



COMPANIES THAT CARE



Employees lead giving efforts at Ingram Micro **PAGE 26**

Local empowerment for My Private Professor **PAGE 30**

Santa Ana is top of mind at Caribou Industries **PAGE 28**

Career paths designed by Ware Malcomb **PAGE 38**

ELSEWHERE:

Community building from FivePoint Holdings

PAGE 1

Presented By:

Diamond Sponsor

Platinum Sponsors

Gold Sponsors

Silver Sponsors





*A journey of self-expression
through wearable works of art.*

LUGANO®
DIAMONDS

FASHION ISLAND NEWPORT BEACH
ASPEN | PALM BEACH | OCALA | HOUSTON | WASHINGTON, D.C. | GREENWICH
LUGANODIAMONDS.COM | 949.625.7722



BIOPLATE IS THRILLED TO BE RECOGNIZED AS A COMPANY THAT CARES!

Giving back is core to our mission of
improving the lives of patients
requiring neurosurgery.



BIOPLATE®
ADVANCING CRANIAL SURGERY

info@bioplate.com . 888-246-7528 (888-BIOPATE) . bioplate.com

Merry

CHRISTMAS!

from all of us at
F&M Bank

F&M
BANK

FMB.com/Christmas

MEMBER FDIC





The Bank of Doing

At Wells Fargo, we have a longstanding commitment to supporting our local communities through philanthropy, volunteerism, and the work we do with individuals and businesses every day. Wells Fargo is The Bank of Doing and, along with providing support for the local community, we are proud to help organizations across the country achieve their goals throughout the year.

As the Bank of doing, we take action to create positive impact for our customers and communities. Doing goes far beyond the investments we make; it's the sum of the impact we have when we work together to make positive change. We are making our communities stronger – from making financial education more accessible and housing more attainable, to empowering diverse and women-owned small businesses, and helping to make communities more sustainable.

Doing is aligning our capital investments and employee engagement with community needs as we seek to strengthen historically marginalized communities by investing in pathways to economic advancement and generational wealth.

We are proud to work with local organizations that are truly embedded in their communities and equipped to address their unique needs. In Orange County, we have a longstanding relationship with OC United Way. Through our funding for United to End Homelessness we support the WelcomeHomeOC which provides

assistance to those experiencing homelessness. In addition to new programs like, Whatever it takes Housing Support, that moves homeless individuals and families into housing as quickly as possible through flexible assistance that addresses barriers preventing them from accessing and maintaining housing.

Other organizations that we have supported, include Innovative Housing Opportunities, Small Business Diversity Network, We Give Thanks, Illumination Foundation, and Community Action Partnership OC, among many others. By funding these organizations, we have been able to provide affordable housing to Orange County residents, provide technical assistance and technology to diverse business owners, help serve over 11,000 hot meals during Thanksgiving, as well as launch a sustainable wealth building tools in LMI communities.

As 2023 winds down, our hope at Wells Fargo is that we are creating solutions through our philanthropic efforts to build stronger communities. On behalf of all our employees who serve our Orange County customers, we thank you for allowing us to be an active part of the community.

News, insights and perspectives from Wells Fargo are also available at www.wellsfargo.com/impact. Julie Tomanpos is Associate VP, Philanthropy & Community Impact In Orange County with Wells Fargo Bank.



Building relationships that make a lasting difference

By celebrating diversity, we can all benefit from unique perspectives, experiences, and approaches to create positive change in our community.

Wells Fargo is proud to acknowledge 2023 OCBJ's Companies that Care.

wellsfargo.com/impact

© 2023 Wells Fargo Bank, N.A. 7583819-4 MOD: 982



Our Corporate Partners Create *Miracles!*



Through our corporate partner program, companies and their employees give back to the community in a very direct way. They see their contributions, both in donations and volunteer hours, help stabilize families in need with a critically-ill child. They even have the opportunity to meet, first hand, the families they help.

Become a corporate partner and help make *Miracles*.

Volunteer. Partner. Donate.

For more information, contact Ruby Foster at (714) 730-3040 or rfoster@miraclesforkids.org.



Miracles for KIDS

www.miraclesforkids.org | info@miraclesforkids.org





**EDWARDS
LIFESCIENCES
FOUNDATION**

Edwards Lifesciences Celebrates Global Month of Giving

Our employee-driven global giving initiative supported over 40 charities globally

Giving is at the heart of who we are and what we do at Edwards Lifesciences. Our giving is focused on supporting underserved patients and strengthening communities where we live and work. The reach and scope of our giving is only possible through the efforts of our more than 19,000 employees globally, and partnerships with charitable organizations that bring our giving to life.

As part of our global corporate giving efforts and through the work of Edwards Lifesciences Foundation, we launched our first **Global Month of Giving** this October. This month-long effort focused on amplifying our employee charitable activities, celebrating our year-round giving efforts, and deepening our impact. The key to our success in engaging employees globally is supporting local organizations. No one knows the needs of their community better than those who live there. To meet these local needs, each Edwards site selected its own charitable organization and activity, resulting in **support to more than 40 charitable organizations, through more than 7,000 employee participations.**

At our global headquarters in Irvine, this took shape as part of our annual campaign for the Orange County United Way and charitable activities supporting partners such as Child Creativity Lab, Project Hope Alliance, OC Coastkeeper, and Washington Elementary. **More than 67% of our eligible employees participated by donating or engaging in a charitable activity, and through their giving, along with our Foundation match, \$1.2 million will be donated to Orange County United Way.**

These results speak volumes to the passion of our employees and their commitment to supporting our local communities. Taking this time to celebrate our achievements and amplify our giving efforts inspires us to do more. We'll continue to do so year-round. Will you join us?



**Edwards Lifesciences
Foundation is proud
to support our Orange
County community**

**Because Every
Heartbeat Matters**

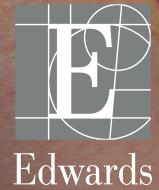
[@edwardslifesciences](http://Edwards.com/corporategiving)

Edwards, Edwards Lifesciences, the stylized E logo, and Every Heartbeat Matters are trademarks of Edwards Lifesciences Corporation or its affiliates.

© 2023 Edwards Lifesciences Corporation. All rights reserved.

Edwards Lifesciences Foundation • One Edwards Way, Irvine CA 92614 USA • edwards.com

**EDWARDS
LIFESCIENCES
FOUNDATION**



2023 COMPANIES THAT CARE



CATHWORKS



Antis Roofing & Waterproofing

Antis believes that it is their mission to take care of the people of Orange County by keeping a roof over their heads. Antis supports local charitable organizations with a focus on those that provide shelter and housing. Each year Antis donates a roof and provides maintenance to nonprofit organizations in need. In 2023, Antis donated a roof(s) to Habitat for Humanity of Orange County, Ronald McDonald House of Orange County, HomeAid, Boys & Girls Club of Central Coast and the Sister League of San Diego.

Irvine

Roofing

Applied Medical

At Applied Medical, they design, develop and manufacture medical devices in-house at corporate headquarters in Rancho Santa Margarita (RSM), with additional facilities in Irvine and Lake Forest. For more than 35 years, it has been their mission to make a meaningful, positive difference. They partner with more than 170 nonprofits across the globe to support their vital efforts through in-kind donations, team member volunteering and financial support. The Volunteer Time Off (VTO) program gives eligible team members a way to support the Orange County community. Team members receive 16 hours of time off annually to volunteer for a wide range of local nonprofits. The Community Relations team facilitates volunteer activities and events for team members throughout the year. Team members also make a positive difference in the environment through the ProTerra Committee. The committee is made up of passionate team members from various departments who volunteer their time to inspire awareness and education through planned events and campaigns that focus on the importance of sustainability.

Rancho Santa Margarita

Medical Device

Arrow&Branch

Laguna Beach

Rare Coins, Wine, Retail

Steve Contursi is a family office principal who has been one of the most successful investors in the United States rare coin industry for over 48 years. Steve and his wife, Seanne, created the "Arrow&Branch" brand to pay homage to the Contursi family's success in the rare coin industry, U.S. coinage, and Americana. In 2023, their OC charitable focus has primarily been on auction donations to four organizations. Among these organizations are Cure Duchenne, The Drake Gives, SchoolPower and the Boys & Girls Clubs of America.

Newport Beach

Finance

Bank of America develops deep and lasting partnerships with Orange County nonprofits addressing issues fundamental to economic mobility and social equity, especially in underserved communities. So far in 2023, the bank has awarded \$1.4 million in grants to Orange County nonprofits that provide job skills, career pathways and the environment. Last year alone, Orange County employees logged over 39,000 hours of volunteer time locally and provided over 40 hours of its Better Money Habits workshops to 19 different partners.

Barton Integration

Irvine

Fire and Life Safety

Barton Integration partners with Big Brothers Big Sisters by sponsoring multiple events throughout the year. Their favorite event of the year provides an opportunity for the Bigs and Littles to attend Angel Stadium, meet professional baseball players, and have batting practice on the field. A new event sponsored by Barton this year was the Orange County Soccer Club Night Out, where the kids were able to run on the field before the game and high five players while enjoying the game with their match. With many having family members who were in the service, veteran needs are a huge part of the company's hearts. The yearly local golf tournament that supports Operation Mend allows them to meet and golf with soldiers who were injured during their service. They sponsor and take the day as a team to work a booth on the course. Stop Soldier Suicide is another organization that they have had the opportunity to participate in this year.

Bioplate Inc.

Placentia

Medical Device: MedTech: Lifesciences

Thomas Hopson and his team have participated and supported various Orange County nonprofit organizations above and beyond its business operations. Bioplate participates and raises money for the Orange County American Heart Association Walk and Heart and Stroke Gala and Annual Walk. Through Hopson's leadership and that of the executive team at Bioplate, all the employees of Bioplate are encouraged and supported in their philanthropic efforts. The participation includes financial contributions, employee and executive staff member participation and involvement in many Orange County nonprofit organizations that serve the community.

Blue C - Creative Marketing Agency

Costa Mesa

Marketing Agency

Through the Blue C Care program, the Blue C team has provided donations and services for their community, those in need through the California Love Drop and ongoing mentorship programs for the next generation of marketing leaders.

Burkhart Bros Construction

Tustin

Construction/ Home Building

Since Bryan and Mark Burkhart began their company in 2008- they have made it part of their mission to give back to organizations close to heart and involve themselves deeply in the community of Newport Beach. The Burkhart team actively dedicates time and sponsorships to the Newport Beach Baseball Association, CDM Home Tour, Newport Harbor Home Tour, CDM PTA , and Tilly's Life Center. CFO Mark Burkhart has dedicated 10+ years on the Board of Tilly's Life Center Organization and Burkhart Bros annually sponsors the Stars + Stripes Tournament.

California Bank & Trust

Irvine

Financial services

California Bank & Trust (CB&T) is an engaged community partner, and corporate social responsibility is a key part of our mission to champion the people and businesses building California, and more specifically, Orange County. Through the bank's Volunteer Time Off program, each CB&T associate has 16 hours annually to volunteer with groups and organizations they are passionate about. This results in associates donating hours of volunteer time to local non-profit organizations, including Junior Achievement, United Way and NeighborWorks OC, to name a few.

CapRock Partners

Newport Beach

Industrial Real Estate

"One of CapRock's 7 Core Values is "Blessed to be a Blessing" and the company has a goal of donating 10% of its net profits through its charitable foundation, CapRock Giving. CapRock partners with nonprofits serving young adults and families both locally and globally, CapRock's unwavering commitment to philanthropy shines through its outstanding support of Big Brothers Big Sisters of Orange County and the Inland Empire.

Caribou Industries Inc

Santa Ana

Developer/Contractor

For more than 30 years, Michael F Harrah has been widely recognized for his philanthropic efforts, focused on education and student success in Santa Ana and Orange County. Nowhere is this perhaps more evident than his work in designing, developing and financing the Orange County School of the Arts (OCSA).

CathWorks

Newport Beach

Medical Device

CathWorks actively participates in community outreach and give back in all global areas where we have a presence and engage in many philanthropic efforts in the Orange County area where our headquarters is located. We have many senior leadership members who serve on the boards at AHA, Council on Aging Southern California, UCI, Octane and Chapman University, to name a few. Our Orange County employees all actively participate in our giveback efforts by personally donating and giving their time to the AHA Women Go Red Event, Council on Aging - Evening of Comedy, Council on Aging-Pickleball Tournament, Council on Aging- SmileMakers, UCI Paul Merage school events and many many more throughout the year.

CerraCap Cares

Costa Mesa

Impact Investment Fund

CerraCap Cares supports founders and sustainable technology startups that share their vision of not only impact but returns. In addition partners contribute time and charitable support for enhanced educational programs and nonprofit organizations that offer access for treatments and care.

Clearinghouse CDFI

Lake Forest

Finance

Clearinghouse CDFI is a driving force in Orange County, making a profound impact through a triad of initiatives: volunteerism, corporate philanthropy, and the 'B' BOLD Internship Program. In 2023, contributions exceed \$106,000, benefiting over 15 organizations that tackle pressing issues like veterans services, poverty/homelessness, community development, and entrepreneurship. Nearly 28% of this amount was extended to Orange County, where they donated over \$29,700 to organizations such as Santiago Little League, Kidworks, Freedom Sings, and the Orange County Community Housing Corporation (OCCHC).



Hyundai Motor America is Committed to Progress for Humanity

Hyundai Motor Group's guiding principle is progress for humanity—from product innovation to corporate social responsibility, making the world a better place for everyone is part of its DNA. Giving back is an essential part of progress for humanity, starting with the community where we live and do business. With our national headquarters in Fountain Valley, it is only fitting that we invest into the Orange County community.

Hyundai is a corporate leader in Orange County when it comes to health and safety initiatives. Celebrating its 25th anniversary this year, Hyundai Hope On Wheels, Hyundai's nonprofit arm dedicated to fighting pediatric cancer, awarded a \$100,000 impact grant to the pediatric oncology department at Children's Hospital of Orange County (CHOC) this year. This donation will allow the hospital to improve patient care and outcomes for children battling cancer. In the realm of safety, Hyundai held a car seat and pedestrian safety event at its national headquarters in partnership with Children's Hospital of Los Angeles. Technicians inspected families' car seats and provided free replacements if needed, and children also learned about safe street walking practices in a simulated street environment.

Hyundai is also passionate about education and giving youth the opportunity to thrive. Genesis and the Genesis Inspiration Foundation, its nonprofit organization aimed at increasing children's access to arts education, committed \$1,000,000 to the TGR Foundation to support science, technology, engineering, art, and mathematics education for children. Genesis Inspiration Foundation also donated \$50,000 to The Wooden Floor in Santa Ana to support dance education for children. When it comes to higher education, Hyundai values its partnerships with nearby universities. At the University of California, Irvine Paul Merage School of Business' Future Leaders Initiative, our leaders have presented to students from underrepresented backgrounds on topics such as our electrification strategy. At California State University, Fullerton, Hyundai has participated in Project MISS (Mathematics Intensive Summer Session) to help share career advice with women in science, technology, engineering, and math (STEM). The Hyundai Hydrogen STEM Program also expanded this year at schools and organizations in Orange County, where students learned about hydrogen technology and built and raced their own hydrogen-powered model vehicles.



With donations and employee volunteer events, Hyundai partnered with local organizations dedicated to alleviating food insecurity such as Second Harvest Food Bank of Orange County and the Orange County Food Bank. Hyundai employees also volunteered with Habitat for Humanity of Orange County, participating in a home build for local families. Hyundai also expanded its partnership with Northgate Gonzalez Market with \$50,000 towards a holiday food program to help families and bring joy to many this holiday season.

Hyundai is proud of the relationships it has cultivated with community partners who are doing important work to make Orange County a better place for everyone. Hyundai is a proud resident committed to helping reshape what is possible in our communities of today—and tomorrow.



Genesis Gives is a corporate social responsibility initiative from Genesis Motor America, committed to the development of future generations through our support of STEAM education and sports programming.

GENESISGIVES.COM

GENESIS GIVES



Bringing Hope Everyday

Hyundai Hope is a corporate social responsibility initiative from Hyundai Motor America, committed to the principle of Progress for Humanity through our support of health, safety, and food insecurity initiatives.

