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BUSINESS

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2026 Banking Outlook – How
Mid-Level Banks Are Re-Prioritizing
in a Dynamic SoCal Market

The Top Banks and
Credit Unions in
Southern California

The 2026 Banking
Visionaries Leading the
Region's Financial Sphere

VISIONARIES



Margaret SHANLEY

Principal, Transaction Advisory Services Practice Leader
COHNREZNIK Professional Services

As the principal and transaction advisory services practice leader, Margaret Shanley manages a global team of over 100 professionals at CohnReznick Advisory LLC. She draws on 29 years of industry experience to provide full-service transaction advisory, including financial due diligence, merger integrations and complex carveouts for middle-market private equity clients. Shanley currently serves on the board of trustees for Notre Dame Academy of Los Angeles and is a long-standing board member of the Los Angeles Chapter of the Association for Corporate Growth. She also holds the position of vice chair for the Los Angeles Annual Business Conference and actively supports disaster relief efforts for California wildfires and adaptive sports through Angel City Sports. Her leadership successfully aligns performance improvement and tax strategies to ensure favorable outcomes for diverse strategic and financial investment groups.



Jonathan SHENSON

Partner
GREENBERG GLUSKER Professional Services

Founder and former managing principal of his own law firm for nearly a decade, Jonathan Shenson is a partner in the bankruptcy, reorganization & capital recovery and corporate groups at Greenberg Glusker. He utilizes 30 years of industry experience to represent debtors, secured creditors and committees in high-stakes chapter 11 cases and out-of-court restructures. Shenson possesses specialized expertise in Section 363 asset sales and fraudulent conveyance litigation, as well as navigating complex syndicated and subordinated credit transactions for institutional lenders and borrowers. He is a frequent lecturer at prominent industry forums, including the California Bankruptcy Forum and the American Bankruptcy Institute, where he addresses fiduciary duties and intellectual property issues in insolvency. He previously practiced within the bankruptcy and finance departments of an AmLaw 100 firm and served as a partner at a nationally recognized bankruptcy boutique.



Ashley M. SIMONSEN

Partner
COVINGTON & BURLING LLP Professional Services

As a partner in the class action and mass torts practices, Ashley M. Simonsen represents global financial institutions and technology companies in complex litigation across the United States. She leverages her background as a former associate at Lehman Brothers to defend clients against "true lender" claims, recently co-leading a team to a complete defense victory for Celtic Bank following a five-day evidentiary hearing. Simonsen successfully secured the dismissal of a high-profile class action against Capital One involving pandemic-related relief and led the team that obtained Second Circuit affirmation of a nationwide settlement for Navient. She serves on the executive committee for the Litigation Section of the Los Angeles County Bar Association and has successfully defended major fintech platforms, including Afterpay and PayPal, against overdraft fee class actions.



Chris SPICER

Partner
AKIN Professional Services

By leading a \$1.1-billion senior secured library credit facility for Fifth Third Bank to support the strategic debt repayment of Lions Gate Entertainment Corp., Chris Spicer is a partner and head of the media, entertainment and sports practice at Akin. He specializes in high-visibility deals between independent production companies and major financial institutions, recently representing Fifth Season in a \$500-million credit facility refinancing with JPMorgan Chase. Spicer also advised Alpha Wave Global on a \$100-million Series A investment in Gamma Media Holdings and a \$50-million investment in Feastables Inc. His recent portfolio includes advising Comerica Bank on a \$150-million production loan for the motion picture *The Resurrection of the Christ* and facilitating a \$75-million credit facility for Vice Media through Western Alliance Bank.



Zachary STREIT

Founder & President
PRIORITY CAPITAL ADVISORY Lending

Founder and President of Priority Capital Advisory Zachary Streit leads the sourcing and execution of debt and equity placements for commercial real estate projects across the western United States. Since launching the firm 19 months ago, he has closed 25 financings totaling over \$600 million, including a \$35-million land loan for the Robertson Lane retail and hotel project in West Hollywood. Streit utilizes 17 years of industry experience to navigate complex CRE cycles, having previously closed more than \$5 billion in career financings as a leader at WAY Capital and George Smith Partners. He successfully oversees every aspect of capital markets engagement for ground-up and workforce housing developments, including a recent \$21-million land loan for a mixed-use multifamily project in Koreatown.



