

The San Fernando Valley Business Journal presents

Trusted Advisors 2013



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TRUSTED ADVISORS 2013

Publisher's Letter

We're excited to once again honor the outstanding accountants, attorneys, business bankers, insurance professionals and wealth managers helping their clients to thrive here in the greater San Fernando Valley region.

These individuals, all of them well-deserving of the "trusted advisor" mantle, are recognized by the San Fernando Valley Business Journal for their commitment to high-quality client service, their longevity as professionals in their chosen fields, and their commitment to overall excellence.

With the many great professionals providing services in our area, it's not easy to single out a select few to be honored. We collect and examine a long list of finalists and review each within his or her respective professional category. Within each category, there are individual awards criteria. Certified public accountants and attorneys have annual billing requirements, business bankers have a portfolio threshold, insurance professionals are required to meet minimum annual premium revenue, and wealth managers have 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 is ultimately what steered us in the direction of our honoree selections.

I want to thank our presenting sponsors: Michele Grace of Chase, James Hillman of BNY Mellon Wealth Management, Maria Nazario of California Society of CPAs, Alan Buckle of Community Bank and Stephen Redmond 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 2013 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 2013 finalists!

Best regards,

Josh Schimmels
Associate Publisher



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Alan Buckle
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HONOREES

► ATTORNEY



KEVIN REX
PARTNER

**LEWITT, HACKMAN, SHAPIRO,
MARSHALL & HARLAN**

KEVIN REX provides business and corporate counsel to high net worth individuals, entrepreneurs, corporate executives, privately held businesses, family owned businesses, and mid-market companies in a variety of industries.

Rex's more than 17 years of practice at Lewitt Hackman includes hands on experience in managing transactions ranging from a few hundred thousand dollars to a hundred million dollars in California, nationally and internationally as well as structuring, negotiating and drafting documentation relating to mergers and acquisitions, buy-

ing and selling businesses, joint ventures, revenue sharing, and other business arrangements.

Rex strategizes with clients on different options and alternatives relating to difficult operational or business decisions. He also effectively counsels clients regarding business succession issues as well as the transfer of assets from one generation to the next generation. In short, Rex represents Lewitt Hackman clients in all aspects of company ownership in very diverse industries.

After negotiating hundreds of millions of dollars of transactions over the course of his career, Rex has received numerous honors, including being rated AV 5.0 Preeminent by the Martindale-Hubbell, which is the highest rating awarded by peers of the bar and judiciary for legal ability and ethical standards.

"I have been fortunate to have had the opportunities to work with great lawyers over the past 37 years of my public accounting career," said Mary O. Akpovi, MBA, Ph.D. CPA, a Partner with Martini, Iosue & Akpovi. "I have to honestly say that Kevin is in a very unique category. I truly admire not only what a great attorney he is, but also what an amazing human being he is – who cares greatly about his family, his colleagues, other professionals and the community as a whole."

"I have had the opportunity to know Kevin, as an attorney and a family man, for several years, having worked with him on various projects for a mutual client. His dedication to people in general and his clients in particular is beyond description. From taking phone calls while on vacation, dealing with urgent issues from the most inconvenient places, to making trips to my office, in the midst of the most tragic period in his life, to ensure that a client's urgent need is met, Kevin defines the phrase 'trusted advisor.' He never ceases to amaze me and working with him has made me a better professional."

Mary O. Akpovi, MBA, Ph.D. CPA
Partner
Martini, Iosue & Akpovi, CPAs