HyundaiHope
hyundaihope.com

2023 COMPANIES THAT CARE



CoreLogic

Disneyland
RESORT



ENTERPRISE BANK & TRUST

EVERETT DOREY LLP

Exemplis



gsf
golden state foods

HASKELL WHITE
CERTIFIED PUBLIC ACCOUNTANTS | BUSINESS ADVISORS

HYUNDAI



ideahall

CommerceWest Bank

CommerceWest Bank is committed to making a difference in the lives of their clients and in supporting the community. And with President and CEO, Ivo Tjan's guiding principles and compassion, the bank fulfills his life's mission to give back to the community for over 22 years. Primarily focusing on the Southern California community to maximize local support, nonprofits addressing children and individuals with disabilities, those experiencing a hardship in their life, and those battling life threatening diseases are sought out.

Irvine

Commercial Banking

CoreLogic

As part of its mission to fuel thriving societies, CoreLogic is dedicated to giving back to the communities where its people live and work. This is manifested through relationships with organizations such as Habitat for Humanity, Operation HOPE, Project Scientist, and the Boys & Girls Club. Additionally, CoreLogic empowers its employees to give back to the organizations that matter most to them with 32 hours of paid volunteer time off annually. In 2023, CoreLogic has donated more than \$350,000 to local impact organizations in Orange County and its employees have completed over 1,000 volunteer hours.

Irvine

Technology & Information Services

Disneyland Resort

Since 1955, Disneyland Resort has welcomed guests to experience immersive stories and imagine the possibilities within them. That same commitment continues into the community, where the resort has contributed in a myriad of ways including millions of dollars in cash and in-kind donations to local nonprofit organizations, leaders serving on boards and thousands of Disney VoluntEARS hours provided by cast members. In total, the Disneyland Resort community workforce development initiative has impacted more than 10,000 lives over the last six years. Over \$6.5 million in contributions has helped more than 20 nonprofits and school districts grow their existing programming and develop new programs to meet Anaheim residents' unique needs. In 2023, Disneyland Resort hosted over 70 workforce development sessions for nonprofits and school districts that serve Anaheim residents, directly impacting more than 1,100 participants. Events included skills workshops, career presentations, mock interviews, and 1:1 mentoring sessions hosted by more than 100 Disney VoluntEARS.

Anaheim

Entertainment/Theme Park

Eaton

Eaton is a power management company doing business in more than 175 countries. Their energy-efficient products and services help customers effectively manage electrical, hydraulic and mechanical power more reliably, efficiently, safely and sustainably. By giving people tools to use power more efficiently. Helping companies do business more sustainably. Eaton has been making an impact in Orange County as a partner of Orange County United Way's for many years, having most recently hosted their own team-building activity to assemble hygiene kits for Orange County's unhoused neighbors in Santa Ana. More than 400 essential needs kits were created and distributed.

Irvine

Power Management

Edwards Lifesciences

Helping people and participating in charitable causes is one of the defining elements of Edwards Lifesciences' vibrant culture. The company feels inspired and fortunate to have the ability to support many charitable health- and community-focused programs through the Edwards Lifesciences Foundation. Since establishing Edwards Foundation in 2004, the company and foundation have gifted almost \$165 million to charitable organizations in Orange County and around the world to improve the lives of underserved patients and strengthen communities where employees live and work. Employee enthusiasm for giving time and talent for charitable activity is an all-time high and 86% of global employees participated in charitable activities in the past 12 months (as reported from the 2022 employee engagement survey). Edwards leaders serve the board of directors of 90 charities, with the majority serving the Orange County community.

Irvine

Medical Technology

Enterprise Bank & Trust

With a strong belief that our role in the community goes far beyond banking transactions, Enterprise Bank & Trust seeks out unique and impactful ways to improve the communities they serve. All associates are encouraged to join together for company initiatives that include a recurring Fall fundraising drive for local United Way chapters, the annual Pedal the Cause cycling event to support cancer research and volunteer partnerships with organizations including Ronald McDonald House locations in LA and San Diego. 2023 Southern California community efforts include affordable housing projects, economic development, diversity and inclusion, education, philanthropy, volunteerism and green initiatives that make a tangible and measurable impact in Orange County and the surrounding region.

Cerritos

Banking

Everett Dorey LLP

Everett Dorey is committed to making a positive impact on the community. Since its inception in 2017, the firm has invested time, charitable contributions, in-kind services and employee volunteerism to advance social causes, issues and to support the work of nonprofit organizations and pro-bono work. The firm believes that giving back to society is a valuable investment and a catalytic force for change and remains steadfast in its commitment to giving back to its community and to lead by example.

Irvine

Legal Services

Exemplis

Exemplis strives to make a positive impact in the communities that they serve. Through product donations, grants from the Exemplis For Good Charitable Giving Fund, and employee volunteering efforts, Exemplis is committed to making a difference in Orange County and beyond. As the largest chair manufacturer in North America, Exemplis looks for opportunities to support organizations and schools in our communities with product donations. As of October 2023, Exemplis donated nearly 4000 products to over 25 different organizations this year, including Santa Ana College, Long Beach Rescue Mission, and the Huntington Beach High School Academy of the Arts, as well as many other deserving local organizations.

Cypress

Manufacturing

Farmers & Merchants Bank

Farmers & Merchants Bank has been supporting local communities in Orange County for over 68 years. If you have been to a non-profit fundraiser, Pacific Symphony Family Musical Mornings concert, Angels baseball game, local Rotary meeting, Chamber event or even a little league game, you have probably seen F&M Bank's logo. They support organizations through charitable contributions, sponsorships, access to grant programs, and through employee involvement.

Newport Beach

Financial

Golden State Foods

Founded in 2002, the GSF Foundation (GSFF) is a volunteer-run-and-funded nonprofit that was built upon the existing community involvement of GSF associates. GSF associates volunteer their time serving others, nominate local charities for support, and donate financially to fund Foundation programs with 100% of associate contributions directly benefiting those in need. GSF Irvine leaders have also served on various local nonprofit boards, including Families Forward, Goodwill Orange County, OneOC, SPIN, All-American Boys Chorus, Big Brothers, Big Sisters, and Leadership Tomorrow Orange County.

Irvine

Business-to-Business Foodservice

Haskell & White LLP

Driven by unwavering dedication to social responsibility, Haskell & White has enhanced community engagement programs over the past year, introducing innovative, hands-on volunteer projects that deeply resonate with their team's passion for making a meaningful difference. This initiative led to a significant increase in participation, with the number of volunteers rising from 11 in 2022 to 37 in 2023, dedicating a total of 800 hours, averaging 22 hours per volunteer.

Irvine

Accounting

Hyundai Motor America

Hyundai Motor Group's guiding principle is progress for humanity. They take people forward in their journeys while leading advancements in automotive technology, design, and safety. It's in their DNA to make the world a better place for everyone to live. Giving back is an essential part of that mission, and it begins with building up the community where they live and do business. Hyundai is a corporate leader in Orange County when it comes to health and safety initiatives. Celebrating its 25th anniversary this year, Hyundai Hope On Wheels, Hyundai's nonprofit arm dedicated to fighting pediatric cancer, awarded a \$100,000 impact grant to the pediatric oncology department at Children's Hospital of Orange County (CHOC).

Fountain Valley

Automotive

I AM Movement

I AM Movement is a wellness center owned and operated by a mother/daughter duo. More than a gym for adults with special needs and the elderly, it's a resource and community center that provides a sense of belonging. I AM Movement is that club no one ever wanted to have a reason to join, yet those who do enjoy the camaraderie and no longer feel isolated. In class, members battle their symptoms in a non-competitive yet intense and fast-moving manner. They encourage members to be safe while giving it their all ("The more you put into it, the more you get out of it. Go. GO. GO!"). The non-clinical and often quirky format provides a much-welcomed sense of escapism in the form of fun and friendship. Besides classes, I AM Movement hosts game days, guest speakers, and coffee chit-chats so folks can learn, share, and socialize.

Irvine

Health/Wellness

Idea Hall

Dedicated to exemplifying her agency's mantra "Champions of All Things Good" in every aspect of business, Idea Hall CEO Rebecca Hall is continually searching for new ways to support local causes and partner with community-minded organizations. In addition to offering discounted rates to non-profits, Rebecca holds leadership positions at Orange County Business Council (OCBC) and is the Vice Chair of Chapman University's Board of Governors where the agency founded the Idea Hall Endowed Scholarship for PR & advertising students.

Costa Mesa

Communications

2023 COMPANIES THAT CARE



Impact Wealth Management

Economic inequality, financial illiteracy, and lower home ownership rates are real and systemic issues that have hindered the economic growth and opportunity for under-served individuals for generations. Not only are there monetary differences between those with financial education and those without, but there can also be severe in life expectancy. Over the last twelve months, Impact Wealth Management helped participants avoid over \$320,000 of unnecessary interest and helped them receive over \$170,000 in employers' 401k match.

Irvine

Wealth Management

Ingram Micro is deeply committed to helping the community in which they live and work and are proud to support this commitment in a variety of ways. From their Corporate Giving Campaign (monetary/in-kind) to Matching Gift Program and disaster relief support, Ingram Micro is passionate about giving back and recognizes that when their communities flourish-so does business. These efforts also extend to their strong culture of associate volunteerism which is driven by strong leadership engagement and sponsorship, department fundraisers and overall associate awareness of the need in local communities.

Irvine

Technology Distribution

KBS

KBS, one of the largest investors in commercial real estate in the nation, has been contributing to philanthropic organizations and causes for more than 30 years. The history of KBS as a company that cares begins at the top with its co-founder, president and chairman Chuck Schreiber. Chuck and his family have been long standing supporters of the J.F. Shea Therapeutic Riding Center in San Juan Capistrano, a place where miracles occur almost every day-a place where children who couldn't walk take their first steps, veterans traumatized by war find peace, and people with significant mobility challenges are revitalized with the help of professional staff, volunteers, and extraordinary equine companions.

Newport Beach

Commercial Real Estate

Leisure Capital Management

Leisure Capital Management's mission is to "Invest Wisely, Live Abundantly and Give Purposefully". On the giving front the team has been actively volunteering and giving to local charities both on a personal and business level. They have volunteered at War Heroes on Water, KidworksOC, Susan G Komen, Bradley Rofer Foundation, Jewish Federation of OC...and more. This year the firm walked with families and raised money for the Walk to Feed OC with Second Harvest Food Bank.

Costa Mesa

Wealth Advisor

loanDepot Inc.

As a purpose-driven lender helping more families realize their financial and homeownership goals, giving back to the communities where they live and work is in loanDepot's DNA. Their approach is two-pronged: in addition to financial investments, they also introduced a new Volunteer Paid Time Off (VPTO) program in 2023 to support employees in their support of local organizations they're passionate about.

Irvine

Mortgage

MCDA CCG Inc.

At MCDA CCG, they have focused on providing valuable resources to struggling businesses and individuals, particularly in the areas of operations, financial and tax support, HR, and digital marketing. One key accomplishment in philanthropy has been offering free resources to businesses in need. The company understands the challenges faced by entrepreneurs and small business owners, especially during difficult times. By providing guidance and support in operations, they aim to help businesses streamline their processes and enhance their overall efficiency.

Placentia

Business Consulting

Montage Laguna Beach

Montage Laguna Beach is committed to actively serving communities they call home through the Hearts of Montage programs. Hearts of Montage began in 2003 when their resort opened and has now expanded to all Montage Hotels & Resorts. Hearts of Montage is dedicated to supporting organizations that provide empowerment opportunities to those in need. Areas of focus include education, senior citizen care, family socioeconomic assistance, healthcare/disease prevention, environment protection and education.

Laguna Beach

Hospitality

MSI International

MSI's Charitable Trust aims to improve and strengthen the health, education, and wellness of communities they live and work in. They support causes such as early childhood education, healthcare and wellbeing, and employment generation. MSI partners with organizations to make a fundamental shift in the quality of life of individuals with leapfrogging ideas.

Orange

Flooring, countertops, wall tile, and hardscaping products

Murrow Development Consultants

Murrow Development Consultants actively engages in Orange County by sending teams for hands-on volunteering: painting the Homeaid Family Care Center, serving meals monthly at OC family homeless shelter, and dedicating full days to Thanksgiving and Diaper drives. Consistent involvement, donations, and committed teams reflect the deep commitment to the OC community's welfare.

Irvine

Construction Consulting

My Private Professor LLC

My Private Professor, LLC (MPP) is an impact-driven, educational services company that partners with individual & institutional clients to provide a critical academic resource to thousands of students across the country & gives back with every hour to provide free tutoring to students experiencing homelessness. MPP has partnered with Illumination Foundation, SAHARA, & Boys & Girls Club to provide free weekly tutoring to students in underserved communities, including those residing in emergency shelters. Additionally, MPP is a longtime supporter of initiatives benefiting students & teachers at Tustin Public Schools Foundation & Orangewood Foundation's Samueli Academy through free tutoring, classes, workshops, & grants for teachers. By providing access to the academic support that all students need to succeed, MPP aims to inspire & empower others to achieve their greatest potential & lead tomorrow's world.

Irvine

Educational Services

myTOD

myTOD is a start-up organization founded in June 2021. Two of the main principles that have guided the organization from the start were offering a recruitment service model that would be disruptive to the standard way of recruitment in the market and impacting the lives of at-risk youth in the community. They are committed to supporting 1000 teenagers in 2025 and 10,000 in 2030. They support the community by serving as a bridge between a few selected non-profit organizations supporting youth from the foster care system or transitioned-aged young adults and the Human Resources Business Community.

Rancho Santa Margarita

myTOD

Northwestern Mutual-Orange County

At Northwestern Mutual, Orange County, community impact is not just a statement; it's unwavering commitment. Beyond transforming client's financial lives, they're actively shaping a stronger, more vibrant community. Their approach is comprehensive - they provide financial support, dedicate their time to volunteering, and create powerful partnerships.

Irvine

Financial Services

O Arch Inc.

Continuing the commitment to giving back, O Arch supports multiple organizations dedicated to supporting under privileged children and families. O Arch designs the offices of multiple non-profit organizations in Orange County.

Irvine

Architect

Open Gym Premier

Open Gym Premier (OGP) has consistently demonstrated its commitment to philanthropy and community engagement since its inception. At the core of their values, the concept of "care" drives everything they do. The team, comprised mostly of individuals who grew up playing sports in the Orange County area, is deeply rooted in the community. In 2023, they launched their non-profit organization, OGP Cares. In the short time that it has been active, they have initiated various community service programs aimed at making a positive impact on the Orange County community.

Anaheim

Sports & Entertainment

P11

P11 has always worn its heart on its sleeve since the company's inception in 1989. It's a deliberate choice they embrace as a company and as human beings. For over 34 years, they've helped many vital organizations help others so we can all live better lives. P11's Co-CEOs, Lance Huante and Jasvina Gill, who exemplify compassion in action for a better Orange County, so babies and young people have a chance to live, enjoy gifts during the holidays, and enjoy life as full-grown adults. So young mothers have the necessary supplies to take care of the basic needs of their children to ensure dignity.

Newport Beach

Marketing

Pacific Dental Services

PDS is committed to building a healthier, happier world. As a leader in the healthcare industry, they have the opportunity, and believe it is their responsibility to serve their communities. The award-winning culture of service leverages corporate philanthropy and team member engagement to create impact. At PDS they focus on access to care and building healthier communities through a strong culture of service. They have the vision of a healthier, happier world and with compassionate team members and supported dentists across the U.S., they have the power to create this.

Irvine

Healthcare/Dental

2023 COMPANIES THAT CARE
**Pacific Life**

Newport Beach Financial Services
Pacific Life's philanthropy supported 220 Orange County nonprofits in 2023, including: the opening of a new UW SparkPoint OC financial education center; major grants and monthly volunteer events with local food banks and pantries; building a new playground for Boys & Girls Club Santa Ana; \$1million commitment to Hoag; and protecting OC beaches with cleanups and grants to ocean health-related causes. In all, 75% of Orange County-based employees participated in at least one CSR program, with Pacific Life officers serving on 21 local nonprofit boards. Pacific Life, and the Pacific Life Foundation, stands out for its outstanding commitment to community service and philanthropy, especially with their recent impact on Think Together students.

Parker Aerospace

Irvine Aerospace and Defense
Across three divisions and group-level employees, Parker Aerospace has supported nearly a dozen organizations in Orange County that include: WISEPlace, FIRST Robotics, Habitat for Humanity, Girl Scouts, United Way, Special Olympics, Toys for Tots, and others. In addition to volunteering time and donations, Parker Aerospace and the Parker Foundation partnered this past year to provide grants to WISEPlace for \$15,000 and FIRST Robotics for \$10,000.

