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**SARAH BACAY**  
CIRE Equity



**JENNIFER BARNES**  
Optima Office, Inc.



**LISA BEHUN**  
Bank of America Private  
Bank



**MICHELLE BELLO**  
National University



**LIVIA BENJAMIN**  
Duffy Kruspodin, LLP



**ANNIE  
BRIDENSTINE**  
Deloitte



**JENILEE  
CABADING**  
Community HousingWorks



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**DAISY HOM**  
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**ANNA HOWARD**  
LPL Financial



**MICHELLE  
JACKSON**  
CohnReznick LLP



**SUZAN R. KORTH**  
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**ROSEMARY  
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2024



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**CATHY LOCKE**  
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**NICHOLE MAYER**  
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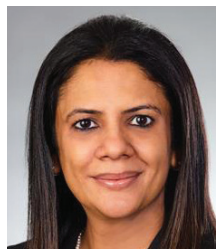
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**VANJA  
VERMEZOVIC**  
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**MOLLY ADDINGTON**

Wealth Treasury Management  
National Sales Director  
Wells Fargo

Molly Addington is the National Sales Director for Wells Fargo's Wealth and Investment Management Treasury Management group, leading a team of highly skilled individuals who specialize in cash management solutions for family offices. She creates innovative and efficient cash flow improvements and real estate holdings portfolio solutions for high-net-worth families often with multigenerational wealth. Molly is also the outgoing president of CREW San Diego. She focused her tenure on improving the nonprofit's fiscal management through successful fundraisers and smart investments and continuing the work she previously started growing the chapter's membership, which is at its highest ever. She remains a board member and will continue serving as a mentor for younger commercial real estate industry professionals. Molly is a long-time supporter of the Jacobs & Cushman San Diego Food Bank and other local organizations.



**SARAH BACAY**

Director of Lease Administration  
CIRE Equity

In 2016, Sarah Bacay assumed the role of director of lease administration at CIRE Equity, bringing her expertise as an ROI-focused corporate real estate professional with a distinctive skill set that seamlessly integrates IT, finance, accounting, and operations. Harnessing her advanced technical background, Sarah excels in driving operational efficiencies through targeted automation and process improvement initiatives. She excels in extracting crucial data for strategic decisions, ensuring seamless communication among internal stakeholders in real estate transactions, and overseeing the management of real estate portfolios and associated transactional activities. Directly engaging with department leaders, Sarah ensures seamless alignment with overarching business directives while delivering best-in-class service to both internal stakeholders and clients. Her multifaceted responsibilities include lease abstracting, management of aged receivables, accurate billing of rents, handling and more.



**JENNIFER BARNES**

CEO  
Optima Office

Jennifer Barnes is the CEO of Optima Office which provides Outsourced Accounting, Fractional CFO and COO services along with Human Resources Support. Jennifer attracts extraordinary employees and allows them the flexibility to work the hours they desire so they achieve an ideal work-life balance. Providing opportunities to superstar employees and helping small businesses grow is what keeps her motivated. Her motto is Happy Staff = Happy Clients. Jennifer currently sits on the board of Junior Achievement, The Better Business Bureau, Tech Coast Angels and a publicly traded company, Presidio Property Trust. She volunteers time for numerous student mentor programs and is a member of Rotary 33, NAWBO, CWI, WBENC, Vistage, ACG, Entrepreneurs Organization, Young Executives Council and Social Venture Partners. Optima Office provides Outsourced Accounting, Fractional CFO & Controllers, and Human Resources Services, serving nearly 300 companies across the United States, with a concentration on the West Coast.



**LISA BEHUN**

Senior Vice President / Private  
Client Advisor  
Bank of America Private Bank

Lisa Behun is Senior Vice President and Private Client Advisor at Bank of America Private Bank in San Diego, managing \$1.1 billion in assets for her multigenerational, high-net worth clients. Behun leads a team of seven specialists from Del Mar and Downtown San Diego offices providing customized investment management, estate planning, tax mitigation, generational wealth transfer strategies, custom credit, and concierge banking services. With over 25 years of diverse industry experience from owning and operating an E&S insurance brokerage firm for high-end properties in Minneapolis to her family's San Diego business managing marinas from the border to Bay Area and providing specialized yacht financing - Behun is a recognized leader in wealth management. She graduated summa cum laude from the University of North Dakota with a Bachelor of Science in business administration and is a board member of the San Diego Symphony.



