DANA ALLGOOD
West Market Executive, Global Commercial Banking
Bank of America

Dan Allgood has worked in accounting and finance for three decades. She is the manager of BOB’s global commercial banking business in the Western U.S., focusing on healthcare, education and not-for-profit clients, generating more than $50 million annually. She leads a team of 15 bankers in six offices: San Diego, Seattle, San Francisco, Los Angeles, Newport Beach and Phoenix. Allgood grew portfolio size by over 8% in 2022 representing billions of dollars in loans and deposits by these clients. She has generated a record number of new clients in 2022 and earned double-digit growth in client satisfaction and employee satisfaction across her team. Allgood has served as board chair for Big Brothers and Big Sisters of San Diego, currently on the board for the San Diego Regional Chamber of Commerce and is board treasurer for San Diego Food Bank. She can be reached at d.allgood@bofa.com or 619-515-5630.

ESTHER AMANO
Controller
Capstone Advisors

A 20-year veteran in accounting and finance, Esther Amano has had a monumental impact on Capstone Advisors where she is controller. She brings strong technical skills and a genuine care for the company’s accounting staff to her job, as well as a focus on treating investors and tenants with care. During her tenure with a large commercial development firm, her analyses were relied upon by equity partners and lenders. She oversees a portfolio exceeding 1 million square feet. Her experience spans all facets of commercial real estate including Big 4 CPA firm, private commercial real estate development and commercial loan underwriting. With a dynamic approach, dedicated to high-quality, end-user-driven deliverables, she oversees the firm’s treasury management, financial reporting, investor administration, compliance and lender draws. She was a committee member for Boy Scouts of America, treasurer for the Kensington Preschool Parent Auxiliary and is an accountant for the San Diego Canoe Kayak team.

JENNIFER BARNES
CEO
Optima Office

Jennifer Barnes is the CEO of Optima Office and has worked in the finance and accounting fields for 20 years. She has led Optima Office, an outsourced accounting and human resource firm, from its launch in October 2018 to a profitable, rapidly growing company with 80 employees. She had Optima Office designated as a Certified Women-Owned Business and expanded from firm headquarters in San Diego to throughout California, opening a second office in the San Francisco Bay Area. Barnes has a reputation for holding herself to the highest standards, from creating clear and concise financial reports to maintaining client satisfaction. Barnes volunteers for programs that encourage younger generations to develop entrepreneurial skills and prepare for careers. She is on the board for Junior Achievement of San Diego County and is a mentor for the Last Program at SDSU. She volunteers with the San Diego Leadership Council of the San Diego Food Bank.

LIVIA BENJAMIN
Partner
Duffy Krupedin, LLP

Livia Benjamin, who has 18 years in finance and public accounting, is a tax partner at Duffy Krupedin, LLP. Benjamin’s level of detail and care has successfully transitioned clients and staff during challenging and unsettling times. She is a leading member of the Taxation and Finance committees within the firm and strives to ensure that the firm is operating at the highest levels of technical and professionalism. Among her accomplishments, she has guided the implementation of a successful internal program and firm tour event; developed a supportive and successful mentor program; directed the firm’s conversion to new software; co-led the firm’s pro bono initiative; and participated in leading multiple firm acquisitions and mergers. She leads her time and efforts to The International 2.11.2 Foundation, a nonprofit organization that supports the needs of families and individuals affected by dementia 22.12.2 differences. She can be reached at livia@dok.cpaa or 858-642-3050.

ISABEL BERNAL
VP and Controller
Maravai LifeSciences

Isabel Bernal has more than 15 years of progressive leadership experience and 20 years in accounting and finance. She joined Maravai LifeSciences in 2020 and is VP and controller. An influential, dynamic and expert accounting leader, Bernal brings a unique balance of being objective, professional and technically proficient to her accounting practices. She champions fostering a stable and connected team environment and has expertly applied her knowledge of best practices to increase the company’s core accounting processes’ efficiency while significantly improving its control environment. Bernal is a trusted partner at the executive level and is respected by the Maravai LifeSciences board. She is well known for her effective communication across all levels of the organization. Maravai has been able to recognize its accounting function under her leadership, greatly accelerating its days to close while meeting the business demands of a high-growth, highly dynamic public life sciences company.

TASIA BLAZEVICH
Managing Director
Deloitte

Tasia Blazevich has been in the accounting and finance field for 18 years and is San Diego leader and managing director at Deloitte in the Accounting and Reporting Advisory Services practice. Blazevich is an experienced account professional and leader with expertise in the life science industry, technical accounting, transaction advisory support services, SEC reporting, financial statement reporting and Sarbanes-Oxley implementation and compliance. She leads various initiatives/go-to-market strategies within the firm. Active in the San Diego business community, she is part of the Corporate Directors Forum Committee, and is in the process of being on the membership committee of the Life Science Cares Board as an advisor. An emotionally intelligent leader passionate about mentoring, coaching, people development and fostering a collaborative team environment, Blazevich is a market leader and driven to produce results, with a proven track record of new business development and brand awareness. She can be reached at tblazevich@deloitte.com or 858-723-1240.

