

WOMEN

— IN FINANCE —

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WOMEN IN FINANCE

Banking



JESSICA ALIOTTI

NORTHWESTERN MUTUAL

Jessica Aliotti joined Northwestern Mutual as a Financial Advisor in 2014, and currently runs her practice in Orange County. Her greatest professional achievements can be measured by the impact she has on her clients' lives and financial security. She works with her clients at every stage of life, helping them to understand both their needs and their potential. Her specialty is in working with sales executives, tech professionals, and women in law to find the solutions that work best for their unique needs. Aliotti received her B.A. in Communication with a minor in Kinesiology, cum laude, from St. Mary's College of California. In 2016 & 2018, Aliotti was recognized as the #1 ranked Northwestern Mutual advisor as compared to her peers in the Western Region of the United States. She was #2 in 2017 & 2019, and was ranked #7, nationally, in 2018. In fiscal year 2021 – 2022, Aliotti achieved the coveted Northwestern Mutual FORUM recognition, which represents approximately the top 5% of advisors in the country.

Through partnership with the women's empowerment group VALUE, Aliotti supports several women's-based non-profits, including domestic violence shelters and breast cancer research organizations. She is also a member of the Northwestern Mutual Women's Field Association, a women-only group designed to impact and empower women working at the company. Aliotti is also a member of the Community of Irvine Soccer League as well as the Dove Canyon Social Committee. She is frequently invited to speak to women's groups at tech and entertainment firms throughout California, such as Pinterest, BuzzFeed, and Cribl.

Banking



KATE ARMADO

ENTERPRISE BANK & TRUST

Enterprise Bank & Trust is proud to have strong women like Kate Armado, SVP, Business Development, on our growing commercial banking team. Armado has been in banking for more than ten years and has held several roles with growing responsibilities. She started in banking as a corporate recruiter in 2010, where her ability to build relationships and solve problems was quickly recognized. Since then, has held roles where she could maximize her ability to solve problems and build relationships with local, family-owned businesses and has played an integral role in expanding the bank's footprint in the Los Angeles and Orange Counties. In her role at Enterprise, Armado is extremely active in our communities by partnering with small to mid-size businesses to guide them to reach their financial goals. Armado's streamlined approach to listening and solving her client's needs has made her an essential piece to the Enterprise team and our associates.

Armado has deep ties within the community and is passionate about helping others. She plays an active role in our Women's Connection Group at Enterprise Bank in Trust and has worked locally volunteering for local non-profits like March of Dimes and has volunteered for several years at the Pacific Marine Mammal Center in Laguna Beach. Being a mother to four kids, Armado is also actively involved serving on the RH Dana PTA Board and has held roles as Auditor and Historian.

Armado is an essential piece to the Enterprise team and our associates. She is a team player that is focused on what matters most, our clients success. Kate, thank you for your leadership and dedication, you make Enterprise and our communities better.

Banking



FATIMA ARSHAD

COMERICA BANK

Fatima Arshad is a senior vice president in Credit Risk Management & Decisioning at Comerica Bank. In her role, she partners with the Private Bank lending teams to deliver customized credit solutions to clients across Southern California and Arizona. Arshad joined Comerica Bank in 2004 and has served in various leadership positions across Credit and Sales. In her prior roles she served in Credit Decisioning for Large Corporate and Healthcare and as a Group Manager, leading a team of Relationship Managers in the Western Region.

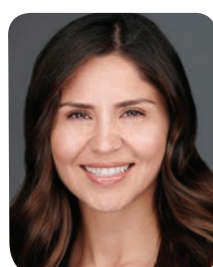
She is actively involved in Comerica Bank's mentoring programs with a focus on fostering the development of minority women in banking. Arshad has also partnered with colleagues in Credit, the Commercial Bank and Human Resources to develop new training materials for Comerica Bank's proprietary Commercial Bank Development Program, focused on underwriting thoroughness and consistency.

She is an active member of her community and serves as Investment Chair and also as a Board of Director for Girls Inc. of Orange County. She has been instrumental in leading the Comerica Bank Women's Business Symposium of California, now in its 17th year, with proceeds that go directly to supporting Girls Inc. of Orange County.

She recently received a nomination for the Los Angeles Times OC Inspirational Women Awards.

Arshad received her BBA from Northwood University in Midland, Michigan with degrees in Management and Finance. She resides in Huntington Beach and in her free time, she enjoys golf, traveling, making her friend's home cooked meals, and is a wine enthusiast.

