

CEO OF THE YEAR *Awards*

2021 WINNERS STAY IN THE HEADLINES

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company technology platform. Lithwick also implemented a new inhouse HR team to provide better benefits for all team members and move away from PEO, led the reinvestment with better benefits to attract and retain talent in the organization. The company had no visibility to the business prior to her employment, Lithwick has been able to provide documentation and processes across the organization, resolved logistics issues with on time arrival of parts and materials for more precise lead times for clients, main influence on the B2B business and better inventory visibility to follow through on promises to the client base with her heavy supply chain/inventory background. She works with an amazing management team that collaborates and pushes the dial every step of the way to improve the business. She has made huge strides in a short period of time to the extent the the company surpassed budgets by 20% and able to accomplish this in Q4 of 2021 when usually the slowest quarter in their industry. Providing positive EBITDA numbers with her first six months of employment.

Jill Livermore, CFO

Sage Hill School, Newport Beach

Not only does Jill Livermore manage the business office and the finances of Sage Hill School, she also oversees Safety and Security, Human Resources, IT and Facilities. It has been a busy year as we entered the second year of the pandemic, and her leadership has been essential to keeping the school not only open and operating, but thriving financially. Since joining the school in 2018, Livermore has improved the financial position of the school, refinanced debt, established reserves, increased endowment and ensured the financial stability during a volatile time for private schools. She supported the amazing faculty and staff as they transitioned from virtual to in-person everyday and worked with the facilities team to provide employees with a safe workplace. Livermore also oversaw the maintenance and operations of the school, which is nearly 130,000 square feet on 29 acres and includes multiple athletic fields, pool, gymnasium, classroom buildings and a Black Box Theater inside the Studio at Sage Hill. Livermore is more than just a CFO at Sage Hill — she is an essential part of what keeps the nonprofit, independent high school running on a daily and yearly basis.



Lisa Locklear, SVP & CFO

Avanir Pharmaceuticals Inc., Aliso Viejo

Lisa Locklear's 38-year career in finance has seen her take on many impressive executive roles with recognizable brands including Price Waterhouse (now PwC), the Walt Disney Company, Avery Dennison Corporation, Ingram Micro Inc., Corelogic, Inc., and GSN Games, Inc. before joining Avanir Pharmaceuticals in 2018. As Avanir's senior vice president and chief financial officer, Locklear unites her team of finance professionals in their mission to become trusted and valued business partners to the organization. She is passionate about developing strategic financial process, systems and teams that enable sustainable growth for the company. In addition to leading financial operations, Locklear also oversees Information Technology (IT), Environmental Health & Safety (EHS), Facilities, and the Enterprise Project Management Office functions at Avanir. She has built and developed teams of strong leaders who are actively leading the best Finance and IT teams in the business. These teams have implemented new systems and processes to streamline reporting and forecasting, developed new management reporting and engaged business leaders with greater decision support and accountability.



Chad Martin, CFO

MeridianLink, Costa Mesa

Chad Martin has deep experience as CFO and has served as chief financial officer of MeridianLink, Inc. since 2018. Martin was instrumental in helping MeridianLink complete its IPO in July 2021 and has closed multiple acquisitions since joining the company. Martin has executed a strategic vision to improve MeridianLink's financial performance by simultaneously investing in tools to modernize the finance department (including implementing an entire new suite of financial software - NetSuite, Anaplan, AvidXchange, Salesforce, Apttus, Mavenlink, Celigo); augmenting and upgrading his team, and also partnering with key vendors (BDO, Wells Fargo) to improve internal processes to gain efficiency and efficacy. Martin joined MeridianLink with more than 25 years' experience in leadership and financial roles. Most recently, Martin was CFO for DealerSocket, a leading provider of innovative and mission-critical software for the automotive industry. Prior to that, he was CFO of P2 Energy Solutions, and Pacific Pulmonary Services. Martin also spent 10 years in investment banking with Goldman, Sachs & Co., working in the Mergers and Acquisitions and Technology, Media and Telecom Groups.



John Meloun, CFO

Xponential Fitness Inc., Irvine

John Meloun is an accomplished finance executive with a demonstrated track record of leading the preparation and analysis of financial data across a variety of industries, including Aerospace & Defense, Telecommunications, Higher Education, Healthcare, and most recently, fitness as CFO for Xponential Fitness. Meloun has deep experience in mergers & acquisitions, coordinating activities across business operations, and leading and developing finance

teams. At his current role at Xponential, he continues to apply his 22-year career in finance to successfully conduct long range planning with applied strategies in revenue growth to drive operating income improvement. At Xponential, Meloun has led the professionalization of the organization, centralizing the accounting and finance operation, putting in place formal operating systems and procedures, and bringing Deloitte onboard as the auditor of the company's financial statements.