ESTHER AMANO
Controller
Capstone Advisors

TASIA BLAZEVICH
Managing Director
Deloitte

BRENDA BOCK
Audit and Assurance Partner
Baker Tilly US, LLP

Brenda Bock, an audit and assurance partner at Baker Tilly, has more than 15 years of experience in public accounting and private industry specialization. She manages all aspects of audit engagements including planning, assessment of internal controls, analytical reviews, budget preparations and audit execution. She specializes in performing audits of charter schools, school districts, local governments, Native American tribal governments and casinos, and not-for-profit organizations. Bock serves on the Friends of Hope School board and volunteers for beach cleanups in the community. Every week, she rallies a group of volunteers to pick up trash on the streets of Carlsbad. Bock is deep in the missions of the organizations she audits and helps to support their programs and financial stability through her work. She can be reached at brenda.bock@baker.tilly.com or 858-320-4869.

JILL BROADFOOT
Chief Financial Officer
aTyr Pharma

Jill Broadfoot is Chief Financial Officer of aTyr Pharma (Nasdaq: LIFE), a publicly traded clinical stage bio-technology company that has more than 30 years of experience in accounting and finance. She raised $86 million via public offering in September 2021 and implemented an IPO vehicle to support the company’s financing, including a $20 million common stock purchase agreement in 2020. Prior to joining aTyr in 2018, she was CFO of Emerald Health Pharmaceuticals Inc. and Emerald Health Biotechnologies Inc., where she was responsible for establishing operations, corporate governance, finance and accounting and investor relations functions. She previously was VP, U.S. Corporate Controller at GW Pharmaceuticals, was CFO of Vical Inc., and held various positions at DIO Global, Inc. She was an audit manager at Ernst & Young LLP and division controller for the Medical Imaging Centers of America. She serves on the board of directors for Otonomy, Inc. and AcelRx Pharmaceuticals, Inc. (ACRX).

LISA BRUNER
Controller
Jewish Family Service of San Diego

Lisa Bruner has been with Jewish Family Service of San Diego for four years and has more than three decades of experience in finance and accounting. As controller for JFS, Bruner helped the organization’s budget move from $20 million to $86 million, helping JFS fulfill its critical mission to serve vulnerable populations including the unhoused, immigrants, seniors and families. Bruner provided steadfast leadership during the COVID-19 pandemic while overseeing fiscal day-to-day operations. With the agency operating budget doubling over the last fiscal year, she has improved internal systems to meet growing demand, reorganized and expanded the accounting team and strengthened support provided to program teams. She has served on the Emergency Food and Shelter local board and has been part of San Diego Rotary Club 33, Rotary Club of Coronado, San Diego Senior Alliance, International Society to Advance Alzheimer’s Research and Treatment and Coronado Junior Woman’s Club.

JENNIFER BARNES
CEO
Optima Office

TANASUE CARPENTER
Chief Financial Officer
Annex Brands, Inc.

Annex Carpenter is CFO at Annex Brands and has more than two decades of experience in accounting and finance. The woman in Annex Brands’ history to hold the position of CFO, she is also the only second CFO in company history. Carpenter joined Annex Brands as its director of accounting in 2012, and in 2018, was promoted to executive director of finance & controller. She was promoted again in 2020 to vice president of finance, before being elevated to the position of CFO in December 2021. While not a board member, Carpenter is a member in good standing of the International Franchise Association. Carpenter is a San Diego native who was raised in Santee. She earned a B.S. degree in business administration from the University of Phoenix in 2003 and earned an MBA from the University of Phoenix in 2006.
JANUARY 30, 2023

Equitable Academy program. In 2021, Deloitte's Making Accounting Diverse and Inclusive (MADI) initiative, led by Chau, was named a Top 50 Honoree by the San Diego Business Journal. She sponsors and mentors several peers and cohorts, leading to her establishing the inaugural San Diego chapter of the National Association of Black Accountants. In that role, she organizes cross-functional events to promote cultural awareness, education and appreciation; and creates opportunities for the company's professionals to connect outside of client service responsibilities. She serves as an executive adviser to the chapter's board. Chau leads Deloitte San Diego's efforts to increase diversity in the accounting/professional services career pathway through Deloitte's Making Accounting Diverse and Equitable Academy program. In 2021, Deloitte committed $75 million to fuel greater racial and ethnic diversity in tax and accounting. Her vision to provide Black professionals a platform to connect with their peers and cohorts led to her establishing the inaugural San Diego chapter of the National Association of Black Accountants.

