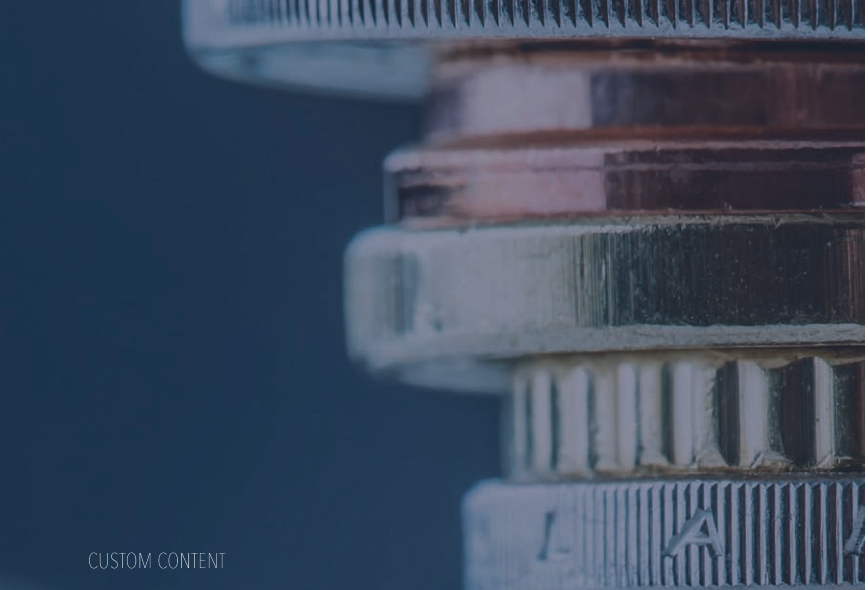
Los Angeles Business Journal
Inside The Valley



CUSTOM CONTENT

LEADERS TO KNOW: FINANCE

Thought leadership of the financial banking sector has faced many key challenges during the past few years. Thankfully, there are some particularly stellar finance professionals in the Valley region – and the financial industry professionals we have chosen to recognize for exceptional leadership, knowledge, skill and achievements in finance across the full spectrum of fiscal responsibility along with the highest professional and ethical standards, and for contributions to the Valley business community at large.

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.

PAULA BAHAMON

Vice President; Community Development Manager
Mission Valley Bank

During her career, Paula Bahamon has focused on the support and growth of small to mid-sized businesses. She has extensive commercial banking experience, specializing in small business, business development and client relationship management. As a results-oriented banker with broad-based management skills, she has earned a solid reputation as a skilled and knowledgeable trusted advisor.

Bahamon's responsibilities also include providing community outreach in an advisory capacity to business owners for financial literacy. Prior to her current role, Bahamon was founding member of the Small Business Banking Program for Bank of America in 2010. In this capacity she increased the profitability of the small business customer base.

DANNY COREAS

Business Banking Officer
Logix FCU

Danny Coreas serves as a business banking officer at Logix FCU. He understands the significance of a thriving and efficient business. As businesses' local financial partner, Coreas is committed to being a trustworthy ally for business needs. He and his team are prepared to assist the business growth journey, offering tailored solutions to specific needs.

Coreas has also established a reputation for being a people person who genuinely enjoys building new relationships with business owners. He won a sales achievement award in 2023 for his outstanding customer service and outstanding sales achievements. He can assist with all business lending needs and has options for SBA lending needs.

NEIL ELMOUCHI

Managing Director
SageView Advisory Group

Neil Elmouchi, who currently serves as managing director of SageView Advisory Group, founded and served as the primary financial advisor of Summit Financial Consultants from 1985 until 2022 when the firm was acquired by SageView Advisory Group.

He has been the trusted advisors of local individuals and families in the San Fernando Valley for decades, transforming personal relationships into professional ones. He embraces a relationship-based approach to financial planning and prioritizes a culture of putting people first for his clients and his team. Elmouchi believes that life is not a "dress rehearsal." He asserts that, "you either get it right the first time or you don't."