Banking



KATHERINE COLLINS

PNC BANK

Katherine Collins is a treasury management officer for PNC Bank's Orange County and Inland Empire market. She consults for and manages a Middle Market and Corporate Banking portfolio, develops treasury proposals for current and prospective clients, conducts an annual assessment of client treasury needs and works with internal partners on client deposit strategies. Collins helps companies drive efficiency in their business by leveraging technology to address challenges faced in corporate treasury. She works with clients to understand their businesses at a micro level to identify ways to optimize working capital and mitigate risk in an ever-changing treasury landscape.

Collins has nearly two decades of experience with a diversified background in retail banking, sales and operations across segments including commercial banking, business banking, life sciences, property management, retail and auto finance. Before joining PNC, she spent over a decade at Wells Fargo where she held multiple roles, ranging from personal banker to treasury management consultant.

Collins leads the bank's local Women in Business program including engagement and support for women financial decision makers and execution of PNC Project 257@: Accelerating Women's Financial Equity initiatives, launched after the World Economic Forum's 2020 Global Gender Gap Report revealed it would take women 257 years to economically catch up to men if progress continued at its current pace. Collins enjoys connecting with women-led businesses and accelerating women's financial equality as a Certified Women's Business Advocate.

Collins is a graduate of California State University, Los Angeles where she received a Bachelor of Science in Business Administration with a concentration in Finance and a minor in management. She resides locally with her husband and dog.

Accounting



ERIKA CONIGLIO

RSM US LLP

As a director with RSM for the past 15 years, Erika Coniglio is passionate about accelerating the growth of Southern California businesses, with an emphasis on C-level relationship management and client satisfaction. She exemplifies the firm's brand promise, "the power of being understood," and five key characteristics, "caring, curious, collaborative, courageous, critical thinkers," by dedicating herself to client advocacy to ensure customer needs are met with a customized tailored approach of the firm's comprehensive tax, audit and consulting capabilities.

Coniglio focuses on Southern California area businesses, primarily in the technology, life sciences and consumer products industries. She serves on the leadership team for the RSM's national restaurant industry practice. A key part of her role is leveraging the firm's vast talent, resources and locations to deliver the best team to every single client engagement. As the largest middle-market professional services firm, RSM has a national presence and global reach, and approximately 80% of Coniglio's clients have an international presence.

Coniglio is actively involved with local organizations, such as Octane, which aims to create 55,000+ jobs in Southern California's tech and health tech space by 2030. RSM has been a platinum sponsor of Octane for the last seven years. Coniglio is a member of Octane's High Tech Awards committee, which interviews and selects program finalists. Additionally, she is involved with the CFO Focus and serves on the membership committee for the Orange County Chapter of Financial Executives International. You can reach Coniglio at erika.coniglio@rsmus.com or (949) 255-6521.

Banking



ELISE DIAZ

NORTHWESTERN MUTUAL

Elise Diaz is a financial planner with expertise in tax efficiency, risk management, retirement planning, investment strategy, and wealth preservation & distribution. Diaz works with clients across many different industries but specializes in working with breadwinning women, tech professionals, and women in sales or who own businesses.

Diaz and her team work with clients in an end-to-end planning experience driven by the client's goals and desired financial outcomes. She sees financial empowerment as a key component to her work, and helps clients, especially women, build confidence in their financial lives and futures, enabling them to stress less and live more. Her clients can expect to gain clarity and organization around their financial well-being, education on how to best address areas of opportunity, and accountability around the execution of their customized, personal financial plan.

With a background in marketing and business development, Diaz first started her career in the financial services industry as the chief of staff for Northwestern Mutual Irvine. While in that role, she discovered her passion for helping people on an individual level achieve both personal and professional goals, which led to her current position as a financial planner.

Diaz graduated from Cal State San Marcos with a bachelor's degree in business and a minor in Psychology. When she's not spending time working with clients and cultivating her business, Elise enjoys cooking big family meals, listening to Italian music, and cozying up and reading a good book.

To learn more about Elise Diaz and her team, visit www.elisediaz.nm.com.

WOMEN IN FINANCE

Finance



KAAREN HALL

UDIRECT IRA SERVICES

Despite being in the midst of a recession and mortgage market collapse, Kaaren Hall founded and made a resounding success of uDirect IRA Services. She discovered a strategic way to put her 20+ years in mortgage banking, real estate and property management to use. The solution was an untapped market for both her skills and for investors—self-directed IRAs. Through uDirect IRA, she has guided tens of thousands of Americans through the process of diversifying their investments using self-directed IRAs.