Jennifer Cook is Tax Senior Manager at EisnerAmper. Over the past decade, she has made a significant impact on the company's clients and the firm's culture. In addition to her technical expertise, she is a trusted mentor and advocate for various programs. Specifically, Cook takes an active role in the EisnerAmper Cares committee which is a firm-wide initiative that encourages and supports volunteer efforts of the firm's employees in their communities. Her dedication to collaboration and client service make her a joy to work with. Cook was previously staff accountant and senior accountant at EY in San Francisco. She attended USC where she earned a bachelor of science in business administration - accounting and was on the ski and snowboard team. She has a CPA certification from the California Board of Accountancy that was issued in 2015 with no expiration date. She can be reached at 858-413-5820.

Quyen Dao-Haddock is Controller at IQHQ. Quyen Dao-Haddock has been responsible for scaling the accounting department from eight to 14 team members and establishing and implementing comprehensive accounting policies. She has worked closely with investors to meet significant milestones for the company. Dao-Haddock has a friendly and approachable attitude, as reflected in her close-knit team. She consistently puts effort into keeping team members connected through department outings and activities. Dao-Haddock is a CPA with more than 20 years of financial and accounting experience and has been responsible for accounting operations of more than $30 billion in assets throughout her career. She was chief accounting officer at Presidio Property Trust, and an audit manager at KPMG LLP. She received a BS in business administration - accounting and was on the ski and snowboard team. She has a CPA certification from the California Board of Accountancy that was issued in 2015 with no expiration date. She can be reached at 858-358-9200.

Anna E. Diaz, Partner and Wealth Advisor at CI-Dowling & Yahnke Private Wealth, has served on the California State University-San Marcos Business School Advisory Board since 2014, influencing the next-generation workforce. She is an advocate for STEMS/STEAM education, and supports Promises2Kids, a San Diego County nonprofit that helps more than 3,000 current and former foster youth.

Thank you for the important work you do!

California Bank & Trust (CB&T) is proud of Chief Financial Officer Chikako Tyler, named one of the Top 50 Women in SD of Influence for Accounting and Finance.

Her leadership and influence continue to make a positive difference at CB&T and throughout the San Diego business community. Bravo for a job well done!

calbanktrust.com

CONGRATULATIONS, CHIKAKO
Sarah Eberhardt is a positive influence on her profession and an innovative leader. She has been recognized for her exceptional leadership, business knowledge, skills and achievements. Her responsibilities include internal audit, risk management and climate/sustainability reporting. She leads her team to find innovative approaches to work smarter and efficiently while covering more risk areas. Eberhardt has the highest level of ethics and integrity, leading by example. She drives her team members to be trusted risk advisers. Her team delivers ResMed’s ESG (Environmental, Social and Governance) report and has raised the bar with climate reporting targets and goals. Eberhardt is a board member of the Institute of Internal Auditors San Diego Chapter, co-chair of the Girl Scouts San Diego’s STEM Council, and an Audit Committee member of the Girl Scouts San Diego.

Emma Epes is a partner with EY’s real estate, hospitality and construction practice. She has more than 15 years of experience in accounting, auditing and advisory services to real estate clients, including SEC registrants, real estate funds, operating companies, REITs and partnerships. She has extensive experience with real estate fair value reporting, valuation of real estate joint ventures and projects, purchase price allocations, construction contract accounting, complex carried interest models and other advanced real estate accounting. Epes has a bachelor’s degree in accounting with a minor in applied mathematics from Villanova University. She is a licensed CPA and a member of the AICPA, an executive board member of the Burnham-Moores Center for Real Estate at the University of San Diego and a member of EY’s Professional Women’s network. She is a past board chair of Kitchens for Good and a member of the finance committee. She can be reached at 619-929-5142.

Michele Farmer, Chief Accounting Officer of PacBio, joined PacBio in 2021 to build its accounting organization and support the company’s planned growth. She applies a three-pronged approach in her executive leadership, which includes partnering with colleagues to build scalable processes and internal controls to address risk and inefficiencies, implementing automation solutions that reduce manual intervention, and providing strong coaching and mentorship for team members. She led the team through the integration of two entities, the first in the company’s history. This included purchase accounting, integration of payroll and accounting operations, internal controls and tax compliance. Farmer also led the team through implementation of a new stock administration platform. She added employees to expand capabilities in tax compliance, technical accounting, revenue recognition and SEC reporting. Farmer is a CPA and holds a bachelor’s degree in business administration from San Diego State University.

Stasia M. Forrest is Tax Manager with Wastvedt & Company. She has worked in the accounting field since 1995 and is a CPA in California. In addition to her MBA in Finance and Accounting, Forrest carries the highly respected CFF (Certified Financial Forensic) certification and has helped identify fraud within two clients’ businesses. She has an exceptional track record of accurately handling financial reporting. Her work as a highly organized and detail-focused accountant has led her to specialize in efficiency and productivity, helping improve efficiency of account processing by 50% within the firm. Forrest has helped guide the firm’s growth in size and revenue by nearly 20% within the last two years, and has taken on the role of mentor to fellow CPAs and accountants. She organizes and runs the weekly Tax Meeting, tracking firm performance, client projects and building positive client relationships. She can be reached at stasiasf@wastvedtco.com.

