

CUSTOM CONTENT

LEADERS TO KNOW: TRUSTED ADVISORS

T

There are some truly outstanding professionals in the San Fernando Valley that, as trusted advisors, have contributed in a multitude of ways to some of the most impressive success stories across the Valley's business landscape. We've shone the spotlight on some of the very best of them here, along with information about their careers, practices and a quick look at what makes them so good at what they do. Congratulations to the trailblazing advisors who made this list.

Methodology: The professionals featured in these pages did not pay to be included. Their profiles were drawn from nomination materials submitted to Inside The Valley. Those selected for inclusion were reviewed by the editorial department. The professionals were chosen based on a demonstration of impact made on the profession and on the Valley community.



SCOTT ALDERTON

*Managing Partner
Stubbs Alderton &
Markiles, LLP*

Scott Alderton is a founding partner of Stubbs Alderton & Markiles, LLP, managing partner and a member of the firm’s executive committee. He is also co-chair of the firm’s Venture Capital and Emerging Growth practice group. Alderton advises clients across a number of industries, including software, technology, digital media, interactive entertainment and video games, cyber security and life sciences.

Alderton’s practice focuses on advising early stage to middle-market technology and emerging growth companies in all aspects of capital formation, venture capital and finance, corporate and securities laws, M&A, high technology, intellectual property, licensing, interactive entertainment and video games, the internet, digital media, manufacturing and distribution of goods in commerce and commercial contracts.



TAMARA GURNEY

*President & CEO
Mission Valley Bank*

With a career spanning over four decades, Tamara Gurney inspires and leads, leaving an indelible mark on the world of community banking and the organizations she serves. The number of accolades she has received and awards earned are numerous. Additionally, Gurney is a past president of the California Independent Bankers Association (president 2013 – 2014) and an affiliate of the national organization Independent Community Bankers of America.

Gurney is the face and voice of community banking locally as well as throughout the state and nation. With the turbulence that has plagued the financial and banking industries, Gurney has become a key player in rebuilding the local economy and community banking sectors. Her influence is not only felt at the local and state levels, but also on a national platform.



SHARON ALEXANDER

*VP, Business Banking
Team Leader
City National Bank*

For the past 20 years, Sharon Alexander’s specialty has been helping commercial banking clients. She has been part of the banking industry for over 25 years. Alexander has helped business owners finance their first commercial properties, finance equipment automation, acquire new business for expansion and more.

Based in Woodland Hills, Alexander is a vice president and business banking team leader with City National Bank’s Business Banking Division. She works directly with clients helping them with business banking and commercial finance needs. As a relationship manager, she is very hands-on with her clients and is passionate about serving them with great care and expertise.

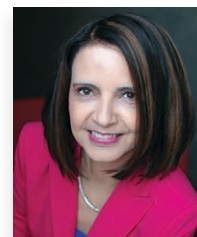


RYAN HAWS

*Partner
LightGabler LLP*

With over 15 years of experience counseling businesses in all aspects of employment law, Ryan Haws has earned the reputation for developing proactive strategies to enhance workplace productivity and avoid employment disputes. Haws also became a partner at LightGabler LLP in 2024.

Since 2018, Haws has managed the firm’s employment law advice and counsel practice, which provides employment law counseling to businesses of all sizes and industries. He consults with hundreds of companies throughout California regarding their day-to-day employment law needs and helping those clients to focus on proactive resolution of workplace disputes while aggressively defending their interests. Haws provides guidance to employers on complying with legal standards while preserving productivity and morale.



PAULA BAHAMON

*Vice President,
Community Development
Manager
Mission Valley Bank*

Paula Bahamon holds the position of vice president and community development manager at Mission Valley Bank in Sun Valley. Throughout her career, she has dedicated herself to supporting and fostering the growth of small to mid-sized businesses. Bahamon has extensive experience in commercial banking, specializing in small business management, business development and client relationship management. Recognized as a results-driven banker with comprehensive management skills, she has established a solid reputation as a proficient and knowledgeable trusted advisor.

In addition to her core responsibilities, Bahamon also plays a key role in community outreach, offering advisory services to business owners on matters of financial literacy.



MICHAEL HILLER

*President
Hiller Enterprise*

When president of Hiller Enterprise, Michael Hiller, started the company, he wanted to take pride in helping entrepreneurs and families meet their financial opportunities. Hiller attended the University of Arizona, where not obtained his Bachelor’s Degree in Communications with a Business minor. He then went on to receive his accounting certificate by attending UCLA’s Accounting program. Coming from a 30-year-old family-run accounting firm, Hiller saw immense financial possibilities families can obtain when the right opportunity and help was given. Four years ago, he established Hiller Enterprise.

