\$250,000 \$250,000	4	Jackie Mazur, CFP®, CDFIA® 2009	
41	<b>D'Arcy Capital Management</b> 12625 High Bluff Drive, San Diego 92130 www.darcycapital.com; 858-461-4391		\$159.0M \$139.6M 14	N	N	Y	N	N	N	N	N	N	N	\$500,000 \$1,000,000	2	Brett D'Arcy Krysta Cordill 2011	
42	<b>Bull Oak Capital</b> 4747 Executive Drive, Suite 1010, San Diego 92121 www.bulloakcapital.com; 858-999-3550		\$145.0M \$121.6M 19	Y	Y	Y	Y	N	Y	N	N	N	N	\$1,500,000 \$1,500,000	1	Ryan Hughes 2014	
43	<b>Nerad + Deppe Wealth Management</b> 4250 Executive Square, Suite 545, La Jolla 92037 www.nd-wm.com; 858-457-1325		\$118.0M \$112.0M 5	N	N	Y	N	N	N	N	N	Y	N	\$500,000 \$500,000	2	Richard Nerad Steven Deppe 2009	

Sources: The firms and CPA/CFO-attested statements.

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Business Journal at sdbjlists@sdbj.com. This list may not be reprinted in whole or in part without prior written permission from the editor. Some companies have declined to participate or did not return a survey by press time. It is not the intent of this list to endorse the participants or to imply a firm's size or numerical rank indicates its quality.

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# CYBER SECURITY STEWARDSHIP AWARDS 2024

## EXECUTIVE OF THE YEAR WINNER



**MARK COMPTON**  
CISO  
NAVWAR

## ORGANIZATION OF THE YEAR WINNERS



ABLE-DISABLED ADVOCACY,  
INC.



BSIDES SAN DIEGO



ESET



FBI SAN DIEGO



JOURNEYS MAP BY EDGATE



NAVAL INFORMATION WARFARE  
SYSTEMS COMMAND



SAN DIEGO COUNTY CREDIT  
UNION (SDCCU)



SAN DIEGO REGIONAL  
CYBER LAB



SYLABS INC

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# CYBER SECURITY STEWARDSHIP AWARDS 2024

## CYBERSECURITY EXECUTIVE OF THE YEAR WINNER

### Navy Executive's Influence Extends Into the Wider Community

**Mark Compton**, a top technology executive with the U.S. Navy in San Diego, has been named the 2024 Cybersecurity Executive of the Year.

Compton is command information security officer at **Naval Information Warfare Systems Command (NAVWAR)** in Old Town. The job is the equivalent of chief information security officer (CISO) in the civilian world. NAVWAR is the Navy's electronics and IT command. It plays a pivotal role in shaping the Navy's cybersecurity posture and serves as the Navy's information technology/cybersecurity technical authority.

Compton is credited for being a driving force in the cybersecurity community, leading key initiatives that have not only advanced cybersecurity innovation but also contributed to workforce development and regional resiliency.

#### 'A Consummate Collaborator'

"Mark Compton is a stalwart of San Diego's cybersecurity industry and works tirelessly in service of our nation," said **Lisa Easterly**, president and CEO of San Diego's **Cyber Center of Excellence (CCOE)** and one of the judges for the Cybersecurity Stewardship Awards. "He is a consummate collaborator and his passion for developing talent, innovation and community resiliency has helped launch and guide many of CCOE's most successful programs and initiatives.

"Mark is also an insightful thought leader, educating the larger community on lessons learned, best practices and resources available through the **U.S. Department of Defense** and government agencies. Our region is very lucky to have such a dedicated cybersecurity leader in Mark and we are delighted to celebrate all his contributions as the Executive of the Year!"

"Frankly, I'm humbled at being selected," Compton said, noting "there are so many other outstanding cyber professionals who provide great leadership for their organizations, both inside and outside the Department of Defense. ...

"It was a bit of a surprise," he continued. "But I also feel honored. It's really recognition of a large number of cyber professionals in the NAVWAR enterprise."

Under Compton's guidance, NAVWAR has been at the forefront of groundbreaking cybersecurity initiatives that have transformed both the organization and the broader community.



**Mark Compton, CISO, NAVWAR.** Photo courtesy NAVWAR

He has been instrumental in advancing workforce development through programs such as CyberHire, NFAR Cyber, CAREERworks and **Girl Scouts** workshops. These initiatives, which aim to create a more inclusive and diverse cybersecurity workforce, reflect Compton's commitment to fostering talent and creating pathways for underrepresented groups in the field.

#### From P-3 Aircraft to Program Management

Compton has had a notable career in the Navy, particularly in the field of information security and cybersecurity.

The executive spent 27 years in uniform. Between 1980 and 2007, Compton served as a naval flight officer. He flew P-3 aircraft in the Pacific, from bases in Hawaii, California and Washington state. The Navy uses its P-3 aircraft for anti-submarine



warfare and maritime patrol. Compton also had two tours of duty on the aircraft carrier USS Forrestal out of Florida.

Compton also spent considerable time as a program manager. He spent approximately two years in the private sector in San Diego before returning to Navy employment.

His home has been NAVWAR – which prior to 2019 was called SPAWAR (Space and Naval Warfare Systems Command). For a while, Compton worked on the Joint Tactical Radio System program, also known as JTRS. From 2014 to 2018, he served as the deputy program manager for the Navy's Command and Control Systems Program Office (known internally as PMW 150), where he was responsible for providing operational and tactical command and control capabilities. This included targeting support, chemical-biological warnings, and logistics support for the Navy, **U.S. Marine Corps**, joint and coalition war-fighters.

In September 2018, Compton became the CISO at NAVWAR. In this role, he has been instrumental in driving cyber resilience through situational awareness and incident response.

"I think we're exceedingly fortunate at NAVWAR of being part of a cyber ecosystem that is so vibrant and growing here in San Diego area," Compton said. The ecosystem takes in not only the military and government, but the defense industrial base, other industry, the commercial sector and academia.

"We're all in this together in the San Diego ecosystem and this presents great benefit and great opportunity."

#### More About NAVWAR

As one of San Diego's largest cyber employers, NAVWAR is at the forefront of efforts to protect data, technology, critical infrastructure and national security. In collaboration with CCOE, NAVWAR has served in an advisory role on several key initiatives aimed at enhancing cybersecurity awareness and resilience. ■



**Mark Compton, second from left, takes part in a cybersecurity panel discussion convened by CCOE at Qualcomm in 2023.** Photo by Elisha Gamboa, courtesy U.S. Navy



**Mark Compton in earlier days, while in uniform.** Photo courtesy Mark Compton

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# CYBER SECURITY STEWARDSHIP AWARDS 2024

## CYBERSECURITY AWARENESS OF THE YEAR

### ACADEMIC/NONPROFIT WINNER

#### Education Is a Year-Round Effort at Credit Union

**San Diego County Credit Union (SDCCU)** is making a return appearance as winner of the Cybersecurity Awareness Initiative of the Year Award in the Academic/Nonprofit category. SDCCU won the same award last year.

“SDCCU is proud to be named among the winners of this year’s Cybersecurity Stewardship Awards,” said **Teresa Campbell**, SDCCU president and CEO. “It is essential that the community be informed and vigilant about online security, and SDCCU is pleased to supply resources to aid in safeguarding the public.”

SDCCU is committed to providing free educational resources to raise cybersecurity

awareness and help the wider community avoid unwanted nefarious activities.

With scams on the rise, SDCCU has focused on cybersecurity awareness to help keep its members and the community safe. This includes creating a series of financial health awareness marketing campaigns, aligning with relevant topics from the Consumer Financial Protection Bureau (CFPB) calendar to further educate the community on financial security, including: February, National Consumer Protection Week; June, World Elder Abuse Month; October, Cybersecurity Awareness Month; November, International

Fraud Awareness Week; and December, Identity Theft and Protection Awareness Month.

SDCCU has also partnered with local experts to provide free educational webinars to the community. For example, each February, former San Diego County Deputy District Attorney **Paul Greenwood** presents a webinar focused on romance scams and how to stay safe while dating online. Each April and October for Cybersecurity Month, Cybersecurity Expert **Jim Stickley** educates the public on the latest tactics hackers use, including ransomware and the dark web. In June, for World Elder Abuse Month, current San Diego

County Deputy District Attorney **Scott Pirrello** presents a webinar discussing common cyber scams that target the elder population and educates the community on their warning signs.

SDCCU has dedicated pages on its website with resources to help guard against fraud and scams. ■



### PRIVATE SECTOR WINNER

#### ESET Spreads the Word About Cybersecurity Skills

**ESET**, the cybersecurity software specialist with an international focus, has received the Cybersecurity Awareness Initiative of the Year Award – Private Sector during the Cybersecurity Stewardship Awards for 2024.

“This award speaks to ESET’s work partnering with organizations across the city to drive cybersecurity awareness with vulnerable communities, including small businesses, youth and minorities. It’s important that San Diegans understand cybersecurity best practices and take simple actions to protect themselves against bad actors,” said **Marissa Pitchford**, head of Corporate Social Responsibility at ESET North America.

ESET is passionate about increasing cybersecurity awareness with businesses and consumers – giving special attention to the communities where it operates.

Locally in San Diego, ESET is a founding partner of the **Cyber Center of Excellence (CCOE)** Cybersecurity Awareness Program, which was created to help small businesses increase their cybersecurity awareness and preparedness to bolster the region’s economic resiliency. The program is offered free to participating small businesses, where they gain access to ESET’s cybersecurity awareness training. It aims to reach 650 businesses across greater San Diego as the program grows.

ESET has recently partnered with the **Boys & Girls Clubs of Greater San Diego**, which enables the company to reach more than 22,000 youth across the region, empowering them with the skills and knowledge to stay safe online through the License to the Lab program and ESET’s SaferKidsOnline resources. Understanding how essential it is for students to have the right tools for the digital age, ESET recently supported the clubs’ Back 2 School backpack drive. With California’s 1:1 initiative providing every child with a device, it’s more important than ever to ensure cyber safety. By donating school supplies, backpacks and a free one-year ESET security license/cyber-safety

parental guide, ESET aims to empower families in San Diego to navigate the digital world safely and confidently.

ESET also supports local youth and vulnerable communities through initiatives such as the **San Diego Police Foundation’s** SafetyNet program. ■



### PUBLIC SECTOR WINNER

#### Cyber Team Puts Threats in Focus, Offers Perspective

This year’s Cybersecurity Awareness Initiative of the Year Award – Public Sector goes to the San Diego office of the **FBI**.

“Receiving this honor is a testament to the dedication and hard work of our cyber team here at FBI San Diego,” said the office’s Special Agent in Charge, **Stacey Moy**. “Raising awareness through cyber threat landscape briefings and discussions surrounding the most significant, emerging threat actors not only enhances our security, but strengthens our collective resilience against evolving cyber threats. This recognition underscores the

importance of building and maintaining our partnerships in the San Diego community as we face these challenges together.”

The nomination form lauded the work of two agents in particular, **Nick Arico** (retired) and **Pete Casey**, for tireless national security cyber work in San Diego and their dedication to the **Cyber Center of Excellence (CCOE)** Executive Briefing Series. As Special Agents with the FBI, Arico and Casey worked to identify, enumerate and counter criminal, nation state and advanced persistent threat (APT) actors, who targeted

critical infrastructure and impacted the San Diego business and defense sectors. Arico and Casey then took their experiences “in the trenches” against our cyber adversaries and created best practices, which they shared with the San Diego community via the CCOE Executive Briefing Series. Their efforts to educate the community and create lasting relationships were significant as we face this threat together as a cyber community.

The CCOE Executive Briefing Series gave Nick Arico and Pete Casey the opportunity

to share their knowledge, not based out of theory, but from real case studies and operations they participated in against our cyber adversaries. ■



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# Comcast Business 2024 Cybersecurity Threat Report: Artificial Intelligence Drives New Era of Cyber Threats and Defenses

Report analyzes 29 billion attempted cybersecurity attacks against Comcast Business customers

Comcast Business recently released its 2024 Cybersecurity Threat Report, a valuable resource for IT and security professionals, based on the analysis of 29 billion cybersecurity events detected by Comcast Business across its security customers in 2023. The report highlights significant changes in the cybersecurity landscape, driven by sophisticated threat actors, an expanding attack surface and the transformative power of AI.

“Armed with a newfound arsenal of AI-based capabilities and a landscape littered with vulnerable systems, cybercriminals are having a moment,” said Noopur Davis, Chief Information Security and Product Privacy Officer, Comcast Corporation. “Our findings confirm that despite these advancements, a multi-layered approach combining advanced protection, detection, managed services, and vigilant maintenance of security practices, can help enterprises protect their digital assets and enhance their resilience against sophisticated threats.”

This report offers a comprehensive overview of the rapidly evolving global cyber threat landscape, based on cybersecurity events detected by Comcast Business across its security customers in 2023. The report highlights an intensifying global threat landscape, including the following:

**AI amplifies cyber risks but offers powerful tools to mitigate threats.**

For both bad actors seeking to steal corporate data and IT security professionals tasked with protecting it, AI is changing the rules of engagement. Defenders are increasingly utilizing AI and machine learning to analyze malware and log data at scale, as well as to scan entire systems for anomalies and automatically respond to threats. AI can act as a force multiplier for defensive

teams working to safeguard their organizations and data.

**Phishing attacks are on the rise, threatening businesses worldwide.**

Phishing remains the primary method used by attackers to gain initial access to networks, with over 2.6 billion interactions detected by Comcast Business. Additionally, over 90% of the phishing interactions Comcast Business blocked were designed to direct victims to phishing sites hosting malware. The trend underscores the need for robust anti-phishing technologies, user education, and email gateway platforms to combat this growing threat.

**Bad actors are employing advanced lateral movement techniques to navigate networks.**

Remote services were the most exploited method for lateral movement, with over 409 million events detected by Comcast Business. Employing tools like Endpoint Detection and Response (EDR) and Managed Detection and Response (MDR) can help IT staff identify early-stage threats by monitoring network activity for anomalies in user behavior. They help protect devices connected to enterprise networks by using AI to proactively detect, investigate, remove, and remediate malware, phishing, and ransomware.

**Attackers are increasingly using encrypted channels and proxies to hide their command and control (C&C) communications.**

By exploiting these protocols, attackers can mask their malicious activities and evade detection. Domain Name System (DNS) tunneling remains a popular technique to bypass traditional security measures, with over eight million observed

events. Similarly, Transmission Control Protocol (TCP) was used in 104,000 events to provide reliable communication channels, often with encrypted payloads that further obscure malicious activities. The use of Windows Remote Management (WinRM), which saw nearly 78 million events, was also prevalent. These methods underscore the need for sophisticated detection tools to identify and mitigate covert malicious activities.

**Distributed Denial of Service (DDoS) attacks and ransomware pose significant risks.**

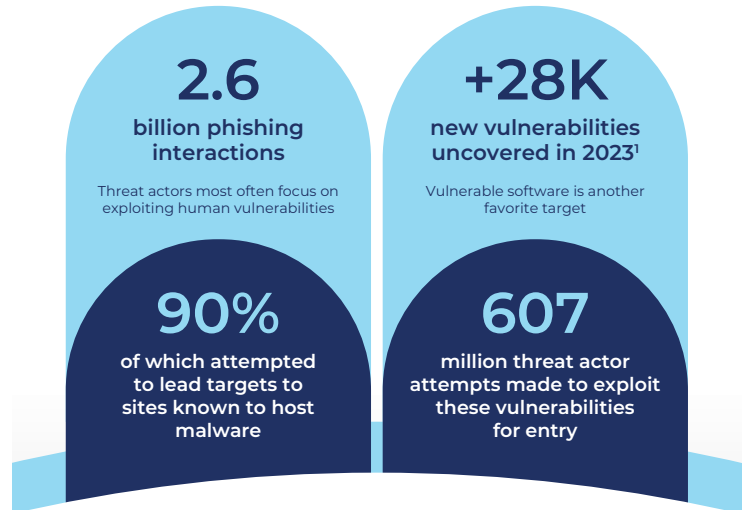
Comcast Business identified and blocked over one billion attempts to destroy data. Additionally, there were more than 126 million blocked instances of malware or botnets designed specifically for financial theft, underscoring the financial motivations behind many cyber-attacks. DDoS attacks remained a major threat to Comcast Business customers, with 103,000 reported events. This surge emphasizes the need for robust DDoS protection and mitigation strategies.

The report provides CISOs, CIOs, and security leaders with a deep dive into how cyber threats can breach and then spread across global networks. This analysis enables them to make informed security decisions for protecting critical assets. The report’s trends and findings underscore the importance of adopting a multi-layered approach to cybersecurity to bolster defenses against evolving global threats.

To learn more about Comcast Business’s advanced cybersecurity solutions, or to access the full 2024 Comcast Business Cybersecurity Threat Report please visit: [business.comcast.com](https://business.comcast.com) or scan QR below.



The clock starts ticking with initial access



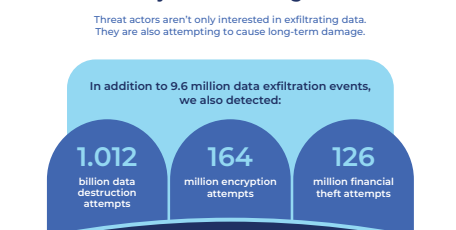
Once inside, attackers move quickly



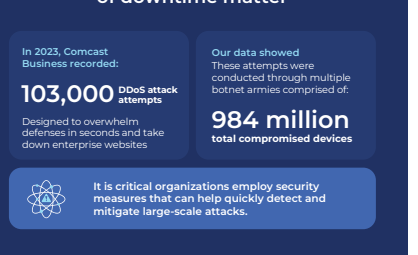
Persistence: Attackers dig in



It's about more than just exfiltrating data



DDoS: When seconds of downtime matter



**COMCAST BUSINESS**

What can 29 billion cybersecurity events tell us about the state of enterprise security?

Quite a bit.

In-depth analysis of these events, published in the 2024 Comcast Business Cybersecurity Threat Report, reveals an intensifying global threat landscape. Drawing data insights from our report, below we follow a typical threat timeline. We look at common tactics threat actors use to gain initial network access, move laterally and increase access privileges while remaining undetected, often aimed at exfiltrating or damaging valuable data.

See why time is of the essence when a breach occurs, and why rapid detection is becoming ever more critical to cybersecurity preparedness.

# CYBER SECURITY STEWARDSHIP AWARDS 2024

## CYBERSECURITY WORKFORCES OF THE YEAR

### ACADEMIC/NONPROFIT WINNER

#### Flexible, Supportive Training Puts People Into Cybersecurity Roles

The winner of the Workforce Development Initiative of the Year Award – Academic/Non-profit is **Able-Disabled Advocacy Inc. (A-DA)**.

Over the last decade, A-DA has secured more than \$10 million in funding to provide IT and cybersecurity training to individuals from diverse backgrounds, ensuring that the growing cybersecurity industry is accessible to underrepresented populations.

“Able-Disabled Advocacy is honored to be recognized by the **San Diego Business Journal** and CCOE with their Cybersecurity Stewardship Award for Workforce Development,” said **Angel Stancer**, director of workforce

development. “This accolade is a testament to our commitment to building a diverse cybersecurity talent pipeline.

“Over the past decade, we have secured \$10 million in grants to provide inclusive, no-cost training programs that empower individuals from underrepresented backgrounds to launch their careers. We also collaborate with local employers to upskill their workforce at no cost, opening new paths for advancement. This approach has enabled us to place over 17,000 individuals in sustainable jobs, many in cybersecurity.

“Receiving this award validates our efforts.

We share this honor with our participants, instructors and partners. Moving forward, we remain dedicated to fostering inclusion in the tech sector and ensuring San Diego thrives as a cybersecurity hub.”

A-DA’s training programs are designed to be flexible and supportive of individuals in culturally diverse areas, removing the financial and logistical barriers that often prevent people from pursuing high-demand careers like cybersecurity. By offering industry-recognized certifications, A-DA equips job seekers with the skills needed to enter the workforce and advance in their careers. This approach

opens the door to nontraditional candidates, many of whom may not have had prior access to tech education or formal employment pathways, helping to diversify the talent pool.

The organization’s efforts go beyond job seekers, as A-DA also supports employers by offering financial incentives to help cover the cost of upskilling their existing workforce with critical cybersecurity skills. ■



### PRIVATE SECTOR WINNER

#### Job Seekers in Search of Guidance Can Consult Maps

The winner of the Workforce Development Initiative of the Year Award – Private Sector is **Journeys Map**.

Journeys Map is honored to be recognized by the SDBJ and CCOE for its contributions to Cybersecurity Workforce Development which is essential to our region’s economic future,” said **Peter Sibley**, CEO of Journeys Map. “Journeys Map helps employers grow their cybersecurity talent pipeline, assists applicants match their skills to career opportunities and links applicants and employers to providers for upskilling. This award will fuel our work.”

Journeys Map was designed, developed and

implemented with the intent to help seed and diversify careers in advanced technology, specifically the cybersecurity talent pipeline in the San Diego region. Research findings report individuals from historically underrepresented communities often lack access to the resources and opportunities necessary to pursue careers in technology such as cybersecurity. Disparities in access to quality education, mentorship and networking further exacerbate the challenges faced by these individuals, perpetuating cycles of inequality and exclusion.

Journeys Map empowers individuals to navigate the increasingly complex career pathways

into cybersecurity and other advanced technology opportunities by using an interactive map that enables users to select educational and career choices and navigate pathways through K-12, college, certifications/credentials and military service options. Journeys provide detailed directions and resources needed to navigate to the desired goal based on an individual profile. Journeys works for everyone at all stages of life. The personalized learning paths can be saved, shared and modified at any time.

Journeys Map goes beyond talent identification by providing targeted career development resources at every stage of career development.

These include assessments, skill-building opportunities and technical training designed to support careers in cybersecurity. By offering these personalized and targeted resources, Journeys Map by EdGate is actively nurturing and developing a diverse talent pool, not just filling positions. ■



### PUBLIC SECTOR WINNER

#### Navy Command Exposes a Broad Population to STEM, Cyber Work

The winner of the Workforce Development Initiative of the Year Award – Public Sector is NAVWAR, the **Naval Information Warfare Systems Command** of the U.S. Navy, which has its headquarters in San Diego.

“We’re incredibly honored to receive the Cybersecurity Stewardship Award, which acknowledges NAVWAR’s dedication to safeguarding our nation’s critical systems,” said **John Pope**, executive director of NAVWAR. “This award showcases the groundbreaking efforts of our team, including projects like RAISE 2.0 and the Cyber Ready program, which bolster the Navy’s security and mission-readiness. As we forge ahead, this recognition fortifies our commitment to protecting national security while cultivating a diverse and talented workforce.”

NAVWAR is deeply committed to building and diversifying the cybersecurity talent pipeline through various initiatives aimed at fostering inclusion and expanding opportunities in the cybersecurity field.

NAVWAR supports **CyberHire**, an initiative designed to equip individuals with the necessary skills to pursue careers in cybersecurity. Additionally, NAVWAR actively partners with NFAAR Cyber (**National Foundation for Autism Research**), a neurodiversity-focused cybersecurity training and internship program. Through this collaboration, NAVWAR has helped create a pipeline for neurodiverse talent, providing crucial opportunities for individuals on the autism spectrum to enter and thrive in cybersecurity roles. The program has

been implemented through NAVWAR’s **Naval Information Warfare Center Pacific** and continues to serve as a model for how neurodiverse candidates can contribute to a more inclusive workforce.

In addition to these efforts, NAVWAR is a key supporter of **CAREERworks**, which connects individuals from diverse backgrounds with training and employment opportunities in cybersecurity. The command also engages with the **Girl Scouts** through specialized workshops aimed at introducing young girls to cybersecurity concepts and careers, thereby encouraging greater gender diversity in the field.

NAVWAR’s dedication to developing a future workforce extends to its robust support for STEM (Science, Technology, Engineering and Math) education. Through hundreds of

outreach events, NAVWAR has connected with more than 40,000 K-12 students nationwide, inspiring the next generation of scientists, engineers and cyber professionals.

At the college level, NAVWAR has engaged with nearly 500 students from public and private research institutions, historically black colleges and universities (HBCUs), and Hispanic and other minority-serving institutions (MSIs). ■



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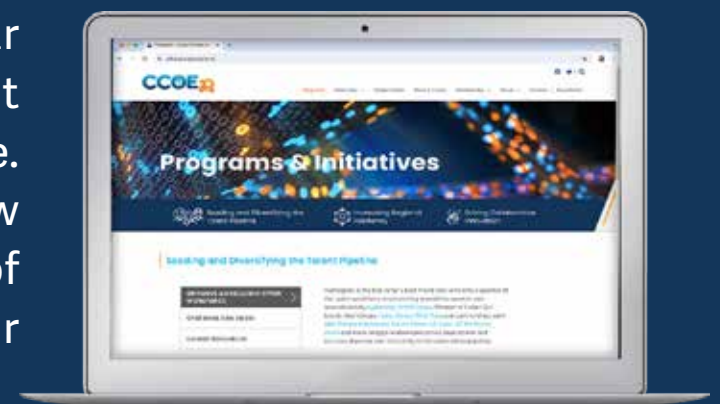
# INTRODUCING THE NEW CCOE



There's a party goin' on right here,  
a celebration to last throughout the year...

**CCOE is turning 10!** We thank you for your continued support and dedication to growing San Diego's cybersecurity economy and creating a more secure digital community for all. Over the past decade, we have advanced the region's cyber workforce, infrastructure and global market share for an industry that now impacts more than 26,000 jobs and contributes \$4 billion annually to San Diego's economy. Together, we've helped the industry grow from 100 to 1,000 businesses.

It's a celebration! To kick off our 10-year anniversary, we're excited to debut our brand refresh and new website. Come on and check out our bold new look and explore our website full of resources and information about our cyber community. [sdccoe.org](https://sdccoe.org)



We're keeping the good times going and welcome your participation and new ideas for our next 10. Contact us to join the CCOE party at [info@sdccoe.org](mailto:info@sdccoe.org).



Lisa Easterly, CCOE President & CEO



# CYBER SECURITY STEWARDSHIP AWARDS 2024

## CYBERSECURITY INNOVATORS OF THE YEAR

### ACADEMIC/NONPROFIT WINNER

#### Conference Offers a Hands-On Approach to Cybersecurity

The Innovator of the Year Award – Academic/Nonprofit goes to **BSides San Diego**.

The BSides San Diego conference is a leading force in cybersecurity, focusing on innovative solutions to protect data, critical infrastructure and national security. By bringing together industry professionals, researchers and thought leaders, the organization fosters collaboration and hands-on learning to address emerging cyber threats.

"BSides San Diego is honored to be receiving the award for innovation," said **Michael Brewer**, executive director and head of cybersecurity. "We have a dedicated group of volunteers that help this event happen every

year, and this absolutely could not have been achieved without them. They all work tirelessly throughout the year to make sure we enhance the cybersecurity understanding and capabilities of San Diego."

A hallmark of BSides San Diego is its hands-on approach to cybersecurity education. Through Capture the Flag (CTF) events and workshops, participants gain real-world experience defending against simulated cyberattacks. In 2023, a CTF event focused on protecting critical infrastructure, equipping participants with the skills and strategies needed to safeguard key sectors such as healthcare and energy.

BSides San Diego also plays a crucial role in advancing open-source security tools. In 2022, a workshop dedicated to improving intrusion detection systems (IDS) through machine learning resulted in practical improvements that have since been adopted by organizations to enhance threat detection capabilities and better secure their networks.

