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Advertising Supplement

The San Fernando Valley Business Journal presents

TRUSTED ADVISORS 2012



This special advertising supplement did not involve the reporting or editing staff of the San Fernando Valley Business Journal.

TRUSTED ADVISORS 2012

Publisher's Letter



Once again, we're pleased to recognize more than 100 accountants, attorneys, business bankers, insurance professionals and wealth managers working and doing business in the greater San Fernando Valley region.

These individuals, all of whom are trusted advisors to their clients, are recognized for their commitment to high-quality client service, their longevity as professionals in their chosen fields, and their commitment to overall excellence.

When we designed this awards program, our plan was to focus on professionals who were actually servicing clients and accounts - those individuals actively engaged predominately as a client's main point of contact and doing most of the client services work. Even with these criteria in mind, we were also able to recognize a few executive-level professionals who met our client service awards guidelines.

Each of the five professional categories had individual awards criteria. Certified public accountants and attorneys had annual billing requirements, business bankers had a portfolio threshold, insurance professionals were required to meet minimum annual premium revenue, and wealth managers had to maintain a minimum portfolio as well. While the size of the client account was certainly considered during the awards selection process, the key driver was client and referral source testimonials. Reading through the submitted material told us clearly that all the nominees are key players in their clients' respective success stories.

I want to thank the members of our advisory committee: Michele Grace of Chase, James Hillman of BNY Mellon Wealth Management, Maria Nazario of California Society of CPAs, Don St. Clair of Woodbury University and Carol Suruki of Moss Adams, LLP. Each of these individuals was instrumental in identifying our honorees. It was no easy task by any means. It required each member to read through a few hundred pages of biographical information, statistics, client testimonials and professional experience.

At our recent annual Trusted Advisors event, we proudly announced the 2012 class of Trusted Advisors, whose stories are also detailed in the pages of this special supplement to the San Fernando Valley Business Journal.

Congratulations once again to each of our 2012 nominees!

Best regards,

Josh Schimmels
Associate Publisher

Advisory Committee



Michele Grace
Vice President &
Area Manager
Chase



James Hillman
Regional Managing
Director Portfolio
Management -
Southern California
BNY Mellon Wealth
Management



Maria Nazario
Strategic Relations
Director
California Society
of CPAs



Don St. Clair
Vice President of
University Marketing
Woodbury
University



Carol Suruki
Partner
Moss Adams LLP

KEITH TODD ZIMMET
Managing Shareholder
 Lewitt, Hackman, Shapiro,
 Marshall & Harlan

Attorney Keith Todd Zimmet knows the ins and outs of working with businesses and has negotiated billions of dollars in transactions throughout his career.

Keith Todd Zimmet is the managing shareholder for law firm Lewitt, Hackman, Shapiro, Marshall & Harlan in Encino. Zimmet has a commercial, corporate and real estate practice and has been practicing law since for 25 years. His focus is on negotiating, structuring and documenting large financial transactions.

Zimmet says what helps him better serve his clients is the fact that, unlike many other lawyers, he's been in his clients' shoes. Zimmet was one of the owners and operators of a hospital in Norwalk for nine years.

"I have a deeper understanding from a business perspective, not just a legal perspective," he said. "Sometimes lawyers just get caught up in the details of a certain agreement, and they lose sight of the bigger picture. ... I try keeping in mind the long-term business

implications of what we're working on."

Zimmet says his long-term approach has led to lengthy client relationships, with some having lasted more than 20 years.

Zimmet's clients come from many industries, including the areas of banking and finance, commercial real estate, entertainment, health care, education, manufacturing, among others. His experience includes negotiating secured and unsecured financing; asset-based lending; buying, selling and leasing of real estate; mergers and acquisitions; shareholder disputes and many other areas.



Zimmet has taught business law as an adjunct professor at the University of California, Los Angeles has written and edited for various publications.

"He's efficient, timely and excellent at what he does. ... He deals with the issue in a very logical approach and stays with it until it becomes a successful conclusion for the client. In my real estate career, we have been in some very challenging situations. He was able to jump into the mire and mud and deal with it."

Monty Morton, real estate investor in Agoura Hills



Managing Shareholder

- Chair, Commercial Finance Practice Group
- Co-Chair, Real Estate Practice Group
- Corporate Practice Group
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LEWITT HACKMAN

warmly congratulates our own

KEITH T. ZIMMET, ESQ.

and all of the

**2012 TRUSTED ADVISORS
 & NOMINEES**

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