

MARCH 2025

# BUSINESS

LA Times STUDIOS

## RAUL ANAYA

BANK OF AMERICA'S BUSINESS BANKING PRESIDENT TAKES ON A NEW ROLE - L.A.'S RECOVERY

ENTREPRENEURS HELPING TRANSFORM EL SEGUNDO INTO AN ENTERTAINMENT MECCA

THE TOP BANKS, CREDIT UNIONS AND MBA PROGRAMS IN SOUTHERN CALIFORNIA THIS YEAR

BANKING AND FINANCE VISIONARIES





**Greg Banner**

*CEO & Senior Financial Adviser*

Asset Preservation Strategies  
**ASSET/INVESTMENT MANAGEMENT**

**G**reg Banner, CFP®, brings over 30 years of experience to Asset Preservation Strategies, specializing in financial planning for high-net-worth individuals, entrepreneurs and business owners. His expertise includes business growth and exit strategies, asset management, tax reduction, estate planning and alternative investments. He has a niche working with real estate developers and private equity to create income strategies. A sought-after speaker, Banner presents at industry events, including IMN Real Estate Family Office and Exit Planning Institute. He is an investment advisor representative with Axxcess Wealth Management, a licensed insurance broker and a California Registered Tax Preparer. He also holds a Chartered Life Underwriter (CLU®) designation and is endowed as a full Fellow of the Southern California Institute.



**Keith Patrick Banner**

*Partner*

Greenberg Glusker LLP  
**PROFESSIONAL SERVICES**

**K**eith Patrick Banner, a partner at Greenberg Glusker, specializes in bankruptcy, reorganization and corporate restructuring across industries including retail, technology, real estate and manufacturing. He advises companies, trustees, creditors and committees on out-of-

**R**ick Bechtel, executive vice president and head of U.S. mortgage at City National Bank, brings over 30 years of experience in residential lending. Based in Los Angeles, he leads CNB's mortgage strategy, overseeing sales, operations, capital markets and servicing. Under Bechtel's leadership, CNB expanded its mortgage and home equity capabilities, including the City National Ladder Up Home Loan Grant. The grant offers up to \$50,000 in majority Black or Hispanic census tracts in Los Angeles and up to \$20,000 in other qualifying areas. The Community Lending Team, now 30 members strong, has partnered with over 50 nonprofits

court workouts, Chapter 11 reorganizations and Chapter 7 liquidations. Previously, he clerked for Judge Peter H. Carroll and worked at an Am Law 100 firm and a boutique insolvency practice. Banner's experience includes bankruptcy litigation and creditor disputes. He has led high-profile cases, including HyreCar Inc.'s asset sale to Getaround and trustee representation in the \$45.76-million auction of Alex Khadavi's mansion. Recognized for pro bono work, he secured \$320,000 in student debt relief. He earned his J.D. from Loyola Law School and B.A. from UC Santa Barbara.

**Rick Bechtel**

*EVP & Head of U.S. Mortgage*

City National Bank  
**LENDING**



and hosted nearly 400 workshops in 2024. Bechtel also serves on the LA Area Chamber of Commerce Board of Governors, collaborating with city leaders to drive economic progress.

**Darnel J. Bentz**

*Senior Wealth Advisor*

Kayne Anderson Rudnick  
Wealth Advisors  
**ASSET/INVESTMENT MANAGEMENT**



**D**arnel Bentz, senior wealth advisor at Kayne Anderson Rudnick (KAR), was inspired to pursue finance after helping his widowed mother navigate financial decisions in college. After earning a marketing degree from Arizona State University in 2000, he spent seven years at Charles Schwab managing high-net-worth clients, later earning an M.B.A. from UCLA Anderson. At KAR, Bentz integrates alternative investments with traditional portfolios, growing his practice by over \$34 million in 2024. He serves on KAR's Wealth Advisory Investment Committee, ensuring top-tier strategies for clients. His goal is to build trust and provide financial peace of mind. Beyond work, Bentz volunteers as a youth coach and supports local and national charities, including the Manhattan Beach Education Foundation and the American Cancer Society.