Collaboration is central to BSides San Diego's mission. In 2023, a panel on Securing the Nation's Critical Infrastructure united experts from government, industry and academia. This collaboration led to the formation of a working group aimed at improving cybersecurity in the biopharmaceutical sector,

an industry facing increasing threats. In addition to technical innovation, BSides San Diego is committed to workforce development and inclusion. The organization's mentorship programs help underrepresented groups and emerging professionals gain the skills needed to succeed in the cybersecurity field, contributing to a stronger, more diverse workforce. ■



### PRIVATE SECTOR WINNER

#### Company's Container Solutions Keep Data Secure

The Innovator of the Year Award – Private Sector went to **Sylabs**, a company that has led the way in developing innovative solutions to ensure that data-in-use remains encrypted.

"It is an absolute honor to be recognized by the **San Diego Business Journal** for cybersecurity stewardship," said **Jason Tuschen**, CEO at Sylabs. "At Sylabs, we are dedicated to delivering next-generation secure container solutions that empower researchers, scientists, engineers and developers to innovate confidently, knowing their data and applications are protected. Having spent nearly three decades as an operator in Naval Special Warfare, I can say unequivocally that the thing that keeps me up

the most at night is our nation's and our allies' vulnerability in the digital landscape. Receiving this award validates our commitment to safeguarding public and private sector organizations' most valuable assets throughout their entire lifecycle, maintaining the security, confidentiality and integrity of digital operations."

The company is on the ground floor innovating container solutions for Confidential Computing. In the past 12 months, Sylabs has submitted eight separate patents on a new technology called encrypted data containers. These patents allow data to be containerized and secured throughout its entire life cycle, whether at rest, in transit or use, without

injecting additional complexity into the process. This technology will pave the way for a proper multi-cloud confidential computing solution.

Sylabs has proven to be a thought leader in the Confidential Computing ecosystem and has actively contributed to the Confidential Computing Container open-source project.

Using the organization's executive team's background in Special Operations and conducting offensive cyber operations for the Five Eyes intelligence community, the organization continually seeks and develops innovative ways to prevent peer and near-peer competitors from accessing critical public and

private sector secrets. By combining these innovations with standardized open-sourced software, they have created a comprehensive solution for secure data management, including the ability to audit the entire software and hardware supply chain, giving users a new level of confidence that what they are running in their trusted execution environment is precisely what they expect. ■



### PUBLIC SECTOR WINNER

#### My eCISO Fills the Need for an In-House Cyber Expert

The **San Diego Regional Cyber Lab** received the Innovator of the Year Award – Public Sector in recognition of My eCISO, a chatbot that helps organizations and individuals make their networks more secure.

My eCISO was officially released in May 2024 and marketing/outreach efforts are actively underway to get it into the hands of those who need it most, including regional small businesses, government agencies, educators and the general public.

"Receiving this award is a testament to the **City of San Diego's** commitment to using

technology and innovation to enhance public service and protect those most vulnerable in our community," said **Ian Brazill**, assistant deputy director of compliance & digital equity at the city. "We are grateful that the **San Diego Business Journal** appreciates the impact that these efforts can have on our residents' quality of life. We encourage everyone who recognizes the value of tools like My eCISO to help spread the word to those who could benefit from stronger digital security."

Due to the complex nature of cybersecurity, many American industries have neglected

to implement proper procedures to protect their sensitive data. Organizations often don't know where to start, as they don't have in-house experts to assess their particular needs. As a result, a solution was needed to provide a no-cost resource to quickly empower users with knowledge on how to better protect their sensitive data. Further, the specific needs of any given environment can be unique, so the solution had to be flexible enough to provide accurate, actionable steps specific to the user. As a result, the San Diego Regional Cyber Lab engaged with a variety of entities including

**Amazon, Cal Poly San Luis Obispo, The San Diego Cyber Center of Excellence, 11:59** and regional stakeholders to develop My eCISO, aptly named to reflect the benefits of a chief information security officer that many enterprise-level agencies enjoy. ■



IN ASSOCIATION WITH





## Sylabs Named 2024 Innovator of the Year in Cybersecurity

Pioneering the future of data protection, Sylabs combines confidential computing with containerization to create unprecedented security for sensitive data. Our innovative approach ensures data remains encrypted throughout its lifecycle, accessible only in secure enclaves. This breakthrough enables organizations to safely collaborate, develop AI models, and protect intellectual property while maintaining complete data privacy. We're honored to receive SDBJ's 2024 Cybersecurity Stewardship Award for Innovator of the Year.

Deploying Secure Container Solutions from Edge to Exascale

Learn how Sylabs is reshaping data security: Visit [Sylabs.io](https://sylabs.io) or email [info@sylabs.io](mailto:info@sylabs.io)

# COMPANIES ON THE MOVE

HIRINGS, PROMOTIONS, BOARD MEMBERS AND SPECIAL

## CONSTRUCTION

Announcement

Premium West Construction is proud to announce the acquisition and opening of its new office in the North Park neighborhood. This move highlights the company's continued growth and commitment to delivering high-quality construction services.



The new office will enhance team synergy and client services as the company continues to invest in the local market.

"We are excited to be located in North Park, a vibrant, growing community that reflects our innovative spirit and dedication to excellence," said Mark Deetjen, President of Premium West Construction. "Our corporate headquarters serves as a launchpad for our exciting growth in the Southern California market."

Premium West has several active construction projects in the area, including multifamily, hospitality, senior living, office, and restaurants.

For more information, visit [www.premiumwestinc.com](http://www.premiumwestinc.com).



## Power Your Team's Career Journeys

San Diego regional employers are leveraging the streamlined career discovery and advancement tools in **Journeys Map**.

Designed to aid employee career growth and for nurturing a robust regional talent pipeline — **Journeys Map** is San Diego's leading cybersecurity career exploration system.

Thank you SD CCOE and SDBJ for the recognition, we are grateful!

Powering Career Exploration

[journeysmap.com](https://journeysmap.com)

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SAN DIEGO BUSINESS JOURNAL



# AlphaCore

➔ from page 1

key areas like the Rocky Mountains region. In March 2023, the company acquired **Johnston & Associates**, in Cherry Creek, Colorado, which added \$400 million in assets under management. The Johnston move was then the company's fourth acquisition in five years.

"The addition of the talented All Season team will immediately strengthen our capabilities in this key wealth market," said AlphaCore Founder and CEO **Dick Pfister**.

Focused on delivering outstanding research-based wealth management solutions to their high-net-worth clients – typically those who have between \$1 million and \$20 million in investible assets – AlphaCore is one of the fastest growing RIA firms in the U.S.

AlphaCore has grown from zero assets since its 2015 launch to nearly over \$3 billion today and continues to be on the **San Diego Business Journal's** lists of fastest growing companies.

From 2020-2022, the company grew its revenue from \$3.3 million to \$9.9 million, and today is more than double that, Pfister said.

"Our current rate is close to \$20 million of gross revenue, and growing," he said.

## Eyeing Expansion, Staying Rooted

When looking to expand its footprint, Pfister said the company eyes areas where there are like-minded cultures, ethics and philosophies for wealth management needs.

Last year AlphaCore added **Magnolia Lane Financial Advisors**, based out of Connecticut, to its portfolio. The firm is also growing its home office.

"We've added a dozen new hires in in our La Jolla office in the last nine months right so today we're 50 people, and we plan to continue to grow that in San Diego," Pfister said. "Our home base is La Jolla and that's not changing. We plan on expanding that to potentially go a



**AlphaCore Wealth Advisory Founder and President Dick Pfister speaks at a team meeting earlier this year. The La Jolla-based company is among the fastest-growing RIAs in California.** Photo courtesy AlphaCore.

little bit more north county of La Jolla as well."

As for All Season, Pfister said AlphaCore is planning on doing "the same kind of expansion that we did here," bolstering the services of wealth planning estate planning and investment management.

"This particular firm, All Season, was perfect fit for that," he said. "They're going to be joining the team and we'll have 9 like-minded, philosophically aligned, same culture people in our Denver office – and it'll be growing from there."

Pfister said the company was impressed with All Season, founded in 1996 by **Sam Jones** to provide high-net-worth individuals and families with service and investment management capabilities. Jones will join AlphaCore as a partner.

With All Season, AlphaCore is benefiting from the addition of a strong team with nearly 30 years of experience that has shown deep expertise in investment management, client service and financial planning, Pfister said.

## Core Values and Philosophy

Pfister said AlphaCore lives by seven core values: It starts with doing what's best for the

client and ends with keeping things fun and creating win-win solutions along the way, which keeps the company expanding strategically, Pfister said.

"Our philosophy is a big part of it but more important than that I would say is the team that we have," Pfister said. "Our staff members are key, because we're bringing on highly qualified, experienced people who their No. 1 priority is do what's right for the client."

AlphaCore recently hired a new COO, **Brian Habas**, who had a 10-year career at **T. Rowe Price** and spent another 10 years at **LPL Financial**.

"One of the reasons I joined AlphaCore was because of where they stand today – at that kind of pivotal moment when they transition from a smaller boutique firm to scaling up to have a national presence while staying true to their personalized approach," Habas said.

"At the same time, I have a passion for the impact of personal financial planning and AlphaCore's mission to offer thoughtful wealth planning backed by a strong internal research team. This approach appealed to me and resonated with my own experiences with family and friends."

Habas said AlphaCore mixes top-down leadership with collaborative teamwork, bringing forth a great effort to hear all voices while remaining strong on the principle of leading.

AlphaCore is also touted for offering a variety of wealth management seminars and webinars to help investors stay informed and plan their financial futures.

It annually hosts the AlphaCore Wealth Summit, featuring industry leaders discussing advanced wealth management strategies.

Earlier this year AlphaCore held a webinar featuring **Blackstone** that focused on market outlooks, covering inflation, economic growth, geopolitical conflicts and potential investment opportunities.

Past webinars have covered topics like the importance of portfolio diversification, the limitations of traditional 60/40 investment models and how alternative strategies can help navigate uncertain markets. ■



**Brian Habas**  
COO  
AlphaCore Wealth  
Advisory

## AlphaCore Wealth Advisory

**FOUNDED:** 2015

**PRESIDENT AND CEO:** Dick Pfister

**HEADQUARTERS:** La Jolla

**BUSINESS:** Wealth Advisory

**REVENUE:** \$20 million+ (2024)

**EMPLOYEES:** 50

**WEBSITE:** alphacore.com

**CONTACT:** 858-875-4100 or info@alphacore.com

**SOCIAL IMPACT:** AlphaCore and its CEO Pfister supports Voices for Children and Curebound

**NOTABLE:** In 2021, AlphaCore was the fastest growing RIA in the state of California

# Cybersecurity

➔ from page 1

## Insurance Firms Weigh Risks

Good habits such as software patching are rewarded in other ways, such as when the time comes for an organization to renew its cyber insurance policy.

Not updating software – thereby increasing the chance and cost of an incident – is unacceptable, said **Jim Skeen Jr.**, founder of **Lockton San Diego**. "It's akin to leaving your doors unlocked, being surprised by theft and expecting sympathy from others," he said.

Skeen noted that over time, it is often less expensive to prevent a cyber incident than to pay for one through insurance. "Invest in your enterprise and your people," he said. "Doing so will make you a better risk, positioned to negotiate more favorable insurance terms and pricing."

Think in terms of minimum-security standards, Skeen advised. Good cyber hygiene will also include using multifactor

authentication and employing authenticators; backing up data and isolating clouds; encrypting sensitive data; and restricting administrative privileges.

Skeen said that cybersecurity should involve every member of an organization's team. He added that executives would be wise to draw up an incident response plan and practice the use of such a plan.

"We reap what we sow," Skeen said. "There are no shortcuts."

## Simple Steps Outlined

Skeen and Daly spoke with the **San Diego Business Journal** recently for an article series on Cybersecurity Awareness Month. Presented in association with San Diego's **Cyber Center of Excellence (CCOE)**, the October series has highlighted simple steps all people can take to practice better cyber hygiene. Other steps include the use of strong passwords, recognizing and reporting phishing and social engineering and other good practices described earlier in this story.



**Jim Skeen Jr.**  
Founder  
Lockton San Diego

Guidance on these steps is as close as the internet. One resource is CCOE at sdcoe.org. A second

is the federal government's **Cybersecurity and Infrastructure Security Agency** at cisa.gov.

A third resource is the **San Diego Regional Cyber Lab**, hosted by the city of San Diego and overseen by Daly.

"We're available to partner with anybody," Daly said. "We're a resource for anyone, from regional businesses and government agencies down to an individual setting up network security."

The lab provides resources for local organizations, including "sandbox" areas. These are isolated computer systems that let cyber professionals simulate attack scenarios and take part in ethical hacking exercises.

The lab also provides software resources that might be out of reach to smaller entities. Case in point: the **Encinitas Union School District** was recently able to use "a very well-respected cyber intelligence tool that monitors the dark web," Daly said. The cost of using such products can be prohibitive, but here, the school district was able to use it through the cyber lab.

The software Daly spoke of was from **Recorded Future**, whose clients include the governments of 45 countries and more than 50% of the Fortune 100. **Mastercard** agreed to acquire the business this fall for \$2.65 billion.

A second resource from the San Diego Regional Cyber Lab is My eCISO.

My eCISO is an AI chatbot trained on the **National Institute of Standards and Technology** cybersecurity framework known as NIST 1.1. My eCISO interviews the client in a straightforward, question-and-answer manner, using natural language. As the interview progresses, the chatbot evaluates the organization's existing cybersecurity situation and recommends steps for improvement. At the end of the interview, the chatbot gives the user a report card, assigning a letter grade to different aspects of cybersecurity and suggesting ways to improve an organization's cyber defenses. My eCISO was designed with security and privacy controls. Only the user who submitted data can access it. User conversations are deleted automatically after 30 days, but they can be removed sooner if the user prefers.

The service has been well received. "Every time I bring it up, people are really impressed by it," Daly said, adding that he was invited to discuss the program before conference attendees convened by **Amazon Web Services**. AWS was among several organizations that contributed to My eCISO.

The lab also provides educational programs and resources for policy development. To learn more, visit the organization's website at sandiego.gov/cyber-lab ■

# Amplifica

➔ from page 3

of females by age 50. Dr. Plikus found his motivation to help these patients when he was younger. "I got hands-on experience working at a Los Angeles hair transplant clinic and saw the deep emotional impact of hair loss on people's lives. It impacts not only their physical appearance but also their self-esteem."

The company declined to disclose its current valuation but shared that it closed an \$11.8 million Series A round of funding in 2022. President and CEO **Frank Fazio** added, "Amplifica plans to initiate its Series B financing in the coming year to advance the development of its proprietary compounds for the treatment of androgenetic alopecia in both male and female patients."

Soon the company plans to incorporate key findings from the recent study into its overall

development program. It'll then initiate additional clinical trials to evaluate the safety and efficacy of the drug while optimizing dosing and durability.

"Looking ahead five years, we envision Amplifica as one of the leaders in the hair growth and regenerative medicine space," added Dr. Plikus. "Our goal is to push the boundaries of what's possible with hair regeneration, providing new, science-backed solutions to patients around the world." ■

## Amplifica Holdings Group

**FOUNDED:** 2018

**CEO & PRESIDENT:** Frank Fazio

**HEADQUARTERS:** Del Mar

**EMPLOYEES:** <10

**BUSINESS:** biopharma

**VALUATION:** undisclosed

**WEBSITE:** amplificabio.com

**NOTABLE:** The science behind one of Amplifica's compounds was published in the journal Nature.

# LEADERS of INFLUENCE in LAW 2024



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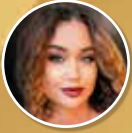
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FARBER SCHRECK



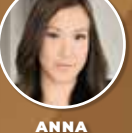
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WATTS**  
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**SUMMER  
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YUM**  
LAW OFFICES OF  
ANNA R. YUM

# LEADERS of INFLUENCE in LAW 2024



**ROLAND ACHEL**  
Partner  
Higgs Fletcher & Mack

**R**oland Achtel is a trust and estate litigator, and the head of litigation for Higgs Fletcher & Mack. He is also a certified specialist in Estate Planning, Trust, and Probate Law as designated by the State Bar. Roland holds an AV preeminent rating from Martindale Hubbell for Legal Ability and Ethical Standards as judged by his peers. Recently, Roland successfully argued a precedent-setting case before the Supreme Court of California, *Haggarty v. Thornton*. The Supreme Court's decision impacts how revocable trusts may be modified, to ensure greater flexibility in capturing a trustor's true intent. In his practice, Roland regularly represents clients in trust contests, will contests, trust and estate accounting disputes, conservatorships and related elder abuse claims. An active volunteer in the San Diego community, Roland currently serves as a Judge Pro Tem for the San Diego Superior Court, Probate Division.

HIGGS | FLETCHER | MACK



**BRIAN ADKINS**  
x  
Clark Hill

**B**rian Adkins has experience handling a variety of complex real estate matters throughout California and beyond. He specializes in housing discrimination investigations conducted by the California Civil Rights Department and U.S. Department of Housing and Urban Development. He regularly provides employment advice and counsel, as well as prepares employment agreements for his clients. Additionally, Brian handles commercial and multifamily real estate purchase and sale transactions, as well as litigated real estate, business and employment disputes. He is an active member and speaker for the National Apartment Association. He has worked with startups and small businesses, assisting with entity formation, IP protection, and commercial agreements. Brian was a contract advisor certified by the National Football League Players Association for 11 years, and handles litigation, transactions and advice and counsel for athletes, entertainers, teams, leagues and companies involved in the

Clark Hill



**MAXWELL AGHA**  
Principal Attorney & Founder  
Banker's Hill Law Firm A.P.C.

**M**axwell C. Agha is the founder of Banker's Hill Law Firm, A.P.C. He graduated with honors from Seattle Pacific University and earned his Juris Doctor from the University of San Diego School of Law. During his career, Maxwell gained significant experience through a judicial clerkship at the California Superior Court, where he conducted legal research and authored bench memoranda. Specializing in personal injury law, Maxwell has secured millions of dollars in settlements for his clients, building a reputation as a dedicated advocate. He has also worked for the U.S. Department of Justice in the Southern District of California, further enhancing his legal expertise. In addition to his practice, Maxwell volunteers as an arbitrator for the San Diego County Bar Association. Outside the courtroom, he enjoys soccer, reading, and spending time with his family, including his two daughters and their dog, Maui. Maxwell's commitment to justice and community defines his career and personal life.

BANKER'S HILL  
LAW FIRM A.P.C.



**DAVID AMAYA**  
Partner  
Fisher Phillips

**D**avid is a partner in the San Diego office and has devoted his entire legal career to representing employers. Fueled by a passion for workplace law and a competitive drive, he is a tireless advocate for his clients. He enjoys developing creative and business-oriented solutions that resolve workplace issues while managing risk and remaining mindful of the client's bottom line. He represents employers in the healthcare and hospitality industries in union and non-union settings. He also represents clients in a wide range of other sectors, from retail to transportation to education. David was included in San Diego Super Lawyers - Rising Stars in consecutive years and selected as San Diego Metro Magazine's "40 Under 40" winner. He serves on the Board of Directors for Sharp Healthcare Foundation, which enhances health care needs of San Diegans through support of critical medical services, clinical research and Sharp's dedicated caregivers through San Diego.

Fisher  
Phillips



**ANTHONY ARNOLD**  
Partner  
Barnes & Thornburg LLP

**A**nthony advises U.S. and foreign investors and companies across a variety of industries, including software and hardware technology, biotechnology, aerospace and defense, industrials and manufacturing, financial and professional services, real estate, and sports, media and entertainment. Clients value his input, appreciate his strong business sense and innovative thinking and, as a result, view him as a trusted adviser and true partner. What Anthony enjoys most about his transactional practice is analyzing all sides of the critical legal and business issues his clients encounter and working closely with them to develop creative, efficient solutions. In 2022, Anthony spoke on a panel at the Hispanic Heritage Foundation's 9th Annual Conference of the HHF Investors Forum. Anthony has also been named as a California Super Lawyer Rising Star. His community involvement includes a board seat on ACG San Diego, Fresh Start Surgical Gifts as well as an active role in Youth Assistance Coalition.

BARNES &  
THORNBURG LLP



**COURTNEY BAIRD**  
Partner  
Duane Morris LLP

**C**ourtney is co-chair of the Commercial Litigation Division of Duane Morris LLP's Trial Practice Group and a member of the Firm's governing Partners Board. She serves as outside counsel to businesses handling litigation and compliance and risk management issues. Courtney has been recognized as San Diego's Women of Influence in the Law, San Diego's Super Lawyers and San Diego's Best of the Bar. She is the past chair of the Civil Litigation Section of the SDCBA and served on the Board of Governors for the S.D. Association of Business Trial Lawyers. She is a member of the Firm's Women's Impact Network for Success Steering Committee, Summer Associate hiring Partner, and member of the Firm's AI and Technology Committees. She serves on the Steering Committee for USD School of Law's Annual Class Action Law Forum and is as a pro bono Arbitrator for the Arbitration Committee of the SDCBA.

Duane Morris®



**MICHELLE BARTOLIC**  
Managing Partner, Legal Production  
The Estate Lawyers

**S**ince joining The Estate Lawyers in 2017, Michelle Bartolic has played a key role in building the team. Starting as a trust and estate litigation attorney, she became a partner in 2021. Her success in litigation and closing cases led to her promotion as Managing Partner of Legal Production. In this role, Bartolic is focused on streamlining workflows, enhancing accountability, and improving overall competency. Her leadership is vital to the firm's strategic direction, ensuring operational excellence and supporting the growth and development of every team member.

THE ESTATE LAWYERS  
ADVOCACY UNITED



**ARIEL BEDELL**  
Shareholder  
Loftin | Bedell, P.C.

**A**riel Bedell utilizes her experience with running a business together with her years of legal experience to provide clients with practical sound legal guidance for real estate transaction and litigation matters. Focusing on the ownership and operation of all aspects of commercial properties, Ariel has negotiated numerous commercial leases and buy/sell agreements for office, industrial, hotel and multifamily projects throughout California. Providing unique service of representing manufactured housing communities, Ariel also provides day-to-day operational guidance and documentation as well as all enforcement matters including overseeing 500+ evictions since 2020 with 99% success rate. Whether assisting clients with transactional documents or litigation services, Ariel provides unique, practical and customized legal solutions for clients.

LOFTIN | BEDELL  
ATTORNEYS AT LAW



**NADIA BERMUDEZ**  
Principal  
Meyers Nave

**N**adia Bermudez, a Principal at Meyers Nave, is a distinguished leader in the legal community, recognized for her expertise, commitment to client advocacy, and dedication to DEI. As a Principal and key member of the firm's Labor and Employment Practice Group, Nadia consistently guides her team to achieve successful outcomes in litigation and offers proactive strategies tailored to her clients' needs. Nadia serves several influential boards, including the Ninth Circuit Court of Appeals Advisory Board and the Judicial Selection Advisory Committee for San Diego and Imperial Counties as Vice-Chair. She actively promotes diversity and mentors young attorneys through her work with the San Diego La Raza Lawyers Association and the Lawyers Club of San Diego. Honored as a Daily Journal Top Labor & Employment Attorney, Top 25 San Diego Women Super Lawyer, and Top 100 Leaders in Law, Nadia embodies leadership, community engagement, and excellence in her daily practice.

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**CALLIE BJURSTROM**  
Intellectual Property Partner  
Pillsbury

**C**allie Bjurstrom, an Intellectual Property partner, is recognized as a trial lawyer delivering big wins. A tenacious client advocate, Callie, who also serves as the managing partner of Pillsbury's San Diego office, has successfully tried cases to verdict as lead counsel in both state and federal courts, as well as represented clients before the International Trade Commission. She litigates patent, trademark, trade secret, copyright, unfair competition and other bet-the-company disputes and defends her clients' IP rights in a diverse range of industries. Notably, some recent matters she has handled include representing medical device company MicroVention in the prosecution of two high-profile cases against competitor Balt USA for misappropriation of trade secrets and patent infringement; HM Electronics in its IP enforcement efforts; and Viking Air Limited in a breach of contract, trade secret misappropriation, trademark infringement and unfair competition case against Ikhana Group.

pillsbury



SAN DIEGO BUSINESS JOURNAL



# WHERE YOU NEED US

Barnes & Thornburg congratulates our own Allison Rego and Anthony Arnold for being named to San Diego Business Journal's Top 100 Leaders in Law list. Your leadership and dedication to our clients and the community set the standard for our industry.



Allison Rego



Anthony Arnold



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# LEADERS of INFLUENCE in LAW 2024



**RYAN BLAIR**  
Partner  
Cooley LLP

Ryan Blair focuses his practice on securities, corporate governance, and shareholder litigation, including securities class actions defense, derivative suits, and M&A litigation. He also represents companies, boards, and special committees on SEC investigations, civil enforcement actions, and internal investigations. Ryan works with clients in multiple industries, including hardware, software, semiconductor, pharma/biotech, and digital media. In the past year, Ryan secured dismissals for clients across industries, including a dismissal with prejudice in a securities class action filed against Aurinia Pharmaceuticals – a rare result on the first motion to dismiss. He also represented Everbridge, a critical events and crisis management enterprise software company, for which he secured the dismissal of a securities class action. Ryan also (twice) secured the dismissal of a securities class action against IonQ, the first purely quantum computing company to be publicly traded in the U.S.



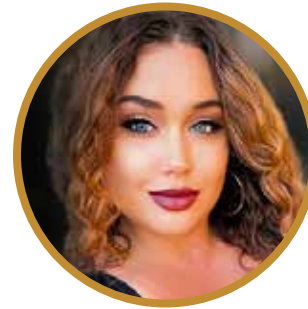
**JOSHUA BONNICI**  
Managing Attorney  
Bonnici Law Group

Joshua Bonnici, a life-long San Diegoan, has been running Bonnici Law Group for nearly 12-years serving injured and disabled individuals throughout the state. While running his practice, he has been involved with his alma mater, Thomas Jefferson Law School, serving both on the alumni association board and recently as an adjunct professional teaching students how to open and run a law firm. As a volunteer, Joshua has served on the Executive Committee of the Solo/Small Firm Section of the California Lawyer's Association since 2019, helping support solo and small firm attorneys all over California become better practitioners and better business people. Bonnici Law Group has recently won "San Diego's Best of" litigation firm but the Union Tribune, was winner of the "40 under 40" award, and has been recognized by several local non-profits for his involvement and contributions over the years.



**ERIN BOSMAN**  
Partner  
Morrison Foerster

Erin Bosman is chair of MoFo's Complex Litigation + Advisement Practice Group and is a founder and co-head of the Artificial Intelligence Group. She navigates complex business relationships and serves as a defense liaison counsel in cases where multiple defendants have conflicting defenses. Outside the courtroom, Erin advises on crisis management and guides clients through product recalls, representing clients before the Consumer Product Safety Commission. Erin is a three-time recipient of "Product Liability Lawyer of the Year" from Euromoney America's Women in Business Law Awards, honoring high-achieving female lawyers and progressive law firms. In 2025, Erin was again recommended in Mass Tort Litigation/Class Actions – Defendants by Best Lawyers in America. The Legal 500 continues to recognize Erin as a Leading Lawyer in Dispute Resolution: Product Liability, Mass Tort, and Class Action. She was also named as a "Top Healthcare Lawyer" by the Daily Journal.