PwC

Irvine Professional Services
PwC's commitment to being a responsible business includes both the actions inside as well as outside of their walls. They feel a responsibility to address social equity because expanding access to opportunity leads to the broader economic development of our society, which benefits everyone. One of the largest events this year was a food packaging event with Rise Against Hunger in support of helping improve food security for the most vulnerable populations. More than 50 employees helped pack over 10,000 meals to be delivered in Vietnam.

Reborn Cabinets

Anaheim Manufacturing
Reborn Cabinets participates in an annual MFG. Day event at their warehouse where over 200 junior and high school students are bussed in to tour the facility and learn about the manufacturing industry. Team Reborn members draw straws because the desire to participate is so popular amongst the staff. 2023 marks the 8th year hosting this event. In addition, the company does operation Home Renovation (formerly known as Baths for the Brave). A nominated veteran is gifted a new shower system in their home as our way of saying 'Thank you for your service'.

Reveille Inc.

Costa Mesa Marketing, branding, PR and communications
With more than a decade of experience leading corporate social responsibility initiatives for a global lifestyle brand, Reveille Inc.'s Founder and CEO, Brenda Springer, has built a top-ranked integrated marketing and communications agency on the foundation of giving back to the community. Reveille has a long history of working with nonprofit organizations that are addressing Orange County's most challenging and complex issues - unhoused families, food insecurity, human trafficking, relationship violence, anti-hate, access to education, poverty, youth empowerment and access to healthcare and equity, as well as support for the arts.

RSM US LLP

Irvine Professional Services, Accounting
In 2014, RSM US LLP (RSM) initiated the RSM US Foundation as a key component of their philanthropic strategy, aligned with the commitment to stewardship and responsible action. As a tax-exempt public charity, the foundation is focused on nurturing future middle market leaders. This is achieved through two primary avenues: enhancing educational outcomes for individuals aspiring to become entrepreneurs or leaders in the middle market, and supporting organizations dedicated to fostering a stable environment for youth in crucial areas like hunger, housing, or health, thereby facilitating their success in education.

Seacliff Dental

Huntington Beach Dentistry
Dr. Jason Cellars of Sea Cliff Dental is passionate about giving back and creating sustainable change. An avid supporter of organizations such as the Rotary Club, Waymakers - HB Youth shelter, D62 Little League Baseball and Robyne's nest, Dr. Cellars dedicates both time and resources to help create opportunity for others. Founding his own non-profit in 2022, The Smile Foundation, the organization seeks to provide general, emergency, and cosmetic dental care services for at risk youth and women.

Sterling Public Relations

Corona del Mar Public Relations
Since its inception, Sterling Public Relations has helped numerous organizations establish charitable giving relationships with local and national nonprofits. Creating actionable partnerships between brands and public figures with charities that have a proven track record of sustainable impact, the firm has been a catalyst for positive change in the Orange County community. Representing organizations such as Sherman Library & Gardens, The Literacy Project and The Drake Gives, the firm's founder Paula Steurer has personally dedicated time, talent, and treasure to organizations in need for over 16 years.

Sundt Construction

Irvine Construction
Sundt's purpose is to build environments where its clients, employee-owners, and communities prosper. The Sundt Foundation was established in 1999 as a way for employee-owners to give back to the communities in which they live and work. The organization is funded primarily by contributions from Sundt employees, which are matched by the company. To date, the Foundation has awarded more than \$14 million in donations.

Taco Bell Corp.

Irvine Food/Quick Service Restaurant
Taco Bell corporate has been fortunate to call Orange County home since 1962. Throughout the last year, Taco Bell corporate has launched several initiatives in pursuit of being a better neighbor. They have focused on increasing corporate Business Employee Resource Groups (BERGs) funds to coordinate civic engagement opportunities that inspire them, promote diversity and inclusion, and benefit the local SoCal community.

TaxRise Inc

Irvine Financial Services - Tax
TaxRise is deeply committed to philanthropy and community engagement. Their team is actively involved in various initiatives that showcase their dedication to making a positive impact in the OC community. From volunteering at the OC Food Bank to participating in beach clean-ups and supporting earthquake relief efforts, they believe in the transformative power of small actions. Furthermore, TaxRise proudly collaborates with the Pediatric Cancer Research Foundation, reflecting their commitment to supporting critical causes.

The File Group

Corona del Mar Residential Real Estate
Led by Brandon Goethals and Janelle File, The File Group is a full-service luxury real estate group serving Coastal Orange County. As the top Compass team in Corona del Mar, with over 50 years of combined sales and marketing experience, The File Group offers an unparalleled real estate experience by placing clients first at every turn. The File Group and its agents have been longtime supporters of the mission at Corona del Mar's Sherman Library & Gardens, which is to serve the community as a sanctuary and education beacon for history, horticulture, and the arts.

The Lukes Network LLC

Aliso Viejo Strategy, Fundraising, Outreach, Marketing, Public Affairs, Project Management
The Lukes Network, LLC (TLN) is a family-owned, woman-owned, and minority-owned firm that specializes in strategy, fundraising, outreach, public affairs, marketing, and project management in Southern California, and it is a company that is rooted in community. TLN promotes the Triple Bottom Line of People, Profit, and Planet and its motto of "Do Well and Do Good" by working with public, private, and non-profit business partners that support sustainability in issues such as economic and workforce development, housing, environmental sustainability and basic needs in Southern California.

The Phillips Group

Anaheim Accounting & Tax
At The Phillips Group, they believe that businesses have a responsibility to make a positive impact on the world. That's why they're committed to creating a more sustainable, equitable, and inclusive future. One of their core business values - Three Pillars - is compassion for clients, staff, and community. They are committed to corporate social responsibility (CSR) as a core business value, and strive to integrate CSR in general - and compassion specifically - into all aspects of operations.

The Tennis and Pickleball Club at Newport Beach

Newport Beach Tennis and Pickleball Club
Founder Sean Bolletieri has instilled community in every aspect of the TTC hosting and contributing directly to a plethora of charitable organizations in OC. The club works directly with the organizations to coordinate and sponsor bountiful fundraising events for CHOC Glass Slipper Guild, Casa OC, KURE IT, Miracles for Kids, Make a Wish, TACA Now, John Wayne Cancer Foundation, JDRF, Susan G Komen, Harbor Day School, and many more local and national organizations to create a unique Pickleball experience for their fundraising goals.

2023 COMPANIES THAT CARE



The Zandbergen Group

Laguna Beach **Wealth Management**
 The Zandbergen Group and its True Wealth advisors have built their practice around elevating their clientele's financial wellness. As members of the Laguna Beach Chamber of Commerce, the firm is proud to help advocate for the great seaside city they work and play within. Letitia Berbaum is also a part of the Brea Chamber of Commerce and is an active part of the Women's Leadership Council. Annually, the firm's partners support causes such as Cure Duchenne, CASA, JDRF, United Way, Susan G. Komen, The Drake Gives, Laura's House and The Literacy Project - all of which have had real impact through their respective missions here in Orange County.



Tiggbee

Rancho Santa Margarita **Education**
 Tiggbee's mission is to empower students, regardless of economic or geographic barriers, with the hope and knowledge of the opportunities to be happy and successful individuals. Tiggbee revolutionizes career exploration for students and schools, grades 4-12, by transcending social, economic and geographic barriers. Free for students and school districts, the interactive video-driven platform ignites students' passion for selecting a career path through weekly presentations given by diverse speakers in various industries, including business, STEM and trade sectors. The program elevates English Language Arts education and boosts professional skills for limitless success.



Topp Advisory

Yorba Linda **Accounting Advisory**
 Topp Advisory is dedicated to making an impact in the community through both financial support and active engagement with organizations making a difference. The company monetarily supports various organizations, including the CHOC Foundation, Orange County Rescue Mission, and more. The Company has historically donated approximately 10% of its net income to these organizations. Topp Advisory employees and family members have additionally volunteered in person at the Orange County Rescue Mission's new Double R Ranch, a horse and livestock ranch where individuals and families facing homelessness have a unique opportunity to receive comprehensive support including shelter, meals, education, counseling, and vital services.



Toshiba America Business Solutions

Lake Forest **Business Solutions and Services**
 Toshiba partners with both Orangewood Foundation and the Ocean Institute in Orange County. They donated \$20,000.00 to each organization in 2023. In addition to monetary contributions and ongoing support for those two organizations throughout the year, the company also partner with Council on Aging Southern California's annual Smilemakers program where we collect gifts for individuals who are in elder care facilities in Orange County. And finally, they donate \$20,000.00 for Exploravision Scholarships around the country. This program encourages STEM projects for school aged children in elementary, middle and high schools around the country including Orange County.



Trooth & Smiles

Irvine **Healthcare**
 Trooth & Smiles has five promises, one of which is the promise of "community". They promise to be good neighbors, citizens, and team members. This starts by donating 1% of net collections to local nonprofits and extends by caring for others through day-to-day actions. They ask every new patient to indicate on their intake form which local non-profit they would like to support. In 2022, they supported the following charities that were nominated by patients: Cadence Park PTSA, Irvine Animal Care Center, and Human Options. In addition, Trooth & Smiles supports all the elementary schools of Great Park including the Beacon Park PTA and Solid Park PTSA.



UBS Financial Services Inc.

Newport Beach **Wealth Management**
 This year, UBS Financial Services supported organizations through volunteering and fundraising including, South County Outreach, Orange County Coastkeeper, Project Hope Alliance, The Leukemia & Lymphoma Society, Sparks of Love toy drive from the OC Fire Department, Coast2Coast Foundation, Red Cross Blood Drive, Cards For Kids, Meal on Wheels OC, United Way, Card 4 Kids.



US Alliance Group Inc

Rancho Santa Margarita **Payment Processing**
 US Alliance Group Inc. (USAG), a family of payment processing solutions, distinguishes itself in the market through its guiding principles that shape its business practices, employment values, and community involvement. Ultimately, at USAG, they strive to be more than just a company. Their philosophies and the intrinsic core of their people drive the commitment to maintaining integrity in our business etiquette and relationships. Furthermore, USAG strives to have a name in the community that exemplifies honor, commitment, trustworthiness, and generosity.



Wahoo's

Tustin **Food Service**
 Wahoo's has provided over 100,000 meals to front line responders, those in need and community programs thru the California Love Drop. Additionally, Wahoo's has provided an additional 150,000 meals through additional programs to community-based programs and a additional \$100,000 from the Wahoo's Family Foundation for support of community programs.

WARE MALCOMB



Wahroonga's **Wealth Management & Insurance Services**

Irvine **Financial Services**

Timothy Mulroy, an esteemed Wealth Management Advisor and Co-Founder of Wealth Coast Wealth Management & Insurance Solutions, stands out not only for his financial expertise but also for his remarkable philanthropic efforts. Mulroy's commitment to making a difference extends beyond his professional endeavors. He serves on the board of directors and development board of the Jessie Rees Foundation, a nonprofit organization dedicated to inspiring children fighting cancer to never give up. Additionally, his involvement in community theater showcases his support for the arts and creative endeavors.



Westcliff University

Irvine

Education

Westcliff University enacted the Social Responsibility Committee in 2022 to work with local nonprofits. In 2023, they more than doubled their impact, going from \$17,000 donated and 634 volunteer hours in 2022 to \$68,843 donated and 5,188 volunteer hours in 2023. Scholarships amounted to \$2,885,916.12. Westcliff encourages social responsibility, fostering a culture of compassion and service.



Westgroup Designs

Irvine

Architectural Design

Westgroup Designs leadership and staff has continued their commitment to making a difference in the lives of those around them since opening its doors in 1989. Over the last 34 years, the company has consistently provided financial and in-kind support to numerous nonprofit organizations through charitable giving, fundraisers, events, and community activities, contributing to positive change within its community. This year alone, Westgroup Designs has donated over \$19,300 to charities such as Laura's House, No Kid Hungry, Visionary Women, St. Jude's Children's Hospital, and Hoag Health. This financial support provides valuable resources.

WESTPORT PROPERTIES



Westport Properties Inc

Newport Beach

Real Estate Management and Investments

Entrepreneur Barry Hoeven established and built Orange County based Westport Properties and US Storage Centers with several core values in mind. These values include accountability, relationships, community, commitment, integrity, and humility. Barry started a nonprofit in 2010 called Kure It Cancer Research. The organization collaborates directly with Comprehensive Cancer Centers throughout Orange County, Southern California and across the world, to grant underfunded research projects in need of financial support. Often these research grants serve as "seed money" for preliminary data and assist moving cutting-edge research into necessary clinical trials.



Windes Inc.

Irvine

Accounting

Windes believes in making an impact on the community that goes beyond the professional services they provide. Windes contributes financially to numerous charitable organizations in Orange County that promote the health and welfare of the community. They encourage employees to share their time and unique talents to further contribute to the success of these causes. Windes partners and professionals serve at various levels in numerous organizations (over 70) throughout Orange County and Southern California.

Xperience Restaurant Group

Cypress

Hospitality/Restaurants

Xperience Restaurant Group participates and hosts many events throughout the year including, Taco 'Bout Kindness Program, Veteran's Eat Free & Heroes Discount, and Collette's Children's Home's Adopt a Family Program.

Argyros College Leads in Innovation with Shah Family's Major Gift

A gift from the Shah Happiness Foundation will fund the Shah Family Endowed Chair in Innovativeness within Chapman University's George L. Argyros College of Business and Economics. This philanthropic initiative aims to ignite innovation, education and research at the intersection of high-tech thinking and low-tech industries.

The Shah Family Endowed Chair will be pivotal in promoting innovative thinking through a dedicated full-semester course titled "Creativity and Innovation — Corporate Entrepreneurship." Further, the endowed chair will actively engage in research and service activities, exploring the successful application of high-tech thinking to low-tech industries.

"Manu and Rika Shah were recently honored with the Business Excellence Award by Argyros College," said Matt Parlow, Chapman's executive vice president and chief advancement officer. "We couldn't be more pleased that such esteemed business leaders are partnering with Chapman in this endeavor."

The endowment also includes plans to offer internships to Chapman students, fostering a collaborative bridge between academia and industry. These internships will provide students with hands-on experience, mirroring the Shahs' transformative journey in the surfacing industry and the founding of their company, MS International, Inc. (MSI).

"What Manu did at MSI was apply high-tech thinking and innovativeness to a low-tech stone industry," said Henrik Cronqvist, dean of Argyros College. "Manu and MSI did not create new products or new technologies; they applied creative thinking to become an industry-leading company. With this gift, the Shah family expresses their deep commitment to education, innovation and social impact. We are thankful for their support!"

The Shah Family Endowed Chair will host events featuring local and national leaders who have successfully applied high-tech thinking to low-tech industries, providing students with invaluable opportunities to learn from their experiences. The initiative will culminate in an annual awards program, The Shah Family Awards for Innovativeness, recognizing leaders in this domain.

"Chapman is thrilled to provide students with direct exposure to advanced technology in traditional sectors, equipping them with the essential skills and innovative mindset required for success in these industries," said Chapman President Daniele C. Struppa.



The Shah Family Endowed Chair in Innovativeness has a mission to share research findings, case studies and best practices nationally. The ultimate goal is to prepare the next generation of innovative low-tech industry leaders and entrepreneurs equipped with the skills to adapt and thrive.

The endowed chair aligns with the Shahs' longstanding dedication to making dreams a reality and their significant impact through the Shah Happiness Foundation. Founded in 1975, the Shahs' company, MSI, is a leading supplier of North American flooring, countertop, wall tile and hardscaping products. Headquartered in Orange, CA, MSI maintains over 45 state-of-the-art showrooms and distribution centers across the U.S. and Canada.

In addition to the endowed chair, Manu and Rika recently had a room named after them in Beckman Hall, titled the "Shah Happiness Room for Innovativeness."

CHAPMAN UNIVERSITY'S ARGYROS COLLEGE OF BUSINESS AND ECONOMICS

Thank You MSI for Caring About Preparing the Next Generation of Business Leaders

About the Argyros College of Business and Economics

The George L. Argyros College of Business and Economics stands out for its personalized approach, connecting students with distinguished faculty members and influential business leaders. Students can learn from Nobel Laureates, renowned scholars, former CEOs and industry professionals.

The school emphasizes small class sizes, fostering personal relationships among students and faculty and providing access to executive mentors, internships and career services.

Resources such as Bloomberg Terminal training, CFA preparation, study



abroad programs and Launch Labs enhance the personalized learning experience. As part of the Argyros College community, students become central figures in the Orange County business network, gaining access to influential alumni and industry partners.