Anthony Nardo, CFO

Reborn Cabinets, Anaheim

Anthony Nardo is CFO of Reborn Cabinets, a family owned and operated company. He has helped get a granted award from the Employment Training Panel to use towards continued training for staff. In addition, Nardo helped budget/plan and achieve a 56% revenue increase for the company. Nardo was a recipient of the Legend of the Home Improvement Industry award. Reborn Cabinets provides signature cabinet refacing, complete kitchen and bath remodeling, one-day bathroom remodeling, and replacement windows direct to their customers as well as through a network of dealers throughout the USA.



Rachel Nelson, CFO

CBT, Orange

Rachel Nelson's most significant business accomplishments include securing a \$5 million investment to successfully fund the transition and growth of CBT from a VAR to a Domain Expert Integrator. Nelson also increased CBT's EBITDA by 720% from FYE 2017 to FYE 2019. Additionally, during the pandemic, Nelson leveraged funding through various sources to not only keep CBT staff fully employed and engaged but also increased headcount by 15% to stay on track with CBT's future revenue and profit goals. And most recently, she created and instituted a hybrid work plan for CBT's Orange County corporate office employees to ensure employee retention and engagement.



David Ngo, CFO, Managing Partner

Culminate Inc and 360 Clinic, Huntington Beach

David Ngo is the chief financial officer responsible for creating the impressive, no-cost COVID-19 testing model that Culminate Care (and formerly at 360 Clinic) - a dedicated group of caregivers, physicians, and providers - offers to the SoCal community. As of 2022, his organizations have served more than 350,000 individuals, with no out-of-pocket costs incurred for patients. While determining how to best serve low-income/high-risk communities and concurrently minimizing costs for the county's health, Ngo was able to identify precisely how much capital was needed to successfully run the initial operation, with both the patients' and the county's best interests in mind. Beyond this impressive model, Ngo had to consider the various insurances being used in these low-income areas - with many individuals having no insurance at all - in order to determine how to build working capital and local government advances. Based on Ngo's strategic low-cost model, he structured agreements with the county and local agencies that benefited his organizations, the patients, and Orange County.



Emily Nguyen, CFO

TaxRise Inc., Irvine

Emily Nguyen is the chief financial officer for TaxRise Inc. Nguyen joined the TaxRise team in 2018 as a Lead Accountant and quickly became an integral part of the growing company. The unprecedented pandemic has forced many companies to shut down or eliminate positions or even salaries. Nguyen was the strongest most strategic CFO that not only kept the doors open for current employees, but also managed to increase revenue as well as employee count by 300% in 2021. Her will power to succeed and keep going is absolutely unheard of. Nguyen's strengths come from her international finance experience. She received her bachelor's degree in accounting and auditing from the prestigious Banking University of Ho Chi Minh City, Vietnam where she was hand-selected to join the Deloitte Touche International as a Senior Auditor. Later, she joined the Association of Chartered Certified Accountants from Chartered Certified Accountants UK in London and joined the e-commerce team ePelcian as an Accounting Manager. As CFO for TaxRise, Nguyen has single-handedly managed the company's 400% growth and built a top-tier accounting department.



Jennifer Olson, VP-Finance

Apriem Advisors, Irvine

Jennifer Olson, CFA, CIPM, AIF®, CFP® is an expert in finance and has appeared in national business publications discussing stock market fluctuations, including Forbes and The Street. A natural born leader, she leads significant initiatives that helped the firm gain national recognition as a top financial advisory firm, Investment News Excellence in Diversity and Inclusion, outstanding small business, and one



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of the most civic-minded companies. She heads the engagement team promoting diversity and inclusion; the firm's compliance to a global investment performance standard on full and fair representation of performance; and pushed for Apriem Cares' Dollar-for-Doers initiative, a giving program that provides grants to nonprofits where employees volunteer. She is the key staff in Apriem Charitable Services which helps nonprofits start and grow their endowments through pro-bono management services on the first \$1 million. Groomed to become CFO, her work in corporate finance has helped reduce expenses that enabled management extend full medical coverage to employees and her financial projections has helped management in taking the company to the next level with growing the firm and seeking investment opportunities.