**KARIE BOYD**  
CEO & Lead Trial Attorney  
Boyd Law, APC

Karie Boyd is the lead trial attorney and CEO of Boyd Law. The National Association of Distinguished Counsel recently ranked her in the "Top 1% of Attorneys in the Nation." Her civil litigation experience includes both jury and bench trials. Having strong litigation and negotiation skills allow Ms. Boyd to handle the integrated areas of business litigation including partnership disputes and unfair business practices as well as representing clients in divorce matters involving businesses. Karie Boyd is a certified family law specialist and the National Academy of Family Law Attorneys ranked her among the "Top Ten" Divorce Attorneys. Ms. Boyd represents celebrities in divorce, high net-worth marital dissolution, child custody, and support disputes. Ms. Boyd is a published author, and contributor to, Inside the Minds: Strategies for Family Law in California, Thompson Reuters' 2015 edition.



**SARAH BRITE EVANS**  
Partner  
Higgs Fletcher & Mack

Sarah Evans is a known force in San Diego's legal community. With a practice focused on business litigation and employment law, Sarah helps employers avert potential problems, and when problems are unavoidable, she helps them find a favorable resolution. Her litigation work includes defending individual and class/representative lawsuits and claims involving employment and wage issues. She is highly engaged in our local community, having held leadership roles in organizations including Lawyers Club of San Diego, Border View Family YMCA, and Crawford High School Law Academy. In 2019, Sarah was named California's 40th Senate District's Woman of the Year for this work. For the past few years, Sarah has devoted her civic efforts to leadership and operational roles to Forever Balboa Park. Sarah served as its first co-chair and led its diversity, equity, inclusion and accessibility working group, while also maintaining a full-time legal practice and raising two teenagers.



**SAMUEL BROTMAN**  
Owner & Managing Attorney  
Brotman Law

Sam founded Brotman Law in 2013, recognized as the 14th fastest-growing law firm by Law Firm 500 in 2018 and ranked 593rd nationally on the Inc. 5000 list in 2024. After earning "highest honors" from St. Catherine's College at Oxford University, he worked as a legal assistant at Covington & Burling LLP in New York City, where he handled major corporate transactions and two of the largest bankruptcies in U.S. history. Since 2016, Sam has been named a "Super Lawyer – Rising Star," recognizing the top 2.5% of lawyers nationwide, and has been nominated to San Diego's "Best of the Bar" list of top attorneys. These achievements reflect Brotman Law's commitment to exceptional legal services. Shaped by Sam's vision and leadership, the firm thrives on genuine empathy, a strong desire to help, and relentless tenacity. These qualities drive the team to achieve the best outcomes for their clients.



**ELIZABETH CARAZOLEZ**  
Director  
Casey Gerry Schenk Francavilla Blatt & Penfield, LLP

Elizabeth is a seasoned legal executive professional and the Executive Director of the Family Law Bar Association. With extensive experience in family law as a Paralegal and a deep understanding of legal processes, she has been instrumental in bridging communication between the judiciary and the legal community. Her leadership ensures that legal teams operate efficiently, meeting high professional standards while navigating the complexities of family law cases. As Director of Management at Casey Gerry Law Firm Elizabeth has demonstrated a strong commitment to upholding ethical standards, resolving performance challenges, and fostering a collaborative work environment. Her experience in managing legal professionals—paralegals, legal assistants, and attorneys—has solidified her reputation as an effective leader who prioritizes both case outcomes and professional growth. She excels in guiding teams through difficult dynamics, refocusing efforts on client service and case progression.



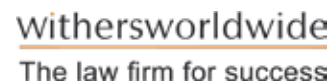
**MEGAN CHACON**  
Principal  
Fish & Richardson

Megan Chacon leverages a background in chemical engineering to represent clients in complex patent litigation across a wide range of technologies, including life sciences and pharmaceuticals. She recently represented a pharmaceutical company in litigation brought against a competitor that sought to market a generic version of her client's novel estrogen-free oral contraceptive. The matter resolved in a victory for the client. Megan also serves as lead counsel for a medical dermatology biotech company in ongoing cases involving a treatment for plaque psoriasis. Outside her litigation practice, Megan mentors junior attorneys, especially women and people of color, and manages Fish's San Diego associates as a group leader. In her pro bono practice, she works with organizations including the ACLU of San Diego and the Alliance for Children's Rights in immigration, guardianship, and adoption matters. Megan frequently publishes content and hosts webinars on life sciences topics.



**HELEN CHENG**  
Partner  
Withersworldwide

Helen Cheng is a partner in Withers' private client and tax team, advising clients in all aspects of estate planning, estate and trust administration and charitable planning with an emphasis on international advice and philanthropy. She represents some of the region's most successful individuals and organizations in their complex estate planning, planned giving and tax planning matters. Helen is a professor at the UCI School of Law, where she lectures on Charitable Planning and Tax Exempt Organizations, inspiring the next generation of lawyers. She serves as chair of STEP San Diego and sits on STEP USA's board of directors, is on the planning committee for the prestigious Western Conference of Tax-Exempt Organizations, general counsel for the International Community Foundation, and vice-chair of the ABA Section of Real Property and Trust & Estate Law's Charitable Planning and Organizations Group subcommittee. Helen co-leads Withers' charities and philanthropy special interest group.



**CHRISTOPHER CONTI**  
Partner  
Fisher Phillips

Christopher Conti is a Partner in the San Diego office of Fisher Phillips. Chris dedicates his practice to providing businesses with sophisticated legal solutions in all aspects of labor and employment law. Throughout his career, Chris has vigorously defended unionized and non-unionized employers in a variety of matters, such as wrongful termination, sexual harassment, discrimination, and retaliation lawsuits, class and representative wage and hour matters, and complex business cases. Chris is also well-versed in handling traditional labor disputes, labor arbitrations, union organizing, and unfair labor practice charges before the National Labor Relations Board. In addition to his litigation practice, Chris routinely provides practical advice and counseling on day-to-day employment issues. His experience crosses various industry verticals, including construction, retail, fast-food, energy, manufacturing, automotive, hospitality, and cannabis.



# Buchanan

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## **JASON MURTAGH**

Chair, California Employment Law  
Head of the San Diego Office

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# LEADERS of INFLUENCE in LAW 2024



## STEVEN COOPERSMITH

Managing Attorney  
The Coopersmith Law Firm, LLP

Steve founded The Coopersmith Law Firm 16 years ago, after nearly a decade working at prominent and well-considered law firms in San Diego, and after service as a military prosecutor in the U.S. Army JAG Corp. His firm represents clients throughout Southern California in a wide range of business litigation matters, including those stemming from corporate and partnership dissolutions, financial fraud violations, trade secret violations, bet-the-company litigation, executive-level employment disputes, and fine art law disputes. He has held an AV-Preeminent rating from the Martindale-Hubbell Law Directory since 2010. He has been on the list of San Diego Super Lawyers since 2014, and was named to Best Lawyers of America for Commercial Litigation in 2025. He was selected to the San Diego Business Journal's SD500 list of the 500 most influential people in San Diego for 2022 and 2023.



## THOMAS CROSBIE

Founding Partner  
Crosbie Gliner Schiffman Southard & Swanson LLP (CGS3)

Thomas Crosbie is a founding partner in Crosbie Gliner Schiffman Southard & Swanson LLP (CGS3), a commercial real estate law firm launched in 2013. He has extensive experience in a broad variety of commercial real estate areas, including acquisitions and dispositions, financing, leasing and construction in connection with commercial, residential, industrial, retail and mixed-use projects. Additionally, he has negotiated the purchase and sale of numerous commercial properties throughout the United States and has worked as counsel to numerous borrowers and lenders regarding all aspects of commercial loan transactions and workouts. He also has vast expertise in all aspects of ground-up development and redevelopment projects. Currently, he is involved with the extensive expansion of Rady Children's Hospital, the development of IQHQ's RaDD life science project and the redevelopment of Horton Plaza. He holds a J.D. from Northwestern University and a B.A. from Columbia University.



## JIM CROSBY

Attorney at Law  
Law Office of James D. Crosby

There are few attorneys in San Diego who have successfully handled the variety of complex matters from both the plaintiff and defense side that Jim has handled in his 40+ year career. Jim represents clients in complex and general business, commercial, contract, intellectual property, unfair competition, securities, real property, and business tort litigation. In 2022, the San Diego County Bar Association named Jim as "Attorney of the Year." He has served on the State Bar of California Commission on Judicial Nominations Evaluations, as President of the Board of Directors of the University of San Diego School of Law Alumni Association, as Vice President and Treasurer of the San Diego County Bar Association and as President of the Bar Association of Northern San Diego County. In 2023, Jim launched the "Trial Call 10" podcast, where he interviews high-profile trial attorneys who discuss strategy and offer advice for newer attorneys.



## MICHAEL DALLO

Founder & Principal Attorney  
Dallo Law Group

Michael Dallo, CPA, JD, LL.M., is a leading tax attorney and certified public accountant (CPA) with unique dual expertise in law and accounting. As the founder of Dallo Law Group in San Diego, Michael leverages his advanced legal training, including a Master of Laws (LL.M.) in Taxation from New York University, alongside his CPA credentials to deliver exceptional representation in complex tax controversies. His firm has earned the prestigious Martindale-Hubbell AV Preeminent rating, recognizing the highest level of professional excellence. Michael's dedication to his clients and the tax profession is further highlighted by his recognition as a Rising Star by Super Lawyers from 2018 to 2024. A Certified Tax Law Specialist and adjunct professor at the University of San Diego, Michael's strategic approach and deep knowledge make him a trusted advocate before the IRS and state tax agencies.



## NICOLE D'AMBROGI

Principal Attorney  
San Diego Legacy Law

Nicole D'Ambrogi is a distinguished estate planning attorney and veteran advocate, recognized as a Super Lawyers Rising Star. Her practice focuses on estate planning, probate, and asset protection, with a strong commitment to serving veterans. Drawing from personal experience, she understands the unique challenges faced by military families and advocates fiercely for their rights. Nicole crafts tailored estate plans to ensure smooth asset transitions and minimize legal complications. Her accolades include the Women Resiliency Award and the Trailblazer Award. Additionally, she serves as an adjunct professor and supervises the Veterans Legal Assistance Clinic, mentoring young attorneys and providing pro bono services to those in need.



## MERRIANNE DEAN

CEO & Principal Attorney  
Bellator Law Group

Merrienne E. Dean, Esq. has 25+ years of courtroom experience litigating probate and trust disputes, financial elder abuse matters, and conservatorships. Merrienne has been an active pillar in the San Diego legal community her entire career. She is a Co-Founder and Director for Probate Attorneys of San Diego, has served as a Co-Chair for the Probate Section of the San Diego County Bar Association, is a member of Lawyers Club, the Tom Homann Law Association and a Mediator at West Coast Resolution Group on trust and estate matters. Most recently, Merrienne Dean is a San Diego Magazine's 2024 Celebrating Women - Legal Pioneer Nominee, and she's also received Super Lawyers, Estate & Trust Litigation Recognition from 2021-2024. Notably, she also received the 2023 Community Pioneer Award granted by Tom Homann LGBTQ+ Law Association and was invited to speak at the Stanford Pride Summit in 2024.



## CAMILLE DECAMP

Equity Partner  
Berg Hill Greenleaf Ruscitti, LLP

Camille Joy DeCamp, an equity partner at Berg Hill Greenleaf Ruscitti, joined the firm in 2020. Joining the firm as a non-equity partner, with an office only in Irvine, during the week the world shut down due to COVID-19, DeCamp has worked diligently to serve her clients through unprecedented times, adapted to a new firm while pivoting to the forced-upon "norms" of a pandemic, all while being a wife and a mother. Since her start, she has championed the efforts of opening the firm's office in San Diego, where she has been practicing law for nearly 20 years. She co-chairs the construction and employment law practice groups, serves on the firm's Compensation and Retention, Marketing, Mentor, and Women's Leadership Committees. She was elected an equity partner in fall 2021. DeCamp's practice focuses on construction, employment and complex business litigation.



## JENNY DOLING

Attorney & Founder  
J. Doling Law, PC

Jenny L. Doling is a California State Bar Certified Bankruptcy Specialist at J. Doling Law, PC and a recent USD Taxation LL.M. graduate. She serves as the President of the San Diego Bankruptcy Forum where she is bringing debtor and creditor attorneys, trustees, and judges together to make a difference in the practice of law in San Diego. She was elected as the incoming Vice President for the National Association of Consumer Bankruptcy Attorneys (NACBA) beginning in 2025. She recently had the great honor to be appointed by U.S. Supreme Court Chief Justice John G. Roberts Jr. to the Judicial Conference Advisory Committee on Bankruptcy Rules and is helping to shape the practice of bankruptcy nationwide. She is a leading expert in consumer bankruptcy law, a frequent speaker nationwide, and collaborates on new legislation affecting bankruptcy and consumers. Ms. Doling was honored as a 2023 SDBJ Woman of Influence in the Law.



## ALEXANDRA EAKER PEREZ

Shareholder  
Eaker Perez Law

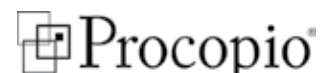
Alexandra Eaker Pérez is an award-winning tax trial lawyer and founder of Eaker Pérez Law, a tax controversy firm. Nationally and locally recognized by Super Lawyers, San Diego Business Journal, and The Daily Transcript, Alexandra is celebrated for her mastery in tax litigation. She is frequently featured in leading publications such as Tax Notes Today and the San Diego Union Tribune, and is a prominent speaker at major conferences for the American Bar Association, U.S. Treasury, and IRS. Alexandra has addressed six congressional committees on tax law changes and published numerous articles on taxation and tax policy. She serves on the board of #AfghanEvac and has held leadership roles with Culture Shock Dance Troupe, State Bar of California Taxation Section, and First United Methodist Church. Alexandra holds a Master of Science in Financial Planning, Doctor of Jurisprudence, and LL.M. in Taxation.



## WILLIAM EIGNER

Partner  
Procopio

Listed in THE BEST LAWYERS IN AMERICA, Bill Eigner is one of California's top mergers and acquisitions and financing attorneys, based in the San Diego office of Procopio, one of California's largest law firms, with offices in Irvine, Del Mar, San Diego, Las Vegas, Scottsdale and Washington, DC. Eigner is often called "the go to guy" for M & A and emerging companies. He is also an authority on forming, utilizing, showcasing and providing compensation for boards of advisers. He is on the board of advisers for Cross Oceans Ventures Fund, Athletiverse, Sokyhealth, Acenda and Greenbutts LLC. He is a trustee emeritus of the San Diego Police Foundation and began his career as a U.S. Supreme Court Judicial Intern. Eigner is a partner at Procopio and a graduate of Stanford University and the University of Virginia School of Law. Bill has volunteered many hours to helping retired veterans and disadvantaged minorities learn to start their own businesses.



SAN DIEGO BUSINESS JOURNAL

# LEADERS of INFLUENCE in LAW

2024

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We are honored to announce  
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**Karie Boyd**  
CEO and Lead Trial Attorney  
Boyd Law, APC

**Dawn Hall Cunneen**  
Partner  
Cunneen Booth, LLP

**Kieran J. Purcell, CCAL, Esq.**  
Managing Shareholder, President,  
and CEO  
Epsten, APC

**Benjamin Morris**  
Partner  
Foley & Lardner LLP

**Louis Galuppo**  
Managing Shareholder  
G10 Law, APLC

**James Huber**  
Partner  
Global Legal Law Firm

**Robert Robinson**  
Attorney and Managing Partner  
Hickman Robinson Yaege LLP

**Jenny Doling**  
Attorney & Founder  
J. Doling Law, PC

**Randy Grossman**  
Partner and Leader of the San  
Diego Office  
Manatt, Phelps & Phillips, LLP

**Erin Bosman**  
Chair of Global Complex Litigation  
and Advisement and Partner  
Morrison Foerster

**Carree Nahama**  
Principal Attorney  
Nahama Law

**Pete Potente**  
CEO and Founder  
Potente

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# LEADERS of INFLUENCE in LAW 2024



**GUILLERMO ESCOBEDO**  
San Diego Office Managing Partner  
Constangy, Brooks, Smith & Prophete

**G**uillermo Escobedo is San Diego office managing partner for Constangy, Brooks, Smith & Prophete, a national labor & employment firm with over 200 attorneys across the country. Guillermo leads Constangy's growing San Diego team, which added seven attorneys since August. Guillermo is focused on growing Constangy's San Diego presence as a steward of local culture and values. Recent Accomplishments: Co-chaired SD La Raza Lawyers' Judicial Reception 2016-2024; Vice Chair / Board Member of Chicano Federation of SD County; Handled Kenyan refugee asylum case pro bono. Recognitions: SDBJ, "Leaders-in-Law Finalist, Employment" (2019-2020); SD La Raza Lawyers, "Attorney of the Year" (2019); SD Metro Magazine, "2020 Men of Influence"; Latino Leaders Magazine, "Top Latino Lawyers in 2019"; SD Super Lawyers® (2014-present); Southern California, "Top Lawyers" (2014-2023).



**STACY FODE**  
Managing Partner, West Coast Office  
Nukk-Freeman & Cerra

**S**tacy Fode has been a driving force in empowering women in the legal profession for over two decades and is a champion for diversity and inclusion locally and on the national stage. Stacy is the Managing Partner of Nukk-Freeman & Cerra's San Diego office, and has a thriving employment litigation practice, where she represents and counsels large national employers, including Fortune 500 companies, in all areas of employment law. She serves as General Counsel for the National Association of Minority and Women-Owned Law Firms (NAMWOLF), an organization aiming to "promote diversity in the legal profession by fostering successful relationships among preeminent minority and women-owned law firms and private/public entities." The firm recently received the MVP Law Firm of the Year Award from NAMWOLF, in part because of Stacy's staunch support of the organization. Stacy has also served in a variety of high-profile leadership roles locally and nationally.



**KATHRYN FOX**  
Shareholder  
Buchalter

**K**athryn B. Fox is a member of the Labor & Employment practice group and Vice-Chair of the Franchise Law industry group in Buchalter's San Diego office. Ms. Fox advises employers on litigation avoidance and provides counseling on workplace law matters. She has experience representing clients in single-plaintiff cases involving allegations of discrimination, harassment, retaliation, wrongful termination, and wage and hour issues. She also routinely advises and represents clients in class action and representative PAGA cases involving wage-and-hour allegations, including failure to pay regular and overtime wages, meal period and rest break violations, misclassification issues, piece-rate pay agreements, and reimbursement claims. Her representation of clients includes defending actions in state and federal court, in arbitrations, before the EEOC, DFEH, DLSE and EDD, and in mediation. Ms. Fox also provides trainings to clients on workplace privacy issues, etc.



**CHRIS FRAHM**  
Shareholder  
Brownstein Hyatt Farber Schreck

**C**hris Frahm skillfully navigates legal, political and business challenges to ensure water agency and utility infrastructure projects are successful and sustainable. Whether creating a strategic plan or drafting an agreement, she brings a track record of getting deals done and a determined approach to achieve optimal results designed to meet the needs of all parties and stakeholders. Few, if any, can rival Chris' experience in and understanding of water issues in southern California. She works closely with key policy leaders and legislative decision-makers to develop and implement public policy-based solutions that meet her clients' water, energy and infrastructure needs while mitigating risk in an ever-changing political, financial and legal landscape. Chris' first-hand knowledge of the near- and long-term implications of water supply matters, including water rate setting, are a product of her decade of service, including as chair of the board of San Diego County Water Authority.



**JOANNE FRANCISCUS**  
CEO & Executive Director  
Legal Aid Society of San Diego

**J**oanne Franciscus is the CEO and Executive Director of the Legal Aid Society of San Diego ("LASSD"). Joanne leads a staff of more than 228 people committed to protecting the rights of vulnerable and underserved communities. LASSD is the largest poverty law firm in San Diego County and has been serving the community for over 100 years. Joanne has been a practicing attorney for eighteen (18) years. For the first eight (8) years of her career, she worked in private practice as an Associate, then a Partner, at a small law firm in Carlsbad, CA, where she represented plaintiffs in personal injury, sexual harassment in the workplace, and medical malpractice. Over the past decade, Joanne has held a variety of roles at LASSD, including senior attorney, managing attorney and, most recently, chief operating officer. She obtained her J.D. from the University of San Diego School of Law in 2004.



**SEAN GAFFNEY**  
Partner  
Crosbie Gliner Schiffman Southard & Swanson LLP (CGS3)

**S**ean Gaffney is a partner with Crosbie Gliner Schiffman Southard & Swanson LLC (CGS3), a commercial real estate law firm. A member of the firm's litigation department, he counsels investors, developers, and owners looking to minimize risks and handles litigation when disputes cannot be avoided. A skilled litigator, he has represented both plaintiffs and defendants in all phases of trial work and alternative dispute resolution. His practice spans the breadth of California real estate law, including claims arising from failed real estate transactions and construction and development projects; landlord/tenant disputes; corporate governance and insurance coverage disputes; and trespass, partition, easement and eminent domain cases. A member of the San Diego County Bar Association, Association of Business Trial Lawyers and San Diego Volunteer Lawyer Program, he holds a B.A. in political science from the University of San Diego and a J.D. from the University of San Francisco School of Law.



**LOUIS GALUPPO**  
Managing Shareholder  
G10 Law, APLC

**M**r. Galuppo has over 30 years of experience as a coastal, environmental, land use, and real estate attorney, specializing in transactional, litigation, and compliance matters. As Managing Shareholder of G10 Law, APLC, he leads a team of accomplished attorneys, guiding the firm's legal strategy and fostering a collaborative environment to deliver exceptional services to the firm's clients. His contributions to the legal community include chairing the North County Bar Association's Real Property section, serving as a member and seminar presenter for the California Lawyers Association, and authoring course material for the Continuing Education of the Bar. He has taught real estate law at the University of San Diego since 1998 and actively speaks and writes on industry issues, with a particular focus on real property rights along the California coast. Mr. Galuppo holds an "AV" rating from Martindale-Hubbell, the highest peer-reviewed standard of professional excellence.



**PAUL GARCIA**  
Partner  
Hooper, Lundy & Bookman, P.C.

**P**aul Garcia represents providers and clinical laboratories across the country in reimbursement, regulatory, compliance, and litigation matters. He advocates leverages a deep knowledge of government health care programs, an understanding of how regulators operate, and an appreciation of how the letter of the law intersects with business and financial realities. Paul's clients include hospital associations, hospital systems, individual hospitals, and clinical laboratories that turn to him when facing complex or contentious reimbursement issues. He understands that disputes and bureaucratic delays, can severely impair his clients' ability to serve patients and meet legal and ethical obligations. "I pursued a career in health care law, and with HLB, because it gives me the opportunity to represent providers that care for the needy and underserved. When I successfully resolve a reimbursement dispute or compliance issue, it is gratifying to know I play a part in helping my clients continue serving the community."



**ALEX GELBERG**  
Principal  
Fish & Richardson

**P**atent litigator, trial lawyer, and counselor Alex Gelberg represents clients in federal district courts across the country, the ITC, the PTAB, and the U.S. Court of Appeals for the Federal Circuit. Alex has litigated, including through trial and appeal, many patent cases involving a wide variety of technologies, such as cellular and satellite communications, semiconductors, computer architecture, memory and storage systems, consumer electronics, medical devices, and electro-chemical devices, among others. His recent notable work includes representing multiple Fortune 100 clients in global patent disputes involving cellular communication technology and standard essential patents. Alex's extensive pro bono practice focuses on immigration and civil rights causes. He has argued multiple appeals before the U.S. Court of Appeals for the Ninth Circuit and represented clients in the Southern District of California, the San Diego Superior Court, and the Board of Immigration Appeals.



**ALEXANDER GIANNETTO**  
Partner  
Bremer Whyte Brown & O'Meara

**A**lex Giannetto is a partner with Bremer, Whyte, Brown & O'Meara LLP's San Diego office. Mr. Giannetto graduated from Rutgers University with a Bachelor of Arts degree in Communication and with Minors in Economics and Criminology. Mr. Giannetto received his law degree from Thomas Jefferson School of Law in San Diego in 2008. Mr. Giannetto has extensive experience in all aspects of civil litigation handling liability matters including slip and falls, catastrophic injuries, wrongful death, traumatic brain injuries, and construction claims. He has obtained favorable trial results defending clients on personal injury matters in San Diego and has appellate experience. He is an AV-rated attorney by Martindale-Hubbell who was voted Best of the Bar in San Diego in 2014 and a Top Lawyer in San Diego in 2018. Mr. Giannetto is licensed to practice in the states of California, New York, and New Jersey.



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Larry Nishnick



Matt Schwartz

DLA Piper proudly applauds our partners Larry Nishnick and Matt Schwartz for being named Leaders in Law by the San Diego Business Journal.



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# LEADERS of INFLUENCE in LAW 2024



**JOHN GOMEZ**  
CEO & Founder  
Gomez Trial Attorneys

John Gomez is the Firm's founder and CEO. While also one of our nation's leading and most decorated trial lawyers, he is first a devoted husband, father and community leader. John is one of the most prolific and successful trial lawyers in the country. He has tried personal injury, fraud, class action, mass tort and of course, criminal cases. He has won verdicts in excess of one, ten and one hundred million dollars. He has obtained jury verdicts of more than one million dollars in more than 15 separate cases, and in 6 cases, obtained jury verdicts in excess of one million dollars in cases in which the defense offered zero dollars to settle. Those trial results have resulted in him being named San Diego's Trial Lawyer of the Year twice, and his receipt of 11 separate Outstanding Trial Lawyer Awards, more than any trial lawyer in San Diego history.



**AMY GOSTANIAN**  
Managing Partner  
The Estate Lawyers

In 2005, Amy L. Gostanian founded what would become The Estate Lawyers shortly after passing the bar. Mentored by two seasoned attorneys, she developed a focus on estate planning and gained her first significant trust and probate litigation case in 2007, sparking her passion for Conservatorships and Trust Contests. Amy earned bar certification four years into her practice and expanded the firm with a commitment to excellence. In 2017, Michelle C. Bartolic joined as an associate, becoming partner in 2021. By 2023, Amy and Michelle merged with the Law Offices of Bradley R. Kirk, creating The Estate Lawyers.



**RANDY GROSSMAN**  
Partner & San Diego Office Leader  
Manatt, Phelps & Phillips, LLP

Manatt Partner Randy Grossman is a former U.S. Attorney and experienced trial attorney with nearly three decades of experience. Randy has successfully represented clients in government investigations involving alleged violations of federal and state laws, complex civil litigation, and pro bono asylum cases. He has tried more than seventy cases to jury verdict. As U.S. Attorney for the Southern District of California, he served as the chief federal law enforcement official in San Diego and Imperial counties, led the defense of the U.S. in civil litigation, and advised the Attorney General on national policies. Earlier in his career, he served as a San Diego Deputy District Attorney. Randy is also a leader committed to our community, having served as President of the San Diego Association of Business Trial Lawyers, Trustee for California Western School of Law, the San Diego County Bar Association Legal Ethics Committee, and on non-profit governing boards.



**PATRICK HAASE**  
Shareholder  
Seltzer Caplan McMahon Vitek

Seltzer Caplan McMahon Vitek Shareholder Patrick Haase, chair of the firm's Estate Planning & Administration practice group, provides estate planning, trust and probate law counseling. He is known for making a significant impact in the lives of the individuals and families he serves. As a Certified Specialist in Estate Planning, Trust & Probate Law by the State Bar of California Board of Legal Specialization and a designated Certified Elder Law Attorney (CELA) by the National Elder Law Foundation, Patrick is a standout legal authority in a growing and competitive field. His practice focuses on complex and contested probate and trust administrations and advising clients on basic and advanced estate planning strategies.