**2025 Banking & Finance Visionary**



**Nanaz Benyamini**  
Partner, Tax Department

Nanaz is a Partner in SingerLewak's Nonprofit Tax practice, bringing over 28 years of tax and accounting expertise, with more than 20 years dedicated to tax-exempt organizations including state-chartered credit unions. She started her career at Deloitte & Touche, where she progressed to the role of Tax Senior Manager in their Los Angeles Tax Exempt Practice. Nanaz is an experienced speaker, having presented at events such as the CalCPA Not-for-Profit Conference and the Western Conference on Tax-Exempt Organizations.

**Where You Need Us**

Barnes & Thornburg congratulates its own **Carolyn Hunt** for being recognized in the 2025 Banking & Finance Visionary issue published by LA Times Studios.



**Carolyn Hunt**  
Partner

**BARNES & THORNBURG** LLP

btlaw.com



CREDIT UNION SERVICES GROUP  
A Client Service Group by SingerLewak



**SingerLewak**  
Accountants & Consultants



**Zack Stiefler**

Managing Director

Gallant Capital  
PRIVATE EQUITY

**Z**ack Stiefler leads investment sourcing, structuring, financing and execution as managing director at Gallant Capital. Previously, he was a principal at Corridor Capital, vice president at Lindsay Goldberg and an analyst at Bank of America Merrill Lynch's global consumer & retail group. Stiefler also co-founded and served as CEO of Bungalow Insurance, an insurance technology firm sold in 2018. He serves on the boards of InformData, Lightning Step and Arctiq and has held board roles at Arvan, CEO Warrior, Nationwide Property & Appraisal Solutions, Refresh Mental Health, U.S. Industrial Tool & Supply and World Wide Land Transfer. He holds a B.S. in economics and a B.A. in political science from Duke University and an M.B.A. from the Wharton School at the University of Pennsylvania.



**Steven A. Sugarman**

Founder

The Change Company  
LENDING

**S**teven A. Sugarman is founder of The Change Company, a Community Development Financial Institution expanding access to banking and lending for Black, Latino and low-income communities. Partnering with over 75 financial institutions and 1,000 non-bank lenders, its subsidiaries

include Change Home Mortgage, Change Lending and xChange. The firm has earned multiple awards for diversity, leadership and workplace excellence. Previously, Sugarman founded and led Banc of California, growing it into one of Forbes' Top Banks in America. He also led COR Clearing's recapitalization and its sale to Axos Bank. A Yale Law School and Dartmouth graduate, he is of counsel at Michelman & Robinson and a board member of Los Angeles Team Mentoring. Sugarman has received numerous honors for leadership and community impact, including the LATM Keystone Award.

**D**avid Sutton is a partner at GHJ and leads the transaction advisory services and private equity practices. With over 20 years of experience, he advises clients on M&A strategies, financial due diligence and deal execution across industries, handling transactions from \$10 million to \$1 billion. Since joining GHJ in 2017, Sutton has played a key role in expanding the firm's advisory services. He frequently speaks and writes on economic trends, liquidity management and regulatory changes, with insights featured in M&A Journal, CPG Specialist and Mergers & Acquisitions Magazine. He promotes leadership



**David Sutton**

Partner

GHJ  
PROFESSIONAL SERVICES

development and community service. Sutton's recent M&A deals include Coast to Coast's acquisition by AstroTurf, UTA's acquisition of Fletcher & Co. and Kingswood Capital's acquisition of Identity Theft Guard Solutions.