Kathy Greci is the Vice President of Finance for C3 Risk & Insurance Services. She has been with the company for a little over a year and a half. Greci has been in accounting and finance for 16 years and prides herself on staying updated on new codes and policies sent out by the FASB (Financial Accounting Standards Board). Greci is an exceptional leader for the company as she treats everyone with respect; she maintains positive relationships with fellow executives and co-workers. In five years, she was diagnosed with breast cancer two times. She worked her way through diagnoses and treatment cycles. During that time, she was promoted from a senior accountant to controller for a $30 million insurance claims company. She never quits. Greci enjoys being in the office while also being at home living her best life. She prides herself on staying updated on new codes and policies sent out by the FASB (Financial Accounting Standards Board). Greci is an exceptional leader for the company as she treats everyone with respect; she maintains positive relationships with fellow executives and co-workers. In five years, she was diagnosed with breast cancer two times. She worked her way through diagnoses and treatment cycles. During that time, she was promoted from a senior accountant to controller for a $30 million insurance claims company. She never quits. Greci enjoys being in the office while also being at home living her best life. She prides herself on staying updated on new codes and policies sent out by the FASB (Financial Accounting Standards Board).
ANDREW BASS PROOFREADER/EDITOR

PUBLIC ACCOUNTANT. Jessica Groat-Howe serves as CFO for the Bill Howe Family of Companies where she combines her passion for accounting and finance with leadership and employee development. She is a graduate of Gonzaga University in economics and international finance, and a Certified Public Accountant. Her accomplishments in the last year are many. They include sourcing and purchasing a building to allow business scaling and employee growth; outsourcing accounts payable operations, reducing department cost and allowing in-house accounting to concentrate on higher-level tasks; and migrating the company accounting system to a cloud-based platform ensuring data continuity and giving additional flexibility to the department.

A San Diego native, Groat-Howe enjoys spending time with her family among the county’s numerous natural phenomena. She is a loving mother, wife and daughter, and she can swing a golf club, too. She can be reached at jessicah@mail-howefamily.com or (619) 704-4837.

ALEYNA GROVES COO Groves Capital Inc.

Aleyna Groves is COO of Groves Capital Inc., a hybrid mortgage broker and banker based out of San Diego. Having well over a decade of experience in the mortgage business, Groves formed Groves Capital in 2016 with her husband Christoffer, a successful Realtor with experience dating back to the early 2000s. Together, they’ve built a company that puts clients’ needs first while also providing a superior platform to its loan officers. Groves Capital’s mission is to provide a one-stop-shop for all clients’ needs while extending the lowest rates in the market and the best experience possible. This diversity allows it to find the right solution for a client’s individual needs. Aleyna Groves has worked in the field of accounting and finance for 15 years. She can be reached at alev@groves-capital.com or 619-212-1127.

NICOLE HENDERSON Controller MyPoint Credit Union

Nicole Henderson is Controller at MyPoint Credit Union, the organization formerly known as Point Loma Credit Union. She brings 17 years of accounting experience—with credit unions, banks, nonprofits and for-profit businesses—to her job. Henderson has been controller with MyPoint for five of the six years she has been employed there. She has experience in financial statement analysis, budgeting and forecasting, cost accounting, cash management, Generally Accepted Accounting Principles (GAAP) and Sarbanes-Oxley (SOX) compliance. Her job includes working with both federal and state regulatory agencies. During her time at MyPoint, she has improved and sped up several processes, making the credit union into a better and stronger financial institution. Henderson is constantly improving her qualifications and skills. Outside of work, she volunteers in the community. She can be reached at nhenderson@mypointcu.com, 858-268-7270 or 858-430-7106.

HEATHER HERNANDEZ Director CBIZ & MHM

Heather Hernandez is a Director at CBIZ HMH, LLC. She is also a shareholder of MHM. Hernandez has more than 15 years of public accounting experience. She has completed both financial and internal control audits at a variety of industries, including not-for-profit, manufacturing, distribution and professional service firms. She co-leads the San Diego Not-For-Profit Practice Group and has expertise in the not-for-profit industry, working strategically with her clients to strengthen internal controls and procedures. Her experience also includes auditing in accordance with Uniform Grant Guidance for not-for-profit organizations, as well as commercial companies that receive federal funding that require program specific audits under government auditing standards. Hernandez is a CPA in California and holds a Bachelor of Science degree in accountancy from San Diego State University. She can also draw on the resources of CBIZ, which has more than 100 offices and 6,000 team members throughout the United States.

Daisy Hom is a Partner at Duffy Kruspodin, LLP where she leads the accounting and auditing practice. In her nine years working out of the firm’s La Jolla office, she has expanded the firm’s audit practice by over 300% and established and expanded the firm’s niche areas of consumer finance, construction, manufacturing and distributions, not-for-profits, employee benefit plans and the apparel industry. Hom currently chairs Duffy Kruspodin’s Audit Committee and is senior member of the Executive Committee, which guides the firm’s strategic growth and objectives. She also managed and led the firm’s Marketing Committee.