She says, “Financial literacy is not taught in schools, but our future depends on understanding it. Only about 4% of U.S. investors have a self-directed IRA. Why? Because most investors and many advisors simply aren’t aware of it.”

For those raising capital, Self-Directed IRAs represent a way to tap into \$30 trillion in retirement savings. “Alternative assets” is fast-growing asset class and asset sponsors all over the country are utilizing the SDIRA for their capital needs.

Because Self-Directed IRAs can have a dramatic impact on retirees’ quality of life, Hall brings her full passion to educating Americans about the little-known investment vehicle. Hall’s company, “uDirect” is a national company and was founded in 2009 and has \$1Billion in assets under management.

Learn more about Hall and her thriving company at uDirectIRA.com.

Banking



MARIA HUNTER

ENTERPRISE BANK & TRUST

Enterprise Bank & Trust is proud to have strong women like Maria Hunter, SVP, relationship manager, as part of our growing commercial banking team. Hunter has been in the banking industry for 18 years and takes great pride in helping guide her small to mid-size business clients to reach their financial goals. Her ability to understand her client’s unique needs has formed a proven track record of delivering mutually beneficial financing and banking solutions for all parties she partners with. Outside of the bank, Hunter continues to improve our communities by being a leader on several local boards. She takes an active interest in youth development and social responsibility; her commitment to these interests is bolstered by her involvement with the Los Altos Family YMCA, where she has served for eight-plus years in many capacities as a member of the Board, including Board Chair for three years.

Hunter recently joined the Long Beach Rotary Club as she is interested in being a role model for those with a similar background, showing children of immigrants, particularly girls and young women, that, like her, they too can become successful professionals and contributing members of their communities.

Enterprise, thanks you Maria, for your leadership and dedication. With you as part of the team, you help make our clients and our communities better.

Accounting



KATHY LAWSON

SINGERLEWAK LLP

Kathy Lawson is the Southern California Assurance and Advisory Regional Leader in SingerLewak LLP Assurance and Advisory practice based in our Irvine office. Lawson is a Certified Public Accountant with more than twenty years of experience in public accounting. Lawson proudly serves private companies from start up to a billion dollars in revenue in a variety of industries that include technology, professional services, manufacturing and distribution, healthcare and nonprofit organizations. Lawson has transaction experience with corporate restructurings, mergers and acquisitions and previously worked significantly with public initial offerings.

She started her career with SingerLewak in 2002. As part of the Firm’s in-house training program, Lawson has conducted numerous seminars on accounting, auditing, and related subjects and serves on various committees within the Firm and heads up the Firm’s Irvine recruiting and marketing efforts. Lawson takes pride in consulting with her clients in diverse sectors on efficient solutions such as tax compliance and advisory, IPOs, assurance and growth advisory. She is an active member of ACG OC, FEI and other local organizations. Lawson can be reached at klawson@singerlewak.com or at (949) 261-8600 or via LinkedIn @KathyLawson

We’re not waiting for change. We’re working for it.

According to the World Economic Forum’s 2020 Global Gender Gap Report, it will still take another 257 years for women to catch up to men economically.

That’s not fast enough for us.

With Project 257SM, we’re harnessing the power of our resources to help close the economic gender gap. So that everyone has a chance to move forward financially.



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To learn how we can help you move forward financially, contact:

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WOMEN IN FINANCE

Banking



DIANA C. LEYVA

PNC BANK

Diana Leyva is a relationship manager for PNC Bank's Organizational Financial Wellness team in the Orange County and Inland Empire market. In her role, Leyva develops and maintains meaningful relationships with human resources decision-makers

and customizes programs that provide employees of corporate and commercial clients with sound advice and services including HSA plans, personal banking tools, budgeting resources, credit tips, student debt solutions and retirement plans.

Leyva's experience includes 15 years in the financial services industry, ranging from Private Wealth Management at JP Morgan Chase to business-to-business marketing at other financial institutions. Leyva is lauded by management and her contemporaries for the professionalism, experience, attitude, leadership and expertise skills that she brings to her role.

As a career banker, Leyva attributes her professional success to the cultivation of client relationships and optimizing professional partnerships. Leyva is passionate about making a significant impact that will help improve the financial lives of others, fulfilling PNC's mission to move all forward financially.

She currently lives in Orange County with her two children and her dog.

Accounting



CECILIA SANUDO

SINGERLEWAK LLP

Cecilia Sanudo is a director in SingerLewak LLP's Assurance and Advisory practice -based in our Irvine office. Sanudo is a Certified Public Accountant with more than 14 years of experience in public accounting.