The Argyros College rose to No. 60 in the new Best Business School rankings by U.S. News & World Report. It's the school's highest-ever position in the rankings of business schools with full-time MBA programs.

Contact the Argyros College at argyroscollege@chapman.edu to collaborate with us as a guest speaker, employer, program sponsor/donor in preparing the next generation of business leaders.

COMPANIES THAT CARE | SPOTLIGHTS

Antis Roofing & Waterproofing- Every day, Antis lives out its “purpose before profit” corporate responsibility. Charles Antis, Founder and CEO of Antis Roofing, is fueled by a desire to be not just an expert in his field of roofing and waterproofing, but to also be a leader in his community that models how to use success, resources, time and influence to change the world. Living by “Keeping Families Safe & Dry,” each of the company’s employees are devoted to quality product and service in equal measure with giving back to the communities they serve.

Antis Roofing & Waterproofing has donated every roof installation of every Orange County Habitat for Humanity home since 2009 in partnership with Eagle Roofing Products. That’s 93 families housed and over \$1.5 million in “in-kind” donations. Habitat for Humanity was founded on the conviction that every man, woman and child should have a simple, durable place to live in dignity and safety, and that decent shelter in decent communities should be a matter of conscience and action for all. In 2023, Antis completed the roofs on two Habitat homes in Santa Ana.

Applied Medical- Applied Medical Community Relations team and team members foster relationships with Orange County nonprofits by participating in various initiatives, including Casa Teresa (contributed 25 iPads and 68 bags of clothing), Computers 2 SD Kids (donated 355 desktop computers and 124 monitors), Jessie Reese Foundation (NEGU) (made 30 blankets for cancer patients by hand), the Child Creativity Lab (donated 4 blue drums), Crime Survivors (donated 32 stuffed animals), Mission Viejo Animal Shelter (delivered 62 blankets), CREER (provided 32 packages of diapers, 12 printers and two laptops), Orangewood Foundation (gave 41 dresses and one printer), South County Outreach and Solano Food Bank (donated 325 cans and 60 boxes of food), Soles 4 Souls (delivered 56 pairs of shoes), StandUp for Kids (provided 10 backpacks filled with school supplies), Code Orange Robotics (donated two iPads and five computers), OC Rescue Mission (delivered 562 books), San Clemente Christian School (contributed 15 laptops and one printer), and more.

Team members also make a positive difference in the environment through the ProTerra Committee. The committee is made up of passionate team members from various departments who volunteer their time to inspire awareness and education through planned events and campaigns that focus on the importance of sustainability. From picking up litter at Orange County beaches to working with the Irvine Ranch Conservancy to helping rebuild berms in Bommer Canyon, the opportunities to volunteer with local nonprofits are ongoing and impactful. On Earth Day, team members chose from a variety of opportunities, including a habitat restoration project with Earthroots, a beach cleanup shift in San Clemente, and an on-campus gardening and education event.

Bank of America- Beyond the dollars, Bank of America helps Orange County nonprofits in innovative ways – such as through its “Leader on Loan” program with the TGR Foundation, whereby the bank recently funded the full salary and benefits for one of its senior IT professionals who spent a year working at TGR Foundation to help the nonprofit fine tune its data collection and reporting to expands their impact on teens and young adults. This is truly a new take on pro bono expertise.

Another example of going beyond grant dollars is Bank of America’s Neighborhood Builders program that is one of the nation’s largest investments into nonprofit leadership development. Each year, the bank selects two high-impact local nonprofits – this year Orange County United Way and Working Wardrobes were selected for the program, which includes extensive leadership training for the nonprofits’ executive director and an emerging leader.



Supporting every corner of our community.

Proud to support
Orange County Business Journal
Companies That Care

www.calbanktrust.com



CALIFORNIA BANK
TRUST®

COMPANIES THAT CARE | SPOTLIGHTS

California Bank & Trust- For the past 70 years, CB&T has been helping OC residents and their businesses thrive, and today are one of the state's leading banks. CB&T's associates and leadership sit on a number of boards and committees dedicated to strengthening the Orange County community, such as the United Way of Orange County.

CB&T's goal is to help each community where they live and work—and every community where they do business—thrive and prosper. Doing so means providing innovative programs and critical resources to businesses and organizations in their communities. This is exemplified in the bank's Community Development Grant Program, which gives specific consideration to applicants who focus on providing vital community services to revitalize or stabilize low-and moderate-income communities. This includes support for those promoting community reinvestment loans, small business/micro-enterprise development and community economic development.

Further support for underserved communities is evidenced in CB&T diversity loans. They strongly believe that women- and minority-owned businesses are vital to the economy and provide an engine of job creation in our communities. CB&T provides resources, access to financing, and expertise to help our clients make informed decisions. This commitment to diversity extends from the core of who they are as an organization, which is proven in their commitment to building community through supplier diversity. Through the Supplier Diversity Program, the bank is committed to identifying and utilizing diverse third parties that may be able to offer products and services needed by the bank.

Caribou Industries Inc- Mr. Harrah has been widely decorated and acknowledged for his long track-record of generous and well-respected philanthropy focusing on educating students for the next generation of leaders. Mr. Harrah commits his time and resources to countless civic, education and philanthropic organizations throughout Southern California. Mr. Harrah has been presented with many awards throughout his career, including the Inaugural William H. Spurgeon Pioneer Award from the City of Santa Ana for his efforts for the past 20 years.

CerraCap Cares- The Foundation is focused on investing in tech-enabled solutions that tackle disparities, elevate the quality of life, and build sustainable communities across the globe. Through a comprehensive approach that emphasizes Education, Environment, and Empowerment (the 3E's), they are committed to creating lasting change and improving the lives of billions of people. Cares is a 501(c)3 charitable foundation and all pledges and investments in cares are 100% tax deductible. They believe in fostering the world where every challenge is an opportunity, and every solution leads to tomorrow. Their conscious commitment to Mentorship and hosting Shadow Day programs representing underserves high schools of Orange County, provides young minds an opportunity to dream a better future.

CoreLogic- CoreLogic empowers its employees to give back to the organizations that matter most to them with 32 hours of paid volunteer time off annually. In 2023, it went a step further by introducing CoreLogic Cares Day, a global day of service, on September 8, inviting employees to volunteer as a group or individually, creating an even bigger impact in the community. Employees led initiatives that day with local organizations such as Foster Love, the Jessie Rees Foundation, and numerous other organizations.



Ingram Micro Brings The Spirit of Service to OC

At Ingram Micro, our commitment to corporate responsibility is more than a pledge – it's at the heart of our organization. We believe that businesses should not only thrive financially but also contribute positively to the communities they call home. Our roots run deep in Orange County, and we recognize the importance of giving back to the community that has shaped our identity.

Through our Corporate Giving Campaign and Matching Gift Program, we're proud to support several Orange County charitable causes, both financially and through volunteer efforts. This commitment is just one aspect of our holistic approach to community betterment. Our associates, driven by a culture of volunteerism, actively engage in hands-on initiatives, empowered by leadership at every level, including our CEO.

We believe in not only giving back but also fostering a diverse, inclusive workplace that reflects the rich tapestry of our community and celebrates the uniqueness each team member brings. Join us in creating meaningful change in Orange County – because when our communities thrive, we all thrive! For more information, visit www.ingrammicro.com.



We believe giving back moves us all forward.



INGRAM ^{MICRO} Distributing Community

COMPANIES THAT CARE | SPOTLIGHTS

Edwards Lifesciences- Employee enthusiasm for giving time and talent for charitable activity is an all-time high and 86% of global employees participated in charitable activities in the past 12 months (as reported from the 2022 employee engagement survey). Edwards leaders serve on the board of directors of 90 charities, with the majority serving the Orange County community.

Another highlight of employees' generosity also shines through with the success of their first Global Month of Giving, actively engaging their team across all of Edwards' global locations throughout October. Here in Orange County, their 2023 initiative resulted in 66% of local employees participating in many different activities, including the OC United Way Giving Campaign that resulted in \$1.2 million in commitments to charities strengthening communities along with their Foundation. The best part of it all is that they love doing it and can't wait to do more.



Farmers & Merchants Bank- Farmers & Merchants Bank was founded in 1907 by C.J. Walker based on the values of Honesty, Integrity, the Home, the Church and Service Above Self - values that still hold true today under the fourth generation of Walker family leadership. They are proud to be the bank of so many remarkable nonprofits, schools, churches & faith-based entities, as they provide invaluable services to the communities in which we live.

In 2023, F&M has provided over \$3.1 million in donations, sponsorships, in-kind donations and access to grant programs to over 700 organizations across Southern California, with Orange County organizations garnering more than \$1.6 million of the support. More than 350 Orange County organizations benefitted, whose causes range from fighting food insecurity and providing resources for after-school programming, to providing care for persons with disabilities. The Farmers & Merchants Bank Foundation, a corporate 501(c)(3) foundation, distributed \$361,700 in 2023 to 60 deserving recipients, 36 of which are OC-based. Healthcare was the area of focus for 2023.



Haskell & White LLP- In May, The CSUF Giles-O'Malley Center for Leadership awarded Haskell & White the inaugural Leadership Excellence in Community Engagement award, acknowledging their outstanding contributions to corporate social responsibility and community outreach in Orange County and Southern California. This prestigious award was presented at the 12th annual Leadership Awards luncheon.

In their service-oriented business, skills-based volunteering is highly valued. They support nonprofit clients by offering discounted fees and providing employees with opportunities for leadership development through volunteering and board service. They also host educational forums to deepen their team's understanding of nonprofit impacts and offer them direct involvement in community projects. Recent activities include purchasing gifts for children in foster care and volunteering at a Thanksgiving dinner serving over 600 guests.

Haskell & White's support extends to numerous organizations through sponsorships and board service, including UCI Diabetes Center, The Discovery Cube Orange County, Mariposa Women and Family Center, The Priority Center, Laura's House, Orange County On Track, Boys and Girls Clubs of Central Orange Coast, Arts OC, The Laguna Playhouse, Irvine Barclay Theatre, and South Coast Repertory.



Closing Multi-Million Dollar Transactions



Specializing in
**M&A,
Corporate Finance,
Securities**

**Boutique firm
providing high level
legal expertise**

Addison Adams, Esq.



We Close Deals.

Call 714-619-9360 or email me directly at
addison@adamscorporatelaw.com

Countdown to Compliance: The Corporate Transparency Act

The new federal Corporate Transparency Act (CTA) mandates the disclosure of beneficial control and ownership of business entities to prevent criminals from remaining hidden behind the veil of corporate anonymity. These disclosures will make it easier for law enforcement to trace ownership and control across multiple entities regardless of jurisdiction. This disclosure will pull back the curtain on the individuals making the decisions for business entities in the US.



Addison Adams, Esq.

Key Provisions - The CTA mandates companies to disclose ownership and control information to the federal government. This includes names, birthdates, addresses, and a copy of a passport or other similar US ID. This applies to individuals owning more than 25% of a private company. Additionally, those who have substantial control must be disclosed. This applies to entities irrespective of how attenuated the ownership or control may be. Filings will be held in a newly established federal database managed by the Financial Crimes Enforcement Network (FinCEN).

Confidentiality & Applicability - CTA Filings are confidential, accessible only to specific government entities. The Act applies broadly, with exemptions including public companies and private entities with a physical office, over \$5 million in revenue, and more than 20 full-time employees. In total, there are 23 exemptions, but for most companies, compliance will be mandatory. Notably, startups and small businesses are not exempt. Given the legislation's broad scope, it's likely that this applies to your business, making understanding and adhering to its requirements a new compliance burden for you to understand.

Compliance Deadline - Existing companies have until January 1, 2025, to comply.

Penalties - Non-compliance or fraudulent reporting can lead to fines ranging up to \$500,000 and 10 years in prison.

Compliance Support - Will investors limit or reduce their ownership to 24.99% to avoid disclosure? Given the CTA's complexities and the risks of non-compliance, it's wise to plan ahead. **Contact Adams Corporate Law at (714) 619-9360** for expert guidance on your specific obligations, timely compliance, and advice on exemptions and beneficial ownership determinations relevant to your business.

Business law attorney Addison Adams is the lawyer who closes deals. He is a full-service lawyer for businesses across all industries and acts as outside general counsel for many companies in Southern California.



COMPANIES THAT CARE | SPOTLIGHTS

Hyundai Motor America- Hyundai is passionate about education and giving youth the opportunity to thrive. Genesis and the Genesis Inspiration Foundation, the nonprofit organization aimed at increasing children's access to arts education, committed \$1,000,000 to the TGR Foundation to support science, technology, engineering, art, and mathematics education for children. The Genesis Inspiration Foundation also donated \$50,000 to The Wooden Floor in Santa Ana to support dance education for children. When it comes to higher education, Hyundai values its partnerships with nearby universities. At the University of California, Irvine Paul Merage School of Business' Future Leaders Initiative, our leaders have presented to students from underrepresented backgrounds on topics such as our electrification strategy. At California State University, Fullerton, Hyundai has participated in Project MISS (Mathematics Intensive Summer Session) to help share career advice with women in science, technology, engineering, and math (STEM). The Hyundai Hydrogen STEM Program also expanded this year at schools and organizations in Orange County, where students learned about hydrogen technology and built and raced their own hydrogen-powered model vehicles.

Finally, Hyundai is aware of the economic hardship that unfortunately too many neighbors experience. With donations and employee volunteer events, Hyundai has partnered with local organizations dedicated to alleviating food insecurity, such as Second Harvest Food Bank of Orange County and the Orange County Food Bank. Hyundai employees also volunteered with Habitat for Humanity of Orange County, where they participated in a home build for families in need of housing support. Even more, Hyundai is expanding its partnership with Northgate Gonzalez Market with \$50,000 towards a holiday food program to help provide meals to families and bring joy to many this holiday season.



KBS- In addition to being long standing supporters of the J.F. Shea Therapeutic Riding Center in San Juan Capistrano, in 2023 KBS partnered with the Santa Ana Unified School District to sponsor a school supply drive for the Roosevelt-Walker Academy. The firm partnered with the Orange County Coastkeeper at Big Corona Beach near KBS' Newport Beach, California headquarters to assist in a beach cleanup that demonstrated the company's commitment to the environment. Twenty-six KBS employees participated in the cleanup, which resulted in the collection of 35 pounds of trash from the beach—a resounding success. They also held a clothing drive for Working Wardrobes to help those looking for work in Orange County. The firm was able to secure two large clothing racks and more than six boxes of apparel for local residents.

Additionally, advocating for veterans is a central tenet of KBS' philanthropic philosophy. The firm believes that those who have served our country deserve our support and recognition for their sacrifices and commitment to protecting our freedoms. Last year, KBS continued the work it began in 2011 with Orange County Veterans Initiative (OCVI), partnering with different real estate organizations to focus on the three critical areas of need for veterans: transitioning to civilian life, employment readiness and job skills, and health with an emphasis on mental health needs. KBS is a founding partner of OCVI, sits on its board of directors and donates \$25,000 annually toward the initiative, which aligns donors, businesses and community leaders with its humanitarian goals.



LoanDepot Paves the Way to Homeownership by Strengthening Communities

As a purpose-driven lender passionate about helping more families achieve the dream of homeownership, strengthening the communities in which we live and work has always been part of loanDepot's DNA.

Through our national partnership with **Habitat for Humanity**, we are working to deepen our collective impact on families by mobilizing our communities to build safe and affordable homes. Our leaders and employees have helped build and improve homes across the country, with several special projects in Santa Ana and Anaheim.

And, as one of the top providers of VA loans in the country, we're deeply committed to serving the military community. Our founder, Anthony Hsieh, created the War Heroes on Water (WHOW) sportfishing tournament to serve the needs of combat-wounded veterans. We also support the **Marine Corps Scholarship Foundation**, helping to provide need-based scholarships to the children of active-duty and veteran Marines.

Several other organizations have special ties to the company, including **Unlimited Possibilities**, the **American Red Cross's Go Red for Woman campaign** and **Second Harvest Food Bank of Orange County**.

"It's an honor to be able to serve the needs of our Orange County neighbors and to leave a lasting impact on the community," said Chief Administrative Officer TJ Freeborn.



loanDepot HOME MEANS EVERYTHING

As a purpose-driven lender, we're passionate about making homeownership more accessible and achievable for all families. That's why we support Habitat for Humanity International and other organizations that advance the cause of homeownership and otherwise strengthen our communities.



loanDepot.com, LLC. All rights reserved. NMLS ID#174457 (www.nmlsconsumeraccess.org/).
For more licensing information, please visit www.loandepot.com/licensing. (120623 126146-7893)

COMPANIES THAT CARE | SPOTLIGHTS

loanDepot Inc.- In 2023, loanDepot focused much of their community engagement and giving (both nationally and in OC) on organizations that align with the loanDepot's mission. Specifically as part of their national partnership with Habitat for Humanity, executives and employees from Orange County headquarters and local branch locations have rolled up their sleeves to help build homes in Santa Ana and support the renovation of a Veteran's home in Anaheim.