Hom is known to provide mentorship to the Duffy Kruspodin staff. Recently, she developed technical training programs for the audit team. She also helped implement a remote work policy, resulting in increased employee satisfaction, productivity, and a decrease in PTO usage.

Hom can be reached at daisyd@dklcpa.com or (858) 642-0960.

Congratulations to Kayla Schultz on being named to San Diego Business Journal’s Top 50 Women of Influence in Accounting & Finance 2023. We are grateful for your contributions to the industry and for your outstanding leadership and community involvement. We are inspired by your commitment to excellence.

The Partners of CohnReznick
MEGHANA JAGDISH
Director, Risk Consulting
RSM US LLP

JEN KEYES
CFO/COO
San Diego Hunger Coalition

SUZAN R. KORTH
Partner
Duffy Keupspodin, LLP

JEAN LIN
VP, Finance
Tandem Diabetes Care

ROSEMARY LINDEN
President
Momentum CFO

EisnerAmper congratulates our own Jennifer Cook and all of the 2023 Women of Influence in Accounting & Finance Honorees.

Jennifer Cook
Tax Senior Manager

www.eisneramper.com

AUDIT • TAX • ADVISORY • OUTSOURCING
Jeanne Mann, President of Mann & Associates APC, is a California Certified Public Accountant with 33 years of experience in the field. Through her dedication to the accounting profession, she received the California Society of CPAs 2001 Public Service Award and was the second woman president of the CalCPA San Diego Chapter.

Her firm offers a range of professional accounting, audit, tax and consulting services. It specializes in construction accounting, nonprofit audits, franchise audits, biotech, healthcare and estate planning. Mann is pleased to report her firm increased its revenue by 30% in 2022. A graduate of Arizona State University, Mann is involved in franchise audits, biotech, healthcare and estate planning. Mann is pleased to report her firm increased its revenue by 30% in 2022. A graduate of Arizona State University, Mann is involved in several community organizations. She is treasurer of the Jindo Love Rescue nonprofit organization, whose mission is to save the lives of dogs in South Korea by finding loving families in the U.S. and Canada. She can be reached at 619-222-5900.

Lisa Pecora, Vice President of Global Commercial and Product Finance at NuVasive, leads a team of 40+ people representing the global financial organization that drives optimal decision-making across three business units and 50+ countries. As a global finance executive, she has a proven track record of driving profitable revenue growth while cleaning up inefficiencies and designing integrated planning and processes to maximize shareholder returns. For over 20 years, Pecora has held senior leadership roles at multi-billion-dollar, global med-tech organizations such as Cardinal Health, CareFusion and NuVasive, as well as privately owned companies in the entertainment and services sectors. Outside of her finance responsibilities, Pecora is an active board member for the NuVasive employee resource group, an executive advisory board member for CareFusion and NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an executive advisory board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 international subsidiaries since 2018. She is also an active board member for NuVasive’s international trading entity and all 21 interna

Jamie A. Plemons, Owner of Advanced Estate Planning, began in this industry in high school. Her father, a renowned financial planner, brought her into the office at 14 years old to start learning the basics. Starting with data entry and office management, she quickly graduated to doing paralegal work for the estate planning attorney. By the time she was 18 years old, she obtained her Life and Health Insurance license adding long-term care, health insurance, Medicare, life insurance and annuities to her experience. By the time she was 24 she had passed the FINRA series 7 and 66 exams to become a Registered Investment Advisor. After a break to care for family, she has continued her education with the designations of LDA (Legal Document Assistant), CMP (Certified Medicaid Planner) and CEP (Certified Estate Planner). She continues to advance her education. She can be reached at jamie@advancedestateplanning.com or 619-381-9591.

JAMIE A. PLEMONS
Owner
Advanced Estate Planning

Sandie Portilla serves as Financial Administrator at RJ S LAW. Additionally, she assists the executive team with firm operations. Prior to joining the firm, Portilla served as staff accountant/office manager for a medical software company where she managed all accounting functions of the business and directly assisted the CEO. Additionally, she brings over 10 years of supervisory and customer service experience and is fluent in Spanish. Her community work includes assisting the CEO and COO in allocating funds for billboard campaigns run through the firm for Girl Scouts San Diego and other charitable organizations.

Sandie Portilla
Financial Administrator
RJS LAW

Natalie L. Quirarte, CPF, is Vice President, Financial Planning for Hall Private Wealth Advisors. She develops relationships with people, especially women, not their assets. Through intelligent planning, she assists families, business owners and executives in positioning their financial assets to support their most important priorities: quality of life and loved ones. She takes the time to understand what is truly important in people’s lives, coordinating with other trusted advisors to determine the best use of assets and keeping clients on track with their goals. Quirarte’s passion is to provide new perspectives that illuminate possibilities in her clients’ lives.