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.

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, she 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. She was an integral resource during the pandemic, communicating directly with the SBA and Treasury Department as guidelines were established for PPP loans and forgiveness.

JULIE HAYES

Managing Director & Senior Wealth Advisor
Truist Bank

Julie Hayes is a managing director and senior wealth advisor for Truist Wealth. She brings over 21 years of wealth management experience advising and working with a select group of high net worth families. Her practice focuses on business owners and multi-generational families.

Hayes builds trusting relationships with her clients. This starts by listening and working to understand their priorities, goals and family dynamics. Hayes then custom tailors a team of specialists, who systematically manage and implement the plan. The plan may include financial and estate planning, risk and investment management, and strategic credit. Outside her work on behalf of her Truist Wealth clients, Hayes is dedicated to giving back to the communities she serves.

OLGA KAPITSKAYA

AVP-Financial Advisor
RBC Wealth Management

Olga Kapitskaya has been working in the financial industry since 1995 and joined RBC Wealth Management in April of 2022 following more than a decade of professional experience as a financial advisor at Merrill Lynch Bank of America. Her professional background includes wealth advisory, institutional equity research with the concentration in medical devices, private equity roles at other leading wealth management firms in New York City and Los Angeles.

As a financial advisor, Kapitskaya focuses on working with women who are entrepreneurs and executives in their chosen fields. Since her days as an equity research analyst and close involvement with companies that develop innovative solutions in the medical device field, she feels strong connection to the medical device industry.

Congratulations

MISSION VALLEY BANK

TAMARA GURNEY
President & CEO

PAULA BAHAMON
Vice President, Community Development Manager

Named as 2024 Accepted Nominees for Leaders to Know: Finance
We are honored to be a part of the Inaugural Issue of The Los Angeles Business Journal, Inside the Valley.

Congratulations, Tamara Gurney and Paula Bahamon for your leadership and impact in Business Banking and Community Development, driving success for our clients and the communities we serve.

MissionValleyBank.com

LOCATIONS

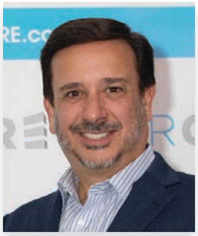
Mission Valley Bank

FDIC

EQUAL HOUSING LENDER

San Fernando Valley
9116 Sunland Blvd
Sun Valley, CA 91352
818.394.2300

Santa Clarita Valley
26701 McBean Pkwy
Suite 100
Valencia, CA 91355
661.753.5693



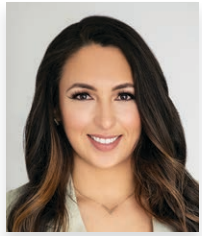
LEE KLEINMAN

Senior Vice President, BDO

Business Finance Capital CDC

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.



LARISA KLETSEL

Business Banking Officer

Logix FCU

Larisa Kletsel is a business banking officer at Logix FCU. She understands the significance of a thriving and efficient business. As businesses' local financial partner, Kletsel is committed to being a trustworthy ally for business needs. She and her team are prepared to assist the business growth journey, offering tailored solutions to specific needs.

Kletsel has developed a reputation for the exceptional service that she provides to the business members of the credit union. She takes the time to get to know each of them and genuinely understands their business needs. That extra effort has earned her multiple sales awards in 2023. Kletsel is a business lending expert who takes the time to listen to each client's story in detail.

STEVE O'CONNELL

President and CEO

California Credit Union

Under Steve O'Connell's leadership for the past 12 years, California Credit Union has achieved outstanding financial performance and introduced numerous innovations to achieve significant transformation, growth and member service enhancements across every area of operations. Through his guidance, the credit union has achieved the strongest financial performance in the organization's history, increasing assets to nearly $5 billion serving more than 200,000 members. In addition, consumer lending has reached all-time highs over the past two years.

At O'Connell's direction, an Innovation Department was created to launch industry-leading technologies to support members more effectively and efficiently.