Hiller Enterprise brings unique financial opportunities to families, entrepreneurs, real estate investors and individuals, providing personal, one-on-one guidance to help establish a secure financial future.

Employment law. It's sticky. Don't get trapped.

Congratulations on Being
2024 Leaders to Know: Trusted Advisors
Nominees!



Jonathan Fraser Light,
Managing Partner



Ryan Haws, Partner

LightGabler^{LLP}
We Make Business Work[®]

EMPLOYMENT COUNSEL & LITIGATION | INTELLECTUAL PROPERTY
info@lightgablerlaw.com | LightGablerLaw.com | 805.248.7208

Innovative | Experienced | Responsive



KATHERINE HREN

Partner
Ballard Rosenberg Golper & Savitt, LLP Practice

Katherine Hren regularly provides advice and counsel

to employers in all matters which bear upon the employment relationship. Her work includes advice on employment law strategy and compliance, traditional labor relations matters (union organizing, strikes/picketing, collective bargaining, grievance handling and arbitration), claims for employment discrimination, sexual and other workplace harassment, wrongful termination, and whistleblower complaints.

Hren also assists employers in developing management oriented employment agreements, personnel policies, separation agreements, trade secret and proprietary information agreements, sexual and other workplace harassment policies, and routine forms.



TOBIAS KENNEDY

President
Montage Insurance Solutions

Tobias Kennedy serves as the president of Montage and the CEO of Sim-

policy Insurance Solutions. He is in his 17th year with Montage and has truly become a trusted advisor, thought leader and well respected insurance broker to Montage's clients, carrier executives and organizations such as PIHRA, SHRM, Convene-CEO organization, HRD Network Credit Union organization.

As the CEO of Simplicity, Montage's sister company that handles smaller employers, Kennedy has further developed the company, showing positive results. He started his podcast, sponsored by Montage, last year and has been well received in the HR, insurance and technology industries.



LEE KLEINMAN

Senior Vice President, BDO
Business Finance Capital

Sherman Oaks-based Lee Kleinman serves as senior vice president of

Business Finance Capital (BFC), an SBA 504 Certified Development Company that facilitates the second mortgage portion of the SBA 504 lending program to assist business owners in refinancing or acquiring their 51% or greater owner-occupied commercial real estate.

Kleinman is responsible for sourcing new lending opportunities and is involved in the entire process from A to Z to ensure his clients lending needs are met in a timely and efficient manner. He maintains a consultative and service orientated approach to his business, and has earned the long-term loyalty of his clients and industry professionals he partners with. His lifetime commercial fundings total more than \$1 billion.

NN NAVA

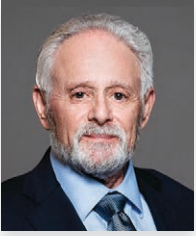
Congratulations!

Nava Benefits is excited to congratulate Brian Lacher for his recognition as a Trusted Advisor of Insurance by *The Los Angeles Business Journal: Inside The Valley's award for Leaders to Know.*

BRIAN LACHER, Partner
Brian.Lacher@navabenefits.com



Driven by a mission to fix healthcare, Nava is making great benefits easy for growing businesses. Learn more at navabenefits.com.



BARRY KURTZ

*Chair, Franchise and
Distribution Practice Group
Lewitt Hackman*

Barry Kurtz is the chair of the Franchise

and Distribution Practice Group at Lewitt Hackman law corporation in Encino. His department is one of the largest of its kind in California. Kurtz is a certified specialist in franchise and distribution law designated by the State Bar of California Board of Legal Specialization, and a certified franchise executive under the auspices of the International Franchise Association.

Kurtz is a prolific author of published articles on franchise and distribution law and has provided expert witness testimony in franchise litigation and arbitration proceedings for both franchisors and franchisees. He is certified as a mediator by Pepperdine University School of Law.



BRIAN LACHER

*Partner
Nava Benefits*

Brian Lacher's journey in group health insurance

is a testament to his unwavering commitment to excellence and integrity. With a foundation built on trust, innovation and a tremendous work ethic, Lacher has carved a distinguished path in the industry. His career highlights are not just about the numbers but about the lives he's positively impacted.

Throughout his career, Lacher has been a relentless advocate for both employers and employees, consistently finding innovative solutions to reduce costs while ensuring access to high-quality healthcare. His dedication has resulted in millions of dollars in savings for his clients, a testament to his ability to navigate the complexities of the insurance landscape with skill and precision.