**STEFFI HAFÉN**  
Managing Partner  
Snell & Wilmer

Steffi Hafén leads a thriving legal practice as the Managing Partner of Snell & Wilmer's San Diego office. She is a Certified Specialist in Estate Planning, Trust and Probate Law, by the California Board of Legal Specialization. She is co-leader of the firm's Private Client Services practice group and a partner in the General Federal Tax practice group. Steffi helped relocate the firm's newest office to San Diego in 2020 and, in just five years, has grown the office from 2 attorneys to 23 attorneys. As a first generation Cuban American, Steffi has always focused on making a meaningful impact on diverse communities. She serves on the Board of the San Diego Regional EDC, advancing inclusive economic development, and on the Board of Junior Achievement of San Diego County, where she supports career readiness programs and mentorship to enhance educational outcomes and Latino representation in San Diego's high-growth industries.



**DAWN HALL CUNNEEN**  
Partner  
Cunneen Booth, LLP

Dawn Hall Cunneen has over 30 years of experience representing clients in estate planning, estate and gift taxation, family succession planning, post-death trust and probate administrations, and trust estate and probate estate litigation. When counseling clients on estate planning issues, Ms. Cunneen employs a collaborative approach and works closely with the client, the client's financial advisors, and accountants to develop a customized, practical estate plan. Employing a strategic team-driven approach ensures all aspects of the client's financial and family circumstances are taken into account in the most economic and productive manner. Ms. Cunneen has significant experience working with complex family dynamics, high concentrations of commercial real estate, and unique assets. Ms. Cunneen uses her extensive litigation experience to identify potential issues and create a strategy for avoiding litigation as she counsels and advises individuals in their estate planning.



**BO HARVEY**  
Partner  
Stoel Rives LLP

A partner in Stoel Rives' Energy Development practice, Bo Harvey represents energy clients in a wide range of matters. He is sought out for his expertise regarding energy and commodity-related transactions, including power purchase agreements, financially settled energy hedges, swaps and derivatives, tolling agreements, and transactions involving environmental attributes and renewable energy credits. He provides regulatory guidance on energy matters that intersect with the Dodd-Frank Act and certain CFTC regulations as well as related industry protocols published by ISDA. Bo also regularly represents developers and sponsors in the acquisition, development and sale of solar and battery renewable energy projects. A renewable energy industry thought leader, Bo has co-authored chapters on power purchase agreements in Stoel's "The Law of Solar Energy" and "The Law of Wind" handbooks and he serves on the Technology Advisory Committee for the Southern California Energy Innovation Network.



**JIM HEFFNER**  
Partner  
Hahn Loeser & Parks

Jim Heffner handles high-stakes business disputes, complex commercial litigation, and large exposure employment litigation. He has a unique perspective, representing plaintiffs and defendants in a broad range of disputes. Jim has successfully represented a Fortune 400 company in defense of a class action through appeal, resulting in an award of defense fees in excess of \$1 million, defended the chairman of the board of a fortune 500 company against a multi-million dollar claim for interference, and both prosecuted and defended multiple multi-million-dollar employee raiding/trade secret cases. Jim has earned AV Preeminent status from Martindale-Hubbell and Rising Star honors from San Diego Super Lawyers. Jim is an active member in the San Diego community. He is a past President of the La Jolla Bar Association where he currently serves on its Board. He is a member of the San Diego County Bar Association and the Association of Business Trial Lawyers.





# Recognizing Success

Foley is proud to congratulate our colleagues on being honored for the *San Diego Business Journal's* Leaders of Influence in Law.



Benjamin Morris



Jaikaran Singh



Paul Hunter

For more information about Foley, please contact:

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 **FOLEY**  
FOLEY & LARDNER LLP

# LEADERS of INFLUENCE in LAW 2024



**NANCY HENDERSON**

Partner  
Henderson Caverly & Pum LLP

**N**ancy G. Henderson is a founding and managing partner at Henderson, Caverly & Pum LLP and Chair of the Estate Planning Group. A Fellow of the American College of Trust and Estate Counsel (ACTEC), she has served on the Program Committee and the California State Bar Estate Planning Law Advisory Commission. Nancy is recognized in Southern California Super Lawyers since 2008 and The Best Lawyers in America® for her work in Nonprofit/Charities Law, Tax Law, and Trusts and Estates, receiving multiple Lawyer of the Year awards. She earned her law degree from UC Berkeley, graduating in the top 10% of her class, and her bachelor's degree magna cum laude from Duke University. Nancy frequently lectures on estate, gift, and tax planning topics at prestigious conferences nationwide, including Heckerling, ACTEC, and ALI-CLE.

**Henderson  
Caverly Pum LLP**



**JAMES HUBER**

Partner  
Global Legal Law Firm

**J**ames C. Huber, Partner at Global Legal Law Firm, is an expert payments litigator, cryptocurrency consultant, and a nationally recognized expert in the compliance field. He has spent the last 15 years in the payment litigation space at the head of his brainchild Global Legal Law Firm. An early entrant to the payment environment, Huber has adapted to the times to lead Global Legal to major wins against giants in the field such as Bank of America, PayPal, Intuit, American Express, and Chase Bank. Huber is well-versed in mergers and acquisitions, compliance, contract review, internal operations, regulatory defense including FTC, CFPB, DOJ, AG, class actions, and all legal aspects that affect a business. Huber received his bachelor's degree from Montana State University and his J.D. from Cal Western School of Law.

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**DANIELLE HUMPHRIES**

Partner  
Hahn Loeser & Parks

**A**s Chair of Hahn Loeser's San Diego Trusts & Estates Practice Group, Group with a reputation as a trusted legal advisor with experience, insight, and sophistication, Danielle serves as general counsel for families, managing a multitude of legal issues, including trust and estate related issues, wealth preservation and protection, philanthropic planning, and tax planning. Danielle has extensive experience representing fiduciaries and beneficiaries in complex trust and estate administration and litigation. She volunteers on San Diego community boards, including Promises2Kids and completed a term as Chair of the Philanthropy Committee, which serves the diverse needs of more than 3,000 San Diego foster children. Danielle has been named to Best Lawyers in America®, for both Litigation-Trust and Estates and Trust and Estates in four consecutive years and earned Women of Influence in Law from San Diego Business Journal in four straight years.

**HAHN  
LOESER  
attorneys at law**



**PAUL HUNTER**

Partner & Office Managing Partner,  
San Diego  
Foley & Lardner LLP

**P**aul Hunter is a leading intellectual property attorney and the managing partner of Foley & Lardner's San Diego office. With deep expertise in electronics, AI, machine learning, semiconductors, and more, Paul helps companies navigate complex legal and business challenges related to cutting-edge technologies. He is known for his ability to protect valuable innovations through patents and trade secrets, particularly in the AI and software sectors. Paul's practice is centered on maximizing the value of technology assets, from patenting software to evaluating patent portfolios for mergers and acquisitions. He also represents clients in post-grant proceedings such as inter partes review (IPR) and advises on technology-driven business agreements, including licensing and joint ventures. His strategic approach and technical insight make him one of San Diego's top attorneys in intellectual property law.

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FOLEY & LARDNER LLP**



**TIM HUTTER**

Partner  
Allen Matkins

**T**im is a litigation and land use partner at Allen Matkins, where he chairs the Litigation group for the San Diego and Orange County offices. Tim focuses primarily on business and real estate disputes, including contract, joint venture, entitlement, land use, construction, and landlord/tenant litigation. He is a leading authority on residential and mixed-use projects that invoke California's density bonus law to incorporate and develop affordable housing. Tim works with landowners and developers as they seek approvals from local jurisdictions and litigates to protect their rights under state and local laws. Tim is very active in the real estate community. He is serving as the 2024 President of Lambda Alpha's San Diego Chapter and has been the Chair of the City of San Diego's Historical Resources Board since 2022. He is active with the Urban Land Institute and the Building Industry Association of San Diego County.

**Allen Matkins**



**MEI-YING IMANAKA**

Partner  
Solomon Ward Seidenwurm  
& Smith

**M**ei-Ying Imanaka, a partner at Solomon Ward Seidenwurm & Smith LLP, balances her employment law and business litigation practices to provide advice, counsel and litigation services to clients facing high-stakes disputes. She leverages her years of prior experience representing plaintiffs in class-action and employment matters to craft creative defense strategies and is known for taking a proactive, client-focused approach that prioritizes early resolution and risk mitigation to secure positive outcomes. Of note, Mei-Ying has had recent success defending a case in arbitration, obtaining a full defense verdict for a well-known hospitality brand and winning several summary adjudication/judgment motions for businesses. A mother of two, Mei-Ying brings empathy and insight to her leadership role, where she champions parental leave, flexible work and professional development opportunities, creating a culture of support, which improves morale and retention even in a demanding work environment.

**Solomon  
Ward  
Attorneys at Law**  
Solomon  
Ward  
Seidenwurm &  
Smith LLP



**ANTHONY INSOGNA**

Partner  
Jones Day

**A**nthony is the Chair of Jones Day's global IP Practice, one of the top IP practices worldwide in reputation and size—over 220 professionals throughout 28 cities in 7 countries across the U.S., Europe, and Asia-Pacific. In 2004, Anthony founded the Firm's 29th office in San Diego (SDO)—serving as the Partner-in-Charge until becoming the co-leader of the IP Practice in 2010. In 2014, Anthony became the IP Practice Chair. Under Anthony's leadership, the Practice has remained one of the Firm's largest practices—with the second largest concentration of IP professionals in SDO. Since 2004, SDO grew from 2 to over 60 lawyers across practices. A preeminent life sciences patent lawyer, Anthony has more than 30 years of experience enforcing and defending patents, driving patent strategy, and conducting due diligence for Bristol-Myers Squibb, Merck & Co., Cerevel, Puma Biotechnology, and Kura Oncology. Anthony's work includes HUMIRA, REVLIMID and OTEZLA.

**JONES  
DAY**



**MICHELLE JACKO**

Managing Partner & CEO  
Jacko Law Group PC

**M**ichelle L. Jacko, Esq., is the Managing Partner and CEO of Jacko Law Group PC, a corporate and securities law firm specializing in securities, corporate law, and litigation. She founded the firm in 2007 to address a gap in the marketplace and help investment advisers, broker-dealers, private fund managers, and others meet their business goals. An active contributor in the securities and compliance fields, Ms. Jacko frequently publishes in top industry journals and is in high demand for speaking engagements at national conferences and prestigious firms. Ms. Jacko is a proud member of the National Association of Women Business Owners (NAWBO), in which she was honored as finalist for the 2019 NAWBO Bravo Awards in San Diego. Recent accolades include San Diego Super Lawyers (2023-2024), San Diego Business Journal (SDBJ) CEO of the Year finalist (2019-2024), Women of Influence in Law (2018-2023), Businesswoman of the Year (2020-2022), and more.

**J L G  
JACKO LAW GROUP, PC**



Pillsbury congratulates **Christian Salaman** and **Callie Bjurstrom** for being selected as 2024 Leaders of Influence in Law by the *San Diego Business Journal*.

Pillsbury is a full-service international law firm with a particular focus on the technology & life sciences, energy, financial, and real estate & construction sectors. It is proud to see two of its local leaders—Christian in M&A and venture capital, and Callie in IP litigation—recognized for their respective work with San Diego’s leading companies.

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2024

# LEADERS of INFLUENCE in LAW 2024



**MYRIAH JAWORSKI**  
Member-in-Charge, San Diego  
Clark Hill

Clark Hill's San Diego office Member-in-Charge Myriah is a go-to advisor on data privacy and AI legal issues. Recognized by Legal 500 U.S. and as a Law360 Rising Star, her career defending clients in privacy and data breach class action litigation, regulatory investigations, and technology disputes started through the DOJ's selective Honors Program. She achieves precedent-setting results in wire transfer fraud, cyber bullying and right to publicity matters. Notably, Myriah delivered an impressive win in a first-of-its-kind federal trial on a misdirected wire transfer/business email compromise loss for client Studco Building Systems. An acknowledged industry leader, she was appointed to the Consulting Group to Establish a Legal Specialization in Privacy by the State of California Bar Association; is the Chair of the San Diego County Bar Association Privacy and Cybersecurity Law Executive Committee; and is Vice Chair of the San Diego County Bar Association's Privacy and Cyber Committee.



**PHIL JELSMA**  
Partner  
Crosbie Gliner Schiffman  
Southard & Swanson LLP (CGS3)

Phil Jelsma is a partner and chair of the tax practice team at Crosbie Gliner Schiffman Southard & Swanson LLC (CGS3). Widely recognized as one of the state's leading joint venture and tax attorneys, he has more than 30 years of experience in structuring sophisticated real estate and business transactions – with expertise in real estate exchanges, syndications, nonprofit corporations and international tax planning. His practice focuses on limited liability company (LLC) and partnership business and tax planning, with an emphasis on real estate and nonprofit corporations. An expert witness in partnership and LLC disputes, he also served on the executive committee of the Taxation Section of the California State Bar and is an active participant in ABA tax subcommittees. He is an adjunct professor at the University of San Diego School of Law, specializing in tax law. He holds a B.S. in business from USC and a J.D. from Stanford Law School.



**DANIEL KAMKAR**  
Partner  
Knobbe Martens

Daniel A. Kamkar, a partner at intellectual property law firm Knobbe Martens, focuses on creating and protecting valuable IP portfolios for companies around the globe. Armed with a background in scientific research, Mr. Kamkar counsels clients in a wide range of technological fields including batteries, solar cells, pharmaceuticals, cosmetics, polymers, alloys, lasers, and other areas of chemistry, physics and materials science. He has extensive experience representing clients in proceedings before the US Patent and Trademark Office. In addition to his dedication to client service, Mr. Kamkar is a leader in the legal community. As a Board Member of the Iranian American Bar Association's San Diego Chapter, he helps lead the planning for events that provide student scholarships and networking opportunities for members of the community. He also volunteers with Women of MENA in Technology, a non-profit with a mission to close the diversity and gender gap in STEM fields.



**ANDREW KOHN**  
Shareholder & CEO  
Pettit Kohn Ingrassia Lutz & Dolin

Andrew N. Kohn has a wide range of civil litigation and trial experience, primarily in the fields of personal injury, business litigation, and products liability. Drew has achieved Martindale-Hubbell's highest rating for legal ability and ethical standards. In January 2014, Drew was elected to the American Board of Trial Advocates (ABOTA), and in October 2018, was elevated in rank from Member to Associate. Drew has also been selected for inclusion in Best Lawyers in America for 2019-2025, earning recognition for his work in Personal Injury Litigation Defense and Product Liability Litigation Defense. Drew is involved with many local legal organizations, as well as alumni organizations affiliated with Harvard University and the University of Arizona. Drew has served as the Chief Executive Officer of Pettit Kohn Ingrassia Lutz & Dolin, PC since the firm's inception in 2006.



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# CAMILLE DECAMP

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WITH A UNIQUE BACKGROUND IN LAW AND PSYCHOLOGY, MS. DECAMP IS BOTH AN ATTORNEY AND COUNSELOR-AT-LAW TO HER CLIENTS, HELPING THEM NAVIGATE COMPLEX LEGAL PROCESSES WITH CLARITY AND COMPASSION.

**CONTACT ME**

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# LEADERS of INFLUENCE in LAW 2024



**JOSEPH LAMAGNA**

*Partner*  
Hooper, Lundy & Bookman, P.C.

Joe LaMagna has spent his entire legal career advising health care providers in a wide range of regulatory compliance issues and litigation proceedings. With a lengthy record of positive outcomes inside and outside the courtroom, Joe is a litigator who brings regulatory and compliance perspectives and insights to his advocacy in trials, arbitrations, mediations, administrative hearings, and appeals. His clients include healthcare providers, hospitals, long-term acute care hospitals, skilled nursing facilities, hospice, home health, long-term care pharmacies, specialty pharmacies, DME suppliers, physicians, medical groups, clinical laboratories and behavioral health and substance abuse providers. Representing the diverse range of providers and suppliers help give Joe perspective that he can share with regulators and payors.



**JOSEPH LEVENTHAL**

*Partner & Head of Litigation, San Diego*  
Glaser Weil Fink Howard Jordan & Shapiro LLP

Joseph Leventhal is a partner and the head of litigation in Glaser Weil's San Diego office. Joe is an accomplished trial attorney with extensive experience in complex commercial litigation, class actions, and real estate, employment and intellectual property disputes. He has led jury trial teams in both state and federal courts and achieved successful outcomes through appeal. Joe's clients range from business executives to Fortune 250 companies. Joe's experience is complemented by his leadership in the legal and broader community. He serves on the national board of directors for the Federal Bar Association, on the Southern District of California's Standing Committee on Discipline and as VP of the San Diego Federal Bar Foundation. Joe also actively serves on the boards of St. Vincent de Paul's Village and Just The Beginning, a pipeline organization focused on increasing diversity in law. He was formerly commissioner of the City of San Diego Ethics Commission.



**SCOTT LEVIN**

*Chief PeaceKeeper*  
San Diego Divorce Mediation & Family Law

Scott Levin is a family law attorney, known as the chief peacekeeper in helping families navigate divorce peacefully without having to go to court. He has been a full-time family attorney since 2004. He has a Juris Doctor from the University of Virginia School of Law and a Bachelor of Arts degree from New York University. He leverages an eclectic background in law, business and finance through his family and divorce mediation practice. He provides exclusive mediation services for divorce and family law disputes. He is passionate and dedicated to resolving conflict outside of court. He is known for helping clients understand their needs and goals. He brings a great deal of knowledge and experience to the negotiating table to help arrive at an agreement that benefits both parties.



**CINDY LOVERING**

*Partner*  
Sidley Austin LLP

After joining Sidley Austin in 2023, Cindy has been appointed as one of the leaders of Sidley's San Diego office. She focuses her practice on representing lenders and agents on fund finance transactions, and regularly advises lenders and borrowers on growth stage life science and technology financings, as well as middle-market financings. Her extensive experience includes advising on complex deal structures, cross-border transactions, and investor documentation issues, and she is one of few attorneys in the fund finance industry with experience successfully enforcing a lender's right to call capital and receive capital contributions under a subscription line facility. She is an active member of the Fund Finance Association and its Women in Fund Finance section. Cindy received her J.D. from Chicago-Kent College of Law, Illinois Institute of Technology and her B.A. from San Diego State University.



**Congratulations!**  
**Elizabeth Carazolez,**  
DIRECTOR OF MANAGEMENT

For being selected as a San Diego 2024 Leader of Influence in Law by the San Diego Business Journal!

At CaseyGerry, we pride ourselves on strong leadership and a commitment to excellence. Elizabeth's passion and dedication continue to inspire our entire team, driving us to serve our clients with the highest standards.

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# LEADERS of INFLUENCE in LAW 2024



**JENNIFER LYNCH**  
Owner & Principal  
Lynch Litigation

Jennifer Lynch is a seasoned civil litigator and trial attorney. She stands apart in her dedication and passion to bring civil justice. Whether working for an individual, firm or group located locally or internationally, she is able to bring ease, trust and professionalism to the client and her practice. She serves in leadership on the La Jolla Bar Association serving as co-chair of the social committee and involved in the speakers' committee. She litigates in both California State and Federal Courts and handles cases throughout Southern California. She resides in San Diego, California and currently practices in La Jolla and can be reached at her offices via telephone at 858-454-5500 or via e-mail at Jennifer Lynch at [jl@lynchlitigation.com](mailto:jl@lynchlitigation.com).



**DAVID MAJCHRZAK**  
Office Managing Shareholder &  
Deputy General Counsel  
Klinedinst PC

David Majchrzak is an Office Managing Shareholder and Deputy General Counsel at Klinedinst PC and is a seasoned ethicist, civil litigator, and certified specialist by the State Bar of California in legal malpractice law, who is listed in Best Lawyers in America and Super Lawyers. Majchrzak has served as the president of the San Diego County Bar Association and the William L. Todd, Jr. American Inn of Court and is the President Elect of the Association of Professional Responsibility Lawyers, the country's largest association for legal ethicists and professional responsibility lawyers. Majchrzak has also been a leader in evolution in legal ethics and chairs the American Bar Association's study and potential revision of the regulation of lawyers in multijurisdictional practice. Majchrzak remains heavily involved as a leader in numerous local, national, and international lawyer organizations and is a prominent writer and national speaker on the subjects of legal ethics and civility.



**JOSEPH MARTINEZ**  
Shareholder  
Seltzer Caplan McMahon Vitek

Seltzer Caplan McMahon Vitek Shareholder Joseph Martinez is a veteran real estate, finance and business attorney, and leader of the law firm's Cross-Border practice group, which advises clients in connection with in-bound business and asset investment, acquisition and disposition transactions, and helps them navigate disputes and controversies involving international participants who compete in a global marketplace. Joe and his SCMV colleagues also represented the Sycuan Band of the Kumeyaay Nation in its successful joint venture transaction that will bring a Major League Soccer team to San Diego in Spring 2025. And, outside of his legal practice, Joe serves in a number of community leadership roles, including seats on the San Diego Padres Hispanic Community Advisory Council, the San Diego Opera Board of Directors (and its Philanthropy, Finance and Hispanic Initiatives subcommittees) and the Southwestern College Foundation Board of Directors (where he is the newly elected president).



**JOSH MAXWELL**  
Managing Partner  
Hone Maxwell LLP

One year after opening an office in Tijuana, Mexico, Hone Maxwell LLP Managing Partner Josh Maxwell led his San Diego-based international tax and business law firm in another cross-border expansion, opening a Singapore office in January 2024. Josh is a go-to authority on international tax issues — especially challenges arising from FATCA compliance. A certified public accountant with a robust background in finance and tax law, Josh divides his focus between his successful international tax law practice and leading the eight-attorney, multi-national firm with determination, cultural awareness and market insight. His recent client successes include securing the abatement of all penalties for a client whose CPA didn't file their tax returns on time, creating \$70,000 in international reporting penalties. Another client, facing a \$500,000 penalty under the Off-shore Voluntary Disclosure Program, settled her case for \$120,000 after Josh took over the matter from her previous attorney.



## Congratulations, Guillermo!

Constangy congratulates our new San Diego Partner & Office Head, **Guillermo Escobedo**, for being named a *San Diego Business Journal* 2024 Leader of Influence in Law



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# LEADERS of INFLUENCE in LAW 2024



**SAM MCGOVERN**  
CEO & Managing Attorney  
McGovern Law Group, APC

After transitioning from a career in law enforcement to law school, Sam McGovern founded McGovern Law Group in 2020. The firm focuses on estate planning, trusts, and probate administration. Since its inception, the firm has grown to three locations across San Diego County, with offices in La Mesa, Alpine, and Chula Vista. Sam's vision is to create a firm that is accessible to all San Diegans and provides old-fashioned service to clients with the best modern practice available. The firm's goal is that when a client comes to McGovern Law Group, they will be confident that they are receiving the best service and value possible and will leave with peace of mind no matter the issue. Team MLG is committed helping clients protect their family, assets, and legacy under Sam's leadership. Outside of the firm, Sam is also an active community member and serves on several non-profit boards.



**KEVAN MCLAUGHLIN**  
Managing Partner  
McLaughlin Legal, APC

Kevan P. McLaughlin is the driving force and managing partner behind McLaughlin Legal, APC. Kevan brings a wealth of experience as a Certified Tax Law Specialist, with an unwavering dedication to providing top-notch legal services in San Diego. His practice as a San Diego tax attorney focuses on Federal and California tax law, with a special emphasis on representing taxpayers in civil and criminal tax litigation and controversy cases, which includes defending tax professionals like CPA's, other attorneys, and Enrolled Agents. Kevan has successfully litigated tax cases in the United States Tax Court, 9th Circuit Court of Appeals, California Office of Tax Appeals, and resolved countless cases before the IRS, FTB, CDTPA, and EDD.



**BARDIA MOAYEDI**  
Partner  
Snell & Wilmer

Snell & Wilmer Partner Bardia Moayed is chair of the firm's Technology Industry Group and co-chair of the Life Sciences Industry Group. He advises emerging growth and public companies throughout their life cycles as well as venture capital and private equity firms, particularly in the life sciences, high-technology, financial technology, food and beverage, and clean-technology industries. He has significant experience representing companies and financial firms in a broad range of general corporate governance and transactional matters, including venture capital financings, mergers and acquisitions, debt offerings, spin-offs/divestitures, joint ventures, IPOs, follow-on offerings, and tender offers. Bardia is an active member of the startup and venture capital community, volunteering his time as an advisor for the University of California, Irvine's Applied Innovation Incubator, San Diego State University's ZIP Launchpad, and University of California, Hastings' Startup Legal Garage.



**DANIEL MOGIN**  
Managing Partner  
MoginRubin LLP

As an attorney with more than 40 years of experience in the Antitrust space, Daniel Mogin has been an adjunct professor on the subject, has been honored and recognized countless times by various publications and outlets, and has been invited to participate in some of the largest Antitrust cases in the country, often referred to as a "lawyer's lawyer" for his expertise and experience. Daniel Mogin is the top in the field because he has dedicated his entire career to protecting consumers, promoting competition, and ultimately, changing thousands of lives by improving the way companies do business. Dan has been selected as a "Best Lawyer in America," a "Super Lawyer," and "Lawyer of the Year" and "Thought Leading Author," for Antitrust Litigation. He has repeatedly been chosen as one of San Diego's "Top Attorneys" and has been named International Advisory Expert in Unfair Competition and Complex Business Litigation in California.



Congratulations to Ryan Blair, Summer Wynn and Chad Shear for being recognized by the San Diego Business Journal as 2024 Leaders of Influence in Law.



# LEADERS of INFLUENCE in LAW 2024



**NATALIE MORGAN**

*Partner*  
Wilson Sonsini Goodrich & Rosati

Natalie Morgan helped open Wilson Sonsini's San Diego office in 2004. Twenty years later, she is a longtime partner at the firm and a versatile patent litigator, whose cases span the country and numerous technologies. In 2021, she took to trial a patent infringement case involving electronic trading that she spearheaded for over a decade. The plaintiff sought over \$1 billion in damages from her client and sought to treble that for willful infringement. The jury rejected the plaintiff's bid and awarded just \$6.6 million—the precise amount suggested by Natalie's team. She also won a recent trial for client NuVasive over patent rights to a suite of pioneering spinal surgery tools. She is actively litigating multiple Hatch-Waxman patent cases determining when certain generic drugs can come to market. Natalie mentors associates at Wilson Sonsini and supports rescue dogs (including her own).



**BENJAMIN MORRIS**

*Partner*  
Foley & Lardner LLP

Benjamin Morris is a force in San Diego's legal community, blending professional expertise and advocacy. A litigation partner focusing on construction law at Foley & Lardner, Ben successfully navigates complex legal landscapes and delivers exceptional client outcomes. Ben regularly handles high-stakes construction disputes, negotiates complicated contracts, and provides strategic counsel on significant projects. His in-depth knowledge and innovative problem-solving have earned him a stellar reputation among peers and clients. Beyond his professional achievements, Ben demonstrates a commitment to community service. Serving as the pro bono chair for Foley's San Diego office, he has significantly expanded the firm's pro bono initiatives by getting every attorney in San Diego to participate actively in pro bono projects, ensuring legal assistance reaches those in need.