Working to address economic inequality, financial literacy, social justice, inequitable access to capital and lack of financial dignity for underserved communities, loanDepot contributed to the local efforts of Operation HOPE, of which our President and CEO Frank Martell sits on the board of directors. loanDepot is also one of the country's largest providers of VA loans and is committed to serving the military and Veterans community in any number of ways.



Northwestern Mutual-Orange County- Northwestern Mutual's dedication echoes through partnerships close to their hearts; envisioning a future without childhood cancer, actively fueling the quest for better treatments and cures. Collaborating with Alex's Lemonade Stand Foundation and NEGU – The Jessie Rees Foundation is a testament to their support for families battling pediatric cancer. While Alex's Lemonade Stand Foundation (ALSF) focuses on curing childhood cancer, NEGU focuses on caring for childhood cancer. Mr. Erik Rees, the CEO of NEGU, has expressed his hope that organizations like Alex's Lemonade Stand will eventually make the efforts of NEGU "unnecessary." The Jessie Rees Foundation's uplifting mantra, "Never Ever Give Up," is a beacon of hope and love for countless families, a cause they're honored to champion. Recently, the firm proudly presented NEGU- The Jessie Rees Foundation with a substantial \$25,000 donation. Many advisors at NMOC are involved with NEGU's Development Committee, which focuses on raising awareness and bringing joy to children battling cancer.

But their philanthropic dedication doesn't stop there. Partnering with Paige's Pals and the JDRF Foundation, they actively participate in fundraising events like the JDRF One Walk at the Angels Stadium, rallying to raise over \$10,000 this October for the Diabetes Community. This year, in collaboration with Laura's House, the firm hosted a Clothing for a Cause event, which led to the donation of over 25 bags of clothing to Ukraine, making a direct and impactful difference. As the year concludes, the firm's alliance with Olive Crest for their Toy Drive brings joy to children and families, rounding off the year of unwavering commitment to community upliftment.



Pacific Dental Services- PDS provides several opportunities for clinicians to provide donated dentistry and empower them to offer pro-bono services to patients in need. This includes Smile Generation Serve Day, an annual day of service. In 2023 they celebrated the 13th Annual Smile Generation Serve Day. In 2023 \$317,296 in donated dentistry was donated to 106 patients throughout Orange County on Smile Generation Serve Day. PDS can connect patients to a variety of causes through in-office drives and conduct point of purchase drives which support Orange County non-profits. Donations are often encouraged by offering \$100 off dental treatment in exchange for the donation.



They know that their team member's schedules are busy, so PDS® has committed that each team member receives eight hours of paid volunteer time to serve their community. These hours have allowed team members to serve in schools, homeless shelters, food pantries, animal shelter, beach clean-ups, and many other areas. More than 30 volunteer were scheduled this year for team members at their National Support Center in Irvine to participate in. In 2023 alone, nearly 250 Orange County team members have volunteered more than 1,050 hours throughout Orange County.

antisroofing.com

866.775.1454



**BRIDGING
GAPS,
BUILDING
FUTURE**



CerraCap
Cares

CerraCap Cares stands at the forefront of sustainability as a pioneering impact fund, guided by a dynamic team of women leaders. Its mission is to invest in early-stage, human-centered technologies. CerraCap Cares is dedicated to addressing disparities and pioneering solutions across the crucial domains of **Environment**, **Education**, and **Empowerment**.

Their vision is clear: to **bridge gaps**, **foster innovation**, and **create positive change** for more equitable future.

CerraCap Cares believes in the transformative power of **technology as the great equalizer**. At the heart of their investment philosophy lies more than just a pursuit of financial gains; it revolves around utilizing technology to dismantle obstacles and uplift both entrepreneurs and communities.

COMPANIES THAT CARE | SPOTLIGHTS

RSM US LLP- At the core of RSM's values is stewardship, and they are dedicated to giving back to the communities where they live and work. RSM provides numerous opportunities for employees to actively engage in community initiatives. In 2010, the Davis Love Foundation joined forces with the PGA TOUR, designating RSM US as the Host Organization for The RSM Classic, an Official PGA TOUR Event. Annually, RSM owners and employees passionately volunteer in their communities, raising funds for local charities aligned with the missions of the Davis Love Foundation. These efforts contribute to the well-being and advancement of society, supporting both national and community-based programs that focus on children and their families.

Throughout 2023, Orange County employees participated in the Power of Love program through financial and time donations, supporting Olive Crest and Big Brothers Big Sisters of Orange County. This included 180 participants out of 213 total employees and 317.5 total volunteer hours.

Westgroup Designs- Westgroup Designs' investment in worthwhile causes extends beyond monetary donations. The company empowers its leadership team to take on active roles within nonprofit organizations. The CEO leads by example, infusing her expertise and passion to support a cause close to her heart, the Iranian American Women's Foundation (IAWF). For the past 11 years she has dedicated her time, aligning herself with the organization's mission to provide a platform for empowerment, networking, and mentorship among Iranian American women. Several of the firm's Principals and staff have taken on roles with non-profits and other charitable enterprises, such as Irvine Animal Care Center, our regional animal shelter, Village of Hope Rescue Mission, our regional transitional housing and education program facility, working with The Little Red Dog and Priceless Pet Rescue, to rehome stray and abandoned pets, and Project Coffee Cup, an outreach and support organization helping our county's unhoused to receive basic necessities and resources to help transition them back into the community.

WD's employees dedicate their time and skills to various community initiatives, and actively support and facilitate engagement throughout the year. In the last year, Westgroup Designs' employees have collectively volunteered more than 300 hours, participating in projects such as the annual industry Bocce Ball Tournament hosted by one of its industry partners, for which they received financial winnings to benefit Never Give Up (NEGU), an organization which supports families of cancer patients; holiday decorating for the pediatric patients of CHOC Hospital; and participating in community outreach to low income families with an interactive crafting session for the children at the WeCare Craft Event at the Boys & Girls Club of Tustin.

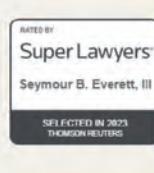
Windes Inc.- Windes has an annual firmwide volunteer day where they choose an organization to support, and everyone in the firm participates in the event. This year (2023), the firm supported the OC Food Bank and Giving Farm, programs of the Community Action Partnership of Orange County that unite communities to end hunger and malnutrition. By partnering with over 300 local charities and organizations, the food bank distributes over 23 million pounds of food annually to low-income families and individuals. Over 60 employees packed 2,000 boxes of food at the OC Food Bank's Garden Grove warehouse. The boxes were loaded onto five pallets with 40 boxes each and sent to areas without food banks, including the Inland Empire, Lake Elsinore, and Palm Springs. The food items were distributed to low-income seniors. Windes holds an annual fall fundraiser where the firm will match all employee donations up to \$2,500 for two organizations. This year, they are supporting veterans and Navy Seals families by donating all funds to Dream Catcher of Los Angeles and C4 Foundation. They also have an annual holiday toy drive benefitting social and health services for children. In 2022, they supported the Marine Toys for Tots Drive.



Everett Dorey LLP is a full-service civil litigation firm of trial attorneys. Everett Dorey prides itself on its legal acumen, trial record, experience and its ability to put clients in the best position to succeed. Client objectives are tailored to individual needs, ranging from early resolution based on experienced evaluations to favorable jury verdicts with awards of attorneys' fees and expert costs.

Recent Firm and Attorney Recognitions:

- "2024 Best Law Firm, Tier 1 Commercial Litigation" by Best Lawyers
- "2024 Best Lawyer in Commercial Litigation" and "2024 Ones to Watch" by Best Lawyers
- Ranked in Chambers USA 2023
- "2023 Recommended Firm," "2023 Litigation Star," and "2023 Future Star" by Benchmark Litigation
- "2023 Best Lawyer in Commercial Litigation" by Best Lawyers
- "2023 Best Places to Work" by Orange County Business Journal
- "2022 Top Verdicts" by Daily Journal



Disneyland

RESORT

Making Dreams Come True – At Disneyland Resort and Beyond

Since 1955, Disneyland Resort has welcomed guests from across the world to experience immersive stories and imagine the possibilities within them. That same mission inspires the resort's efforts in the community with the goal of bringing joy and inspiration to the lives of children and families across Orange County.



Disney VoluntEARS break for a photo after organizing donated, professional clothing at Chrysalis, a nonprofit in Anaheim that helps individuals navigating barriers to the workforce find and maintain employment.

Meeting the Needs of Our Future Workforce

One of the most prominent ways Disneyland Resort is making a difference is by helping make career dreams come true. In collaboration with local nonprofits and school districts, the resort's community workforce development initiative prepares youth and residents for the workforce of tomorrow. Through workshops, career presentations, mock interviews and one-on-one mentoring sessions – all with skilled Disney VoluntEARS – the community workforce development initiative helps organizations such as Chrysalis and Girls Inc. grow their existing programming to meet the unique needs of Anaheim residents.

Disneyland Resort Community Workforce Development Initiative

BY THE NUMBERS

- 10,000+ lives positively impacted
- \$6.5 million contributed
- 20+ nonprofits and school districts benefitted
- 70+ workforce development sessions and workshops in 2023

In addition to making professional dreams more accessible to the community, Disneyland Resort is proud to offer 100% free tuition for eligible full-time and part-time cast members through The Walt Disney Company's education program, Disney Aspire.



Mickey Mouse and Minnie Mouse greet children after the window dedication ceremony in Disneyland park, commemorating Disney's longstanding relationship with Make-A-Wish for World Wish Day.

Granting Wishes – It's in Our DNA

Since the first official wish was granted at Disneyland Resort in 1981, Disney and Make-A-Wish have worked together to make more than 150,000 wishes come true globally for children with critical illnesses. In honor of World Wish Day this year, Disneyland Resort dedicated three windows on Main Street, U.S.A., to the Make-A-Wish organization and the two original wish children. These windows (including the first ever window honoring a nonprofit organization) are located above the Wish Lounge at Disneyland park, which provides a quiet and calm place for children and families during their wish visit to the parks. To learn more about Disney's longstanding relationship with Make-A-Wish, visit Wish.org/Disney.



Disney VoluntEARS packed nearly 4,000 backpacks with an array of supplies like colored pencils and notebooks and delivered them to Orange Grove Elementary School just in time for the start of the school year.

Cast Give Back

In 2023, The Walt Disney Company celebrated the 40th anniversary of Disney VoluntEARS, the volunteer program that originally started at Disneyland Resort by cast members who had a passion for making a positive impact in the community. Since 1983, employees throughout the company have contributed more than 13 million hours of service, including thousands of Disney VoluntEARS hours contributed annually to local nonprofit organizations in Orange County. Events regularly include food distributions, military care kit donations, back-to-school supply drives and more. Cast members can volunteer through Disney VoluntEARS or on their own – either way, they can pay it forward further as all hours can be redeemed for a grant to an eligible nonprofit of their choice.



CHOC Walk in the Park presented by Disneyland Resort on Aug. 20, 2023.

Let's Talk CHOC

For the first time since 2019, Disneyland Resort welcomed back CHOC Walk in the Park—the beloved 5K walk through Disneyland park and Disney California Adventure park, benefiting Children's Hospital of Orange County. This year's walk hosted more than 6,000 participants and raised more than \$2.2 million for CHOC. The "Minnie Walk" also returned, bringing some of the CHOC Walk excitement to patients in the hospital, in addition to the CHOC holiday party, which brings Disney magic to the hospital for the holidays.

To learn more about Disneyland Resort making a difference, follow along on Instagram or Facebook at @DisneylandCastandCommunity.

Disneyland
RESORT

Disneyland**Forward**



SETTING THE STAGE ★ FOR DISNEY TO INVEST FOR DECADES TO COME

DisneylandForward is a multiyear public planning effort to update Disneyland Resort's existing development approvals that will allow Disney to meaningfully invest in Anaheim for decades to come and meet the future demands in entertainment.

MOVING ORANGE COUNTY'S ECONOMY **FORWARD**

According to an independent analysis done by the Woods Center for Economic Analysis and Forecasting, College of Businesses and Economics at California State University, Fullerton, each time Disney invests \$1 billion in creating new theme park and entertainment experiences, it creates thousands of jobs and a projected \$1 million in tax revenue for the County of Orange, \$15 million for the City of Anaheim, and a \$381 million increase in economic output here in Orange County every year of operation.



WHEN DISNEY INVESTS, **EVERYONE WINS**

LEARN MORE at www.disneylandforward.com



Golf and Giving Back: The Barney & Barney Foundation

Marsh McLennan Agency is committed to serving our community in the moments that matter through the work of the Barney & Barney Foundation. Named in honor of our region's founding agency, the foundation has awarded nearly \$4.2 million to more than 250 non-profits since 2009.

This year, we are celebrating the total of \$105,000 awarded in grants to three non-profits at our 11th annual Orange County & Los Angeles Golf Classic in August! Thank you to our passionate colleague volunteers, key sponsors CNA and Anthem, and everyone who came together for a day of fun and philanthropy.



This year's grant recipients:



Learn more at BarneyandBarneyFoundation.org



**MarshMcLennan
Agency**

Your future is limitless.™

Business Insurance | Employee Health & Benefits | Executive Benefits
Private Client Services | Retirement Services | Risk Management | Surety

MarshMMA.com

Lugano Diamonds Celebrates

THE HOLIDAY SEASON

Celebrate the season with a wearable work of art. Explore Lugano Diamonds' creations, each one featuring precious gemstones and unique designs. Meticulously crafted by their skilled artisans, these designs are tailored to accentuate the inherent beauty of these incredible jewels.



Geometric Diamond Necklace

Add glamour to your holiday ensemble with this striking necklace, which showcases over 43 carats of champagne diamonds and an additional 29 carats of black and white diamonds set in 18k white gold.



Calla Lily Diamond Ring

Sure to dazzle, this one-of-a-kind ring inspired by the calla lily features a central pear-shaped diamond surrounded by brilliant round and briolette diamonds, creating a truly showstopping piece.



Diamond and Ebony Wood Earrings

Illuminate your holiday season with the brilliance of wearable art. Crafted from over 5 carats each of brilliant round and round-cut diamonds, these earrings are a true testament to Lugano's artistry and craftsmanship.



Pink Diamond Ceramic Necklace

Infused with the magic of the holidays, this Lugano necklace is adorned with over 43 carats of pink diamonds set in 18k rose gold, featuring exquisite details on both the front and back.



Oval Cut Diamond Earrings

Elevate your style with these elegant pink diamond earrings. Delicately set in 18k rose gold, the earrings boast a captivating arrangement of oval and brilliant round diamonds for the perfect touch of sophistication.

Pink and Black Bracelet

Over 20 carats of pink diamonds are complemented by black accents, creating a modern statement. The careful artistry and craftsmanship offer the wearer a close-up look at the intricate details, highlighting the stunning design and exceptional creativity.



LUGANO®
DIAMONDS

FIVEPOINT.

**GREAT PARK
NEIGHBORHOODS**

A Commitment to Philanthropy within Great Park Neighborhoods and Beyond

California has a rich history of innovators and trailblazers. The list of inspiring industries and brilliant minds living and working in Orange County is extensive.

The entrepreneurial spirit and next-level thinking are also evident in our county's nonprofits. They selflessly devote time, talents and resources to improve people's lives and create a better future for all.

As an owner and developer of large mixed-use communities in California, FivePoint aspires to create equitable, inclusive and sustainable communities of the future.

Our community-building mission began in Irvine in 2013 with Great Park Neighborhoods, where people of different ages, incomes, and walks of life have spaces and opportunities to connect, create memories and experience life to the fullest.

To enhance the quality of life in Irvine and across the county, FivePoint's joint venture (Heritage Fields El Toro LLC) actively supports nonprofits that provide essential "building blocks" of a thriving city. Below is a summary of key community-building priorities and how they align with our philanthropic activities:

Education

With strong public education being foundational to each community it creates, FivePoint is a longtime collaborator with Irvine Unified School District (IUSD) and fundraising programs initiated by nonprofits that serve its 45 schools such as Irvine Public Schools Foundation (IPSF), Irvine Children's Fund and PTA's in Great Park Neighborhoods.