Anna C. TANG

Co-Chair, Corporate Group
NOSSAMAN Professional Services

Co-Chair of the Corporate Group at Nossaman Anna C. Tang represents emerging and established companies as general corporate counsel across the healthcare, real estate and transportation sectors. She specializes in the development of ambulatory surgical centers and outpatient imaging facilities, advising medical groups on complex restructurings and strategic combinations throughout the United States. She utilizes 25 years of experience to facilitate mergers, acquisitions and joint venture formations, often consulting on special purpose entity governance and third-party financing. Tang is a member of the Association for Corporate Growth and previously practiced as a corporate and tax attorney at a top law firm in Australia. She has successfully established a practice that guides foreign and multinational clients through tax-effective structures for international investments and cross-border commercial activities.



Gary TEO

EVP, Chief Human Resources Officer
EAST WEST BANK Commercial Banking

Directing a people-first strategy that saw the bank's workforce double across international and domestic markets, Gary Teo is the EVP and chief human resources officer at East West Bank. He draws on 25 years of industry experience to align human capital management with long-term business objectives, having served at the firm for over 15 years. Teo developed and implemented a standardized goal-setting framework to strengthen transparency and accountability while overseeing more than 40 annual employee engagement initiatives. Under his leadership, the bank has achieved national recognition on *The Wall Street Journal's* 100 Most Loved Workplaces list since 2022 and *U.S. News & World Report's* 2025 Best Companies to Work For. He has successfully advanced leadership development and succession planning to support professional growth during a period of rapid corporate expansion.

Multi-generational wealth management leader Monica Szakos serves as the president and senior wealth adviser at Asset Preservation Strategies. She draws on 25 years of industry experience to curate optimal financial outcomes for families, specializing in behavioral finance and exit planning strategies. She is a Certified Financial Planner and a fellow of the Southern California Institute who has completed the Advanced Wealth Strategist Planner Program. Szakos serves on the Estate & Trust Planning Council for the Rady Children's Hospital Foundation and is a dedicated supporter of the Helen Woodward Animal Center. She successfully leads the firm's strategic initiatives by pairing meticulous attention to detail with agile investment management during volatile market seasons. Her tenure of 14 years at the firm underscores a commitment to service-first advisory and high-touch relationship management for clients spanning several generations.



Monica SZAKOS

President & Senior Financial Adviser
ASSET PRESERVATION STRATEGIES Asset Investment Management



VISIONARIES



Greg BANNER
CEO & Senior Financial Adviser
ASSET PRESERVATION STRATEGIES
Asset/Investment Management

Greg Banner is the CEO and senior financial adviser of Asset Preservation Strategies, where he has spent 33 of his 39 years in the industry building a specialized practice focused on ultra-high-net-worth individuals, entrepreneurs and real estate developers. He has carved out a distinct niche in tax-efficient wealth strategies, combining precision planning with creative approaches to private equity and alternative investments for clients navigating complex financial portfolios. Banner holds the CFP, CLU and CRTP designations, is authorized to provide tax advice and has completed the Advanced Wealth Strategist Planner Program, earning full Fellow status with the Southern California Institute. His expertise has made him a sought-after speaker for organizations including Marcus Evans, IMN Real Estate Family Office, the Business Enterprise Institute and the Exit Planning Institute.



Halé BEHZADI
U.S. Vice Chair
California
BMO
Commercial Banking

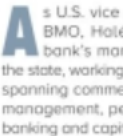
financial services experience to the role, having previously served as North American head of private banking for Citi Global Wealth, where she oversaw private banking activities across 25 offices in the U.S. and Canada, serving ultra-high-net-worth families and their closely held businesses and philanthropic ventures. Behzadi serves on the board of trustees of the Iranian American Women Foundation, is a founding member of the Ambassadors for Georgetown University's Institute for Women, Peace and Security and has been a board member of the Los Angeles Economic Development Corporation since 2016.

Darnel J. Bentz is a senior wealth advisor at Kayne Anderson Rudnick Wealth Advisors, where he has built a practice centered on sophisticated wealth management solutions for high-net-worth clients over 12 years with the firm. He has secured approximately \$100 million in new assets over the past two years, highlighted by a single \$35-million relationship with a nonprofit organization, while maintaining a three-year average client retention rate of 95%. As a member of the firm's investment committee, Bentz shapes strategy, conducts due diligence and advocates for alternative investment solutions that have since influenced firm-level offerings. In 2025, he was appointed to the InvestmentNews Advisory Committee, through which he contributes 12 articles annually and participates in video panel discussions on topics including alternative investments and tax planning.