**MICHELLE BELLO**

Senior Vice President,  
Administration and Finance  
National University

Michelle Bello is the senior vice president for administration and finance at National University. A CPA, Michelle is a 1989 SDSU graduate and has served in her current role since 2004. Prior to joining NU, she worked at McGladrey & Pullen, where she was a senior manager overseeing their nonprofit practice. As the SVP, Michelle provides leadership to an exceptionally dedicated accounting team and is known for her relentless pursuit of excellence and steady work ethic. Just recently, she led the successful implementation of a new Enterprise Resource Planning (ERP) system at the university. Michelle's influence extends beyond the university's day-to-day operations. She plays a pivotal role in steering investment strategies and managing the university endowment, displaying her proficiency in financial planning and investment diversification. Michelle also serves on the audit committee of the San Diego Youth Services, a not-for-profit dedicated to promoting achievement for all children.



**LIVIA BENJAMIN**

Partner  
Duffy Kruspodin, LLP

Livia focuses on consulting and compliance in the areas of real estate, service-related industries, health care, hospitality, and high-net-worth individuals at Duffy Kruspodin, LLP. Livia is a Tax Partner in our La Jolla office with over 18 years of experience in public accounting practice. Livia is passionate about international and state tax matters and focuses on consulting and compliance in the areas of real estate, service related industries, health care, and working with high net worth individuals. Her expertise includes complex tax situations, international transactions, and multistate tax matters. Livia is a contributing member of the taxation committee within the firm and strives to ensure that the firm operates at the highest levels of service. She is also regularly active in the firm's acquisitions and merges and was instrumental in the firm's recent merger with San Diego-based MAK Financial. In addition to being a successful businessperson, Livia is also a dedicated mother attending a variety of activities her children participate in such as softball, soccer, gymnastics, and swimming. She also enjoys lending her time and efforts to local organizations such as The International 22q11.2 Foundation.



**ANNIE BRIDENSTINE**

Tax Managing Director  
Deloitte

Annie Bridenstine has been in the accounting and finance field for 19 years and is a managing director at Deloitte in the Tax Services practice. Bridenstine is an experienced account professional and leader with expertise in the life sciences and health-care industries, serving both public and private multinational corporations in San Diego and the broader west coast. Annie has significant experience with federal income tax, state income, franchise tax, international tax, Accounting for Income Taxes (ASC 740), loss planning, research and development credits, and other corporate life events. She leads various initiatives/go-to-market strategies within the firm, including as the San Diego Tax Practice's Diversity, Equity, Inclusion leader and Volunteer leader which allows her to collaborate with numerous nonprofits in the San Diego community. An emotionally intelligent leader passionate about mentoring, coaching, people development and fostering a collaborative team environment.



**JENILEE CABADING**

Controller  
Community Housing Works

Jenilee Cabading has more than two decades of accounting and leadership experience. With a background supporting commercial and multifamily real estate entities, she has experience with construction, property management, and investing. Since 2019, Jenilee has served as the Controller for Community HousingWorks, a San Diego-based affordable housing nonprofit. She leads the team responsible for all finance, accounting, and financial reporting activities. During her tenure with CHW, she has led the internal financial consolidation, integration, reporting and analysis of a diverse mix of business lines including asset management, property management, real estate development, resident services and fundraising. Under Jenilee's leadership, the team has grown and increased its capacity to serve the organization's mission. A native San Diegan, Jenilee is a 2023 graduate of LEAD San Diego's advanced program. She has a bachelor's of science in accounting from San Diego State University.



**ERIN CARLSON**

Partner  
Lavine, Lofgren, Morris, & Engelberg, LLP

Erin Carlson, a partner at Lavine, Lofgren, Morris, & Engelberg LLP, guides high net-worth individuals through life and posthumous planning. Heading up the firm's trust and estate group, Erin helps individuals, families and business entities, especially those with substantial real estate assets, navigate the complexities of trusts, estate planning and taxation. Empathetic and understanding, Erin keenly addresses family dynamics to meet the unique goals of each client, including setting up future generations for success, ensuring the continuity of businesses and real estate legacies and securing charitable gifting. She also mentors rising tax and accounting professionals and collaborates on firmwide initiatives spanning education, recruitment and wellness. Erin holds a bachelor's in economics, law degree from Pepperdine University and Master of Laws from Boston University. She's a member of the San Diego County Bar Association and presents on topics such as fiduciary accounting.



