

PEOPLE ON THE MOVE

HIRINGS, PROMOTIONS, BOARD MEMBERS AND SPECIAL ANNOUNCEMENTS IN SAN DIEGO



FINANCIAL SERVICES
New Hire



Lori Helmers

Lori Helmers has joined City National Bank as senior vice president and manager of Structured Trade Finance. She reports to Steve Bash, global head of Trade Finance and Supply Chain. An established leader with 25 years of global trade experience, Helmers is responsible for managing short- and long-term trade financing solutions and risk mitigation programs within the Capital Markets group. City National is based in Los Angeles and has \$91.2 billion in assets and 68 branches across the country.



ACCOUNTING & FINANCE
Promotion



Jennifer Betyar

Jennifer Betyar has been named Tax Senior Manager at L&B. Jennifer has over 10 years of experience, joining L&B in 2016, and has made a significant impact on our clients and our firm culture. She assists with entities and individuals at L&B and helps lead the firm's High Net Worth Individuals practice group. "Jen's dedication to communication, collaboration and client service makes her a joy to work with" said Tax Partner, Michelle Mhyra. "She is a valuable member of the team and I look forward to having her in senior leadership."

Jen attended University of Southern California where she earned a Bachelor of Science in Business Administration – Accounting.

For more information: www.LBAdvisors.cpa or (858) 558-9200



ARCHITECTURE
Promotion



Virginia Maggiore

Virginia Maggiore, AIA, has been named Principal of RDC, a full-service, award-winning architecture firm. Since joining RDC in 2019, Maggiore has built the firm's Retail Store Rollout and Planning practice, adding retail and cannabis industry clients to the firm's roster and garnering accolades for her work. Maggiore offers clients 20 years of experience in the retail, wholesale, and international markets where she has successfully developed and implemented retail strategies for global brands. She works in close collaboration across the RDC architecture, interiors and procurement teams to provide clients with a detailed brand experience uniquely designed to fit their needs.



ACCOUNTING & FINANCE
Promotion



Casey Hart

Casey Hart has been named Tax Senior Manager at L&B. Casey joined L&B 10 years ago after graduating from Fort Lewis College in Durango, CO. Casey assists with entities, individuals, and trusts at L&B and helps lead the firm's International, Multi-State, and Real Estate practice groups. In addition, Casey is also heavily involved in L&B's internal training and mentorship programs. His efforts made towards firm and staff development resulted in being presented the 2021 Exemplary Leadership Award, voted on by L&B's staff. "Casey's contribution to firm development and client service is truly a testament to his dedication to L&B" said Tax Partner, Jeff Ackley. "I look forward to the positive impact he will continue to make as he moves into the Senior Manager role."

While attending Fort Lewis College Casey earned a Bachelor of Science in Business Administration – Accounting and a Bachelor of Science in Business Administration - Finance.

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COMMERCIAL REAL ESTATE
Announcement



Stacey Tyree

Re:Align Tenant Strategies has announced the addition of Stacey Tyree as Principal. Stacey has fifteen years of experience as a commercial real estate attorney and has spent her career focusing on acquisition, disposition and leasing transactions for corporate clients. Stacey began her career at Troutman Pepper LLP (previously Troutman Sanders) and most recently was a partner at the commercial real estate firm Crosbie Gliner Schiffman Southard & Swanson LLP (CGS3). Stacey notes, "When I decided to leave the practice of law and began investigating brokerage opportunities at commercial real estate firms, Re:Align really impressed me with their unique team-based approach. I've worked with a number of brokers over the years, but I've never experienced the high level of service and expertise that the Re:Align team provides to their clients. I knew that representing tenants at Re:Align would be a great fit for my skill set and the team's detailed and thoughtful approach is consistent with how I counseled my clients as an attorney."

ABOUT Re:Align –

Re:Align exists to get better and more favorable deals for commercial real estate tenants in the life science, technology and professional services sectors. Purposefully small and nimble, our commercial real estate boutique is owned and run by its principals and recently celebrated its 10-year anniversary.

The Re:Align team has represented public and private companies across multiple sectors, including Nike, Ligand Pharmaceuticals, Tandem Diabetes, Oric Pharmaceuticals, DLA Piper, Neurelis, Kate Therapeutics, Longboard Pharma, Mainstay Medical, Mintz Levin, Upper Deck and SHARP Healthcare.

To find out more, visit: www.realignts.com



ACCOUNTING & FINANCE
Promotion



Donny McGraw

Donny McGraw has been named Tax Partner at L&B. Donny joined our firm in 2018 and has over 12 years of public accounting experience. Donny specializes in tax consulting and compliance for closely held businesses and high net worth individuals, including commercial and residential real estate, equity compensation, international tax and mergers and acquisitions. Donny has made an impact on both our clients and our firm by helping to lead our International and Mergers and Acquisitions practice groups. "Donny's commitment to the firm, our employees and our clients showcases our values in such an impactful way" said Managing Partner, Steve Brownell. "We are excited to have him join the partner group and look forward to his continued growth at L&B."

Donny attended San Diego State University where he earned a Bachelor of Science in Business Administration – Accounting degree as well as a Master's of Science Accounting - Taxation degree.

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