Sanudo's clients are primarily private companies from start up to a billion dollars in revenue in a variety of industries that include manufacturing and distribution, professional services, technology, transportation and logistics and nonprofit organizations. Sanudo also has transaction experience including corporate restructurings, mergers and acquisitions and previously worked significantly with public initial offerings.

She started her career with SingerLewak in 2008 and is a member of the AICPA and CALCPA. Aside from her daily client service responsibilities, Sanudo is an active member of the Firm's recruiting efforts, in-house training program and is a member of various professional organizations such as ACG OC. Outside work, Sanudo loves to spend time with family, traveling and mentoring first generation college students. Sanudo can be reached at csanudo@singerlewak.com or at (949) 261-8600 or via LinkedIn @CeciliaSanudo

Banking



KARA TREBS

SUNWEST BANK

Kara Trebs is the EVP, chief human capital officer at Sunwest Bank. Ms. Trebs joined the bank in early 2016 and held positions as AVP, Corporate Recruiter, and SVP, Director of Human Capital. Over the past 15

years, she has had a variety of HR roles within the retail and financial services industries for companies such as Nordstrom and Boot Barn. Ms. Trebs has had an instrumental hand in the exponential growth of Sunwest Bank. Her unique skillset allowed her to leverage her HR experience to build the bank's new competitive Health Savings Account platform SelfcareHSA.

Trebs progressive approach to leadership focuses on the empty chair philosophy and believes management is more effective when engaging with their team within their own environment. Trebs serves as a mentor and coach to the executive team at Sunwest and finds this role her most gratifying.

Outside of her work with Sunwest Bank, Ms. Trebs has served on various boards and non-profits such as Tilly's Life Center, OC Rescue Mission, National Human Resources Association, and as a California State University system mentor. Trebs graduated from the University of Phoenix with a Bachelor of Science in Business Administration and a Human Resources Management Certification and is currently enrolled in Pacific Coast Banking School.

Check out how Sunwest Bank, a \$2.5 billion regional business bank founded in Tustin, California helps female entrepreneurs thrive at <https://sunwestbank.com>. You can also find her work on SelfcareHSA located here <https://selfcare.com>.

Banking



CHIKAKO TYLER

CALIFORNIA BANK & TRUST

As chief financial officer of California Bank & Trust (CB&T), Chikako Tyler is responsible for development and execution of the bank's financial and strategic plan.

Besides excelling in her role as CFO for one of California's leading banks, Tyler also makes time to give back to the community. She has been involved with several organizations that make a positive difference in young lives:

- United Way of Orange County
- Accessity – Board Member and Secretary, 2020 – present
- Teen Entrepreneur Academy – Board Member, 2016 – 18
- Junior Achievement of Orange County – Board Member, 2016 – 17

Tyler is an exceptional leader, and a force for good, not only within CB&T but throughout California. She truly is an Orange County Woman of Influence in Finance.

Some of her career highlights:

- Grew the bank by over 40% in combined loans and deposits during the last five years as CFO.
- Selected from among 14,000 employees of Zions Bancorporation (of which CB&T is a subsidiary) to attend the International Women's Forum Executive Leadership Fellows Program at Harvard.
- Founding chair of the "Banking on Women" diversity, equity, and inclusion business resource group.
- Selected as one of the 'Top Teams in the Most Powerful Women in Banking' by American Banker for two years in a row.

Tyler holds an International MBA from the Amsterdam Business School and a B.S. in mathematics from UC Irvine.

Accounting



BRITNEY WATSON

BDO USA

Brittney Watson recently joined BDO as an audit director in the firm's BDO Orange County office and specializes in serving real estate, hospitality and construction clients. She has over 13 years' experience serving a variety of

public and private clients, with an emphasis on real estate funds, REITs, homebuilding, and engineering and construction companies. She also has significant experience with financing transactions, M&A activities, real estate investment valuation, fund structures and purchase price allocations.

Watson has dealt with a variety of complex accounting issues, such as fair value of real estate investments, real estate purchase price allocations, business combinations and purchase accounting, stock-based compensation, debt and equity offerings, consolidation matters and revenue recognition. Watson and her Orange County BDO teammates offer a sophisticated array of assurance, tax and advisory services, as well as the resources and capabilities of BDO's global organization.