MARTY LEVY

*CEO
Corpstrat*

Martin Levy, CLU/RHU, founded Corporate Strategies over

20 years ago. He is a chartered life underwriter (CLU), registered health underwriter, a certified annuity analyst, and holds a certificate in long term care insurance credential.

Levy is a frequent contributor to many industry publications and is also a Life and Qualifying member of the Million Dollar Round Table, an elite organization representing the top 1% of producers in the life insurance industry. Levy holds a BA in psychology and, as a CLU, has earned the premier credential in the insurance profession. CLUs represent ten or more comprehensive college-level courses covering all aspects of insurance planning, estate and retirement issues, taxation, business insurance and risk management.

**Congratulations to
our colleagues
Katherine A. Hren &
Richard Rosenberg
for being named
Leaders of Influence,
Trusted Advisors
for 2024.**

**BALLARD ROSENBERG
GOLPER & SAVITT, LLP**

The Law Firm for Employers

brgslaw.com • 818.508.3700 • 949.431.0470





JONATHAN LIGHT

*Managing Partner
LightGabler LLP*

Jonathan Light has more than 40 years of experience in the field of employment law. He is AV preeminent-rated by Martindale Hubbell, the highest peer-review rating possible. As co-founder and managing partner at LightGabler LLP, Light consults with almost 2,000 companies throughout California regarding their day-to-day employment law needs.

Light has been successful in jury trials, appellate cases, Labor Commission hearings and binding arbitration claims involving wrongful termination, sexual harassment, race discrimination, class action wage and hour, and other employment-related matters. He has also appeared on behalf of employers before the federal EEOC and Labor Department, the state Civil Rights Department, the National Labor Relations Board, and other government agencies.



RICHARD ROSENBERG

*Partner
Ballard Rosenberg Golper
& Savitt*

Richard Rosenberg began his career as a workplace lawyer in 1977 after obtaining degrees from Cornell University's School of Industrial & Labor Relations and the Santa Clara University law school. Rosenberg has spent his entire career helping management defend and risk-manage workplace-related legal matters and proposed personnel transactions.

Rosenberg has built a reputation as a formidable opponent and labor law strategist who is both fair and trustworthy. He has also published over 75 articles and legal commentaries in trade publications and legal journals and is the creator and principal author of the firm's widely read e-bulletin Compliance Matters. His experience in the trenches enables him to provide management with a clear-eyed assessment and strategic options.



TERRI HILLIARD OLSON

*Principal
Terri Hilliard, P.C*

Terri Hilliard Olson is an attorney, mediator, certified exit planning advisor, accredited estate planner and certified Alzheimer's disease and dementia care trainer whose practice centers on advanced estate and business succession and exit planning, asset preservation, special needs trusts and family protection planning for seniors and others.

Olson is also a skilled public speaker and author of three books on dementia and Alzheimer's for the caregiver and loved ones to help families navigate the legal, financial and psychological maze of the diseases and care options. In September 2023, Hilliard began her second, two-year term as District 6 Governor for California Women Lawyers, the only statewide bar association for women in the state.



CHRISTINA SHAFFER

*Family Law Attorney
Shaffer Law*

Christina Shaffer is a family law attorney that has been practicing for over 20 years. She has received numerous awards for her accomplishments as a family law advocate. Some of her accomplishments include NAWBO's Community Advocate of the Year award for her strong advocacy against domestic violence. Shaffer is well known in the legal community as a strong advocate for her clients. Respected by her colleagues and judiciaries, she receives referrals on a regular basis.

Shaffer is skilled and experienced at representing cases ranging from mediation to high conflict litigation. As a certified collaborative family law attorney, she assists clients in reaching out of court settlement agreements. Shaffer's mediation training and compassionate attitude give her the ability to effectively represent clients through turbulent times.



CHRISTOPHER PASSMORE

*Partner-in-Charge,
Encino office
Withum*

Earlier in his career, Chris Passmore spent several years working with publicly and privately held businesses while at PricewaterhouseCoopers. He understands both the accounting firm and client side of the business, having served as a corporate controller for a publicly held manufacturing company.

Passmore currently serves as Withum's partner-in-charge of the Encino office. He specializes in assurance and business consulting services to emerging and middle-market companies. While Passmore services a wide variety of clients, he has developed a reputation as an expert in working with technology companies, professional service firms, franchised businesses and benefit plans. He consults on a wide range of business situations, including merger and acquisition activities.

CONGRATULATIONS TO
INSIDE THE VALLEY'S
2024
LEADERS
TO KNOW:
TRUSTED
ADVISORS