FivePoint's joint venture designed and funded the construction of Beacon Park School, Cadence Park School, and Solis Park School K-8s (which debuted in 2016, 2018 and 2022, respectively), and provided land for the 2016 opening of Portola High in partnership with IUSD and The Irvine Company. All four schools are located at Great Park Neighborhoods.

FivePoint's joint venture has also been a major contributor to the IPSF-led CubeSat STEM Program and its annual fundraising gala since its inception.

Affordable Housing

Having access to a home to call your own is foundational to the American Dream. It may also be the biggest threat to Orange County maintaining its relevance if housing becomes less available, attainable, or affordable. FivePoint's joint venture has funded the construction of six affordable housing communities with Related California, Riverside Charitable Corporation and ETHIC Housing Trust – three for low-income seniors and three for families – in Great Park Neighborhoods (approximately 80% of the planned 1,056 affordable units are now operational).

FivePoint's joint venture also contributes funds to affordable housing initiatives led by nonprofits Orange County Community Housing Corporation and Irvine-based Families Forward.

Wellness

Wellness comes in many forms: access to best-in-class medical care, sports and recreation, trails, open space, live music, and living in a safe community.

With a shared goal of bringing compassionate care, pioneering research and lifesaving therapies to Irvine, FivePoint first invited City of Hope Orange County to become a cornerstone of the four-building FivePoint Gateway campus in 2018.

The result was the August 2022 opening of the 190,000 square-foot City of Hope



FivePoint associates pack food at Second Harvest Food Bank on National Philanthropy Day on November 15, 2022

Orange County Lennar Foundation Cancer Center.

City of Hope is also constructing a hospital exclusively focused on treating and curing cancer, which plans to open adjacent to the cancer center in 2025. By extension, FivePoint proudly supports annual fundraisers hosted by City of Hope.

Sports and Recreation

The extricable link between sports and recreation opportunities and overall well-being is on display at the nearly 200-acre multi-sports complex at Irvine's Great Park. Built and funded for approximately \$250 million by FivePoint's joint venture through its public-private partnership with the City of Irvine, the city-owned complex features baseball and softball fields, soccer/lacrosse fields, volleyball courts, tennis courts, basketball courts and other features.

Adjacent to the sports complex is Great Park Ice, a 280,000-square-foot facility featuring four ice rinks – including the 2,500-seat FivePoint Arena. The public ice facility also serves as a training hub for U.S. Figure Skating athletes and Orange County's professional hockey team, the Anaheim Ducks. FivePoint is a founding partner for the \$110 million facility, which was funded by the Irvine Ice Foundation established by Anaheim Ducks' owners Henry and Susan Samueli.

Safety

To support residents' overall wellness and Irvine's multi-year designation as the safest city in the nation, FivePoint also routinely contributes to fundraisers supporting the Irvine Police Department and Orange County firefighters.

Innovation and Technology

Finding partners that share our passion for attracting world-class talent is essential to keeping innovative businesses in Orange County, particularly in Irvine.

FivePoint's joint venture is a major contributor to technology accelerator Octane and its mission to bring 55,000+ tech and life science jobs to the region by 2030.

As a primary sponsor and active participant of the Orange County Business Council and Greater Irvine Chamber of Commerce, FivePoint is also passionate about ensuring that today's workforce and future generations stay and prosper in Orange County.

Environmental and Agricultural Stewardship

To be effective stewards of the land and live sustainably for the future, FivePoint is collaborating with nonprofits to protect natural resources and preserve its agricultural history.

In collaboration with nonprofit Laguna Greenbelt and other environmental organizations, FivePoint's joint venture has completed grading, planting, landscaping, irrigation, fencing and crossings in and around a 2.5-mile portion of a 6-mile wildlife corridor within Great Park Neighborhoods – encouraging biodiversity and providing a vital connection point for wildlife to migrate between the Santa Ana Mountains and Orange County coastline.

FivePoint's joint venture also has a longstanding history in supporting Second Harvest Food Bank and Solutions for Urban Agriculture (SFUA), two organizations dedicated to equitable food distribution and agricultural resiliency. SFUA's founder, A.G. Kawamura, is also the owner of Orange County Produce, a family-run business that is producing fruits and vegetables within the Great Park with a sustainable commitment to the land, environment, and community.

A decade of different.



It's true what they say: time flies when you're having fun. And we have a lot of it. From orange bikes to green trees, high-fives to pop flies, neighborly neighbors and parks right next door. Here's to our residents, to Irvine, to community and to many more years to come.

Celebrate with us at greatparkneighborhoods.com/10
and join the fun using [#GPN10](#) on social media.





Celebrating over 100 Years

Partners in Improving the Community

Since 1899, when F&M Bank founder, C.J. Walker, became an early organizer and member of the board of directors of the Greater Long Beach YMCA, there has never been a moment when the YMCA has not been graced with the guidance and support of the Walker family.

For them, the "Y" is a deeply rooted family affair. As a youth in 1911, second generation F&M Bank president Gus Walker attended Camp Kole in the Angeles National Forest and co-led a Bible class. Kenneth Walker, Gus's son and third generation F&M Bank president, later attended the same camp, while all his sons, including current Executive Chairman Daniel Walker and CEO Henry Walker, attended Camp Oakes in the San Bernardino Mountains.



F&M Bank and Walker family's loyalty to the YMCA organization has not diminished with time. Today, as the bank of the YMCA of Orange County, F&M Bank has supported scholarships for programs such as Youth Science Camp, preschool sports classes, balance & mobility classes for seniors, youth swim lessons, youth overnight camp and the New Horizons Program for adults with disabilities.

For more than 100 years, the partnership between F&M Bank and YMCA has strengthened Southern California through programs that build healthy spirit, mind, and body for all.

Farmers & Merchants Bank shines as a dedicated community cornerstone. Their unwavering dedication to nurturing communities and families is inspiring. Their generosity and support have brought about positive transformations in the lives of thousands of young individuals, families, and the overall strength of communities.

- Jeff McBride, President & CEO, YMCA of Orange County

Buchalter

**PROUDLY SERVING ORANGE
COUNTY FOR FOUR DECADES**



Martin P. Florman
Orange County
Managing Shareholder
mflorman@buchalter.com
(949) 224-6281



ARIZONA | CALIFORNIA | COLORADO | OREGON | UTAH | WASHINGTON



CARIBOU INDUSTRIES PULLS \$5,600,000 IN BUILDING PERMITS AND EXECUTES DISPOSITION AND DEVELOPMENT AGREEMENT WITH THE CITY OF SANTA ANA, CALIFORNIA TO BEGIN CONSTRUCTION ON MIXED-USE, HIGH-RISE DEVELOPMENT, 3RD & BROADWAY PROMENADE

Caribou Industries, Inc., a leading, national contractor and developer of residential, commercial and resort real estate, announced today that it has pulled \$5.6 million in building permits and executed a disposition and development agreement ("DDA") with the city of Santa Ana in Orange County, California, paving the way for Caribou Industries to begin construction on its largest Orange County-based project so far: 3rd & Broadway Promenade, a mixed-use development project in downtown Santa Ana. The development will include a 16-story multifamily property, a three-star, 10-story hotel, an event center, and more. The project is designed by the leading global architecture firm, Gensler. Construction is expected to begin in the second quarter of 2024.

"This project has truly been a labor of love. After several years of diligent effort, we are excited and honored to have the opportunity to begin construction," said Michael F. Harrah, founder and president

of Caribou Industries. "While we have worked to revitalize Santa Ana for nearly four decades, this is our most significant project to date in the community."



Located in the epicenter of Santa Ana, 3rd & Broadway Promenade will not only provide much needed jobs and tax revenue for the city, but it will completely reshape Santa Ana and re-energize Orange County as a whole. We look forward to beginning construction on this momentous and highly sustainable project in the spring of 2024."

Located at the intersection of 3rd Street and Broadway in the heart of Santa Ana, 3rd & Broadway Promenade will consist of a 16-story residential building comprised of 171 apartment homes, with studio, one-bedroom, and two-bedroom floorplans, along with 198 secured homeowner garages. The project also includes a 10-story, 75-room, three-star hotel complete with a rooftop conference facility, restaurant, and bar. The property will feature more than 13,500 square feet of retail and residential space. A parking structure with 204 public parking spaces will also be constructed. With a walkability score of 97% and a convenient location near the new city light rail system at 4th and Sycamore, along with an outdoor event center, 3rd & Broadway Promenade offers residents and employees unmatched access to all of downtown Santa Ana.

"The city of Santa Ana has been working with Caribou Industries and Michael F. Harrah for several years to bring this exciting project to fruition, and we are so happy to welcome the 3rd & Broadway Promenade development to the heart of our community."

- Santa Ana Mayor Valerie Amezcuia.

"This high-caliber project will create hundreds of jobs, provide much-needed quality housing, and give an economic boost to our historic downtown by bringing in new residents and visitors," said Santa Ana Mayor Valerie Amezcuia.

3rd & Broadway Promenade will create hundreds of union construction jobs, along with hundreds more long-term jobs for its retail, residential, and hospitality opportunities. Additionally, the project is expected to generate millions of dollars in tax, sales, and event revenue, greatly benefitting the city of Santa Ana.

About Caribou Industries

Founded in 1977, Caribou Industries owns and operates 40 subsidiary companies known for premier real estate, executive aviation, five-star restaurants, hotels, resorts, and entertainment venues. Since its inception, Caribou Industries and Founder and President Michael F. Harrah have acquired, developed or completely renovated over seven million square feet of commercial office, retail, and residential properties in Santa Ana, Hawaii, Arizona, California, and Nevada; and has consistently maintained Michael F. Harrah's commitment to "Preserving the Past and Ensuring the Future" through the development of inner-city properties and resort communities. To learn more, visit michaelfharragh.com.



Increasing Opportunities for High-Achieving Students

Titans of Empowerment



"I never saw myself doing anything else."
- Kelsie Whitmore

CSUF ALUMNA CHANGING THE GAME

Many professional baseball players launched their careers at Cal State Fullerton. Kelsie Whitmore is no exception. The former Titan softball standout made history when she became the first woman to play in the Atlantic League, one of four Major League Baseball partner leagues. The Class of 2020 and 2022 grad was empowered by her CSUF coaches, teammates, and professional development opportunities. "Their support helped me open up about my hopes for the future."

Kelsie and Alexis are just two examples of graduates who experienced Cal State Fullerton's commitment to advancing student success. This empowered them to pursue their passions and career paths.

From admissions through commencement, CSUF works to empower all Titan students to reach their fullest potential.

Learn more at
<https://campaign.fullerton.edu/empowerment>



"She believed in me. She looked at me, heard my life story, saw my academic history, and said, 'You made it to CSUF... you can be a doctor'"
- Alexis Ruiz

FUTURE PEDIATRICIAN EXCEEDS HER OWN EXPECTATIONS

Alexis Ruiz always knew she would graduate from college, but she never imagined she could attend medical school. It was the words of an assistant dean at Cal State Fullerton that ultimately changed the first-generation college student's path for the better. "You made it to CSUF. If you can make it here, you can be a doctor." Empowered by the support that she received, Ruiz graduated with a bachelor's degree in Childhood Adolescence and Development. Ruiz plans to pursue her goal of becoming a doctor in pediatric oncology.



IT TAKES A TITAN
THE CAMPAIGN FOR
CAL STATE FULLERTON

1

Best Bachelor's Degree in
HUMAN SERVICES

■ Best Accredited Colleges, 2023



Cal State Fullerton.



Connecting People with Opportunity.



goodwill
orange county

We connect people with opportunities. That is our purpose.

Goodwill of Orange County helps people achieve their goals through a journey of personal support, work experience and career development.

We envision a caring and connected community where everyone has access to meaningful career opportunities.

Goodwill of Orange County is proud to partner with many leading Orange County companies, fellow nonprofits, business leaders, and supporters to make this vision a reality, to create and connect people with life-transforming employment opportunities.

These companies that care make opportunity accessible for people with disabilities and mental health diagnosis, people with little to no work experience, veterans and their families, and many more.



An Opportunity from 7 Leaves Cafe

In a unique new partnership, 7 Leaves Cafe, the Orange County-based artisan coffee and tea house, selected Goodwill of Orange County as its 2023 holiday fundraising partner offering community members across Orange County a fun way to support Goodwill's mission this giving season.

Now through the end of December:

- 01** Community members who **donate five or more items** at any Goodwill of Orange County donation center will receive a **free 7 Leaves drink voucher** redeemable via the 7 Leaves mobile app. Limited to one (1) redemption per mobile app account.
- 02** Community members who **make an in-store purchase of \$30+** will receive a **free 7 Leaves drink voucher** redeemable via the 7 Leaves mobile app. Limited to one (1) redemption per mobile app account.
- 03** For every purchase of the Santa's House Coffee, 7 Leaves' **signature holiday drink** featuring coffee infused with peppermint and topped with chocolate sea cream and crunchy peppermint candy bits, 7 Leaves will **donate \$1 to Goodwill's mission work**.

Beyond serving delicious drinks, 7 Leaves Cafe is dedicated to serving and enriching the Orange County community alongside Goodwill of Orange County.

This is just one example of an O.C. business collaborating with Goodwill to provide meaningful impact opportunities to further Goodwill's important mission work.



Celebrate our 100th Anniversary with Us

2024 marks our centennial anniversary—100 years of working wonders in Orange County. As we look ahead to the next 100 years of serving our beautiful and diverse community, we aim to do even more good. As a nonprofit employment social enterprise, we are uniquely positioned to leverage and maximize our community impact. Our stores and e-commerce operation provide the fuel to operate innovative and truly transformative programs for people right here in our community.

We aim to double our impact and footprint in Orange County over the next 10 years. To do that, we need you. We need partners and supporters to come alongside us in the work, to maximize the good that can happen here in Orange County, to create a better and brighter Orange County for all.

To learn more about partnering with Goodwill of Orange County, visit ocgoodwill.org or contact Danielle Sheets, Development Director, at danielles@ocgoodwill.org.



Our Impact in Action

120+
Orange County
companies that
care partnered with
Goodwill to create
meaningful career
opportunities and
expand our mission
services

800+
people placed
into sustainable
careers annually

18,000+
people served by
Goodwill programs
and services annually

340,000+
hours of job coaching
provided annually to
help develop skills
and build confidence

\$2.1 million+
earned by individuals
employment with
Goodwill's help annually

Visit ocgoodwill.org to learn more.

CONNECTING PEOPLE

WITH OPPORTUNITY

> Cameron D. works
as an Associate at
Smart & Final

Goodwill of Orange County connects people with opportunity.
We help people unlock their potential and reach their goals.
To put it simply, we are a force in workforce development.
Are you ready to be a champion for good?

OCGOODWILL.ORG

7 Leaves Cafe Partners with Goodwill this Holiday Season

Through the end of December, community members who
donate five or more items or make an in-store purchase
of \$30 or more will receive a free 7 Leaves drink voucher.

And! For every purchase of a Santa's House Coffee,
7 Leaves will donate \$1 to support Goodwill's mission.

SPECIAL
HOLIDAY
EDITION
-drink-





Want to feel better about the future? Look at the next generation.

Whether it's media outlets or just social conversation, there's no shortage of concern about "kids these days" and whether they're prepared for the future. But in our experience, young people are some of the best sources of optimism and fresh thinking. In our concern about their wellbeing and their future, though, we're not always as quick to give them the resources and encouragement to pursue their passions. That's why the Taco Bell Foundation has spent the last three decades focused on supporting bright young minds, regardless of their goals.

Thinking Outside the Report Card

How many stories have we heard about incredibly smart and successful people who didn't do well in school? Education is critical, but if we measured potential exclusively through test results and grade cards, our world would be missing so much of what makes it great. The Taco Bell Foundation's Live Más Scholarship was created to give students with unique passions and pursuits the opportunity to find success beyond conventional pathways. And unlike many other scholarship programs, it doesn't take grades or test scores into consideration. It's our way of enabling success for the students who might not be valedictorian or varsity letterman, but who might be making their own documentary, writing their own novel or volunteering on the weekends.

The public charity has created opportunities for so many rising stars, whether in pursuit of trade school, an arts program, a four-year university or another educational route. For the eighth year of supporting Live Más Scholars, the Taco Bell Foundation is offering up to \$10 million to both Taco Bell fans and team members. All that interested students have to do is submit a two-minute video; no essays needed.