Her community involvement includes working to provide financial literacy and resume preparation for survivors of human trafficking. She proudly touts the title of One of 50 Best Moms of San Diego County awarded by Time Warner Cable, as nominated by her son. She can be reached at 760-212-8621.

NATALIE L. QUIRATE
V.P. Financial Planning, CPF®
Hall Private Wealth Advisors

Congratulations to Jill Broadfoot

aTyr Pharma celebrates CFO Jill Broadfoot on being named one of the Top 50 Women in Accounting and Finance in San Diego!

We appreciate your diligent leadership of our financial strategy and effective oversight of our finance and accounting department. Your dedication and contributions are an integral part of supporting our mission to translate findings from our tRNA synthetase platform into new therapeutics for fibrosis, inflammation and cancer.

Jill Broadfoot
CFO, aTyr Pharma

Congratulations, TanaSue!

On behalf of Annex Brands and PostalAnnex, we’re proud to continue to build the franchise network with you, so we can provide more services to more people in more places.

www.annexbrands.com | www.postalannex.com

Congratulations to Jill Broadfoot

aTyr Pharma celebrates CFO Jill Broadfoot on being named one of the Top 50 Women in Accounting and Finance in San Diego!

We appreciate your diligent leadership of our financial strategy and effective oversight of our finance and accounting department. Your dedication and contributions are an integral part of supporting our mission to translate findings from our tRNA synthetase platform into new therapeutics for fibrosis, inflammation and cancer.

www.atarpharma.com

aTyr’s mission is to translate findings from our tRNA synthetase platform into new therapeutics for fibrosis, inflammation and cancer.
Marti Rodish joined EVOTEK in 2018. Under her hands-on leadership as CFO and board member, the business got the No. 1 spot on SDBJ’s 2022 list of Fastest Growing Private Companies in the large category. She was SDBJ’s CFO of the Year in 2021 and made CRN’s Women of the Channel Power 40 and Power 60 lists. With more than 20 years’ experience in management and consulting leadership, Rodish has directed all aspects of service delivery, project management, client relations and global operations. Living in Belgium for two years, she led process integration across seven countries. Prior to joining EVOTEK, Rodish was the managing partner and vice president of professional services for 3RP. Prior to that, she held various leadership roles at Ports America, serving in executive management roles at The Port of Los Angeles and Ports America, Scarbel always prioritizes appropriate staffing and consults with her team to ensure that every employee is equipped to take on their role. She is a trusted advisor to our leaders and executive committee of Cleantech San Diego. She is a member of the American Institute of Certified Public Accountants and the California Society of Certified Public Accountants. She received her B.S. in business administration in 2015 from California State University, San Marcos. She can be reached at investorrelations@contextfunds.com or 201-400-7535.

**MARI RODISH**  
**CFO**  
**EVOTEK**

**FRANCES ROSAL**  
General Accounting Branch Head  
**Naval Information Warfare Systems Command (NAVWAR)**

Frances Rosal is a Certified Public Accountant, a Certified Defense Financial Manager and holds a Financial Management Certification Level 3. She can be reached at charo.rosal@yahoo.com or 619-846-1761.

**KELLY SCARBEL**  
Director of Corporate Accounting  
**Cibus**

Kelly Scarbel, CPA, is Director of Corporate Accounting at Cibus in San Diego. She is a results-oriented accounting and finance professional with both hands-on and management experience in global accounting functions, financial reporting and FP&A. Her supervisor describes her as the consummate professional who consistently leads her peers across organizations by setting a positive example. She is able to create productive work atmospheres in dynamically changing environments. While she manages a team of six individuals very effectively, Scarbel is a hands-on workhorse. While allowing teammates opportunities to take responsibility, when there is a priority job to be done for the F&A team and the company, Scarbel always prioritizes appropriately, rolls up her sleeves, contributes and gets the job done. Outside of work, she is an absolutely wonderful and graceful parent and maintains very high quality volunteer commitments. She can be reached at kscarbel@cibus.com or 201-400-7535.

**KAYLA SCHULTZ**  
**Partner**  
**CohnReznick LLP**

Kayla Schultz is a CohnReznick assurance partner serving public and private companies across a variety of industries, notably renewable energy and technology. She serves as a national assurance instructor for CohnReznick and has led numerous internal and external trainings including renewable energy accounting seminars as well as soft skills trainings. Her strong technical skills help her identify and resolve complex technical accounting issues including business combinations, investment accounting and consolidation, financial accounting modeling, revenue recognition, multifaceted equity and debt financing transactions, and leasing arrangements. She serves on the board of directors and executive committee of Cleantech San Diego. She is a member of the American Institute of Certified Public Accountants and the California Society of Certified Public Accountants. She received her B.S. in business administration at California State University San Marcos. She can be reached at kayla.schultz@cohnreznick.com or 858-380-3451.