Rita Parvaneh, CFO*Spireon, Irvine*

Before stepping into the role of chief financial officer, Rita Parvaneh joined the company's leadership team in 2011 as vice president, controller. In that role, Parvaneh successfully steered the merger of EnfoTrace GPS, Procon GPS and PFS, LLC as the companies joined resources and expertise to become Spireon, the industry's leading vehicle intelligence company. Among her vast experience at prior organizations, Parvaneh spent eight years with Deloitte and Touche.

Parvaneh also serves as the treasurer on the board of directors for the Susan G. Komen, Orange County Affiliate. A Certified Public Accountant (inactive), she earned her Bachelor of Arts degree in Business Administration with concentrations in Accounting and Finance from California State University, Fullerton.

**Ricardo Perdigo, CFO***Sambazon, San Clemente*

Ricardo Perdigo started at Sambazon in 2017 as global CFO & COO. He is a strategic and structured CFO with vast experience in business strategic leadership agenda deployment, corporate restructuring, shared services migrations and ERP implementations. Perdigo has seven years of international experience has provided the ability to adapt to new cultures and businesses environment.

**Hiep Pham, CFO***Clever Care Health Plan, Huntington Beach*

Hiep Pham is the chief finance officer and one of the founders of Clever Care

Health Plan. He has extensive experience in health care finance spanning over 14 years, with heavy focus on financial oversight, regulatory compliance and audits, and risk management. Prior to founding Clever Care, Pham served as CFO of Blue Cross® Blue Shield® Arizona Advantage, where he successfully reconciled and recouped \$15 million of CMS payment errors. Pham also spent nine years as a vice president of financial planning & analysis at SCAN Health Plan and five years as a finance manager at Mitsubishi Motors North America. While at Clever Care Health Plan, he launched a full product pricing strategy to set pricing for a new managed care business. Pham has hired key players on the Finance Team to build scale and set up the department for success - currently running a team of Risk Management, Finance, HR - total of eight. In addition to closing Series B Fund Raising, Pham has successfully secured KNOX-KEENE License in first year. Which is very difficult - most companies it takes three to four years.

**Claudia Pieropan, CFO***Orgain, Irvine*

Orgain is a leading producer of high-quality, great tasting, organic and clean nutrition products. The company has a broad portfolio of category-leading products spanning across protein powders, shakes and bars with a focus on organic, protein-rich, clean ingredients. They are unique in its product formats within both plant-based and grass fed dairy based offerings. Claudia Pieropan is chief executive officer at Orgain where she is skilled at creating high performing finance teams. She is also skilled at using technology to create transparency of financial information. In her career she has participated in strategic growth and profitability of several companies, took a company public on Nasdaq, led over 10 acquisitions and led integration and has been involved in several ERP implementations. Pieropan is skilled at partnering with sales/marketing/operations to show transparency of data.

**Cindy Pinto, CFO***Endologix LLC, Irvine*

Endologix, filed for Chapter 11 bankruptcy 2021 and reorganized to become a privately held company. The devicemaker completed the reorganization by the beginning of 2021 and to operate business as usual during the process.



AVID BIOSERVICES

**THANK YOU
DANIEL HART**

For your leadership and dedication to our company. Your vision and guidance as the Chief Financial Officer contribute greatly to our success. We congratulate you on this well-deserved recognition, being nominated for the Orange County Business Journal's CFO of the Year.

A proud member of the Orange County community for nearly 3 decades, Avid Bioservices is a contract development and manufacturing organization (CDMO) focused on development and CGMP manufacturing of biologics. A globally compliant partner, Avid offers a comprehensive range of process and analytical development and CGMP clinical and commercial manufacturing services.

avidbio.com



Jennifer Olson

Rising Star

Jennifer Olson, VP-Finance Apriem Advisors, Irvine

Jennifer Olson, CFA, CIPM, AIF®, CFP® is an expert in finance and has appeared in national business publications discussing stock market fluctuations, including Forbes and The Street. A natural born leader, she leads significant initiatives that helped the firm gain national recognition as a top financial advisory firm, Investment News Excellence in Diversity and Inclusion, outstanding small business, and one of the most civic-minded companies. She heads the engagement team promoting diversity and inclusion; the firm's compliance to a global investment performance standard on full and fair representation of performance; and pushed for Apriem Cares' Dollar-for-Doers initiative, a giving program that provides grants to nonprofits where employees volunteer. She is the key staff in Apriem Charitable Services which helps nonprofits start and grow their endowments through pro-bono management services on the first \$1 million. Groomed to become CFO, her work in corporate finance has helped reduce expenses that enabled management extend full medical coverage to employees and her financial projections has helped management in taking the company to the next level with growing the firm and seeking investment opportunities.