**Monica Szakos**

President & Senior Financial Adviser

Asset Preservation Strategies  
ASSET/INVESTMENT MANAGEMENT

**M**onica Szakos is president and senior financial adviser at Asset Preservation Strategies, Inc., guiding individuals and families through complex financial decisions. Known for her calm leadership, she prioritizes client education to ensure informed wealth management choices, especially in volatile markets. A Certified Financial Planner™ (CFP®), Certified Exit Planning Advisor, Behavioral Financial Advisor and Certified Financial Fiduciary, Szakos has also completed the Advanced Wealth Strategist Planner Program and is a fellow of the Southern California Institute. She holds a B.B.A. from the University of San Diego with a real estate emphasis and a minor in accountancy. Committed to philanthropy, she actively supports the Helen Woodward Animal Center and serves on the Estate & Trust Planning Council for Rady Children's Hospital Foundation.



**Anna Tang**

Co-Chair, Corporate Group

Nossaman  
PROFESSIONAL SERVICES

**A**нна Tang is co-chair of Nossaman's corporate group and a leading corporate lawyer known for her strategic approach to complex transactions. She advises companies across industries on mergers and acquisitions, corporate governance, commercial agreements and business structuring. Tang works with clients throughout the business lifecycle, from entity formation and joint ventures to restructuring and dispositions. She also specializes in taxation implications of transactions. Her expertise extends to healthcare and real estate, representing surgical centers, medical groups and real estate developers in structuring ventures and securing financing. With experience as a corporate and tax attorney at a top Australian law firm, Tang advises multinational and foreign clients on Australian and international commercial and taxation issues.

**D**ouglas Thompson is a partner at Snell & Wilmer, LLP, specializing in class action defense and regulatory investigations for financial institutions and businesses. He has defended over 250 class actions and is admitted pro hac vice in numerous federal courts. Thompson advises clients on litigation risk, regulatory compliance and ESG and sustainability matters. He has extensive experience with federal banking laws, including RESPA, TILA, FCRA, FACTA, FDCPA and ECOA, as well as banking deposit operations and fraud claims. He also represents businesses in technology, retail and financial services against statutory and contractual claims. Previously, Thompson



**Douglas A. Thompson**

Partner

Snell & Wilmer  
PROFESSIONAL SERVICES

led litigation strategy at major financial institutions and held leadership roles at an AM Law 100 firm. A community leader, he serves on the Legal Aid Foundation of Los Angeles Board.



**Mark Udis**

Partner

Certuity  
ASSET/INVESTMENT MANAGEMENT

**M**ark Udis is a partner at Certuity, specializing in wealth management for high-net-worth individuals, including technology entrepreneurs, executives, athletes and professionals. He leads Certuity's Manhattan Beach office, expanding the firm's presence in Los Angeles and serving a younger entrepreneurial client base. An active member of Certuity's investment strategy team, Udis tailors financial strategies to adapt to market changes and offers clients access to institutional alternative investments. Recognized by Forbes and Barron's as a top wealth advisor from 2021 to 2024, he is known for his strategic portfolio management and client communication. Committed to community service, he serves on the board of directors for Team IMPACT Los Angeles and coaches youth sports. Udis received a Bachelor of Science in finance from Lehigh University.



**Ivo A. Tjan**

Chairman, President & CEO

CommerceWest Bank  
COMMERCIAL BANKING

**I**vo A. Tjan is the chairman, president & CEO at CommerceWest Bank and is known for his dedication to employees, clients and the community. He fosters a supportive workplace, empowering his team with mentorship and growth opportunities.

His leadership extends beyond business, forming lasting client partnerships built on trust and care. A committed philanthropist, Tjan supports initiatives like the Walk to End Alzheimer's, the Journey of Hope Gala and Working Wardrobe's Infinite Horizons Gala. He also engages with Chambers of Commerce, providing economic insights to help businesses thrive. His leadership has earned notable recognition, including Newsweek's 2025 America's Best Regional Banks and Credit Unions, the OC 500's Directory of Influence and one of the Fastest Growing Public Companies and Top 100 Publicly Traded Banks.