Keith Patrick BANNER
Partner
GREENBERG GLUSKER
Professional Services

A partner at Greenberg Glusker, Keith Patrick Banner has spent 18 years developing a practice centered on business insolvency, distressed transactions and bankruptcy-related litigation across retail, entertainment, technology and real estate. He guides companies through the full spectrum of insolvency solutions, from out-of-court remedies such as assignment for the benefit of creditors to chapter 11 reorganizations and chapter 7 liquidations, while also representing bankruptcy trustees through complex investigations, asset sales and contentious litigation. Banner brings additional depth in fraudulent transfer and preference recovery actions, as well as mergers, acquisitions and private equity transactions. He serves on the board of the Los Angeles Bankruptcy Forum and holds memberships in the Financial Lawyers Conference and the American Bankruptcy Institute.



Letitia BERBAUM
Founder & Wealth Advisor
BLUE SANDS WEALTH
Asset/Investment Management

Founder and wealth advisor of Blue Sands Wealth, Letitia Berbaum has built her firm around a focused client base that includes individuals, families, widows and business owners navigating exit planning, establishing a distinct niche within the wealth management space over 15 years in the industry. In the past three years, she has spoken or presented at 15 wealth management conferences and workshops, including RIA Edge, Portfolio Summits, Family Office Club and NAWRB, and has been recognized as an Orange County Five-Star Wealth Manager for eight consecutive years. Berbaum serves on the Investment Committee of Goodwill of Orange County, the Audit, Finance and Budget Committee of USA Volleyball, the Emerging Leaders Council of Orange County United Way and the Women's Guild of Tilly's Life Center.



Darnel J. BENTZ
Senior Wealth Advisor
KAYNE ANDERSON RUDNICK WEALTH ADVISORS
Asset/Investment Management



Rick BARRAGAN
Managing Director
JPMORGANCHASE
Asset/Investment Management

Rick Barragan is a managing director and head of Los Angeles at J.P. Morgan Private Bank, where he leads a team of bankers and specialists serving high-net-worth clients. His 35-year tenure at J.P. Morgan has taken him from the Global Credit Risk Management Group to Head of Sales for the Equity Finance Desk covering institutional investors across the Americas, EMEA and Asia. Barragan was named a Leader of Influence by the Los Angeles Business Journal in 2024 and earlier received the Harlem YMCA's Black Achievers in Industry Award. He serves on the boards of the Debbie Allen Dance Academy, Green Dot Public Schools California, the Boys and Girls Clubs of Metro Los Angeles and the Los Angeles Urban League, and co-sponsors The Fellowship Initiative, which provides academic and leadership development for low-income communities.



Carol BATES
Private Wealth Advisor
STRATEGIC VIEW ADVISORS
Asset/Investment Management

Carol Bates is a private wealth advisor at Strategic View Advisors, where she has spent six of her nearly two decades in finance delivering personalized financial planning and investment management to clients navigating complex financial decisions. Beyond her client-facing work, she contributes to the firm's financial planning and investment committees, where her insights help shape firmwide strategies that directly influence client outcomes. Bates' transparent communication style and focus on aligning financial plans with each client's individual goals have made her a trusted resource within the organization. Through Strategic View Advisors' philanthropic initiative SVA C.A.R.E.S., she supports Foster Nation, the Alzheimer's Association, the American Cancer Society and the Humane Society as part of a firm-wide commitment to strengthening the communities her clients call home.



Warren BIRO
Partner
MANATT, PHELPS & PHILLIPS, LLP
Professional Services

Warren Biro is a partner at Manatt, Phelps & Phillips, LLP, where his practice centers on commercial lending and financing transactions spanning asset-based credit facilities, venture debt and leveraged acquisitions across the technology, fintech and life sciences sectors. He recently represented one of the country's top-performing banking companies in closing a \$475-million senior secured syndicated credit facility to a major energy drink manufacturer, a \$195-million facility to a national restaurant chain and a \$77-million facility to a group of premium culinary solutions companies serving the travel, retail and hospitality industries. Biro also represented a leading specialty finance company in closing an \$80-million credit facility to a cloud-based networking and security firm and a \$30-million facility to an artificial intelligence robotics company.