She was drawn to BDO by the firm's core purpose of helping people thrive every day and its commitment to working with, for and in the service of its people, clients and communities. Watson prides herself on being a professional problem solver and joined a culture that also values understanding the experiences of its professionals, listening to their challenges and ideas, and putting thought into action to deliver exceptional client service.

Watson earned a bachelor's degree in economics-accounting from Claremont McKenna College and a master's degree in accounting from the University of Virginia. Watson is a CPA licensed in California and a member of the AICPA.

Banking



VALERIE WIJAYA

PNC BANK

Valerie Wijaya is a vice president, relationship manager, of real estate banking at PNC Bank. In this role she is responsible for developing and deepening real estate banking client relationships across the

Orange County and Inland Empire markets. In addition to business development and loan originations, her contributions also span portfolio management, risk management and serving as the primary point of contact for coordinating and fulfilling real estate banking clients' needs across multiple business lines.

Since joining PNC earlier this year, Wijaya has delivered a breadth of lending and financial solutions for her clients including construction financing, bridge and term loan financing, multifamily agency referrals, capital markets resources, as well as treasury management and deposits solutions. Among the real estate asset classes that Wijaya finances are multifamily apartment communities, industrial and office properties, retail shopping centers and hotels.

Wijaya began her career in the financial services industry with Wells Fargo where she was a portfolio manager for middle market and commercial real estate clients with annual sales ranging from \$20 million to \$2 billion. Prior to joining PNC, she served as a relationship manager at JP Morgan Chase, supporting business development and maintaining client relationships for middle market customers in Orange County.

Wijaya is a graduate of the University of Southern California (USC), where she earned a Bachelor of Science in Business Administration with a concentration in Finance. She was a member of the professional business fraternity, Delta Sigma Pi and also played NCAA Division I Women's Golf prior to transferring to USC.

WOMEN IN FINANCE

Accounting



JEANETTE ZIKA

RSM US LLP

Jeanette Zika, partner, Audit Services, is a first-choice advisor at RSM US LLP (RSM), the U.S. member of RSM International and the leading provider of professional services to the middle market. She has over fourteen years of experience serving public and privately held middle-market companies.

Zika works closely with business owners, CFOs and controllers to assist with audit and accounting issues. She has extensive experience advising on complex accounting matters, including business combinations, revenue recognition, equity transactions, complex internal control structures and other reporting matters.

Zika focuses on Southern California businesses predominantly in the industrials and life science industries. Additionally, she leads the Family First employee networking group for RSM Orange County and is committed to providing an inclusive community, including her support and help to other female professionals in balancing career and family life. You can reach Zika at jeanette.zika@rsmus.com or (949) 255-6611.

Accounting



CRYSTAL LI

UHY LLP

Crystal Li is a partner at UHY LLP with more than 15 years of diversified experience in public accounting, with a concentration in IPOs, Special Purpose Acquisition Companies (SPACs), reverse-mergers, and financial due diligence. She additionally serves as a leader of UHY's China Group, which closely works with U.S. and Asian companies to encourage international growth between the continents.

As a leader of the firm's SPAC and IPO practice, Li supports companies on all sides of the public market, including international firms seeking entrance to the U.S. market. Her work with SPACs regularly results in deals in excess of \$100 million, although Li has completed an international de-SPAC transaction in excess of \$1 billion. Last year, she led a traditional IPO engagement for a local Southern California based company, which was listed on Nasdaq within six months. She serves as a technical resource to UHY International and collaborates with other firms to complete international and cross-border due diligence engagements.

In addition to serving as the Irvine office's lead partner, Li co-manages the Beijing office established by UHY's U.S. operations. She has grown both offices from the ground, both now boasting a rapidly expanding workforce with a client base to match.

Li is an advocate for the Chinese American community and involves herself in the Chinese American CPA Association. Li always welcomes opportunities to share her extensive knowledge, and she regularly collaborates with other community professionals to provide information on hot topics and answer questions from businesses that help them grow.

On Behalf Of The Entire Sunwest Bank Team, We Would Like To Congratulate

KARA TREBS

On Being Honored In The Orange County Business Journal's Inaugural

WOMEN OF INFLUENCE IN FINANCE




BUILT FOR ENTREPRENEURS BY ENTREPRENEURS

www.sunwestbank.com Member FDIC



Enterprise Bank & Trust is Proud to Empower Women in Finance

Enterprise joins all the companies in Orange County that are honoring women in banking and finance. Together, we are not only making meaningful change for our companies but also for the communities that we serve. To all those being honored, thank you for making Orange County better.

Together, there's no stopping you.
enterprisebank.com