**TEAGAN SEMAN**  
Chief Financial Officer  
**Context Capital Management, LLC**

Teagan G. Seman, CPA is CFO of Context Capital Management, LLC, an alternative asset management firm based in La Jolla and Greenwich, Connecticut. The firm manages capital on behalf of some of the world’s most sophisticated single and multi-family offices as well as other institutions. As CFO, Seman oversees all cross-functional areas of the firm including management of the financial reporting for the firm including management of the firm’s relationship with its independent administrator as well as outside audit and tax firms. During Seman’s tenure at Context, she has institutionalized all aspects of the firm’s operations, finance and compliance efforts. Seman began her career at the Big Four public accounting firm Deloitte & Touche LP, where she worked in the financial institutions audit practice before transitioning to the tax practice. In 2017, she joined HeadSpace Inc. to help grow the accounting and finance department during the Series B fundraise, a time of exponential revenue growth.
R ebecca Spane, CFO of INDUS, has over 21 years of accounting experience. She has been with INDUS, a government services provider, for over 11 years. She manages contracts, accounting and project control staff. Spane oversees the cost accumulation and allocation, A/P, A/R, payroll, labor distribution, rev-wraps, and joint venture accounting. She is responsible for banking, cash management and investments. She is responsible for the development of the annual budget, interim financial and indirect rate forecasts. She provides monthly financial reports, monitors indirect rates, analyzes budget variances, coordinates DCAA audits, and monitors indirect rates. She also analyzes policies and procedures. She ensures compliance with FAR and government regulations and supports stock valuations.

T ammy Strayhorn is currently serving in the Naval Information Warfare Systems Command (NAVWAR) as the Deputy Program Executive Officer for Management and Budget for the Naval Information Warfare Systems Command (NAVWAR). She has built out an entirely new finance department. She led the finance team at Biosero, the former private company, and worked diligently to aid in the growth of the organization. Part of her work brought the former private company into compliance with International Financial Reporting Standards and Generally Accepted Accounting Principles (IFRS and GAAP).

M ichelle Talarico is responsible for all aspects of Biosero’s global finances. Since joining Biosero in April 2022, she has built out the finance department. She led the finance team as Biosero made the transition of being privately held to publicly held. She established processes for developing budgets, created clarity for the team and worked diligently to aid in the growth of the organization. Part of her work brought the former private company into compliance with International Financial Reporting Standards and Generally Accepted Accounting Principles (IFRS and GAAP). Talarico has more than 18 years of experience in finance roles. Previously she served as vice president of finance at eMolecules and as controller and finance manager at McElmo. Outside of the office, Talarico is involved with youth sports. She holds a bachelor of arts in accounting from Point Loma Nazarene University.

J oy Timple, Assurance Senior Manager at Moss Adams LLP, has practiced public accounting since 2009. She specializes in providing assurance services to mid-market clients in the technology, life science and manufacturing industries. Her experience includes financial statement audits, engagements, private company and SEC reporting, audits and compliance, and managing all phases of the audit process. Timple leads teams during fieldwork, supervising staff and seniors and coordinating with audit teams in foreign locations and subsidiaries. Timple’s expertise also includes providing services for employee benefit plans, including numerous 401(k) plans, multiemployer health and welfare plans, employee stock ownership plans and pension plans. As a member of the Moss Adams Forum-W business resource group, Timple is willing to speak to groups about choices and options. She is also always willing to personally coach one-on-one as she is clear everyone’s journey is personal. She can be reached at joy.timple@mossadams.com.

C hicako Tyler is Chief Financial Officer (CFO) of California Bank & Trust (CB&T), responsible for development and execution of the bank’s financial and strategic plan. She was twice selected as one of the Most Powerful Women in Banking by American Banker. In 2016, she founded the Banking on Women Business Resource Group, the women’s diversity and inclusion initiative at CB&T. The program pairs seasoned executives with more junior CB&T employees to help them gain insights and confidence. So far, more than 60 women have received mentoring – and a career boost – from their more accomplished colleagues. She was selected from among 14,000 employees of Zions Bancorporation (of which CB&T is a subsidiary) to attend the International Women’s Forum College Leadership Fellows Program at Harvard University. Tyler holds an International MBA from the Amsterdam Business School and a B.S. in mathematics from UC Irvine.

Momentum CFO provides fractional CFO services to small and mid-size businesses. We help business owners feel confident and secure about their finances.

Congratulations, Rosemary, on this well-deserved recognition! We are proud to have you represent Momentum CFO and lead the way for all women in the industry.

Cheers to you!

Rosemary Linden, President

Congratulations to:

Nicole Henderson

On being named Top 50 Women in Accounting and Finance in San Diego!