**KEVIN MURPHY**

*President*  
Murphy Jones APC

Kevin C. Murphy is the co-founder & managing partner of Murphy Jones APC. Mr. Murphy earned his Bachelor's Degree in Political Science with a concentration in Public Law in 2003 from the University of California, San Diego (UCSD). Mr. Murphy completed a Comparative Law Institute at the Université Paris-Sorbonne, via Cornell University in 2003, and obtained his Juris Doctorate Degree from California Western School of Law (CWSL) in 2006. Mr. Murphy represents licensed professionals before State Administrative Boards and practices civil litigation in both California and Nevada. Mr. Murphy is an active member of the State Bars of California and Nevada, and currently serves as Immediate Past-President of the East County San Diego Bar Assoc. and as Vice-Chair of the Nevada State Bar's Administrative Law Section. Mr. Murphy is a Fellow of the College of Stoic Philosophers and founded StoicAttorneys.com which is an organization for legal professionals to foster ethical practice of the law.



**JASON MURTAGH**

*Shareholder*  
Buchanan Ingersoll & Rooney

Jason Murtagh is the Chair of Buchanan Ingersoll & Rooney's California Employment Law practice and the Managing Partner of the Firm's San Diego office. With more than 25 years of legal experience on both coasts, he serves as a trusted advisor to clients in a variety of fields, including financial services, pharmaceutical and life sciences, retail, and start-ups. Jason has a background in employment law, antitrust, products liability, and corporate transactions. He has experience in almost every type of venue available including mediation, arbitration, and state and federal court including the U.S. Supreme Court where he prevailed in the case he argued. Given the variety of Jason's experience, he is able to offer full-service support to his clients, including everything from advising on everyday employment issues, to litigating "bet the company" cases, to advising senior executives about their transitions between companies and negotiating on their behalf.



Congratulations Brian Adkins and Myriah Jaworski,  
2024 Leaders in Law!



**Brian Adkins**  
Member, San Diego  
badkins@clarkhill.com



**Myriah V. Jaworski**  
Member-in-Charge, San Diego  
CIPP/US, CIPP/E  
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# LEADERS of INFLUENCE in LAW 2024



**CARREE NAHAMA**  
Principal Attorney  
NAHAMA LAW

Carree Nahama is the principal attorney of NAHAMA LAW which is celebrating its 9th anniversary. Dedicated to seeking justice for injured children and their families, Carree and her legal team at NAHAMA LAW are compassionate, hard-working, and committed to results that make a difference in clients' lives. Carree is an award-winning trial attorney, receiving the "Streetfighter" award from Consumer Attorneys of San Diego (CASD) in 2023. Beyond her legal practice, Carree is deeply engaged in the legal community. As a Master and team leader for the Louis M. Welsh Inn of Court and co-chair of the Women's Caucus for CASD, she spearheads initiatives that empower and support her peers. The Latin phrase "BONA FIDE" captures Carree's vibrant personality, passion, and authenticity. She is a committed volunteer and gifted connector, who often collaborates with individuals with different areas of specialization, firm size, skill sets and is a strong advocate for intergenerational collaboration.



**OMAR NAZIF**  
Office Managing Partner  
Latham & Watkins LLP

As the Managing Partner of Latham's San Diego office, Omar Nazif's leadership and experience help drive the success of the firm in the community. He coordinates 215 lawyers and professional staff as they advise clients ranging from local start-ups to multinational corporations. In his project finance and development practice, Omar represents sponsors, lenders, and investors on debt and tax equity financings of renewable energy projects and other energy transition matters, with particular experience working on solar, wind, energy storage and carbon capture projects. For example, he recently advised Harvestone Low Carbon Partners in a first-of-its-kind carbon capture and sequestration transaction and advised Clearway Energy Group in a \$700 million solar energy and battery storage construction financing in California. Having previously worked in the firm's San Francisco, London, and Dubai offices, he brings a unique perspective to clients developing projects in the U.S. and abroad.



**RYAN NELL**  
Shareholder  
Pettit Kohn Ingrassia Lutz & Dolin

Ryan H. Nell is an employment attorney responsible for representing California employers statewide in both counseling and comprehensive litigation support. With the ever-changing landscape of California and federal employment law, Ryan prides himself on assisting clients in staying ahead of the curve in an effort to avoid legal trouble before it arises. He has extensive experience representing clients in harassment, retaliation, and discrimination matters, as well as large-scale wage and hour lawsuits. Ryan speaks regularly on a wide range of topics aimed at assisting California employers in the avoidance of legal trouble before it arises, and his work in the field has led to his recognition as a San Diego Rising Star by Super Lawyers in 2018-2024 and his inclusion in the Best Lawyers: Ones to Watch list in 2021-2024.



**BRIAN NESE**  
Partner  
Stoel Rives LLP

One of California's most respected renewable and alternative energy attorneys, Brian Nese is a partner in Stoel Rives' Energy Development group and leads the firm's renewable energy team in California, working on renewable energy projects nationwide and furthering the work of innovative sustainable energy organizations dedicated to reducing the country's reliance on fossil fuels. In his practice, Brian represents renewable energy project developers, owners and operators in project development and M&A transactions, helping them to develop, build, finance, own and operate renewable energy projects. As Co-Chair of Stoel's Energy Industry Group from 2015 to 2018, he expanded the firm's renewable energy practice to encompass the full spectrum of alternative energy sources. An influential leader at his firm, Brian is a member of Stoel's Executive Committee and previously served as California Office Managing Partner, overseeing Stoel's offices in Sacramento, San Diego and San Francisco.



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**SARA NEVA**  
Partner  
Procopio

Sara Neva is a commercial real estate partner at Procopio. Neva counsels clients on real estate purchase and sales, leases, joint ventures, and financing. Neva continues to build her own rapidly growing client base by creatively guiding real estate developers, investors, lenders, landlords and tenants through the ever-changing economic environment. Neva finds creative and practical solutions for clients, while cutting down on unnecessary legal roadblocks. By focusing on real-world issues, Neva is key to reaching deals faster and more efficiently. She was honored as a Best Lawyers One to Watch (2024), Super Lawyers Rising Star (2020-2024), SD Metro Top Attorney (2024), and SD Metro 40 under 40 (2021). Neva graduated magna cum laude from Santa Clara University (B.S.) and magna cum laude from the University of Minnesota Law School (J.D.).



**LARRY NISHNICK**  
Office Managing Partner, San Diego  
DLA Piper LLP

Larry Nishnick focuses his practice on advising public companies on securities law compliance and reporting and corporate governance matters. He also represents public and private companies in mergers and acquisitions and venture capital transactions. He represents clients in a broad range of industries, including life sciences and healthcare, semiconductor, technology, sports, media, entertainment, consumer products and retail. Larry also advises venture capital and private equity firms, corporate and strategic investors, and angel investors in connection with their investments. Larry advises clients from initial formation and early-stage fundraisings through later-stage venture capital and private equity financings to public company public company advisory services and capital market transactions, such as IPOs and follow-on offerings, PIPEs and convertible debt financings. Larry has extensive experience in mergers and acquisitions, joint ventures, partnerships and collaborations.



**CHRISTOPHER OLMSTED**  
Office Managing Shareholder  
Ogletree Deakins

Christopher Olmsted is the office managing shareholder of Ogletree Deakins' San Diego office. He helps businesses navigate California's complex employment law landscape, specializing in providing advice on workplace issues, including wage and hour compliance, terminations and severance negotiations, leaves of absence, disability accommodation, and more. He has 30 years of litigation experience defending employers in myriad matters involving California FEHA and Title VII discrimination, harassment, and retaliation claims; wrongful termination claims; wage and hour litigation; California CFRA, federal FMLA, and other LOA claims; and more. He leads a group of compliance attorneys in San Diego and is a member of Ogletree Deakins' California Advice Group. He is recognized in The Best Lawyers in America® for Employment Law – Management and Litigation – Labor and Employment.



**JON OLSEN**  
Partner  
Sidley Austin LLP

Jon Olsen is a partner in Sidley's M&A and Emerging Companies and Venture Capital practices in San Diego. He regularly advises large multinationals as well as emerging companies in the technology and life sciences industries in their strategic acquisitions, dispositions and joint ventures. In addition to providing strategic counseling to his clients, Jon's practice includes mergers and acquisitions, venture capital financings, joint ventures, debt financings, and corporate governance. Jon's substantial experience includes representing buyers and sellers in M&A transactions as well as in cross-border transactions, including acquisitions, dispositions, minority investments, and joint ventures in over 30 international jurisdictions ranging from Europe and the Middle East to South America and Asia. He also represents corporate venture groups in their minority investments in both U.S. and international emerging growth companies.



Congratulations to  
**Louis Galuppo,  
Georgia Schneider,  
and Daniel Watts**  
on being named 2024 Leaders of Influence in Law



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# LEADERS of INFLUENCE in LAW 2024



**EMIL PETROSSIAN**  
*Managing Partner, San Diego*  
 Glaser Weil Fink Howard Jordan & Shapiro LLP

Emil Petrossian is an experienced trial attorney and managing partner of Glaser Weil's San Diego office. Emil's practice covers all facets of complex commercial litigation in federal and state courts and arbitral forums, and he is routinely called upon to handle his clients' most sensitive matters. Recent representations include handling a multimillion-dollar affordable housing litigation for Alliant Capital, securing favorable outcomes in high-value disputes for Post Investment Group and CoreVest, achieving a summary judgment victory and \$1.6 million fee award for Gensler in one of its most significant litigations ever, and serving as lead counsel for various businesses in eight-figure civil and contract disputes. Emil is consistently recognized as a leading commercial litigator in California and has been selected for the Daily Journal's "40 Under 40" list, SD Metro's "2024 Top Attorneys," LABJ's "Thriving in Their 40s" list, and Lawdragon's "500 Leading Litigators in America."



**DOUGLAS PETTIT**  
*Shareholder & VP*  
 Pettit Kohn Ingrassia Lutz & Dolin

Douglas A. Pettit has extensive trial and litigation experience in the areas of civil litigation, business litigation, and professional liability. He has tried over 50 cases in California. His extraordinary record of favorable outcomes and exemplary client service has resulted in recognition by his peers over the years. He was inducted into the American Board of Trial Advocates in 2007 as the youngest member of the San Diego Chapter and has achieved Martindale-Hubbell's highest rating for legal ability and ethical standards. He has been selected for inclusion in the San Diego Super Lawyers list every year since 2007 and most recently listed as one of the Top 10 San Diego Super Lawyers for 2015, 2016, 2023, and 2024. Doug has been recognized by every possible "Top Attorney" list for San Diego including "San Diego's Top Attorneys" by The Daily Transcript, the San Diego Business Journal's Inaugural Best of the Bar in 2014, the San Diego Magazine's Top Lawyers, and Best Lawyers in America.



**PETE POTENTE**  
*CEO & Founder*  
 POTENTE

First-generation American entrepreneur and international business attorney Pete Potente is the founder and CEO of global law corporation POTENTE, headquartered in San Diego. A proud alumnus of The California Western School of Law, Pete advocates for the future of the legal industry and recently spoke on a panel at his alma mater to inspire aspiring attorneys. Passionate about his work, he often says he is in the business of helping people, and he loves to do just that. Pete is a high-energy, encouraging leader who drives success for his team through a family-oriented mindset that fosters collaboration and trust. Today, POTENTE is recognized for its expertise in guiding international business expansion and providing strategic planning for sustainable growth. With nearly 20 years of experience, Pete has assisted companies from over 20 countries in expanding to and from North America.



**ADAM POWELL**  
*Partner*  
 Knobbe Martens

Adam Powell is a partner at intellectual property law firm Knobbe Martens with a successful track record of resolving technologically complex issues for clients in the medical device, software, electronics, chemistry, and biotechnology industries. Mr. Powell serves as the co-chair of the firm's antitrust practice group and has extensive experience litigating trade secret, patent, and antitrust cases. Beyond his practice, Mr. Powell is an active member of the San Diego legal community. He serves as an Officer of the San Diego Intellectual Property Law Association and previously sat on the Board of Governors for the San Diego chapter of the Association of Business and Trial Lawyers. In the latter role, he helped implement a Trial Attorney Partnership program with the San Diego County District Attorney's Office and the San Diego City Attorney's Office to provide assistance to those offices as well as valuable trial experience to newer attorneys.



## HAHN LOESER CONGRATULATES JIM HEFFNER AND DANIELLE HUMPHRIES

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# LEADERS of INFLUENCE in LAW 2024



**OWEN PRASKIEVICZ**

Partner

Solomon Ward Seidenwurm & Smith

Owen Praskievicz, a partner at Solomon Ward Seidenwurm & Smith LLP, is a standout trial and appellate attorney with a history of success for his clients in San Diego. His notable victories include recently winning a real estate trial involving a historic Gaslamp Quarter building, prevailing on appeals in the California Courts of Appeals and Ninth Circuit and defending a trademark registration before the Trademark Trial and Appeal Board. Known for his integrity, reliability and commitment to mentorship, Owen brings a unique perspective to his legal practice that's shaped by his early foundation in journalism. His ability to communicate complex concepts helps him guide clients through the challenges of civil litigation and appeals in state and federal courts. He skillfully represents clients in investment, real estate and commercial contract disputes; defends against class actions involving product labeling and false advertising; and protects trademarks, trade secrets and copyrights.



**ERIC PROOS**

Founder

EJP Law P.C.

Eric's journey into law was deeply personal, stemming from his family's experience with a traumatic workplace incident when he was just four years old. His mother and family were victims of a workplace shooting in the U.S., leaving the family in emotional and financial turmoil. After witnessing numerous lawyers refuse their case as "too hard" or "unwinnable," Eric was inspired to make a difference. Though he didn't pursue the same type of law that could have helped his family, he chose to focus on simplifying complex legal issues for his clients. Now leading EJP Law, Eric and his team treat clients as part of their family, guiding them through challenging legal processes. His dedication to excellence has earned him the title of Super Lawyers Southern California Rising Star for 2021, 2022, 2023, and 2024.



**TEODORA PURCELL**

President & Attorney at Law  
Purcell Law, APC

Teodora Purcell's journey from Bulgarian immigrant to esteemed immigration attorney is a testament to her exceptional skill and dedication. A certified specialist in Immigration and Nationality Law, she founded Purcell Law, APC and teaches at UCSD's paralegal program. Purcell's expertise has earned her numerous accolades, which include the 2023 Women of Influence award by SDBJ, Thompson Reuters Super Lawyers (2015-2024), Top 25 Women Super Lawyers in San Diego (2019), Best Lawyers of America (2024). As an advocate for diverse communities, she skillfully navigates complex immigration cases for both individuals and corporations. Her commitment extends beyond her practice, as she dedicates time to pro bono work, and has been recognized by KPBS Local Hero Award and CCLC La Mancha Attorney of the Year award. Purcell's leadership in local organizations and her unique perspective as an immigrant have solidified her reputation as a distinguished figure in immigration law.



**KIERAN PURCELL**

Managing Shareholder, President & CEO  
Epsten, APC

U.S. Navy Captain Retiree Kieran J. Purcell, CCAL, Esq., is a legal counsel that works on behalf of community associations and provides advice on all types of corporate matters. He has been a shareholder of Epsten, APC, since 2002 and now serves as Managing Shareholder, President, and CEO of the firm. Kieran served three terms on the Board of Directors of the San Diego Chapter of the Community Associations Institute, where he served as President and co-chaired the National Seminar Committee. He is a delegate for the San Diego Chapter's Legislative Support Committee, a former Legislative Co-Chair for the California Legislative Action Committee (CLAC), and now serves as Chair of CLAC. Kieran is a four-time recipient of the San Diego Chapter's President's Award and the Samuel L. Dolnick Lifetime Achievement Award. In 2023, he was recognized with the San Diego Chapter's Legacy Award.



**CONGRATULATIONS TO PAUL GARCIA & JOSEPH LAMAGNA ON BEING NAMED 2024 LEADERS OF INFLUENCE IN LAW**



**Paul Garcia**  
Partner



**Joseph LaMagna**  
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# LEADERS of INFLUENCE in LAW 2024



**MARK RACKERS**

Partner  
Sheppard, Mullin, Richter & Hampton

Mark Rackers is a partner in Sheppard Mullin's Business Trial practice group. He is the co-leader of the firm's Multifamily Housing team, a member of the firm's mortgage banking and healthcare litigation teams, serves on the firm's Pro Bono Committee and heads pro bono efforts for the San Diego office. An experienced trial attorney, Mark represents clients in business disputes involving multi-family litigation, consumer class actions, healthcare entities and real estate. Mark regularly counsels clients, including landlords and property management companies, on compliance matters. He also has experience as lead trial counsel and has successfully argued before the Ninth Circuit, California Supreme Court and several California Courts of Appeal. He is on the boards of the Legal Aid Society of San Diego and the Neighborhood House Association.



**ALLISON REGO**

Partner  
Barnes & Thornburg LLP

Allison focuses her practice on commercial law, bankruptcy and financial restructuring, as well as related litigation and appeals. Allison has been involved in a wide array of bankruptcy and restructuring-related matters. She has served on teams that have represented creditor interests in insolvency events in real estate, oil and gas, entertainment and manufacturing. Notably, Allison has co-authored articles that appeared in the American Bankruptcy Institute Journal. As part of her work with the San Diego Bankruptcy Forum, she moderated a panel on the interplay between the bankruptcy and state courts featuring members of both benches. While in U.S. law school, Allison was an extern for the Honorable Janis L. Sammartino of the U.S. District Court for the Southern District of California and for the Honorable M. Margaret McKeown of the U.S. Court of Appeal for the Ninth Circuit.



**KRISTIN REYNA DEHART**

Partner & Assistant Managing Partner,  
San Diego  
Gordon Rees Scully Mansukhani LLP

Kristin Reyna DeHart is the Assistant Managing Partner at Gordon Rees Scully Mansukhani's San Diego office, with over 23 years of legal experience. A member of the firm's Environmental/Toxic Tort Steering Committee, she specializes in defending complex environmental and toxic tort claims and general tort and product liability matters. Elected to national partnership in 2007, Kristin now manages over 125 attorneys and 200 employees in one of the firm's largest offices. She has successfully litigated numerous high-profile cases, including a 12-month environmental trial and a class action suit. Kristin also plays an active role in the firm's Diversity Committee and Women's Initiative. Beyond her professional achievements, Kristin is deeply involved in the San Diego community. She serves on the Board of Directors of FC Balboa, a non-profit local soccer club, volunteers with North Park AYSO, actively participates in her children's schools, and volunteers at her local church.



**HEATHER RILEY**

Partner  
Allen Matkins

Heather Riley, a land use partner in the San Diego office of law firm Allen Matkins, has worked on some of San Diego's most significant land use projects. Her work has helped shape the community her family calls home and has increased housing production across the region. She is at the forefront of the housing crisis dialogue, working with the Building Industry Association of San Diego and the City of San Diego to develop practical and defensible solutions. Her efforts resulted in a published appellate decision that codified density bonus law and has been cited by regulators and applicants alike in their ongoing push to speed up market-rate and affordable housing production. Heather also works with commercial and industrial developers throughout Southern California to entitle projects and create new uses for older facilities. Lately, she has been handling a number of historic property issues, and as a result, she is helping to update the City of San Diego's historic procedures.



## CONGRATULATIONS

to **Jenny L. Doling, JD, LL.M.**

on being named a Woman of Influence in Law 2023 and a 2024 Leader of Influence in the Law. The work you do on the local, state, and national level changes lives. Never stop fighting the good fight for consumers and small businesses.



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# LEADERS of INFLUENCE in LAW 2024



**ROBERT ROBINSON**  
Attorney & Managing Partner  
Hickman Robinson Yaeger LLP

Robert Robinson has been the managing partner of Hickman Robinson Yaeger LLP for over 15 years. The law firm is a local leader in the fields of real estate law, business law, and litigation. He is a San Diego State University graduate '00 (BS in Business-Accounting). As a California Western School of Law graduate '03 (Juris Doctorate), he was an editor of the California Western School of Law, Law Review and International Law Review. During law school, Robert also studied in York and London, England, at the Law School of England and Wales. He has served on the alumni board at CWSL, as well as the Advisory Board for the San Diego State University Corky McMillan Center for Real Estate. Robert has also served as a legal analyst and legal contributor on radio and television, appearing on such shows as Politics & Profits, America Trends, and Real Talk San Diego.



**LESLIE RYLAND**  
CLS-F  
Schaffer Family Law Group

Leslie Ryland, CLS-F, is a principal attorney with Schaffer Family Law Group. Leslie is a family law specialist, certified by the State Bar of California, and a certified collaborative divorce practitioner. Leslie represents clients in all types of family law matters, with a special focus on custody issues. She has successfully litigated all types of family law disputes, including complex financial matters and highly contested custody cases, and she is also a skilled mediator. A leader in San Diego's legal community, Leslie is Past President of Collaborative Practice San Diego, an association of attorneys, mental health professionals and financial advisors working to promote collaborative processes and peaceful resolution of family law issues. Leslie was also featured as one of the Best Divorce Attorneys in San Diego of 2024 by Forbes Advisor.



**CHRISTIAN SALAMAN**  
Partner  
Pillsbury

Corporate partner Christian Salaman is one of SD's leading attorneys. He's well-known within the SD community of technology entrepreneurs and investors for his M&A and VC work and his support for the startup community. Notable clients include Shield AI, where he led every equity round; orphan drug leader Sentynl; VC investor Blueprint Equity; Petvisor, which acquired companies alongside his long-time client PetDesk; and Everi, where he led its \$6.3 billion deal to combine it with IGT so that combination can be acquired by Apollo. Every year, dozens of SD's new startups hire Christian. His work has led to many accolades, including SDBJ's "Leader in Law" in 2021. Best Lawyers named him as SD's M&A "Lawyer of the Year" in 2024 and 2021. He also routinely receives recognition from Chambers USA and The Legal 500 U.S. In regard to community involvement, he serves on the Executive Committee for Connect, is the incorporator of Startup San Diego and a continuing sponsor, among other



**BRANDON SAXON**  
San Diego Assistant Managing Partner  
Gordon Rees Scully Mansukhani, LLP

Brandon Saxon is the Assistant Managing Partner of Gordon Rees Scully Mansukhani's San Diego office and Chair of the office's Employment Practice Group. With over fifteen years of experience, he focuses on defending companies and employers in employment and commercial litigation, navigating highly regulated practice areas. As Assistant Chair of the firm's National Employment Group, Brandon is recognized for his thought leadership and frequent speaking engagements at national events. His legal insights are featured in publications such as Law360 and Bloomberg Law. A passionate mentor, he dedicates time to nurturing young attorneys. Deeply connected to the San Diego community, Brandon has volunteered for over 14 years as a High School Mock Trial coach and serves as a youth sports coach. His contributions to the firm and community reflect his commitment to professional excellence and civic engagement.



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**Randy Grossman**

on being named as one of *San Diego Business Journal's* Leaders of Influence in Law.



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# LEADERS of INFLUENCE in LAW 2024



**SARAH SCHAFFER**  
CLS-F, LL.M.  
Schaffer Family Law Group

Sarah T. Schaffer, CLS-F is founder of Schaffer Family Law Group. As a family law specialist, certified by the State Bar of California, Sarah represents clients in high-conflict family matters. She has an LL.M. in taxation and prior to becoming an attorney, worked as a tax consultant. Her background gives her the ability to ensure clients' assets are adequately protected. Sarah is also a certified collaborative divorce practitioner. This process provides divorcing parties the opportunity to reach a creative settlement that meets the needs of the family. Earlier in her career, Sarah served in the Marine Corps and recently retired as Deputy Director, Reserve Legal Support, Headquarters Marine Corps, Judge Advocate Division, Washington DC. Sarah is involved with Casa Cornelia Law Center, which provides pro bono legal services to victims of human and civil rights violations, and Kids Turn, which supports children and parents experiencing family separations.



**MARTIN SCHMIDT**  
Managing Partner  
Schmidt National Law Group

Martin Schmidt of Schmidt National Law Group has led the charge on lawsuits against JUUL, 3M, Bayer and other major corporations. His firm is considered San Diego's Product Liability law firm. Mr. Schmidt has been on local TV news discussing the various lawsuits he is involved in. He has been practicing law in San Diego for over 30 years. He is San Diego's lawyer!



**GEORGIA SCHNEIDER**  
Shareholder  
G10 Law, APLC

Georgia Schneider is a shareholder and head of the litigation team at G10 Law. She is an accomplished attorney, respected leader, and mentor to the firm's junior associates. Ms. Schneider brings over 17 years of litigation experience to matters such as commercial real estate contract disputes, real estate failure to disclose, real estate brokerage and agent breach of fiduciary duty, and commercial unlawful detainers. As a licensed California real estate broker, Ms. Schneider offers unique insights into real estate litigation matters. Ms. Schneider graduated Summa Cum Laude from Southwestern Law School and Cum Laude from UCLA with a B.A. in Psychology. Prior to joining G10 Law, she was an associate at Ponist Law Group in San Diego and Morgan Lewis in Los Angeles. An active member of the San Diego legal community, Ms. Schneider is a member of the North County Bar Association and Lawyer's Club.



**MATT SCHWARTZ**  
Partner & U.S. Finance Practice  
Group Leader  
DLA Piper

Matt Schwartz is the chair of DLA Piper's US Finance practice, which includes a broad range of finance transactions and clients across six different subspecialties, including Leveraged Finance; Structured Finance; Venture and Growth; Sports, Media and Entertainment; Projects and Energy; and Restructuring. Matt has spent more than two decades representing banks and private credit funds in structuring and negotiating a wide range of debt, equity and hybrid debt/equity investments with a specific focus in technology, life sciences and healthcare. Matt is a co-founder of the Legal Mentor Network, the first nonprofit dedicated to mentoring young lawyers and law students, particularly those students from communities who are traditionally underrepresented in the legal industry. Matt is also a founding board member of the Randy Jones Foundation, a local San Diego charity founded by MLB legend Randy Jones that supports military families through scholarships and community activities.



## CONGRATULATIONS 2024 Leaders of Influence in Law



**Douglas A. Pettit, Esq.**  
Professional Liability  
Business Litigation



**Andrew N. Kohn, Esq.**  
Business Litigation  
Personal Injury - Defendants



**Ryan Nell, Esq.**  
Employment Law Litigation  
Employment Law Management



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# LEADERS of INFLUENCE in LAW 2024



**SEAN SCOTT**  
President & Dean  
California Western School of Law

Sean M. Scott is the first African American and female president and dean in California Western School of Law's 100-year history. Since her appointment, she has led the institution with a forward-thinking vision centered on diversity, equity, and inclusion. Dean Scott secured the largest gift in the school's history—\$3M to help diversify the legal profession and create an intellectual hub where critical conversations about justice occur. She also launched the Law, Justice, and Technology Initiative, which equips students with cutting-edge legal technology skills and fosters dialogue on the intersection of law and social justice. A prominent voice in legal education, she serves on the Board of Governors for the Society of American Law Teachers (SALT) and is a sought-after speaker nationwide on leadership and diversity in the legal field.