Fueling Personal Ambitions

We've also been passionate about what happens for students after the school bell rings or the graduation ceremony ends. Over the years, the Taco Bell Foundation heard growing interest from Live Más Scholars looking for support beyond education and into social enterprise. Many students were going on to enact change, with efforts addressing local community struggles and uprooting systemic issues. They just often didn't have the resources, network and funding to make their ambitions happen.

In response, we launched The Ambition Accelerator: a new social impact program that's designed to support budding social entrepreneurs. Funded by Yum! Brands' \$100 million Unlocking Opportunity Initiative, and supported by Taco Bell Corporation's franchisees, it's part of a commitment to creating pathways that build a more equitable, inclusive society.

More Than Just Money

It's our belief that support doesn't start and end with writing a check. To enable real change, young people need a support system, which means connections, mentorship and guidance. The right person with the right advice is often the difference needed to empower someone, which is why the Taco Bell Foundation prioritizes efforts like creativity workshops and digital forums for their program participants.

Rallying Together

The Taco Bell Foundation has committed to raising an additional \$100 million by 2026 for continued support of all their programs. Every contribution will matter in bringing that goal to fruition, from Taco Bell fans to franchisee partners to local community members. As the organization pursues empowerment of future leaders and changemakers, the change in your pocket can literally make change for the better.

Taco Bell Foundation, Inc. is a 501(c)(3) public charity that helps break down barriers to educate and inspire the next generation of America's young leaders. Since 1992, the Taco Bell Foundation has reached more than 5 million young people across the country and has awarded more than \$130 million in grants and scholarships, focused on education and career readiness. For more information about the Taco Bell Foundation, visit www.tacobellfoundation.org.



'TIS THE SEASON TO SPARK CHANGE, OC

Your contributions help to impact the next generation through education and connection.

TO MAKE A DONATION:

Contact Kalina La Vine at Kalina.LaVine@yum.com



LIVE MÁS SCHOLARSHIP

Breaking down barriers to education through scholarships and beyond-the-money resources like a community of peers, professional development events, and mentoring.

COMMUNITY GRANTS

Uplifting communities through grants to youth charities that create educational pathways through mentorship, college and career readiness, financial literacy, entrepreneurship, and more.

AMBITION ACCELERATOR

Accelerating young innovators' powerful ideas for creating positive change with seed funding, skills development resources, project feedback, and a community of like-minded young people.



IN 2023:

\$130,000

in Community Grants provided to 7 organizations in Orange County

- Boys & Girls Clubs of Central Orange Coast
- Orangewood Children's Foundation
- Girl Scouts of Orange County
- Bracken's Kitchen – Culinary Training Program
- OCAPICA – Rooted Program
- Team Kids
- Girl's Inc.

\$150,000

Awarded in Live Más Scholarships to Orange County students



LEARN MORE:

Scan the QR Code or visit

www.TacoBellFoundation.org

Local Companies Are Investing in Orange County #TheOCWay

As Corporate Social Responsibility (CSR) continues to generate immensely positive results for both businesses and our community, Orange County companies are tapping into strategic networking and creating innovative opportunities to come together to make a tangible difference, while inspiring a culture of caring and engaging employees.



Nikki Clinton
Internal Communications & Engagement Manager
Ware Malcomb

“People want purpose in their jobs. When a company gives back and finds ways for employees to give back, it helps root us all in our community. Through our partnership with Orange County United Way, I've seen an increase in employee engagement and that makes people feel good about coming to work every day. **”**

Going Above and Beyond by Including Supply Chain in Networking

To put its credo of “We make what matters work” into action, **Eaton** developed its own Supplier Network Event with the intention of engaging their partners and advocating for community needs. Produced in collaboration with Orange County United Way, these events have encouraged dialogue that has strengthened professional relationships and inspired attending companies to implement some of Eaton's successful business and CSR practices at their own facilities.

Attendees got a unique tour of the Eaton manufacturing plant facility and then participated in a volunteer activity to support United Way's work of ensuring local students succeed, struggling OC families gain financial security, our neighbors experiencing homelessness find a place to call home, and everyone gets connected to the assistance they need. At their latest event, 260 STEAM kits were assembled and donated to a local Title I school, providing students with valuable resources to support their academic journey while bolstering Eaton's company purpose and commitment to engaging low-opportunity communities to inspire careers in engineering.



Want to Make a Difference in Your Community?

To develop a plan that fits your company's CSR and workforce needs, contact Livi Kerszenbaum, Senior Director, Corporate Social Responsibility at LiviK@UnitedWayOC.org or 949.263.6167.

Networking Creates an Ecosystem of Good

To bring community leaders and business professionals together and learn from one another, OC companies are hosting Networking Mixers in partnership with Orange County United Way. Why? Because networking results in key advantages that help deepen community engagement, knowledge sharing, resource development, and brand awareness.

Each event highlights an important community issue and offers a collaborative environment to exchange best practices, share how CSR positively impacts business results, and discuss ways to increase social impact while expanding professional networks.



Host companies have included **Auto Club of Southern California**, **Little Diversified Architectural Consulting**, and **FirstService Residential** to name a few. Topics covered range from:

- Best practices to establish company employee giving campaigns
- Purpose planning to design an annual customized CSR strategy, boost brand awareness, and activate your workforce
- Overcoming engagement and volunteer challenges
- Aligning CSR with employee benefits program

Get Involved!

You're invited to attend the next Networking Mixer on March 21, 2024 at **Pacific Life**. Professor Richard Matthew, UCI will present on: *The Impacts Environmental, Social, and Corporate Governance (ESG) has on Climate Change and Orange County's Vulnerable Populations*.

To attend, please contact Christine Tran, Corporate Engagement Coordinator, at ChristineT@UnitedWayOC.org or 949.263.6107.



Amy Mathieson
President,
California Market
FirstService Residential

“To me, CSR is really doing the right thing to give back in a broader way than just being a good employer. There is a level of responsibility to ensure that you set the example so that everyone feels they can contribute to their community in a meaningful way. And you do that first, by doing that as a big corporation. **”**

2023 RALLY FOR CHANGE



A CORPORATE
— SOCIAL —
RESPONSIBILITY
CELEBRATION!



CONGRATULATIONS TO THE 2023 RALLY FOR CHANGE AWARD WINNERS!

These champions of corporate social responsibility (CSR) help ensure local students succeed, struggling OC families gain financial security, our neighbors experiencing homelessness find a place to call home, and everyone gets connected to the assistance they need.

AWARD WINNERS

UNITED4OC AWARDS

These awards honor the top companies that embody an overall spirit of philanthropy through time, leadership, and resources.

COMPANIES WITH MORE THAN 1,000 EMPLOYEES IN ORANGE COUNTY



COMPANIES WITH 301 TO 999 EMPLOYEES IN ORANGE COUNTY



COMPANIES WITH 300 EMPLOYEES OR LESS IN ORANGE COUNTY



CORPORATE GIVING CLIMBER AWARDS

COMPANIES WITH MORE THAN 1,000
EMPLOYEES IN ORANGE COUNTY



COMPANIES WITH 301 TO 999
EMPLOYEES IN ORANGE COUNTY



The Word & Brown Companies

COMPANIES WITH 300 EMPLOYEES
OR LESS IN ORANGE COUNTY



CORPORATE AMBASSADOR OF THE YEAR AWARDS

COMPANIES WITH MORE THAN 1,000
EMPLOYEES IN ORANGE COUNTY

Amberlee "AT" Taylor
Pacific Life

COMPANIES WITH 301 TO 999
EMPLOYEES IN ORANGE COUNTY

Alejandro Mayoral
Enterprise Rent-A-Car

COMPANIES WITH 300 EMPLOYEES
OR LESS IN ORANGE COUNTY

Susan Compton
FirstService Residential

EXECUTIVE LEADERSHIP AWARD

Jacqueline A. Kelley
Ernst & Young LLP

ALEXIS DE TOCQUEVILLE SOCIETY AWARD



VOLUNTEERING THE OC WAY AWARD



THANK YOU TO
OUR SPONSORS

HOST SPONSOR



EDWARDS
LIFESCIENCES
FOUNDATION

CHAMPION SPONSOR



PARTNER WITH
US AND BOOST
YOUR CSR.

Contact Angely A. Vallarta,
Corporate Engagement Director,
Orange County United Way
AngelyV@UnitedWayOC.org
949.263.6117

UnitedWayOC.org | #RallyForChangeOC



Host Your Next Corporate Event at These Celebrated SoCal Restaurants

Southern California's leading casual, polished casual, and fine dining Mexican restaurants. With locations throughout the area, Xperience Restaurant Group's award-winning restaurants like SOL Mexican Cocina, Solita Tacos & Margaritas, and the iconic Las Brisas are seasoned experts and are ready to host and cater your upcoming corporate holiday party.

Las Brisas in Laguna Beach is the desirable venue for formal occasions, private parties, and special events. Perched above the scenic Laguna Beach coastline, Las Brisas is a Southern California landmark that is the perfect dining destination for locals and visitors alike. Offering a range of indoor and outdoor dining rooms for entertaining or holiday events, Las Brisas is the premier oceanside event destination. With a variety of chef-curated menus offering brunch, lunch and dinner, Las Brisas makes the menu selections and beverage offerings a breeze.

SOL Mexican Cocina in Newport Beach, Playa Vista and Irvine, offers guests the warmth of Baja Mexico with a social antojito experience or a seated meal. Each SOL offers inspired options for private dining, meetings, and receptions; full and partial restaurant buyout options are available. Guests can indulge in modern-takes on traditional Mexican dishes like Wild Fish on Esquites, Short Ribs 'Babacoa' and Goat Cheese Enchiladas.

Solita Tacos & Margaritas, with locations in Huntington Beach, Valencia, Long Beach and Anaheim, is the perfect spot when you want a modern playful

environment. Inspired by contemporary tequila distilleries, the restaurant spaces can be transformed into private dining areas for a cocktail reception with passed aperitivos or sit down, coursé dining. There are a variety of package options like a Taco Party, seated three-course dining options as well as a brunch menu. And don't forget hand-crafted margaritas for celebrating your organization's achievements.

El Torito has been a staple for Southern California since 1954 offering traditional Mexican dishes. With 26 locations throughout Southern California, the restaurants offer plenty of private and semi-private dining spaces. With plated options, as well as, buffet offerings, El Torito can accommodate a fiesta of any size. If you prefer to bring the party to your office, the restaurant offers an elaborate catering menu with taco, fajita, and enchilada bars available plus a variety of additional options.

Acapulco Restaurant is the option to choose when wanting to treat guests to the flavors of the Mexican Riviera. Inspired by playful cantinas one would find on vacation, Acapulco provides a colorful, fiesta for your next private party or event. Expect playful Mexican cuisine like enchiladas suizas, carne asada and shrimp and a variety of buffet options to choose from. Catering options are also available to bring the flavors of the Riviera to your next event.

'Tis the season, let Xperience Restaurant Group host your holiday happenings this year. For more information and holiday event rates, please visit: www.xperiencergr.com/brands or call 888-TORTILLA.





TACO 'BOUT KINDNESS

"We are honored to be serving the communities in which we operate and know a little kindness can go a long way. Whether serving as a location for people to enjoy a warm meal or provide larger support for groups that need assistance, we are committed to sharing kindness to our neighbors."

– Randy Sharpe, President & CEO



XPERIENCE
RESTAURANT GROUP





Providing A Solid Platform for Success

By Dawn S. Reese, Chief Executive Officer, The Wooden Floor

Earlier this year, I heard a quote that **we will have more technology transformation within the next 10 years than we have had in the last 100 years!** With the burgeoning impact of artificial intelligence and related technologies, we need to take a serious look ahead at the business and life skills that will be required of our future workforce, who are today's children, for them to be competitive in tomorrow's 21st Century economy, and world.

But first, there needs to be consensus that Orange County needs to provide a solid platform for success, for all children to succeed. Since 2018, I have co-Chaired Santa Ana Youth Mental Health Sub-Committee (SAYMC), which has looked at the issues that children and their families face in receiving high quality mental health support within the City of Santa Ana. Examples include mental health awareness and education, a decentralized system for the access of care, addressing stigmas and shifting societal norms, while addressing technology barriers. We have seen that the pandemic has only exacerbated the existing social-emotional-academic challenges of children from under-served communities due to their longer periods of remote learning and social isolation as a result of higher pandemic-related health issues in their cities. Unfortunately, this has led to profound learning losses in Math and English Language Arts, as well as a rise in depression, anxiety, and suicidal ideation for children. It is not unusual to hear of students today who are two grade levels behind in reading literacy in third grade. **Why is this important?** A child who is not reading at grade-level proficiency by third grade, can lead to a higher likelihood of dropping out in high school which will have longer-term impact to economic mobility, and social determinants of health such as housing, food insecurity, and social support.

At The Wooden Floor, we believe **Dance is The Answer™** and it is our strategic solution to provide hope and opportunity for children to reach their highest potential both in school and in life. Our mission is to inspire and transform the lives of young people through the power of dance and access to higher education. We are not a dance studio or conservatory. **We use dance as a vehicle for empowerment and change.**

We are seeing remarkable outcomes resulting from your investment in academic services, which we increased throughout the pandemic.

- Our All-Campus GPA maintained at 3.2; and **our students are exceeding state**, and county benchmarks for Math and English Language Arts



Monica T., Class of 2019

In June 2023, The Wooden Floor CEO Dawn Reese traveled to Palo Alto to attend the graduation of Monica, The Wooden Floor's first alumni to graduate from Stanford University. Monica received a Bachelor of Science in Management Science and Engineering with a minor in Sociology. She is now enrolled in Stanford's Masters in Sustainability Science and Practice program.

- **100%** on time high school graduation, Class of 2023 – achieved 19 consecutive years. In comparison, the high school graduation rate for socio-economic peers in Orange County was 88%.
- **100%** immediate enrollment in higher education, Class of 2023 – achieved 19 consecutive years; In comparison, immediate college enrollment rate for peers nationally dropped from 64% in 2019 to 19% in 2022, a consequence of the pandemic.
- Our first-generation alumni continue to achieve a college degree attainment rate of **54%** as of March 2023, compared to 12.6%, the national rate for their low-income peers (National Education Statistics).

Recent analysis of The Wooden Floor data from 2005-2022 provides the following details:

Of The Wooden Floor Alumni Bachelor's degrees:

- 42% of graduates attain in S.T.E.A.M. degrees such as biotech engineering, molecular biology, computer engineering and physical sciences (81% earned by women; 19% by men)

Of Master's degrees:

- 48% in STEM
- 88% earned by women; 12% by men

As we culminate our 40th Anniversary of year-long celebrations, **we have been reflecting on the companies, foundations and individuals who care about our students through their stalwart support of our year-round programs**, which strategically integrates dance education with academics, college and career readiness, and family services for 475 under-served youth in Orange County.

The Wooden Floor would like to congratulate all of the honorees and those corporate partners of ours who were recently recognized by the 2023 OneOC Civic 50: **Antis Roofing & Waterproofing, Bank of Amerxica, Capital Group, Edwards Lifesciences, Farmers & Merchants Bank** of Long Beach, **First Foundation, Inc., Haskell & White LLP, Ingram Micro Inc., Mountain View Services, Inc., Pacific Life, PIMCO, Rutan & Tucker LLP**. The Wooden Floor is heartened by the commitment of our corporate partners, recognized above, as well as many other companies and businesses, which are too numerous to list.

As The Wooden Floor looks forward to our next 40 years of impact, our Board of Directors, staff, families, and supporters will work tirelessly to ensure that our promise to our students remains strong: *from here you can step anywhere.*



Dawn S. Reese, Chief Executive Officer of The Wooden Floor, leverages her unique blend of experience in business, technology, education, and the arts to propel young people forward. During Reese's 14-year tenure, The Wooden Floor has seen significant growth, including the opening of its second location in Santa Ana, and licensing of its model. Celebrating its 40th Anniversary, recent awards for The Wooden Floor include: 2023 **Best Places To Work** from the **Orange County Business Journal**, 2022 **Nonprofit of the Year Award** **Greater Irvine Chamber**, 2021-2022 **AIM High Award** **New York Life Foundation**, and 2021 **Stand Up the Arts Award** from **Ovation TV/Charter Communications**. Reese's recent honors include: 2023 **Empowering Lives Award** by **Templo Calvario**, 2023 **Sam Estes Award for Community Leadership** from the **Santa Ana Task Force**, 2022 **Orange County Visionary by**

the **Los Angeles Times Orange County**, and the **2020 Women of Distinction Award** from **34th CA Senate District Tom Umberg**.