Thank you for being an inspirational leader to everyone here at MyPoint Credit Union and for helping the San Diego community do more!
ANGIE VANNAJTA
Tax Senior Manager
Moss Adams LLP

Angie Vannatta has practiced public accounting since 2010. She provides tax compliance and planning services to closely held businesses and high net worth individuals, strongly focusing on family-owned real estate. Vannatta’s experience includes compliance tax filings at the federal, state and local levels for businesses and their owners; research and consultations on various tax matters for corporations, partnerships and LLCs; and IRS representation during examination and appeals. Her expertise also includes consulting with clients on transactional issues, entity structure and tax planning. Vannatta has been a leader on the front line of growing Moss Adams’ real estate and private client practices in San Diego and maintaining a motivated, productive and cohesive office workforce during a period of significant disruption. She also recently organized and hosted a virtual seminar geared toward inspiring women to closely held businesses and high net worth individuals, strongly focusing on family-owned real estate. Vannatta has been a leader on the front line of growing Moss Adams’ real estate and private client practices in San Diego and maintaining a motivated, productive and cohesive office workforce during a period of significant disruption. She also recently organized and hosted a virtual seminar geared toward inspiring women on how to grow their professional careers. She can be reached at angie.vannatta@mossadams.com.

MARTA VASQUEZ
Director, Accounting and Finance
R3

Martha Vasquez is Director of Finance and Accounting for R3. She has worked in the accounting and finance space for more than 30 years. She oversees operational and financial accounting for an approximately 200-person company with operations across 26 states and three countries primarily supporting the Department of Defense. In 2022, she led R3 transition from an S to C corporation, establishing an Employee Stock Ownership Plan (ESOP), including obtaining the financing, and led the company through its first formal corporate valuation process. In addition to being a proven financial leader, Vasquez has an exceptionally strong background in government accounting including Defense Contract Audit Agency (DCAA) requirements, the Federal Acquisition Regulation (FAR), Cost Accounting Standards (CAS), and other regulations. She holds a BS in accountancy from the University of San Diego and a Certified Public Accountant certificate (inactive) from the State Board of Accounting.

ALISON WEBER
Chief Financial Officer
San Diego Habitat for Humanity

Alison Weber has served as Chief Financial Officer of San Diego Habitat for Humanity since May 2019. She has more than 25 years of financial leadership experience. She maintained financial stability through COVID-19, working closely with banking partners to ensure that the organization was able to capture all available relief funding and maintain progress with its homebuilding efforts. Weber was previously CFO of the Dental Specialties Group of Henry Schein Inc., based in Carlsbad, for 10 years. Prior to that, Weber was with Cadbury Schweppes for 11 years, where she held several key finance positions in the United Kingdom, Mexico and the United States, ultimately serving as CFO and vice president of finance for the Snapple Distribution Business. Weber is a U.K. Chartered Accountant and has an MBA from the Wharton School, University of Pennsylvania. She can be reached at alison.weber@sandiegohabitat.org or 619-283-4663.

TARA WEISINGER
Principal, Director of Tax Services
Rowling & Associates LLC

Tara Weisinger, CPA is Principal and Director of Tax Services at Rowling & Associates LLC. She joined R&A in 2012. Alongside two other team members, she took ownership of the firm in 2020. As Director of Tax Services, her primary responsibilities include organizing tax return preparation and leading her team in providing personalized tax planning for clients. She hired and trained two team members in 2022 and has kept the firm and clients up to date on tax changes throughout the year. She has taken an active role in the CPA industry by working with the PFS Credential Committee and the CPA evolution. She leads R&A’s charitable committee, which is responsible for everything from client events to firm-wide charitable initiatives. These recently included a backpack drive and a holiday toy drive through STEP (Support the Enlisted Project). She can be reached at tara@rowling.com or 619-295-0200.

SYLVIA WU
CPA, Partner
Baker Tilly US LLP

Sylvia Wu is a partner with Baker Tilly’s tax practice. She has over 15 years of experience providing tax compliance, consulting and reporting services to closely held businesses and public multinationals and their owners. She works in a variety of industries including real estate, technology, manufacturing, energy and healthcare. She assists with specialists related to mergers and acquisition transactions, bankruptcy tax matters and international taxes. Prior to joining Baker Tilly, she had experience in performing services for private to public traded companies and high net worth individuals. For Sylvia Wu, 2023 is a banner year. Last June, she became a partner, one of two in the San Diego office. After exploring work with local, national and Big Four employers, she has landed at a firm where she is ready to thrive as a young leader. She can be reached at sylvia.wu@bakertilly.com or 619-516-8387.

SAN DIEGO BUSINESS JOURNAL
CFO OF THE YEAR
2023 AWARDS

This event recognizes our local chief financial officers’ great achievements within their companies and in the community.

THURSDAY, MARCH 9, 2023
4:30 PM to 7:00 PM
Hyatt Regency La Jolla At Aventine,
3777 La Jolla Village Dr, San Diego

SPONSORS

www.r3ssg.com

www.sdbj.com
Leadership on Demand
ACCESS to executives when you need it

CFO - Controller - Senior Accountant
Procurement - Fractional - Interim
Timeshare - Project - Temporary
Direct Hire

CFO Systems
info@cfosystemsllc.com

Congratulations to the Top 50 Women of Influence in Accounting and Finance.

Karen Jordan, Director
Kjordan@cfosystemsllc.com