**RONSON SHAMOUN**  
CEO & Principal Attorney  
RJS LAW

Ronson J. Shamoun is the founder and CEO of RJS LAW, a premier tax law firm with over 21 years of experience. Specializing in federal and state taxation, criminal tax defense, and estate planning, he represents clients before agencies such as the IRS and FTB. Mr. Shamoun has saved clients hundreds of millions of dollars and is renowned for securing reduced or avoided criminal charges. Under his leadership, RJS LAW has been recognized as San Diego's top tax law firm and has excelled in handling PPP, EIDL, and ERTC cases. In addition to his legal practice, Mr. Shamoun is an adjunct professor at the University of San Diego, where he co-founded the USD School of Law – RJS LAW Tax Institute. His contributions to the field have earned him the USD School of Law Distinguished Alumni Award, as well as recognition in Super Lawyers and SD Metro Magazine. A San Diego native, he is also a successful real estate and business investor.



**DAVID SHAPIRO**  
Founder & CEO  
David P. Shapiro Criminal  
Defense Attorneys

Arrested for a crime he, admittedly, did commit in 2004, David experienced firsthand the same fear, uncertainty, and concern for his future and freedom so many of his clients undergo when arrested or under investigation for allegedly committing a crime. That experience motivates him each and every day to provide the best representation possible to any and all who entrust his Firm to handle their criminal defense matter in their time of need. Practicing exclusively criminal defense in San Diego since 2007, David has built one of San Diego's most respected criminal defense firms since opening its doors in 2010. He has become a community leader, donating his time and money to numerous community causes creating an impact to the San Diego community far beyond criminal defense.



**CHAD SHEAR**  
Partner  
Cooley LLP

Chad Shear represents pharmaceutical companies in high-stakes patent litigation nationwide. He has successfully represented clients with market-leading name brand drugs, including Gilead (Vemlidy, Odefsey, Descovey, Harvoni); Dainippon Sumitomo (Latuda); and Astellas (Xospata). Chad is renowned for his approachability, legal and business acumen, and his unwavering dedication to his clients. Since 2023, he's secured two wins for Moderna, the biotechnology giant behind Spikevax – the groundbreaking COVID-19 vaccine. Most recently, victory came in a patent infringement suit brought by Alnylam, which alleged Spikevax employs RNA-based technology covered by three Alnylam patents. In recent weeks, a federal judge issued a claim construction order interpreting the meaning and scope of the patents in dispute and adopting Moderna's construction on a case-dispositive claim term. Last Fall, Chad represented Moderna in a related case in which he secured a stipulated judgment of noninfringement.



## Congratulations

**SARAH SCHAFFER**  
CLS-F, LL.M



**LESLIE RYLAND**  
CLS-F



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# LEADERS of INFLUENCE in LAW 2024



**FEI SHEN**  
Partner  
Kilpatrick Townsend & Stockton

Fei Shen is a registered patent attorney focusing his practice on patent prosecution and counseling in the computer, software, and semiconductor industries with technical expertise on, but not limited to, network technologies, semiconductor manufacturing, circuit design, enterprise systems, database systems, graphics processing, computer security, search technologies, big data, mobile applications, communication protocols, smart devices, social media, and automated business infrastructure. He has experience developing patent filing strategies, preparing and prosecuting U.S. and international patent applications, providing opinions on patentability, invalidity or non-infringement with respect to intellectual property rights, conducting due diligence investigations, performing post-grant actions, and providing litigation support. Fei helps Chinese clients on outbound work to the U.S. He also works closely with our Shanghai office serving American companies with their interests in China.



**JAIKARAN SINGH**  
Partner  
Foley & Lardner LLP

Known for his exceptional skill and dedication, Jaikaran Singh is a partner and litigation attorney with Foley & Lardner LLP. His expertise spans high-stakes business and commercial litigation, focusing on defending consumer class actions across various industries. Over his 20-plus-year career, Jai has represented Fortune 500 companies in more than 160 state and federal class actions, consistently navigating complex legal challenges with expertise. Jai's leadership roles as Vice-Chair of the firm's Consumer Law, Finance, & Class Action Practice and Co-Chair of the Consumer Products Team highlight his strategic vision. His guidance on product labeling, warranties, advertising, and regulatory compliance is invaluable to manufacturers and retailers. Along with his professional leadership roles, Jai also serves as a member of the Board of Directors for the Boys & Girls Club of Greater San Diego.



**KEVIN SMITH**  
Founding Partner  
Wood Smith Henning & Berman LLP

Kevin D. Smith is a founding partner of Wood Smith Henning & Berman LLP, a national trial firm with 42 offices strategically located across 22 states. Kevin is an active trial lawyer and has spent most of his professional career trying cases on behalf of Fortune 500 companies and major corporations. Throughout his 40-year career, he has defended commercial, professional liability, employment, product liability, transportation, and catastrophic cases in both state and federal courts. Despite frequently overcoming challenging liability and damages issues in high-exposure cases, Kevin has achieved victories on behalf of his clients in an impressive 94% of the cases he has tried. As a result of his success, Kevin has been elected to the prestigious American Board of Trial Advocates (ABOTA) and the International Association of Defense Counsel (IADC) and routinely recognized as a "Super Lawyer."



**PETER STOCKBURGER**  
San Diego Office Managing Partner  
Dentons

Peter Stockburger is managing partner of Dentons' San Diego office, Lead of the firm's Artificial Intelligence Advisory Team, and co-lead of the firm's Global Autonomous Vehicle practice. Peter's practice is at the leading edge of technology and the law, partnering with clients from around the world to develop smart strategies on how to comply with complicated data privacy laws, maintain good cybersecurity, and develop and deploy new technologies such as artificial intelligence and autonomous vehicles. Peter is a recognized thought leader on artificial intelligence, writing and speaking widely on the subject as well as guiding his clients through the technology's emerging risks and opportunities. Peter is a proud alumni of the University of San Diego School of Law, where he taught moot court for almost ten years. Peter also has an active pro bono practice focused on expanding and defending human rights worldwide.



## Congratulations!



**Kathryn Fox**  
SHAREHOLDER

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# LEADERS of INFLUENCE in LAW 2024



**NICHOLAS TRANSIER**  
Office Managing Partner  
Dinsmore & Shohl LLP

Nick is a registered patent attorney and the managing partner of Dinsmore & Shohl's San Diego office. He advises clients on all aspects of obtaining, asserting and defending patents in the U.S. and abroad in technical domains including: artificial intelligence (AI), machine learning (ML), telecommunications, additive manufacturing, fintech, blockchain, cryptocurrency and automotive. He also helps clients with intellectual property landscape analyses and licensing. Nick is a frequent speaker on topics including patent strategy and artificial intelligence, and he has published many articles about the same. Nick's natural curiosity and inherent interest in technology are noted by clients as key drivers of his successful representations. Outside of work, Nick is a father of two, motorsports enthusiast, devoted Texas Longhorn football fan and avid tinkerer. Prior to becoming a lawyer, Nick was a systems engineer working for companies including Lockheed Martin and Raytheon.



**MARGARET 'MOLLY' TREEZE**  
Chief Legal Officer & Secretary  
Teradata Corporation

Molly Treeze is the Chief Legal Officer and Corporate Secretary at Teradata, a global leader in data analytics software. With over 20 years of legal experience, she has guided companies through mergers, acquisitions, and restructurings, and her expertise in governance, compensation, and crisis management has strengthened investor confidence. Since joining Teradata in 2007, Molly has played a key role in its transition to a cloud-first SaaS model, offering strategic legal counsel and leading governance efforts with the Board and shareholders. She also oversees Teradata's Ethics & Compliance, Data Privacy, and Environmental, Social, and Governance (ESG) programs, contributing to the company's recognition as one of the World's Most Ethical Companies® by Ethisphere for 15 consecutive years. Molly is modernizing Teradata's global Law organization, leveraging data analytics and technology to enhance efficiency and ensure the department remains at the forefront of legal innovation.



**ELIZABETH TRESP**  
Principal Attorney  
Tresp Law, APC

Elizabeth A. Tresp, JD, LL.M., is the founder and principal attorney of Tresp Law, APC, and the principal attorney of Tresp, Day & Associates, Inc. She has grown Tresp Law into a mid-sized law firm offering comprehensive estate planning, trust and probate administration, and litigation of decedents' estates. In 2019, she expanded her impact by acquiring the nationally-recognized Day & Associates, Inc, a well-established firm practicing high-net-worth estate planning and international asset protection law since 1992. Licensed in California, Montana, and Wyoming, Elizabeth serves clients across the U.S. and internationally. Beyond her legal expertise, she is an accomplished real estate investor, business owner, and philanthropist, contributing to various ventures throughout the U.S.



**RYAN WATERMAN**  
Shareholder  
Brownstein Hyatt Farber Schreck

Ryan Waterman solves complex land use, water quality, renewable energy and hazardous substance issues. With first-hand experience navigating the inextricably linked issues of land use and water in California, Ryan possesses the insight needed to efficiently navigate the environmental challenges that arise during a wide range of development and redevelopment projects. Ryan skillfully works through permitting, administrative and litigation matters, keeping his client's goals at the forefront. His deep familiarity with the land use entitlement process and CEQA/NEPA environmental review is an integral asset to successful project outcomes. From helping to secure federal and state water quality permits to counseling on contaminated sites, Ryan understands the complex decisions and options available to keep projects moving and appropriately handle remediation as needed. Ryan also maintains a robust pro bono practice and sits on the firm's Pro Bono Committee.



Fisher Phillips is proud of our winners and **Congratulates all of the 2024 Leaders of Influence in Law.**



**David Amaya**  
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**Christopher Conti**  
Partner  
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With almost 600 attorneys in 41 offices across the United States and Mexico, Fisher Phillips is an international labor and employment law firm providing practical business solutions for employers' workplace legal problems. We regularly advise and counsel clients on issues surrounding wage and hour, class action and PAGA lawsuits, employment discrimination and harassment, litigation, workplace safety, immigration, trade secrets and non-competes, and more.

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**Omar Nazif**

and all the 2024 Leaders of Influence in Law honorees.

In both his leadership role and project finance practice, Omar embodies the talent of culture of Latham. We commend him for the many accomplishments that have earned this recognition.

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# LEADERS of INFLUENCE in LAW 2024



**DANIEL WATTS**  
Shareholder  
G10 Law, APLC

A shareholder on the litigation team, Daniel Watts founded G10 Law's appellate practice group. He's a certified specialist in Appellate Law – one of only 38 such specialists in San Diego County. His published decisions in real estate, contract, evidence, environmental, and anti-SLAPP law, including a California Supreme Court decision, improved the law statewide. A recent success (*Epochal Enterprises v. Leichtag*) was particularly significant to mesothelioma and landlord/tenant lawyers. A barrister with the American Inns of Court, Watts gives back to the community by serving on non-profit boards (North County Bar Association, New Village Arts theater), writing plays for community theaters and donating his royalties, volunteering as a pianist for musicals, and judging moot court competitions for UCSD undergrads. He earned his J.D. from UC Davis School of Law, where he was an editor of the Law Review and served on the governing board of the Appellate Advocacy program.



**KARINE WENGER**  
Managing Partner, San Diego  
Fragomen

Karine is an accomplished corporate immigration counsel and Managing Partner of Fragomen's San Diego office, bringing more than 20 years of expertise in U.S. immigration and nationality law. Karine serves a diverse clientele comprising of individual high net worth investors, startups to large multinational corporations spanning various industries. She enjoys partnering with her clients to devise strategic solutions forward that meet the individual or enterprise needs. Karine leads a dedicated legal team that provides innovative immigration solutions and comprehensive guidance on compliance and policy matters. Having immigrated from France in the 1980s, Karine's personal journey fuels her passion for advocacy. She sets the bar in leadership, client service, staffing, innovation, and mentorship. Intuitive and devoted to success at all levels, she embraces diversity and transformation, empowering others to feel confident and resourceful in achieving meaningful goals.



**SUMMER WYNN**  
Partner  
Cooley LLP

Summer Wynn's practice encompasses employment litigation and counseling, environmental and land use litigation and counseling, and complex commercial litigation, including class actions. She has trial and appellate experience representing employers in litigation matters on a wide variety of individual claims, including wrongful termination, harassment and discrimination and retaliation. In recent months, Summer led the authoring of thought leadership regarding California's sweeping changes to the California Private Attorneys General Act (PAGA), and most recently she has presented on Cooley's annual HR Network series regarding workplace investigations and post-investigation remediation. The discussion centered on the effective management of employee work-related complaints – and how to recognize the need for an employment-related investigation. Summer has significant trial experience, including class action trial experience, and she has extensive experience litigating cases on appeal.



**ANNA YUM**  
Founder & Owner  
Law Offices of Anna R. Yum

Anna Yum is a nationally recognized and premier criminal defense attorney in San Diego. Ms. Yum is licensed to practice law in state and federal courts in both the Southern and Central Districts of California. She is also licensed to practice law in the state of Illinois. Ms. Yum has successfully represented clients on various criminal charges ranging from serious and/or violent offenses such as sexual assault, domestic violence with great bodily injury enhancements, child molestation, murder, attempted murder, "criminal street gang" cases, robbery, felony offenses with firearm enhancements, etc. to lower-level offenses including driving under the influence, theft-related offenses, narcotics cases, commercial burglary, insurance fraud, assault and battery, and much more. During the course of her career, Ms. Yum has successfully tried a multitude of jury and bench trials to verdict.



Congratulations  
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on being named a  
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Congratulations to  
**Kevin C. Murphy, Esq.**  
on being named a  
2024 Leader of  
Influence in Law

Murphy Jones APC attorneys are advocates for individuals with professional licenses. We protect licensed professionals and defend their livelihood in legal administrative proceedings. We understand how valuable our clients' careers are to them and we fight to save their license, reputation and ability to practice in their chosen occupation. **Murphy Jones APC** focuses on defending healthcare practitioners, but also represents individuals with other professional credentialing defense issues.



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Congratulations **Joanne Franciscus, CEO & Executive Director** of the Legal Aid Society of San Diego, for being selected as a 2024 Leader of Influence in Law.

LASSD is the largest poverty law firm in San Diego County providing free legal services and more to the community for over 100 years.



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## 2024 Leaders of Influence in Law

A special congratulations to Glaser Weil San Diego partners Joseph Leventhal and Emil Petrossian.



**Joseph Leventhal**  
Partner and Head of  
Litigation for the San  
Diego Office



**Emil Petrossian**  
Managing Partner of the  
San Diego Office

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Congratulations to

# Scott F. Levin Esq.

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Scott Levin is dedicated to providing the compassionate, effective mediation that families deserve.

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## Estilo

→ from page 1 —

Tijuana,” King said. “A lot of people have businesses locally and they go back and forth.”

In another twist, the six-story project has some ground-floor apartments designed for people to run a business out of their home, said **Greg Mueller**, CEO and principal designer of **Tucker Sadler Architects**.

“It’s a building to allow seniors to continue to work,” Mueller said.

In addition to appealing to cross-border tenants, King said that Casa Estilo is targeting people 55 and older “who want prestige and all the bells and whistles that come with that.”

That includes concierge service and house cleaning.

“It’s very much resort-style living. It’s worry-free living,” King said. “Our goal is to reach out to people who are getting older and don’t want to maintain their homes anymore. They can sell their property while the market is high.”

Translated from Spanish, the name of the project means “house of style,” a name that is befitting Casa Estilo because “there’s nothing else like it in this area,” said **Derek Edwards**, general manager of Casa Estilo.

“We’re expecting to run this more like a hotel than just an apartment building,” Edwards said. “With Gaylord and some of the other projects surrounding that along the waterfront, Chula Vista is in a prime area to develop these resort style projects.”



**Wende King**  
President and CEO  
Royal Property  
Management Group



**Casa Estilo in Chula Vista opened this month. The apartments are being marketed to people age 55 and older.** Photo courtesy Casa Estilo

The **Gaylord Pacific Resort & Convention Center** is a \$1.2 billion hotel and convention center along the Chula Vista bayfront.

### Modern Look

Describing Casa Estilo’s look as “Bohemian,” Edwards said, “We’ve got Italian marble in our lobby and lounge areas,” adding, “We have amenities that kind of blow people away when they come into the building.”

They include a sixth-floor vista lounge that overlooks the **San Diego Country Club** with views of San Diego Bay to the west and the mountains to the east.

There’s also a fitness center, a yoga studio, an outdoor pool with cabanas, a game room, a dog-washing area and dog run, and a courtyard with multiple fire pits and big-screen televisions.

Casa Estilo has 24 studio apartments of 463 square feet, 71 one-bedroom apartments of 579 square feet, 27 two-bedroom apartments



**Derek Edwards**  
General Manager  
Casa Estilo

of 808 square feet, and 18 two-level loft apartments on the top floor that range from 700 square feet to 1,100 square feet.

Of the 142 apartments, 16 will be earmarked for low-income tenants.

Monthly rents for the market rate apartments range from \$2,410 to \$7,665. Rents for the affordable apartments are based on income.

Most of the apartments have balconies. Two of the apartments are short-term rentals “which we would allow tenants to rent for family members who come to visit,” Edwards said.

Each of the loft apartments has an elevator to reach the second level. There are no staircases in the loft apartments.

Mueller said that the design is meant to evoke a sense of grandeur.

“As you get above the second floor, you have some of the most incredible views,” Mueller said, adding that all of the apartments have

floor-to-ceiling glass.

“My goal was to capture as much natural light as possible,” Mueller said. “The idea was to bring as much natural light as possible in from the outside.”

Interior hallways, which are 10 feet wide compared to the more typical eight feet, have windows at the end to provide natural light and dark wood accents to go with the overall warm feeling of the structure, Mueller said.

“You don’t feel like you’re in a tunnel. If you’re walking past someone, you don’t feel crunched. You can actually stop and have a conversation,” Mueller said. “Everything that we incorporated into the building is bringing people together.”

Where it’s not glass, the exterior façade is sand-colored stucco with copper trim – stucco to mimic the city’s historic building and copper to evoke the setting sun.

“If you look at the final color of a sunset, it’s copper,” Mueller said. “The thing we were looking at doing was to get a very modern look to the building using materials that are common to the Chula Vista area.” ■

### Royal Property Management Group



**FOUNDED:** 1995

**HEADQUARTERS:** Rancho Bernardo

**CEO:** Wende King

**BUSINESS:** Property Management

**EMPLOYEES:** 181

**WEBSITE:** www.royalpropertymanagement.com

**CONTACT:** 808-312-8170

**NOTABLE:** Royal Property Management has specialized in affordable housing projects. Casa Estilo is the first luxury apartment building the company has managed

## Wildfire

→ from page 1 —

capital for continued innovation and deployment of its platform.

**Tristan Barnum**, chief marketing officer for Wildfire, said that with the series B funding, “our investors are showing that they believe in Wildfire’s growth and want to fan the flame.”

“Our growth isn’t just about delivering technology products,” Barnum said, “it’s about empowering our clients with tools built from our expertise in creating the most rewarding shopping experiences on the planet.”

### Revenue Growth for All

Wildfire enables its clients to embed e-commerce solutions directly into their websites, apps and browser extensions.

“We are experts in building rewards and loyalty programs as a white label platform that drives loyalty and retention and new revenue streams for partners,” Glazier said.

Wildfire ranks No. 80 on the 2024 Inc. 5000 in its annual list of the fastest-growing private companies in America, the second consecutive year it made Inc.’s top 100. The company most recently celebrated three-year growth of 479.4%, landing Wildfire in the No. 3 spot on **San Diego Business Journal’s** 2024 list of fastest-growing medium size companies. Wildfire also added 20 employees since last year and now has 70, all working remotely.

Wildfire Systems’ AI platform, RevenueEngine, helps content creators monetize product and brand mentions within generated content.

The company’s innovative technology platform drove nearly \$600 million in online purchases from merchants last year.

Wildfire’s clients include **Microsoft**, **Visa**, **Royal Bank of Canada** and **Citi**. Its technology is used in services such as the **Acorns Earn**



**Tristan Barnum**  
CMO  
Wildfire Systems, Inc.

rewards program, which offers users micro-investments in companies as a reward for shopping at participating brands.

Wildfire works with performance marketing platforms **CJ**, **Impact.com** and **Rakuten Advertising** and others to drive incremental sales for more than 50,000 merchants in 50 countries offering cashback and discounts through its services. Merchants that work with Wildfire include **Dell**, **Macy’s** and **Sephora**.

### Staying ‘Top of Wallet’

Glazier said that many of Wildfire’s clients are looking for solutions to challenges that include building new revenue streams, retaining customers and “staying top-of-mind and top-of-wallet” – Wildfire helps clients achieve these goals with loyalty as a profit center.

Wildfire Systems’ platform enables financial services organizations and technology companies to provide rewarding online shopping experiences to consumers worldwide through embedding social commerce, cashback rewards programs, digital coupons and shopping tools into their services.

In early October, Wildfire released a 2024 consumer trends report, titled, “Banking on Shopping Rewards: The Value-Added Services Today’s Consumers Prefer.” Wildfire partnered with research firm **Big Village** for its survey of 1,000 U.S. consumers 18 and older to determine what’s driving their spending behavior online and implications this behavior has on the financial services industry and retail brands.

The report found that most consumers have continued to refine their deal hunting strategies in order to save money when buying products online. The 2024 survey found consumers are using cashback and coupons to earn rewards and save money even more than shopping at discount retailers or buying generic products. Seventy-seven percent of respondents are more interested than ever before in earning cashback

rewards for shopping.

Glazier said the company’s survey found that cashback rewards and coupons are an essential value-added service for budget-conscious consumers.

“Consumers are increasingly focused on and interested in saving money,” Glazier said. “We just completed some research through our annual consumer survey and once again... many of the habits show they care more and more about saving money when they shop, with services like cash back. Online cash back has truly crossed over to becoming a mainstream behavior. Consumers don’t just want it, they have come to expect it. And where do they want to receive it? The survey again said from their existing trusted services that they’re already using.”

The report also said 54% of respondents expect cashback and coupons from their credit card and 33% expect it from their bank. A majority (64%) of respondents reported they use cashback rewards (30%) and coupons (34%) the most to save money when shopping online, far more than those who reported shopping in an online offer portal or paying with points or miles to save.

### Multifaceted Approaches

In February of this year, **TMC** awarded Wildfire Systems’ Revenue Engine a winner of its 2023 Generative AI Product of the Year Award.

Glazier said that while Wildfire works with some of the world’s top corporations, it is also devoted to smaller companies and those making their first ventures into loyalty programs.

“We’re working with very big companies that are deploying loyalty programs which are essential to driving revenue or loyalty or engagement,” he said. “They will all stack that differently, but it’s important because each strategic plan is a priority to them. But we also work with a bunch of startups. Our white label programs (help those who) want to build rewards and loyalty apps or services.”

One of the newer startups Glazier said Wildfire recently started working with is a company

called **Givebacks** based out of North Carolina.

Givebacks is a platform designed to help schools, nonprofits and brands raise funds and engage communities. It is used by more than 14,000 schools and has engaged millions of parents across the U.S. and also works with brands, allowing them to connect with customers who value giving back to communities.

“They’re a relatively small company but we love working with creative interesting services like that,” he said.

Wildfire was also able to help tech startup **OctoShop** grow.

The Texas-based tech startup began during the pandemic, specializing in price tracking and comparison technology via a browser extension, but needed a new revenue stream that could be integrated with its pre-existing technology.

A cashback program was a natural fit for its business model but before connecting with Wildfire, OctoShop encountered issues implementing an affiliate marketing program that would deliver commission revenue that moved the needle.

Partnering with Wildfire solved those issues, and with intuitive Application Programming Interface and Software Development Kit integrations, OctoShop was able to start generating revenue from its cashback program from thousands of online stores. ■

### Wildfire Systems, Inc.



**FOUNDED:** 2017

**FOUNDER & CEO:** Jordan Glazier

**HEADQUARTERS:** San Diego

**BUSINESS:** FinTech

**EMPLOYEES:** 70

**REVENUE:** \$18.6 million (2023)

**FUNDING:** \$36 million (through Series B)

**SOCIAL IMPACT:** Wildfire CEO Glazier supports Creative Visions Foundation, committed to creating a more caring, just, and sustainable world through creative activism

**NOTABLE:** Wildfire has been recognized for the past two years as one of the top 100 fastest growing companies on the Inc. 5000 (No. 80 in 2024)

## Beam Global

➔ from page 8

enough water to cook food, enough water to clean up after you've cooked. ... There's not even the hint of luxury about it, it's literally people are dying because of a lack of access to this stuff."

Wheatley said Beam Global can produce several thousand BeamWell systems per year between its two facilities in San Diego and in Serbia. The system also has the potential to benefit victims of natural disasters both domestically and abroad, as well as people living in areas of crisis such as Ukraine, Lebanon and Sudan.

Wheatley added that deploying BeamWell systems internationally will also depend on the approval of multiple parties.

"Our ability to deploy them will not be the gating factor," he said. "I think likely the gating factor will be politics."

Wheatley compared the haste at which the

BeamWell system can be deployed, as well as the company's BeamBike solar-powered electric bike charging ports, to a satellite unfolding once its deployed in space.

"Although its large and heavy, it actually arrives at the customer site or the location where it's needed in its complete condition," he said.

### Curbside EV Chargers Utilize Streetlights

Beam also recently announced the launch of its BeamSpot curbside electric vehicle chargers, which utilize existing streetlight foundations and circuitry to provide sustainable electric vehicle charging to drivers who don't have a dedicated place to install a charging station.

While existing streetlight circuits generally only conduct enough electricity to power a light bulb, the BeamSpot charger can connect to that circuitry and boost electrical output by combining solar and wind energy that is collected by a solar array and small-scale wind turbine atop the charger.

Wheatley argued that while 80% of electric vehicle owners charge their cars at home,

that is largely because EV owners are primarily wealthier households who have larger homes, off-street parking and can afford larger electrical supplies.

"This doesn't describe the typical citizen," he said. "So what we need to do is solve for charging on the curb."

He added that BeamSpot charging systems are far cheaper for local governments than completely converting street infrastructure to accommodate EV chargers.

"They know they're going to have to do a lot of digging up streets and all that sort of stuff," Wheatley said. "This is a way for them to avoid doing that ... The BeamSpot will allow cities to have ubiquitous on-curb charging, but without having to go through with all the costs and everything associated with the construction and electrical work to make that possible."

In the current market, establishing cheap and convenient sources of renewable energy is largely a matter of incumbency and a lack of vision by those who could make electric transportation solutions more ubiquitous, Wheatley argued.

"The things I'm talking about here, we're not waiting for a scientific breakthrough or some brand new technology to make this possible," he said. "It works today. We do it, lots of other people do it. It's really more a question of will." ■

### Beam Global



**FOUNDED:** 2006

**CEO:** Desmond Wheatley

**HEADQUARTERS:** Sorrento Valley, San Diego

**BUSINESS:** Renewable energy tech company providing products and technologies for EV charging, energy storage, energy security and outdoor media

**STOCK:** BEEM (Nasdaq)

**REVENUE:** \$29.4M in calendar year 2024 through June 30, 2024

**WEBSITE:** beamforall.com

**NOTABLE:** Beam Global's customers include the FDA, National Park Service, Small Business Administration, Department of Homeland Security and the U.S. Army.

## Testur

➔ from page 4

so we wanted to do it right," Naslund said. "I think of it as kind of our classic American small town. It has a really friendly, accommodating spirit about it."

Naslund said the design was "a homage if you will to my memories of growing up in the '60s in La Mesa."

### Playful Features

Built in a rounded-L-shape, the most striking feature of Textur is a lattice work roof that soars over a terrace deck of 760 square feet atop a corner segment of the building between the two wings.

"We have a big common space under a trellis that offers really good views to the north and the east," Naslund said.