Reese serves on the Board of Directors for the **Passkeys Foundation** as Board Chair and OneOC as Audit Chair, as well as **Advisors in Philanthropy OC, OC Forum, Orange County Music and Dance**, and the **Santa Ana Chamber of Commerce**. She is on the Board of Advisors for the **Giles-O'Malley Center for Leadership - College of Business and Economics at California State University, Fullerton**. Reese is the founder of the **OC Nonprofit CEO Forum**.



DANCE IS THE ANSWER.TM

We transform the lives of young people through
the power of dance and **access to higher education**.

For over 40 years, The Wooden Floor has been one of the foremost creative youth development nonprofit organizations in the country. **100 percent** of our graduates enroll in higher education since 2005, as compared to about 50 percent of their socioeconomic peers.

Students at The Wooden Floor consistently academically exceed their peers nationally. Our students become change agents and beacons of hope within their own families, their neighborhoods, our community, and our world.



JOIN US IN MOVING MORE
YOUNG PEOPLE **FORWARD.**

Find out more by scanning the QR code.



TheWoodenFloor.org

A BRIEF HISTORY OF DIVORCE:

ANCIENT EGYPT

By Paul Nelson, Esq



Introduction

Divorce, as a legal concept, dates back almost as far as marriage itself. It's a natural development that when people formalize their unions, they also create a legal way to dissolve them. Let's delve into the early history of divorce, starting with Ancient Egypt.

Divorce in Ancient Egypt

The oldest recorded divorce document comes from the reign of Amasis II, an Ancient Egyptian Pharaoh who ruled from 570 to 526 BC.

Reasons for Divorce

In Ancient Egypt, divorce could be requested by either spouse for several reasons:

- 1. Adultery:** Committing adultery by either party was grounds for divorce.
- 2. Infertility:** Infertility, often blamed on the wife, could lead to divorce.
- 3. "Irreconcilable Differences":** Couples who couldn't stand each other could choose to divorce.

The Divorce Process

To initiate a divorce, the husband had to verbally declare, "I am leaving you." He then provided a written document signed by four witnesses, confirming the end of the marriage. This document allowed both parties to remarry if they wished.

Financial Support

An interesting aspect of Ancient Egyptian divorce law was the husband's obligation to provide financial support to his divorced wife. Failure to do so could result in penalties for the husband.

Conclusion

Ancient Egypt provides a glimpse into the early history of divorce as a regulated process. Divorce could be initiated by both spouses, with various grounds for separation. The process involved verbal declarations, written documents, and financial support for the divorced wife. This historical example sheds light on how societies have dealt with marriage and separation over time.

*Read more in Paul Nelson's new book,
The Dissolution Solution, out now!*

NELSON KIRKMAN

Family Law Attorneys & Advisors

RATED BY

Super Lawyers®

Paul Nelson

SuperLawyers.com

When the stakes are highest

NelsonKirkman.com

JUST RELEASED!

AVAILABLE NOW ON AMAZON.COM

PAUL NELSON
with MICHAEL ASHLEY

Foreword by PETER J. BRENNAN,
Orange County Business Journal executive editor

THE DISSOLUTION SOLUTION

A Divorce Lawyer's Advice on
the Best Ways to Part Ways

DIVORCE & SEPARATION

"An indispensable tool to prepare for divorces, whether you are the divorcing spouse, a family law practitioner, or simply curious about the process."

—Nicholas A. Salick, divorce attorney for Kanye West

"Paul writes expertly on how to pick a lawyer and what to expect at a trial."

—Peter J. Brennan, executive editor of the *Orange County Business Journal*

Almost no one goes into a marriage expecting to get divorced. But if you find yourself on the brink of parting ways with your spouse, it's best to be prepared. Long-time family law attorney Paul Nelson has seen (in his clients) and felt (personally) the pain of divorce and, with this book, seeks to help you prepare for and navigate the legal landscape of splitting up.

Filled with practical advice, history, interesting facts, real-world stories, and even viewpoints from other experts, *The Dissolution Solution* is an informative guidebook for anyone going through one of the most difficult processes couples can face. Topics include, among many others:

- How smart planning can help you avoid going to trial
- How to choose the best attorney for your situation
- How to navigate property and child custody laws
- How to best present your case and yourself to win in court
- How to protect and support your kids through the divorce process
- What happens after your divorce

If you've found yourself in the tough situation of having to dissolve your marriage, this book is an indispensable guide to helping you come through with the best possible outcome.

NELSONKIRKMAN.COM



RIVER GROVE
BOOKS
www.rivergrovebooks.com



ABOUT THE AUTHOR



Paul Nelson is the founder of California firm Nelson Kirkman Family Law Attorneys. Certified by the State Bar of California Board of Legal Specialization in family law, he has extensive courtroom experience and knowledge of California family law, which have helped him build an impressive track record of successful outcomes for a wide range of clients. Paul is rated highly with Super Lawyers, possesses twenty five star ratings with Avvo, and enjoys the highest ranking with Martindale-Hubbell.

Active in the legal community, Paul has published numerous

articles in the *Orange County Business Journal*, *Forbes*, and *Fortune*. He is a member of the Orange County Bar Association, the State Bar of California, and the J. Reuben Clark Law Society. In his free time, Paul volunteers at the Veteran's Legal Institute, working tirelessly to address obstacles keeping our military veterans from the benefits they deserve.

Paul also serves on the board of the William Gray Inn of Court, whose core principle is to promote nationwide legal excellence and ethics. Specializing in complex, high-asset family law proceedings, Paul excels at producing the most favorable outcomes for his many clients, allowing them to get on with their lives—and their business.

celebrating **BRIGHT** futures ahead

What happens when people come together with a shared mission? **Bright futures.** Mere blocks from Triangle Square in Costa Mesa is a small community called Shalimar. In the early 90s, mothers in this densely populated neighborhood decided their street shouldn't belong to the gangs and that their children deserved a safe space to grow up. They wanted to see them thrive in school and have all the opportunities associated with the American Dream.

When Randy Barth met the Shalimar moms, he was a successful Newport Beach stockbroker and head of the Mission Committee at his church. Amassing funding and volunteers, they made plans for a learning center in the neighborhood. The Shalimar Learning Center opened in 1994, only expecting on a handful of kids.

100 showed up on the first day.

Starting in a single 3-bedroom apartment and later expanding to three apartments to make space for the Teen Center, Shalimar quickly became a haven for the neighborhood's kids and has remained so for almost three decades.

What began on Shalimar Drive has now grown into the largest nonprofit in Orange County and the largest expanded learning operator in California, serving over 200,000 students a year across the state. **This is the Think Together story.**

Think Together partners with schools to change the odds for kids. From this one neighborhood alone, Think Together has helped hundreds of mostly first-generation students attend college and prepare them for the workforce. Students have gone on to become architects, doctors, award-winning reporters and teachers.

Think Together does this by not only helping students succeed in school, but also in developing critical life skills to prepare them for college and beyond.

Think Together, through a Workforce Readiness Education Program (WREP), provides high school students with a paid leadership intern program. In 2022, Think Together was able to provide 92 high school students across the state with paid internships. Between 12-15 of those internships are offered annually to students enrolled at our Shalimar Teen Center.

The internship program began during the 2019-2020 school year. As part of the program, students attend regular weekly meetings, support events, coordinate donor and stakeholder engagement, and are a representative of the Think Together program.



To remain in good standing, a Think Together intern completes 200 hours of service by May each year. In addition to service hours, Shalimar interns are required to attend WREP workshops in resume writing, interviews, and how to apply for jobs through Think Together's partnership with the You Run This Town Foundation.

Family and Community Engagement Coordinator for the Shalimar Teen Center, Melissa Arambula, shared how she has seen this internship program help Shalimar students over the last four years.

"The program has helped students gain work experience, develop their leadership skills, and engage in community service. Because many of our students participate in the program all four years of high school, the growth in their self-confidence, public speaking, collaboration, and leadership skills is accelerated. Many of these students become the "face" of Shalimar to the community and visitors."



Here is what three of the interns had to share about their experience:

"The high school intern program is a fun place to be for students. To be able to connect with the community, plan events, and then set them up is rewarding to see other people happy."

- ALBERTO, 11TH GRADE

"I really liked the experience of having to go behind the scenes and knowing what happens on-site that normally most kids in the program don't see, so it's a fun experience."

- TRACEY, 12TH GRADE

"Through my experience, I'm a lot more vocal as a person and I express my opinions and just like lead better in rooms. Before I was a little shyer, but now I feel like I make myself a person that is noticed when I walk into a room."

- CHIARA, 11TH GRADE

Think Together is proud to help teens get access to internship programs and workforce readiness experiences that give them skills they'll use for the rest of their lives.

If you would like to support Think Together's mission, visit thinktogether.org/givingseason.





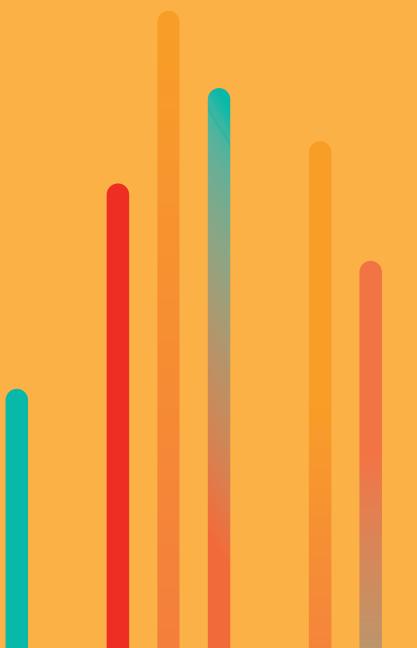
So more kids find their greatness.

Think Together partners with schools to provide academic and enrichment programs so that students have the opportunity to discover their talents, unleash their possibilities and envision their brightest future.

For more information visit thinktogether.org or scan the QR code below



think
TOGETHER





Independent v. Institutionalized Trust Companies: In Defense of the New Paradigm

The financial services industry has witnessed extraordinary developments in U.S. trust law, beginning in 1983 when South Dakota was the first state in the nation to establish the dynasty trust. Modern trust law concepts such as domestic asset protection, strong privacy provisions, directed trusts, trust protectors, and decanting revolutionized the trust industry, directly addressing and resolving inherent conflicts of interest and lack of control that families were forced to endure under the traditional, institutionalized trust company model – where asset management, trust services, banking, and often insurance, were sold to families through a “big bank bundled” approach, wrought with hidden and excessive fees and high turnover.

The U.S. Trust Industry Transformed: A New Paradigm

Without a state income tax, top-tier U.S. jurisdictions with powerful modern trust law planning tools, such as South Dakota, offered tax planning opportunities for large families. The importance of selecting the proper trust jurisdiction became paramount, with some suggesting that it is a breach of fiduciary duty to place a trust in an unfavorable tax, asset protection, or privacy jurisdiction.

Fueled by exciting developments in modern trust law, independent “boutique style” trust companies that did not manage assets, such as Bridgeford Trust Company, proliferated in top-tier jurisdictions, and families were able to avail themselves of the most progressive trust laws in the nation, engage in prudent tax planning, and avoid conflict of interests, while not giving up direction and control. A market-driven correction to a highly flawed trust industry, and a new paradigm was born.

International Conglomerates and the Infusion of Private Equity

The new paradigm in the U.S. trust world developed a huge market opportunity for independent/directed trust companies. This attracted the attention of major international financial services and private equity firms – all looking for a “piece of the action” and to capture, or in many instances, retain revenue going to independent trust companies in top-tier U.S. trust jurisdictions.

The negative impact of this attention is already being felt in the U.S. trust industry. These international, multifaceted, and institutionalized financial services providers have established trust companies in top-tier jurisdictions, often without essential fiduciary talent, requisite understanding of U.S. trust law, or knowing how to properly administer trusts in a given state.

More troubling, many of these companies – often fueled and emboldened by private equity dollars – are buying independent trust companies in top-tier jurisdictions, including recently in South Dakota. Independent trust companies that were originally founded on the principal that the trust industry needed an independent, conflict-free, and non-institutionalized approach, have been rendered institutionalized, no longer boutique, and no longer conflict-free. An unfortunate development for the U.S. trust industry, as once independent trust companies created in the vein of a new paradigm, as a panacea for all that was wrong with the U.S. trust industry, have become part of the very problem they sought to remedy.

Bridgeford Trust Company: Big Enough to Matter, Small Enough to Care

The trust industry is and always will be a

relationship business and, therefore, trustee services are best executed through a boutique, conflict-free, fully independent, personalized, and non-institutionalized approach. Large families not only crave this approach but have come to expect and demand it from their corporate trustee. Bridgeford Trust Company passionately embraces modern trust law and the new paradigm and executes a service model committed to these attributes with a clear focus on education, creativity, attention to detail, and great responsiveness.

Now the oldest and largest independently owned South Dakota chartered trust company, Bridgeford Trust Company provides boutique and conflict-free trust and fiduciary services as well as progressive U.S. modern trust law solutions around asset protection, privacy, and tax planning to domestic and international families.

Bridgeford Trust Company has evolved from one of South Dakota’s first private trust companies into a fully independent public trust company serving the global ultra-high net worth and family office space, leveraging over 125 years of combined legal, accounting, and trust administrative experience executed through our talented and growing staff of fiduciary professionals. With a fiercely independent spirit and a deep passion for the power of modern trust law, Bridgeford Trust Company is committed to serving domestic and international families with its conflict-free, personalized, and non-institutionalized paradigm for many years to come.

BRIDGEFORD



For more information, scan the QR code to watch a short video from David A. Warren, JD, President & CEO of Bridgeford, that discusses this transformation and new paradigm.

If you have any questions, please contact David at dwarren@bridgefordadvisors.com or by calling (949) 798-6262.





WHEN PEOPLE SURVIVE, THEY CAN THRIVE

The task of ending poverty in Orange County is a big one and it almost seems too daunting to begin. Fortunately, Community Action Partnership of Orange County (CAP OC) has been working for decades to address the root cause of poverty. By advocating for systemic reform, social justice and racial equity, CAP OC has been able to compassionately serve millions of individuals, helping to stabilize, sustain, and empower vulnerable communities all over Orange County.

By addressing the immediate needs of every single person served, CAP OC assists people in crises by providing the solutions they need — covering basic needs like food and rental assistance, as well as homelessness prevention. After all, only when people survive, can they thrive.

PLEASE VISIT CAPOC.ORG TO LEARN MORE ABOUT OUR WRAPAROUND SERVICES AND HOW YOU CAN DONATE.



11870 Monarch Street, Garden Grove, CA 92841
info@capoc.org | 714-897-6670 | capoc.org





Mentorship has the power to change lives.

For more than a century, Big Brothers Big Sisters has been a beacon of positive change, connecting young individuals facing adversity with dedicated role models who provide not only guidance but also essential social capital—opening doors to opportunities and access, shaping a brighter future through mentorship.

For many of the young people in our program, mentorship is the difference between dropping out of high school and being the first person in their family to go to college. It happens one conversation, one door opened, and one affirmation at a time.

Since 2019, Orange County has seen a significant 25% rise in the number of young people who are neither in school nor employed. According to Measure of America, the county now has over 33,000 youth facing challenges in forming positive social connections and finding sustainable pathways to success.

While acknowledging that there's no one-size-fits-all approach, the World Bank recognizes mentoring and socio-emotional learning as core interventions for reengaging this group.

For over six decades, Big Brothers Big Sisters has been offering Orange County a solution: one-to-one mentoring relationships that kindle the power and promise of youth. This program places a significant focus on college and career readiness, helping children navigate complex systems, foster a strong sense of self and belonging, and learn how to identify resources.

The impact is clear:

- **Mentored youth are 52% more likely to enroll in college**
- **80% of youth in our program have plans to attend postsecondary education**
- **Mentored youth are 17% more likely to be employed and earn 13% higher wages than non-mentored youth.**

Your investment, be it in time, financial resources, or advocacy, enables us to continue pairing exceptional young people with inspiring mentors dedicated to unlocking potential. **Your support empowers thousands of kids across Orange County to future-proof our local workforce and closes the skilled labor gap in our community.**

Visit ocbigs.org to learn more and get involved.

INVESTING IN A BRIGHTER FUTURE

Each match we make sparks newfound potential and career paths that our young people may have never known were possible without a mentor by their side inspiring them. **Invest in your future workforce by investing in mentorship with Big Brothers Big Sisters.**

Giving just a little, can change a lot.

OCBIGS.ORG