MEGHAN PINCHUK

Chief Investment Officer

Morton Wealth

Meghan Pinchuk is a leading chief investment officer in the industry, managing over $2.5 billion in assets. She is a female CIO in a male-dominated industry, breaking glass ceilings and empowering other women in the financial industry.

With 20 years of experience in the industry, Pinchuk achieved CIO status under the age of 40 and is a fiercely independent thinker, pushing client portfolio meaningfully away from a standard 60/40 (stock bond) portfolio into a multitude of alternative investments. The goal is aligned with Morton Wealth's core investment tenets of true diversification, cash flow and downside risk management.

JEFF SARTI

CEO

Morton Wealth

Jeff Sarti is passionate about democratizing alternative investments for the typical investor. Typical investors are stuck with investing primarily in stocks and bonds and high quality alternative investments are typically only available to institutions such as endowments, foundations or larger family offices. Sarti and Morton Wealth are changing this narrative by partnering with investment groups to provide broader access to these alternative investments.

Sarti is also passionate about serving NextGen clients, and through Morton is launching a new service offering called Modearn, focused on empowering younger investors who are still in the height of their careers and growing their families to enjoy the present while preparing for the future.

KEITH SULTEMEIER

President & CEO

Kinecta Federal Credit Union

Keith Sultemeier has served as president and CEO of Kinecta Federal Credit Union for eight years and has approximately 30 years of experience in financial services, public accounting and technology startups. Kinecta is a $5 billion full-service financial institution headquartered in Manhattan Beach, serving members throughout Southern California and across the country. Sultemeier earned a BBA in accounting and an MBA from the University of Texas at Austin.

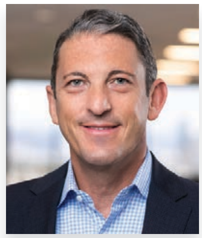
Sultemeier and his leadership team are dedicated to providing a comprehensive array of financial services and constantly strive to improve the services, convenience and support they offer to its member-owners and communities.

WAYNE WARD

Senior Vice President; Regional Manager, Greater Southern California West Region
California Bank & Trust

A well-known industry expert, Wayne Ward has broad and extensive leadership experience in financial services in both government and private sectors. He has more than 35 years of commercial banking and leadership experience in driving revenue growth and profitability in both sales and commercial banking organizations.

Ward joined California Bank & Trust as a business center manager out of the Long Beach Main office in 2007. After spending one year managing the Long Beach Main office, Ward was promoted to manage the Greater Southern California West Region of California Bank & Trust, where he manages 14 business banking offices.

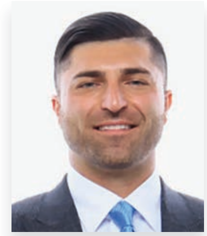


MICHAEL WAXBERG

Private Wealth Advisor
Northwestern Mutual - Fortify Capital

Michael A. Waxberg is the founder and private wealth advisor of Fortify Capital, which is a member firm of the Northwestern Mutual Private Client Group. He is a certified financial planner and has spent over two and half decades building a nationally recognized investment and financial planning practice.

Waxberg is deeply rooted in the legal, entertainment and business communities, advising on comprehensive retirement, investment and estate planning strategies. He has in-depth knowledge of tax and business planning, working with both individuals and businesses, helping to navigate the ever-changing financial landscape.



REZA ZAMANI

Founder, CEO
SteelPeak Wealth

Reza Zamani is a founding partner and CEO of SteelPeak Wealth. Zamani has specialized in investment advisory and financial planning to meet the specific needs of ultra-high net worth clients, with over 20 years of industry experience. SteelPeak Wealth represents the culmination of an approach combining responsible fiduciary services, excellent client service and innovative thinking.

Zamani believes that giving back to the community is vital. He has served as a board member for non-profit organizations such as Providence Saint Joseph Medical Center and The Wellness Community of Los Angeles. He is currently involved with the Boys & Girls Club of Malibu.