The siding of that mid-section of the building is paneling applied in a way to create a pattern of vertical and horizontal lines running up and across the face of the structure.

The bottom floor at the corner has floor-to-ceiling glass wrapping around the commercial space and the 900-square-foot entry lounge.

"Think of it like an engagement ring where you have a central gold band then a jewel that is the focus of everything.

The stucco wings of the building would be the gold band and the rooftop deck, the gem.

First floor ceilings are about 14 feet compared to 10 feet on the upper floors.

"From an urban design, that is an important

element, to make the ground floor seem more grandiose," Naslund said. "We're seeking to get a pretty active pedestrian zone right there at the corner."

Adding to the textured look, apartment balconies tilt in different directions.

"There's kind of a playfulness in the way the balconies work," Naslund said.

In what is a signature look for Studio E, the project has splashes of color – red in this case – with the doorways leading from the balconies into the apartments.

Aside from its distinctive look, Haley and Naslund said that Textur will stand out because the site is on a prominent corner of La Mesa.

"This is a really good location, relative to getting to things. You can catch a bus on

La Mesa Boulevard, you can walk across the street for shopping. You can even walk down the street to **Grossmont Center**," Naslund said. ■

### CityMark

CITYMARK

**FOUNDED:** 2000

**HEADQUARTERS:** North Park

**MANAGING PARTNER:** Russ Haley

**BUSINESS:** Mixed-Use housing developer

**EMPLOYEES:** 75

**WEBSITE:** citymark.com

**CONTACT:** 619-231-1161; info@citymark.com

**NOTABLE:** CityMark has built more than 1,800 housing units.

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### LEGAL NOTICES

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019263**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sept 23, 2024. FICTITIOUS BUSINESS NAME(S): a. THE ESPRESSO STATION & OASIS LOCATED AT: 2303 Galveston St, San Diego, Ca. 92110, San Diego, Ca. 92110. REGISTRATION INFORMATION: a. CRAIG EDWARD WINONA 2303 Galveston St., San Diego, Ca. 92110. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant first began to transact business under the name(s) above as of 08/28/2024. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019677**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sept 30, 2024. FICTITIOUS BUSINESS NAME(S): a. TAKE FIVE CLEANING SERVICE LOCATED AT: 8668 Andromeda Rd, San Diego, Ca. 92126, San Diego, Ca. 92126. REGISTRATION INFORMATION: a. ANDY HARRISON MILLER 8668 Andromeda Rd., San Diego, Ca. 92126. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant has not yet begun to transact business under the name(s) above. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019743**  
his statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct. 01, 2024. FICTITIOUS BUSINESS NAME(S): a. PACIFIC EAST INTERNATIONAL LOCATED AT: 11852 Campo Road, Spring Valley, Ca 91978, San Diego, Ca. 92126. REGISTRATION INFORMATION: a. MARIA ELENA HERNANDEZ PO Box 1014, Tecate, Ca. 91980. REGISTRATION INFORMATION: a. SARAH JEYNES DESIGN LOCATED AT: 7778 Tierra Tesoro, San Diego, Ca. 92127. REGISTRATION INFORMATION: a. SARAH MCGEORGE CLARK 7778 Tierra Tesoro San Diego, Ca. 92127. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant first began to transact business under the name(s) above as of 07/12/2019. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9017655**  
his statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Aug 29, 2024. FICTITIOUS BUSINESS NAME(S): a. ORO ELEVEN DESIGN b. SARAH JEYNES DESIGN LOCATED AT: 7778 Tierra Tesoro, San Diego, Ca. 92127, San Diego, Ca. 92127. REGISTRATION INFORMATION: a. SARAH MCGEORGE CLARK 7778 Tierra Tesoro San Diego, Ca. 92127. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant first began to transact business under the name(s) above as of 08/03/2024. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019136**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sept 20, 2024. FICTITIOUS BUSINESS NAME(S): a. NAMU BIRTH SERVICES LOCATED AT: 9528 Miramar Rd #1140, San Diego, Ca. 92126, San Diego, Ca. 92126. REGISTRATION INFORMATION: a. KRISTEN BARAK-PARK 9528 Miramar Rd #1140, San Diego, Ca. 92126. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant first began to transact business under the name(s) above as of 02/18/2024. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019328**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sept. 24, 2024. FICTITIOUS BUSINESS NAME(S): a. LONG ISLAND MIKE'S PIZZA LOCATED AT: 5250 Murphy Canyon Rd #116, San Diego, Ca. 92123, San Diego, Ca. 92123. REGISTRATION INFORMATION: a. L I M PIZZA CORP. 5250 Murphy Canyon Rd #116, San Diego, Ca. 92123, California. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant first began to transact business under the name(s) above as of 08/09/2010. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019923**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct. 02, 2024. FICTITIOUS BUSINESS NAME(S): a. EP MANAGEMENT INC. LOCATED AT: 5751 Copley Dr, Suite A, San Diego, Ca. 92111. REGISTRATION INFORMATION: a. E.P. MANGEMENT INC. 5751 Copley Dr, Suite A, San Diego, Ca. 92111, California. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant first began to transact business under the name(s) above as of 10/01/2024. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019269**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sep 23, 2024. FICTITIOUS BUSINESS NAME(S): a. CALYPSO REEF b. EQUINE ACCESSORIES LOCATED AT: 1455 Kettner Blvd #1105, San Diego, Ca. 92101, San Diego, Ca. 92101. REGISTRATION INFORMATION: a. KENNETH DARREL FEIGNER JR. 1455 Kettner Blvd #1105, San Diego, Ca. 92101. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant first began to transact business under the name(s) above as of 10/08/2013. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9018415**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sept. 10, 2024. FICTITIOUS BUSINESS NAME(S): a. BHC CHICKEN. LOCATED AT: 9450 Scranton Rd, #112, San Diego, Ca. 92121, San Diego, Ca. 92105. REGISTRATION INFORMATION: a. JJ FOODS GLOBAL INC. 11091 Roxboro Road, San Diego, Ca. 92131, California. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant first began to transact business under the name(s) above as of 05/30/2024. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9018065**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sept. 05, 2024. FICTITIOUS BUSINESS NAME(S): a. AXE THRO CO LOCATED AT: 4428 Convooy Street, Ste 310, San Diego, Ca. 92111, San Diego, Ca. 92111. REGISTRATION INFORMATION: a. DJR ENT LLC 4428 Convooy Street, Ste 310, San Diego, Ca. 92111, California. THIS BUSINESS IS CONDUCTED BY: I. A Limited Liability Company. Registrant first began to transact business under the name(s) above as of 08/31/2019. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019975**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct. 03, 2024. FICTITIOUS BUSINESS NAME(S): a. BHC CHICKEN. LOCATED AT: 11983 Bernardo Plaza Dr., San Diego, Ca. 92128, San Diego, Ca. 92131. REGISTRATION INFORMATION: a. JJ FOODS GLOBAL INC. 11091 Roxboro Road, San Diego, Ca. 92131, California. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant has not yet begun to transact business under the name(s) above. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019976**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct. 09, 2024. FICTITIOUS BUSINESS NAME(S): a. BHC CHICKEN. LOCATED AT: 2540 El Camino Real, Ste D, Carlsbad, CA. 92008, San Diego, San Diego, Ca. 92131. REGISTRATION INFORMATION: a. JJ FOODS GLOBAL INC. 11091 Roxboro Road, San Diego, Ca. 92131, California. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant has not yet begun to transact business under the name(s) above. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020490**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 10, 2024. FICTITIOUS BUSINESS NAME(S): a. THE ALLEY OTAY MESA LOCATED AT: 940 Dennery Road, Suite 102, San Diego, Ca. 92154, San Diego, Ca. 92105. REGISTRATION INFORMATION: a. FLAVOR HARVEST GROUP INC 3315 52ND Street, San Diego, Ca. 92105, California. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant has not yet begun transact business under the name(s) above.. Pub Dates 10/14, 10/21, 10/28, 11/04/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020488**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 10, 2024. FICTITIOUS BUSINESS NAME(S): a. SEAPORT NAILS AND SPA LOCATED AT: 789 W Harbor Dr #154, San Diego, Ca. 92101, San Diego, Ca. 92105. REGISTRATION INFORMATION: a. D&T BEAUTY, INC. 3315 52ND Street, San Diego, Ca. 92105, California. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant first began to transact business under the name(s) above as of 10/20/2020. Pub Dates 10/14, 10/21, 10/28, 11/04/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020390**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 09, 2024. FICTITIOUS BUSINESS NAME(S): a. MONDES-TIN LOCATED AT: 616 Sage Way, San Diego, Ca. 92114, San Diego, Ca. 92114. REGISTRATION INFORMATION: a. YVETTE DIANA SAUCIER LOPEZ 616 Sage Way, San Diego, Ca. 92114. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant has not yet begun to transact business under the name(s) above.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9018177**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sep 06, 2024. FICTITIOUS BUSINESS NAME(S): a. MINDFUL TRAVEL MEDITATIONS LOCATED AT: 3774 33RD St. Unit 3, San Diego, Ca. 92104, San Diego, Ca. 92104. REGISTRATION INFORMATION: a. WANDERING ON A MISSION LLC 3774 33RD St Unit 3, San Diego, Ca. 92104, California. THIS BUSINESS IS CONDUCTED BY: I. A Limited Liability Company. Registrant first began to transact business under the name(s) above as of 03/25/2024. Pub Dates 10/14, 10/21, 10/28, 11/04/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019382**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 10, 2024. FICTITIOUS BUSINESS NAME(S): a. HILTON LA JOLLA TORREY PINES LOCATED AT: 10950 N Torrey Pines Rd., La Jolla, Ca. 92037, San Diego, Ca. 92037. REGISTRATION INFORMATION: a. JRK TORREY PINES HOTEL OWNER LLC 11766 Wilshire Blvd, Suite 1500, Los Angeles, Ca. 90025. THIS BUSINESS IS CONDUCTED BY: I. A Limited Liability Company. Registrant first began to transact business under the name(s) above as of 07/17/2024. Pub Dates: 10/14, 10/21, 10/28, 11/04/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020502**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 10, 2024. FICTITIOUS BUSINESS NAME(S): a. EFFECTIVE OPTIONS LOCATED AT: 3066 Admiral Avenue, San Diego, Ca. 92123, San Diego, Ca. 92123. REGISTRATION INFORMATION: a. SAUL VALMORE MARIN 3066 Admiral Avenue, San Diego, Ca. 92123. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant first began to transact business under the name(s) above as of 05/19/2015. Pub Dates :10/14, 10/21, 10/28, 11/04/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9018992**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sep 18, 2024. FICTITIOUS BUSINESS NAME(S): a. CSI TO CEO LOCATED AT: 2031 Crenshaw St, San Diego, Ca. 92105, San Diego, Ca. 92105. REGISTRATION INFORMATION: a. STEPHENSON JACK LU 2031 Crenshaw St., San Diego, Ca. 92105. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant first began to transact business under the name(s) above.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020388**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 09, 2024. FICTITIOUS BUSINESS NAME(S): a. COLLARI LOCATED AT: 616 Sage Way, San Diego, Ca. 92114, San Diego, Ca. 92114. REGISTRATION INFORMATION: a. AMALIA CELESTE LOPEZ 616 Sage Way, San Diego, Ca. 92114. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant has not yet begun to transact business under the name(s) above. Pub Dates: 10/14, 10/21, 10/28, 11/04/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019352**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sept 24, 2024. FICTITIOUS BUSINESS NAME(S): a. VANDEWEGHE DISPUTE RESOLUTION b. VDW MEDIATION c. VDW DISPUTE RESOLUTION LOCATED AT: 3733 Warner St, San Diego, Ca. 92106, San Diego, Ca. 92106. REGISTRATION INFORMATION: a. VANDEWEGHE DISPUTE RESOLUTION SERVICES LLC 1220 Rosecrans St., PMB 232, San Diego, Ca. 92106. THIS BUSINESS IS CONDUCTED BY: I. A Limited Liability Company. Registrant first began to transact business under the name(s) above as of 07/23/2024. Pub Dates: 10/21, 10/28, 11/04, 11/11/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019866**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 02, 2024. FICTITIOUS BUSINESS NAME(S): a. PHO CA DAO LOCATED AT: 8373 Mira Mesa Blvd., San Diego, Ca. 92126, San Diego, Ca. 92126. REGISTRATION INFORMATION: a. PHO CA DAO CORP 16446 Espola Rd, Poway, Ca. 92064, California. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant first began to transact business under the name(s) above as of 04/01/2002. Pub Dates: 10/21, 10/28, 11/04, 11/11/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019889**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 02, 2024. FICTITIOUS BUSINESS NAME(S): a. PHO CA DAO VIETNAMESE KITCHEN & BAR LOCATED AT: 2401 Fenton Parkway Ste 104, San Diego, Ca. 92108, San Diego, Ca. 92108. REGISTRATION INFORMATION: a. THE MISSION VALLEY PCD CORP 16446 Espola Rd, Poway, Ca. 92064, California. THIS BUSINESS

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**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020870**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 17, 2024. FICTITIOUS BUSINESS NAME(S): a.OCEAN BEACH STUDIO LOCATED AT: 4656 Brighton Ave, San Diego, CA. 92107. San Diego. Mailing Address: 4656 Brighton Ave. San Diego, CA. 92107. REGISTRANT INFORMATION: a.KIM SILVA 4656 Brighton Ave., San Diego, CA. 92107. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant has not yet begun to transact business under the name(s) above. Pub Dates: 10/21, 10/28, 11/04, 11/11/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019550**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sept. 27, 2024. FICTITIOUS BUSINESS NAME(S): a.LUNAR BAY SPA LOCATED AT: 13350 Camino Del Sur, San Diego, CA. 92129. San Diego. Mailing Address: 13019 Carita Cove, San Diego, CA. 92130. REGISTRANT INFORMATION: a.TAO REN 13019 Carita Cove, San Diego, CA. 92130. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant has not yet begun to transact business under the name(s) above. Pub Dates: 10/21, 10/28, 11/04, 11/11/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9017793**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Aug 30, 2024. FICTITIOUS BUSINESS NAME(S): a.HAIRXNORA LOCATED AT: 3959 30TH St, San Diego, CA. 92104. San Diego. Mailing Address: 940 Winston Drive, San Diego, CA. 92114. REGISTRANT INFORMATION: a.NORA THOMPSON 940 Winston Dr, San Diego, CA. 92114. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant has not yet begun to transact business under the name(s) above. Pub Dates: 10/14, 10/21, 10/28, 11/04/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020615**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 11, 2024. FICTITIOUS BUSINESS NAME(S): a.CNB BEVERAGES LOCATED AT: 2104 Galveston Street, San Diego, CA. 92110. San Diego. Mailing Address: 2104 Galveston Street, San Diego, CA. 92110. REGISTRANT INFORMATION: a.DANSON CONSULTANTS, INC 2104 Galveston Street., San Diego, CA. 92110. California. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant first began to transact business under the name(s) above as of 05/26/2016. Pub Dates: 10/21, 10/28, 11/04, 11/11/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020993**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 11, 2024. FICTITIOUS BUSINESS NAME(S): a.ANNE KELLETT INCLUSIVE DESIGN LOCATED AT: 11233 Tierrasanta Blvd. Unit 40, San Diego, CA. 92124. San Diego. Mailing Address: 11233 Tierrasanta Blvd. Unit 40, San Diego, CA. 92124. REGISTRANT INFORMATION: a.ANNE A. KELLETT 11233 Tierrasanta Blvd., Unit 40, San Diego, CA. 92124. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant has not yet begun to transact business under the name(s) above. Pub Dates: 10/21, 10/28, 11/04, 11/11/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9019783**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct 08, 2024. FICTITIOUS BUSINESS NAME(S): a.AFFORDABLE GARAGE SERVICES LOCATED AT: 3605 Clairemont Mesa Blvd, San Diego, CA. 92117. San Diego. Mailing Address: 3605 Clairemont Mesa Blvd, San Diego, CA. 92117. REGISTRANT INFORMATION: a.TOMAS A. CAMACHO 3605 Clairemont Mesa Blvd., San Diego, CA. 92117. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant first began to transact business under the name(s) above as of 10/01/2024. Pub Dates: 10/21, 10/28, 11/04, 11/11/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020323**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct. 08, 2024. FICTITIOUS BUSINESS NAME(S): a.SOCAL CLEANERS LOCATED AT: 406 Sears Ave, San Diego, CA. 92114. San Diego. Mailing Address: 406 Sears Ave., San Diego, CA. 92114. REGISTRANT INFORMATION: a.DANIEL ALEJANDRO CORNEJO 406 Sears Ave, San Diego, CA. 92114. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant has not yet begun to transact business under the name(s) above. Pub Dates: 10/28, 11/04, 11/11, 11/18/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9018176**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sept 06, 2024. FICTITIOUS BUSINESS NAME(S): a.IRELIA FINE JEWELRY LOCATED AT: 1970 Columbia Street, Unit A, San Diego, CA. 92101. San Diego. Mailing Address: 1970 Columbia Street, Unit A, San Diego, CA. 92101. REGISTRANT INFORMATION: a.IRELIA MEJIA 1970 Columbia Street, Unit A, San Diego, CA. 92101. THIS BUSINESS IS CONDUCTED BY: A. An Individual. Registrant first began to transact business under the name(s) above as of 09/06/2024. Pub Dates: 10/28, 11/04, 11/11, 11/18/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020425**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct. 09, 2024. FICTITIOUS BUSINESS NAME(S): a.HOUSE OF BRIT LOCATED AT: 371 Surrey Drive, Bonita, CA. 91902. San Diego. Mailing Address: 371 Surrey Drive, Bonita, CA. 91902. REGISTRANT INFORMATION: a.HOUSE OF BRIT 371 Surrey Drive, Bonita, CA. 91902. California. THIS BUSINESS IS CONDUCTED BY: I. A Limited Liability Company Registrant first began to transact business under the name(s) above as of 09/10/2024. Pub Dates: 10/28, 11/04, 11/11, 11/18/2024.

**FICTITIOUS BUSINESS NAME STATEMENT FBN #2024-9020448**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Oct. 09, 2024. FICTITIOUS BUSINESS NAME(S): a.CLEAN COALITION LOCATED AT: 1800 Garden Street, Santa Barbara, CA. 93101. Santa Barbara. Mailing Address: 1800 Garden Street, Santa Barbara, CA. 93101. REGISTRANT INFORMATION: a.NATURAL CAPITALISM SOLUTIONS INC, 11823 N 75th Street, Longmont, Colorado, 80503, Colorado. THIS BUSINESS IS CONDUCTED BY: F. A Corporation. Registrant first began to transact business under the name(s) above as of 08/01/2018. Pub Dates: 10/28, 11/04, 11/11, 11/18/2024.

**STATEMENT OF ABANDONMENT OF FICTITIOUS BUSINESS NAME FBN # 2024-9019245**  
This statement was filed with Jordan Z. Marks., Re-

Recorder/County Clerk of San Diego County On: Sep 23, 2024. FICTITIOUS BUSINESS NAME(S) TO BE ABANDONED: a. THE UPS STORE #3172 LOCATED AT: 10755 Scripps Poway Pkwy, San Diego, CA. 92131, San Diego. THE FICTITIOUS BUSINESS NAME REFERRED TO ABOVE WAS FILED IN SAN DIEGO COUNTY ON: 01/24/2023 and assigned File No. 2023-9001659. FICTITIOUS BUSINESS NAME IS BEING ABANDONED BY: a. AYSO CO 5663 Balboa Ave, San Diego, CA. 92111. This Business is conducted by F. A Corporation. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**STATEMENT OF ABANDONMENT OF FICTITIOUS BUSINESS NAME FBN # 2024-90199642**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sep 30, 2024. FICTITIOUS BUSINESS NAME(S) TO BE ABANDONED: a. A LASTING STRENGTH LOCATED AT: 2031 Crenshaw St, San Diego, CA. 92105. San Diego. MAILING ADDRESS: 2031 Crenshaw St., San Diego, CA. 92105. THE FICTITIOUS BUSINESS NAME REFERRED TO ABOVE WAS FILED IN SAN DIEGO COUNTY ON: 03/03/2022 and assigned File No. 2022-9005298. FICTITIOUS BUSINESS NAME IS BEING ABANDONED BY: a. A LASTING STRENGTH INC. 2031 Crenshaw St, San Diego, CA. 92105. This Business is conducted by F. A Corporation. Pub Dates: 10/14, 10/21, 10/28, 11/04/2024.

**STATEMENT OF ABANDONMENT OF FICTITIOUS BUSINESS NAME FBN # 2024-9019245**  
This statement was filed with Jordan Z. Marks., Recorder/County Clerk of San Diego County On: Sep 23, 2024. FICTITIOUS BUSINESS NAME(S) TO BE ABANDONED: a. THE UPS STORE #3172 LOCATED AT: 10755 Scripps Poway Pkwy, San Diego, CA. 92131, San Diego. THE FICTITIOUS BUSINESS NAME REFERRED TO ABOVE WAS FILED IN SAN DIEGO COUNTY ON: 01/24/2023 and assigned File No. 2023-9001659. FICTITIOUS BUSINESS NAME IS BEING ABANDONED BY: a. AYSO CO 5663 Balboa Ave, San Diego, CA. 92111. This Business is conducted by F. A Corporation. Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**NOTICE OF PETITION TO ADMINISTER ESTATE OF DAMIAN PHILLIPS (AKA DEL D. PHILLIPS) CASE NO. 24PE002635C**  
To all heirs, beneficiaries, creditors, contingent creditors, and persons who may otherwise be interested in the will or estate of both, of: DEL DAMIAN PHILLIPS (aka DEL D. PHILLIPS) A PETITION FOR PROBATE has been filed by JOHN M. REED in the Superior Court of California, County of San Diego. The petition for probate requests that JOHN M. REED be appointed administrator with will annexed. The petition requests the wills and codicils, if any, be admitted to probate. The will and any codicils are available for examination in the file kept by the court. The petition requests authority to administer the estate under the Independent Administration of Estates Act. (This authority will allow the personal representative to take many actions without obtaining court approval. Before taking certain very important actions, however, the personal representative will be required to give notice to interested persons unless they have waived notice or consented to the proposed action.) The independent administration authority will be granted unless an interested person files an objection to the petition and shows good cause why the court should not grant the authority. Decedent died on 8/12/2024 at San Diego, California A resident of the county named above. Street address, city and county of decedent's residence at time of death 5633 Lake Murray Blvd, Unit B La Mesa, Ca. 91942 San Diego County of California. County of San Diego at the Superior Court of California, County of San Diego, 1100 Union Street, San Diego, CA 92101, Central Courthouse. IF YOU OBJECT to the granting of the petition, you should appear at the hearing and state your objections or file written objections with the court before the hearing. Your appearance may be in person or by your attorney. IF YOU ARE A CREDITOR or a contingent creditor of the decedent, you must file your claim with the court and mail a copy to the personal representative appointed by the court within the later of either (1) four months from the date of first issuance of letters to a general personal representative, as defined in section 58 (b) of the California Probate Code, or (2) 60 days from the date of mailing or personal delivery to you of a notice under section 9052 of the California Probate Code. Other California statutes and legal authority may affect your rights as a creditor. You may want to consult with an attorney knowledgeable in California law. You may examine the file kept by court. If you are a person interested in the estate, you may file with the court a Request for Special Notice (form DE-154) of the filing of an inventory and appraisal of estate assets or of any petition or account as provided in Probate Code section 1250. A Request for Special Notice form is available from the court clerk. Filed Electronically on 10/03/2024 with the Clerk of the Superior Court, By A. Beason, Deputy Clerk Attorney for Petitioner: Lisa A. Samuth (SBN 227873); Carolina Faccin (SBN 340855) Weitz Philipps Samuth & Sinex LLP 12750 High Bluff Drive #400 San Diego, CA. 92130 858.793.0300 Pub Dates: 10/14, 10/21, 10/28/2024.

**ORDER TO SHOW CAUSE FOR NAME CHANGE CASE #24CU012733C DZUNG VAN HOAN AND MINDY WU (ON BEHALF OF THE MINORS)**  
Petition of: DZUNG VAN HOANG AND MINDY WU, on behalf of the minors 9505 Gold Coast Drive Apt 109 San Diego, CA 92126 TO ALL INTERESTED PERSONS: Petitioner (name): DZUNG VAN HOANG AND MINDY WU (on behalf of the minors) filed a petition with this court for a decree changing names as follows: Present name: a. MINA PHAM HOANG Proposed Name to: a. MINA WU Present name: b. KRISTY PHAM HOANG Proposed Name to: b. KRISTY WU Present name: c. TIFFINY WU THE COURT ORDERS that all persons interested in this matter shall appear before this court at the hearing indicated below to show cause, if any, why the petition for change of name should not be granted. Any person objecting to the name changes described above must file written objection that includes the reasons for the objection at least two court days before the matter is scheduled to be heard and must appear at the hearing to show cause why the petition should not be granted. If no written objection is timely filed, the court may grant the petition without a hearing. NOTICE OF HEARING: DATE: 11/04/2024 TIME: 8:30 am DEPT: 61 NO HEARING WILL OCCUR ON ABOVE DATE Superior Court of California, Central Division, Hall of Justice 330 W. Broadway San Diego, CA. 92101 A copy of this ORDER TO SHOW CAUSE shall be published at least once a week for four successive weeks prior to the date set for hearing on the petition in the following newspaper of general circulation, printed in this county in the San Diego Business Journal, 4909 Murphy Canyon Road, Suite 200, San Diego, CA 92123. Filed: Sept. 25, 2024. Clerk of the Superior Court by S. Felix, Deputy Publication Dates: 10/14, 10/21, 10/28, 11/04/2024

**SUMMONS (CITACION JUDICIAL)**  
#249241 Woodward Law 105 West F Street, Suite 213 San Diego, CA. 92101 858.598.5552 Pub Dates: 10/14, 10/21, 10/28/2024.  
**SUMMONS (CITACION JUDICIAL) Case #37-2024-00023491-CU-FR-CTL**  
NOTICE TO DEFENDANT: (AVISO AL DEMANDADO): SAMUEL PHILLIP II TEITELBAUM, an individual; and DOES 1 through 50, inclusive, YOU ARE BEING SUED BY PLAINTIFF: (LO ESTA DEMANDANDO EL DEMANDANTE): THE GOLDEN 1 CREDIT UNION, a California corporation NOTICE! You have been sued. The court may decide against you without your being heard unless you respond within 30 days. Read the information below. You have 30 CALENDAR DAYS after this summons and legal papers are served on you to file a written response at this court and have a copy served on the plaintiff. A letter or phone call will not protect you; Your written response must be in proper legal form if you want the court to hear your case. There may be a court form that you can use for your response. You can find these court forms and more information at the California Courts Online Self-Help Center (www.courtinfo.ca.gov/selfhelp), your county library, or the courthouse nearest you. If you cannot pay the filing fee, ask the court clerk for a fee waiver form. If you do not file your response on time, you may lose the case by default, and your wages, money and property may be taken without further warning from the court. There are other legal requirements. You may want to call an attorney right away. If you do not know an attorney, you may want to call an attorney referral service. If you cannot afford an attorney, you may be eligible for free legal services from a nonprofit legal services program. You can locate these nonprofit groups at the California Legal Services Web site (www.lawhelpcalifornia.org), the California Courts Online Self-Help Center (www.courtinfo.ca.gov/selfhelp), or by contacting your local court or county bar association. NOTE: The court has a statutory lien for waived fees and costs on any settlement or arbitration award of \$10,000 or more in a civil case. The court's lien must be paid before the court will dismiss the case. Tiene 30 DIAS DE CALENDARIO después de que le entreguen esta citación y papeles legales para presentar una respuesta por escrito en esta corte y hacer que se entregue una copia al demandante. Una carta o una llamada telefónica no lo protegen. Su respuesta por escrito tiene que estar en formato legal correcto si desea que procesen su caso en la corte. Es posible que haya un formulario que usted pueda usar para su respuesta. Puede encontrar estos formularios de la corte y más información en el Centro de Ayuda de las Cortes de California (www.sucorte.ca.gov), en la biblioteca de leyes du su condado o en la corte que le quede más cerca. Si no puede pagar la cuota de presentación, pida al secretario de la corte que le dé un formulario de exención de pago de cuotas. Si no presenta su respuesta a tiempo, puede perder el caso por incumplimiento y la corte le podrá quitar su sueldo, dinero y bienes sin mas advertencia. Hay otros requisitos legales. Es recomendable que llame a un abogado inmediatamente. Si no conoce a un abogado, puede llamar a un servicio de remisión a abogados. Si no puede pagar a un abogado, es posible que cumpla con los requisitos para obtener servicios legales gratuitos de un programa de servicios legales sin fines de lucro. Puede encontrar estos grupos sin fines de lucro en el sitio web de California Legal Services, (www.lawhelpcalifornia.org), en el Centro de Ayuda de las Cortes de California, (www.sucorte.ca.gov) o poniéndose en contacto con la corte o el colegio de abogados locales. AVISO: Por ley, la corte tiene derecho a reclamar las cuotas y los costos extensos por imponer un gravamen sobre cualquier recuperación de \$10,000 o más de valor recibida mediante un acuerdo o una concesión de arbitraje en un caso de derecho civil. Tiene que pagar el gravamen de la corte antes de que la corte pueda desear el caso. The name and address of the court is (El nombre y dirección de la corte es): San Diego County Superior Court 330 W. Broadway, San Diego, CA. 92101 The name, address, and telephone number of plaintiff's attorney, or plaintiff without an attorney, is: (El nombre, la dirección y el número de teléfono del abogado del demandante, o del demandante que no tiene abogado, es): KAREL ROCHA, SBN 212413 Prenovost. Normanidin, Dawe & Rocha 2122 North Broadway, Suite 200 Santa Ana, California 92706 (714) 547-2444 ELECTRONICALLY FILED: 12/11/2023- Superior Court of California, County of San Diego, By Tanisha Moore, Deputy Clerk NOTICE TO THE PERSON SERVED: You are served Pub Dates: 10/07, 10/14, 10/21, 10/28/2024.

**NOTICE OF PETITION TO ADMINISTER ESTATE OF MAUREEN C. CONNOLLY CASE NO. 24PE002786C**  
To all heirs, beneficiaries, creditors, contingent creditors, and persons who may otherwise be interested in the will or estate of both, of: MAUREEN C. CONNOLLY A PETITION OF PROBATE has been filed by MARY L. RABIDEAU in the Superior Court of California, County of San Diego. The petition for probate requests that MARY L. RABIDEAU be appointed executor. The petition requests the decedent's will and codicils, if any, be admitted to probate. The will and any codicils are available for examination in the file kept by the court. The petition requests authority to administer the estate under the Independent Administration of Estates Act. (This authority will allow the personal representative to take many actions without obtaining court approval. Before taking certain very important actions, however, the personal representative will be required to give notice to interested persons unless they have waived notice or consented to the proposed action.) The independent administration authority will be granted unless an interested person files an objection to the petition and shows good cause why the court should not grant the authority. Decedent died on 08/13/2024 at LoveJoy Assisted Living, 1178 Evergreen Drive, Vista, CA. 92084. A resident of the county named above. A HEARING on the petition will be held on 11/19/2024 at 10:00 AM in Dept. 504 at the Superior Court of California, County of San Diego, 1100 Union Street, San Diego, CA 92101, Central Courthouse. IF YOU OBJECT to the granting of the petition, you should appear at the hearing and state your objections or file written objections with the court before the hearing. Your appearance may be in person or by your attorney. IF YOU ARE A CREDITOR or a contingent creditor of the decedent, you must file your claim with the court and mail a copy to the personal representative appointed by the court within the later of either (1) four months from the date of first issuance of letters to a general personal representative, as defined in section 58 (b) of the California Probate Code, or (2) 60 days from the date of mailing or personal delivery to you of a notice under section 9052 of the California Probate Code. Other California statutes and legal authority may affect your rights as a creditor. You may want to consult with an attorney knowledgeable in California law. You may examine the file kept by court. If you are a person interested in the estate, you may file with the court a Request for Special Notice (form DE-154) of the filing of an inventory and appraisal of estate assets or of any petition or account as provided in Probate Code section 1250. A Request for Special Notice form is available from the court clerk. Filed: 10/17/2024 ATTORNEY OR PARTY WITHOUT AN ATTORNEY: Mary L Rabideau 1 Pleasant View Drive Lake Luzerne, NY 12846 p 518.256.9391 Pub Dates: 10/28, 11/04, 11/11/2024.

**NOTICE OF HEARING - DECEDENTS'S ESTATE OR TRUST IN THE MATTER OF THE BILEY FAMILY TRUST, DATED MARCH 2, 1992 CASE NO. 37-2023-00004195-PR-TR-CTL**  
NOTICE IS given that Brad T. Biley and Gregory A. Biley Co-Trustees of the Biley Family Trust has filed a petition. Petition: (1) For Redress of Breach of Trust Including Surcharge; (2) Compel Trust Accounting; (3) For Order Removing Trustee; (4) For Order Appointing Successor Trustee; (5) For Order Instructing Trustee Not To Use Trust Funds To Defend Litigation; and (6) For Attorney's Fees and Costs. Supplement to Petition: (1) For Redress of Breach of Trust Including Surcharge; (2) Compel Trust Accounting; (3) For Order Removing Trustee; (4) For Order Appointing Successor Trustee; (5) For Order Instructing Trustee Not To Use Trust Funds To Defend Litigation; and (6) For Attorney's Fees and Costs. A HEARING on the petition will be held on 12/30/2024 Time: 9:00 AM in Dept. 504 at the Superior Court of California, County of San Diego, 1100 Union Street, San Diego, CA 92101, Central Courthouse. Attorney for Petitioner: Mindy A. Galindo, SBN 325507 Family Roots Law, APC 380 S. Melrose Drive, Suite 321 Vista, CA 92081 p.

**NOTICE OF PETITION TO ADMINISTER ESTATE OF BRYUNG HEE PAK CASE NO. 37-20220030514-PR-LA-CTL**  
To all heirs, beneficiaries, creditors, contingent creditors, and persons who may otherwise be interested in the will or estate of both, of: BRYUNG HEE PAK A PETITION FOR PROBATE has been filed by HYUN JOO KIM in the Superior Court of California, County of San Diego. The petition for probate requests that HYUN JOO KIM be appointed administrator. The petition requests authority to administer the estate under the Independent Administration of Estates Act. (This authority will allow the personal representative to take many actions without obtaining court approval. Before taking certain very important actions, however, the personal representative will be required to give notice to interested persons unless they have waived notice or consented to the proposed action.) The independent administration authority will be granted unless an interested person files an objection to the petition and shows good cause why the court should not grant the authority. Decedent died on 08/14/2024 at Scripps Memorial Hospital, San Diego A resident of the county named above. A HEARING on the petition will be held on 11/27/2024 at 1:30 PM in Dept. 1603, at the Superior Court of California, County of San Diego, 1100 Union Street, San Diego, CA 92101, Central Courthouse. To appear remotely, go to www.sdcourt.ca.gov/ProbateVirtualHearings IF YOU OBJECT to the granting of the petition, you should appear at the hearing and state your objections or file written objections with the court before the hearing. Your appearance may be in person or by your attorney. IF YOU ARE A CREDITOR or a contingent creditor of the decedent, you must file your claim with the court and mail a copy to the personal representative appointed by the court within the later of either (1) four months from the date of first issuance of letters to a general personal representative, as defined in section 58 (b) of the California Probate Code, or (2) 60 days from the date of mailing or personal delivery to you of a notice under section 9052 of the California Probate Code. Other California statutes and legal authority may affect your rights as a creditor. You may want to consult with an attorney knowledgeable in California law. You may examine the file kept by court. If you are a person interested in the estate, you may file with the court a Request for Special Notice (form DE-154) of the filing of an inventory and appraisal of estate assets or of any petition or account as provided in Probate Code section 1250. A Request for Special Notice form is available from the court clerk. Filed Electronically on 10/09/2024 with the Clerk of the Superior Court by M. Galvan, Deputy Clerk Attorney for Petitioner: Caron Calabrese SBN

**NOTICE OF PETITION TO ADMINISTER ESTATE OF MAUREEN C. CONNOLLY CASE NO. 24PE002786C**  
To all heirs, beneficiaries, creditors, contingent creditors, and persons who may otherwise be interested in the will or estate of both, of: MAUREEN C. CONNOLLY A PETITION OF PROBATE has been filed by MARY L. RABIDEAU in the Superior Court of California, County of San Diego. The petition for probate requests that MARY L. RABIDEAU be appointed executor. The petition requests the decedent's will and codicils, if any, be admitted to probate. The will and any codicils are available for examination in the file kept by the court. The petition requests authority to administer the estate under the Independent Administration of Estates Act. (This authority will allow the personal representative to take many actions without obtaining court approval. Before taking certain very important actions, however, the personal representative will be required to give notice to interested persons unless they have waived notice or consented to the proposed action.) The independent administration authority will be granted unless an interested person files an objection to the petition and shows good cause why the court should not grant the authority. Decedent died on 08/13/2024 at LoveJoy Assisted Living, 1178 Evergreen Drive, Vista, CA. 92084. A resident of the county named above. A HEARING on the petition will be held on 11/19/2024 at 10:00 AM in Dept. 504 at the Superior Court of California, County of San Diego, 1100 Union Street, San Diego, CA 92101, Central Courthouse. IF YOU OBJECT to the granting of the petition, you should appear at the hearing and state your objections or file written objections with the court before the hearing. Your appearance may be in person or by your attorney. IF YOU ARE A CREDITOR or a contingent creditor of the decedent, you must file your claim with the court and mail a copy to the personal representative appointed by the court within the later of either (1) four months from the date of first issuance of letters to a general personal representative, as defined in section 58 (b) of the California Probate Code, or (2) 60 days from the date of mailing or personal delivery to you of a notice under section 9052 of the California Probate Code. Other California statutes and legal authority may affect your rights as a creditor. You may want to consult with an attorney knowledgeable in California law. You may examine the file kept by court. If you are a person interested in the estate, you may file with the court a Request for Special Notice (form DE-154) of the filing of an inventory and appraisal of estate assets or of any petition or account as provided in Probate Code section 1250. A Request for Special Notice form is available from the court clerk. Filed: 10/17/2024 ATTORNEY OR PARTY WITHOUT AN ATTORNEY: Mary L Rabideau 1 Pleasant View Drive Lake Luzerne, NY 12846 p 518.256.9391 Pub Dates: 10/28, 11/04, 11/11/2024.

**NOTICE OF PETITION TO ADMINISTER ESTATE OF ERIK BRAATEN CASE NO. 24PE002838C**  
To all heirs, beneficiaries, creditors, contingent creditors, and persons who may otherwise be interested in the will or estate of both, of: ERIK BRAATEN A PETITION OF PROBATE has been filed by ELLEN ISAACSON in the Superior Court of California, County of San Diego. The petition for probate requests that ELLEN ISAACSON be appointed executor. The petition requests the wills and codicils, if any, be admitted to probate. The will and any codicils are available for examination in the file kept by the court. The petition requests authority to administer the estate under the Independent Administration of Estates Act. (This authority will allow the personal representative to take many actions without obtaining court approval. Before taking certain very important actions, however, the personal representative will be required to give notice to interested persons unless they have waived notice or consented to the proposed action.) The independent administration authority will be granted unless an interested person files an objection to the petition and shows good cause why the court should not grant the authority. Decedent died on 08/18/2024 at Imperial Beach, San Diego County, CA. A resident of the county named above. A HEARING on the petition will be held on 12/18/2024 at 1:30 PM in Dept. 1603, Judge Ronald F. Frazier at the Superior Court of California, County of San Diego, 1100 Union Street, Rm 331, San Diego, CA 92101, Central Courthouse. IF YOU OBJECT to the granting of the petition, you should appear at the hearing and state your objections or file written objections with the court before the hearing. Your appearance may be in person or by your attorney. IF YOU ARE A CREDITOR or a contingent creditor of the decedent, you must file your claim with the court and mail a copy to the personal representative appointed by the court within the later of either (1) four months from the date of first issuance of letters to a general personal representative, as defined in section 58 (b) of the California Probate Code, or (2) 60 days from the date of mailing or personal delivery to you of a notice under section 9052 of the California Probate Code. Other California statutes and legal authority may affect your rights as a creditor. You may want to consult with an attorney knowledgeable in California law. You may examine the file kept by court. If you are a person interested in the estate, you may file with the court a Request for Special Notice (form DE-154) of the filing of an inventory and appraisal of estate assets or of any petition or account as provided in Probate Code section 1250. A Request for Special Notice form is available from the court clerk. Filed: 10/17/2024 ATTORNEY OR PARTY WITHOUT AN ATTORNEY: ERIK BRAATEN A PETITION OF PROBATE has been filed by ELLEN ISAACSON in the Superior Court of California, County of San Diego. The petition for probate requests that ELLEN ISAACSON be appointed executor. The petition requests the wills and codicils, if any, be admitted to probate. The will and any codicils are available for examination in the file kept by the court. The petition requests authority to administer the estate under the Independent Administration of Estates Act. (This authority will allow the personal representative to take many actions without obtaining court approval. Before taking certain very important actions, however, the personal representative will be required to give notice to interested persons unless they have waived notice or consented to the proposed action.) The independent administration authority will be granted unless an interested person files an objection to the petition and shows good cause why the court should not grant the authority. Decedent died on 08/18/2024 at Imperial Beach, San Diego County, CA. A resident of the county named above. A HEARING on the petition will be held on 12/18/2024 at 1:30 PM in Dept. 1603, Judge Ronald F. Frazier at the Superior Court of California, County of San Diego, 1100 Union Street, Rm 331, San Diego, CA 92101, Central Courthouse. IF YOU OBJECT to the granting of the petition, you should appear at the hearing and state your objections or file written objections with the court before the hearing. Your appearance may be in person or by your attorney. IF YOU ARE A CREDITOR or a contingent creditor of the decedent, you must file your claim with the court and mail a copy to the personal representative appointed by the court within the later of either (1) four months from the date of first issuance of letters to a general personal representative, as defined in section 58 (b) of the California Probate Code, or (2) 60 days from the date of mailing or personal delivery to you of a notice under section 9052 of the California Probate Code. Other California statutes and legal authority may affect your rights as a creditor. You may want to consult with an attorney knowledgeable in California law. You may examine the file kept by court. If you are a person interested in the estate, you may file with the court a Request for Special Notice (form DE-154) of the filing of an inventory and appraisal of estate assets or of any petition or account as provided in Probate Code section 1250. A Request for Special Notice form is available from the court clerk. Filed: 10/17/2024 ATTORNEY OR PARTY WITHOUT AN ATTORNEY: ERIK BRAATEN A PETITION OF PROBATE has been filed by ELLEN ISAACSON in the Superior Court of California, County of San Diego. The petition for probate requests that ELLEN ISAACSON be appointed executor. The petition requests the wills and codicils, if any, be admitted to probate. The will and any codicils are available for examination in the file kept by the court. The petition requests authority to administer the estate under the Independent Administration of Estates Act. (This authority will allow the personal representative to take many actions without obtaining court approval. Before taking certain very important actions, however, the personal representative will be required to give notice to interested persons unless they have waived notice or consented to the proposed action.) The independent administration authority will be granted unless an interested person files an objection to the petition and shows good cause why the court should not grant the authority. Decedent died on 08/18/2024 at Imperial Beach, San Diego County, CA. A resident of the county named above. A HEARING on the petition will be held on 12/18/2024 at 1:30 PM in Dept. 1603, Judge Ronald F. Frazier at the Superior Court of California, County of San Diego, 1100 Union Street, Rm 331, San Diego, CA 92101, Central Courthouse. IF YOU OBJECT to the granting of the petition, you should appear at the hearing and state your objections or file written objections with the court before the hearing. Your appearance may be in person or by your attorney. IF YOU ARE A CREDITOR or a contingent creditor of the decedent, you must file your claim with the court and mail a copy to the personal representative appointed by the court within the later of either (1) four months from the date of first issuance of letters to a general personal representative, as defined in section 58 (b) of the California Probate Code, or (2) 60 days from the date of mailing or personal delivery to you of a notice under section 9052 of the California Probate Code. Other California statutes and legal authority may affect your rights as a creditor. You may want to consult with an attorney knowledgeable in California law. You may examine the file kept by court. If you are a person interested in the estate, you may file with the court a Request for Special Notice (form DE-154) of the filing of an inventory and appraisal of estate assets or of any petition or account as provided in Probate Code section 1250. 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# Natilus

➔ from page 3

of achieving carbon neutrality by 2050 while reducing costs. Former Boeing CEO **Dave Calhoun** estimated it would cost some \$50 billion to develop a new narrow-body plane design.

“The commercial aviation industry is looking for real solutions to become more sustainable, more efficient and more profitable,” Matyushev said.

The aviation industry currently emits some 900 million tons of carbon dioxide annually, but that figure is expected to climb to 1.8 billion tons by 2040, more than the combined emissions of Germany, the United Kingdom and South Korea.

The 2050 deadline is also largely the reason why development of blended-wing-body designs has accelerated in recent years, Giblin said, despite NASA and Boeing having studied the concept in the late 1990s.

“Because of the inability to meet demand and because of the quality issues out of the likes of Boeing and Airbus today, coupled with the sustainability goals that they’ve all now set for themselves, which every passing month gets closer and closer to reality, a

decision has to be made towards that change (in) technology,” Giblin said.

## Blended-Wing Offers Possible Advantages

Natilus is also not the only aerospace company focused on the blended-wing design for commercial airline use.

**JetZero**, based in Long Beach, is currently working with the **U.S. Air Force**, **NASA** and the **Federal Aviation Administration** to push a similar design into service by the end of the decade. The company has argued its design, which does not include vertical fins, reduces complexity and will result in lowering fuel burn and emissions by 50 percent.

“We want them to succeed in the same way we want any other manufacturer to succeed,” Giblin said. “Because then it props us up as well, and it shows that this is a validating configuration that can be used for commercial space.”

Giblin said the Horizon design will have the same footprint as the 737 and A320, preventing airports from needing to make adjustments to their terminals, and interior seating and amenity designs will be left up to individual airlines.

“Some airlines would add more rows and passengers to maximize that volume for their

revenue side of things,” he said. “Others are seeing it as an opportunity to provide a different product to their customers, meaning a more luxurious product, and actually taking out rows, extending leg room, thinking about things like a lounge or a bar in the back of the airplane.”

Natilus is currently in the preliminary design and simulated environment testing phase with the Horizon, but plans to take its first prototype to the wind tunnel in a matter of months, according to Giblin.

“I really want to see this succeed in San Diego, to build on that rich aviation history,” he said. “And I think we’re the right people to do it.” ■

### Natilus Inc.



**FOUNDED:** 2016  
**CEO:** Aleksey Matyushev  
**HEADQUARTERS:** Downtown San Diego  
**BUSINESS:** Aerospace  
**PURCHASE ORDERS:** \$6 billion  
**EMPLOYEES:** 20  
**WEBSITE:** www.natilus.co  
**NOTABLE:** Along with General Atomics and Northrop Grumman, Natilus employs veterans of Skunkworks, SpaceX and Piper Aircraft.

# ecoATM

➔ from page 8

“At Tops, we believe in exploring opportunities to reduce our carbon footprint by investing in sustainable environmental practices, making this partnership with ecoATM a great way to continue these efforts,” said **Bill Thomas**, a sustainability specialist for Tops.

## Going Beyond Grocery Stores

ecoATM is also piloting its kiosks in 25 Aaron’s rent-to-own furniture and appliance stores, with the goal of eventually expanding to more of the chain’s locations next year.

According to Fried, while the company’s kiosks are primarily located in grocery stores and shopping malls, ecoATM is in discussions with multiple potential partners that are outside the grocery industry like Aaron’s.

“Every day, we are exploring new retail partnerships, and we are starting to see some amazing ways to automate the in-store trade-in experience at some of the world’s largest carriers,” he said.

ecoATM was originally founded in 2008

and eventually acquired by **Outerwall, Inc.**, in 2013 for \$350 million. In 2016, Outerwall, public at that time and the parent company of the coin-cashing enterprise **Coinstar**, was purchased by **Apollo Global Management, LLC**.

Apollo subsequently took Outerwall private and spun off the company’s subdivisions – ecoATM Gazelle, **Redbox** and **Coinstar** – into independent businesses. Since 2021, ecoATM has raised some \$125 million, including a \$50 million growth equity raise from existing investors in March 2023.

## Rewards for Recycling

Once placed in an ecoATM kiosk, recycled devices are sent to the company’s reverse logistics facility in Louisville, Kentucky, where they are inspected and their data is wiped.

The devices are then held for a brief period of time to comply with laws regulating secondhand dealers before being sold to refurbishers, parts harvesters, wholesalers and device recyclers. Regular consumers can also purchase used devices through ecoATM’s direct-to-consumer platform **Gazelle**.

“Our entire mission and vision are about enabling consumers to recycle and rewarding

them for recycling,” Fried said. “We pay a minimum of \$1 for each device that (is) recycled. We have diverted 50 million devices from landfills and enhanced affordable global access to smartphones.”

Whereas mobile device and smartphone recycling programs run by companies like Apple typically offer store credit in return for trading in or recycling old devices, Fried argued ecoATM differentiates itself by immediately paying customers in cash. ■

### ecoATM, LLC



**FOUNDED:** 2008  
**CEO:** Stan Pavlovsky  
**HEADQUARTERS:** San Diego  
**BUSINESS:** Electronic device and e-waste recycling  
**FUNDING:** \$125 million raised since 2021.  
**EMPLOYEES:** 410  
**WEBSITE:** ecoatm.com  
**SOCIAL IMPACT:** ecoATM has collected and recycled 50 million devices that would have otherwise ended up in landfills  
**NOTABLE:** A study of school-age parents conducted by ecoATM found that 32 percent considered buying a pre-owned or refurbished device for their children because of the reduced cost

# Knockaround

➔ from page 8

Tour officially reached out to Knockaround about partnering in January.

“We started putting it all together, we did extensive analysis and then began those discussions with them, which ultimately probably took about six months to make sure we got to a point that we were both comfortable with where we were headed,” Hennion said.

Oliver said that in those six months, “both teams engaged in discussions to finalize the details of the partnership... (and) the result has been a collaboration that reflects the mutual commitment to quality and an elevated experience for fans and players alike.”

## Eyeing More Knockaround Success

Oliver said in looking for partners, ensuring that brand values align well with those of the PGA Tour is paramount, “and that there is a shared commitment to enhancing the experience of both athletes and fans.”

He said that Knockaround’s ability to

create high-quality, performance driven and design-forward sunglasses that are also affordable and accessible, makes them an ideal accessory for the diverse community of golf enthusiasts.

“We’re excited to see how this partnership will enhance the overall golf experience and encourage more people to engage with our sport in new ways,” he said.

Hennion said Knockaround offers the highest-quality affordable sunglasses that are out there for anybody who plays the game.

“That’s a lot of what the PGA TOUR liked – the fact that everything we sell is under \$100, which makes Knockaround one of the most compelling, price-competitive things to buy in their shops.”

Dahmen, a cancer survivor who was featured in the 2023 **Netflix** documentary “Full Swing,” said from the players’ standpoint, on the course, “it’s essential to have a pair of shades that are comfortable, durable and provide clear visibility.”

“Knockaround checks all those boxes for me,” Dahmen said. “Plus, their designs are awesome enough to wear off the course, too. It’s exciting to see the partnership with the PGA Tour as more players, caddies and

fans will get to experience Knockaround’s reliable, affordable sunglasses. I trust them, and hopefully many more people will too.”

Founded by **Adam “Ace” Moyer** in 2005, next year marks the 20th anniversary of the brand. Knockaround is available at retailers including **Topgolf**, **REI**, **Dick’s Sporting Goods** and **Academy Sports & Outdoors**. ■

### Knockaround



**FOUNDED:** 2005  
**FOUNDER:** Adam Moyer  
**CEO:** Jeff Hennion  
**HEADQUARTERS:** San Diego  
**BUSINESS:** Retail sunglasses  
**GROWTH:** Double-digit annual growth  
**EMPLOYEES:** 50  
**WEBSITE:** knockaround.com  
**CONTACT:** 619-383-2141  
**SOCIAL IMPACT:** Company is plastic neutral and works with 4ocean to remove a pound of ocean-collected plastic for every pound of plastic it uses  
**NOTABLE:** Knockaround has added the PGA Tour to its collaborations that include U.S. Ski & Snowboard, New York Roadrunners, Fender Guitars, Major League Baseball, The Grateful Dead and Sponge Bob Square Pants.

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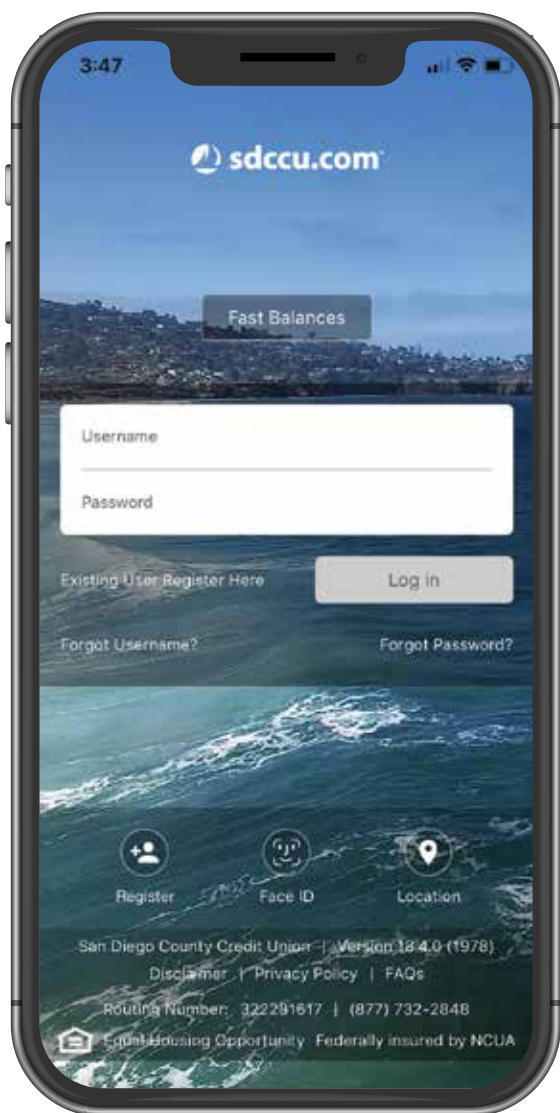
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