**JANE COLEMAN**

Tax Senior Manager  
Moss Adams

Jane Coleman, a tax senior manager at Moss Adams, has practiced public accounting since 2008. She provides tax and consulting services to not-for-profit organizations, including social service organizations, universities, religious organizations and foundations. Jane is a firm leader and plays an integral part in training Moss Adams staff, seniors and managers. She's also a frequent speaker at national and regional conferences and events such as the California Society of CPAs (CalCPA) Not-for-profit organizations conference and various catalysts of San Diego and Imperial Counties events. Jane serves on CalCPA's Not-For-Profit Organization Conference Planning Committee and served on the board of Dreams for Change, a not-for-profit organization. She holds a bachelor's degree in international economics and accounting from the University of California, Los Angeles, and a master's in taxation from the Golden Gate University.





**DAISY HOM**  
Partner  
Duffy Kruspodin, LLP

Daisy leads the accounting/auditing practice at Duffy Kruspodin (DK) and in her 10 years at the firm, she has expanded its audit practice by 300%. Additionally, she has launched and expanded the firm's niche areas of consumer finance, construction, manufacturing and distribution, nonprofits, employee benefit plans, and apparel. Daisy has been an incredible mentor enabling junior level contributors to become partners and collaborating closely with senior managers to provide them with a platform for growth and personal/professional development. She is especially supportive of other women and due to her efforts, the women of DK know they have an advocate focused on work-life balance, leadership, and empowerment. Daisy also works with local nonprofit organizations and is currently serving her eighth year as the Chair of Union of Pan Asian Communities' board and is on the audit committee of the La Jolla Institute for Immunology.

Duffy Kruspodin, LLP  
Certified Public Accountants & Advisors



**ANNA HOWARD**  
SVP and Head of Private Wealth Management  
LPL Financial

With over 20 years focused on serving high-net-worth-focused advisors and their clients, Anna Howard understands the importance of viewing client relationships in their entirety. She believes that exceptional financial planning is defined by relationships, collaboration, resources and services that work together to support clients' financial and life goals. Anna is the Senior Vice President and Head of LPL Private Wealth Management at San Diego-based LPL Financial. Before joining LPL Financial, Anna was the Head of Family Wealth at First Republic Bank in San Francisco. Prior to First Republic Bank, she worked at Wells Fargo Private Bank in San Diego and held a variety of roles including Private Banking, Advanced Planning and Sr. Regional Fiduciary Leader. Anna first moved to San Diego in 1999. She earned a BS in Management and an MSBA in Financial and Tax Planning from San Diego State University and holds a Certified Financial Planner certification.

LPL Financial



**MICHELLE JACKSON**  
Manager  
CohnReznick LLP

Michelle Jackson, CPA, is a manager in CohnReznick's Transaction Advisory practice. She specializes in providing financial due diligence services to private equity firms and other strategic corporate buyers and sellers in industries including technology, consumer products, and construction. Since joining CohnReznick, Michelle has made a significant impact on its business development initiatives and firm culture. She began her career in assurance leading audits of public and private companies and also spent time in private industry providing consulting and managerial services to an electric vehicle company under IPO. In addition to technical expertise, Michelle is a certified volunteer for women affected by domestic violence and is involved with charitable giving at CohnReznick. She earned a BS, Accountancy, from Cal Poly, San Luis Obispo, where she was a member of the accounting club and founder of the women's basketball club.

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**SUZAN R. KORTH**  
Partner  
Duffy Kruspodin, LLP

Suzie founded the firm's CAS practice—overseeing a group that provides a range of services such as basic bookkeeping to advanced management reporting, advisory and consulting services. She is well known for her personalized service, recognizing that each client is unique and works diligently to resolve all those individual financial needs that require careful analysis. Her clientele includes private real estate investors, professional practices, and small business owners. Suzie is an outstanding advocate to her clients and an inspirational mentor to her team. She drives and expects high performance while fostering a culture of inclusion and support. She serves on several nonprofit board of directors as treasurer and is an experienced Tax Accountant with a demonstrated history of working in the accounting industry. Skilled in Nonprofit Organizations, Tax Preparation, Sales Tax, Internal Audit, and Fixed Assets. Strong accounting professional with a Bachelor of Science in Business focused in Accounting from University of Phoenix.

Duffy Kruspodin, LLP  
Certified Public Accountants & Advisors



**ROSEMARY LINDEN**  
President  
Momentum CFO

Rosemary Linden, president of Momentum CFO, leverages 25 years of finance and accounting expertise to provide fractional CFO consulting services to women-owned businesses. Having previously led Financial Planning & Analysis (FP&A) divisions of global corporations such as Quest Diagnostics and WD-40 company, she adapts large-company best practices to optimize small business financial performance. As board chair and former treasurer of San Diego Civic Youth Ballet, Rosemary helped propel the nonprofit to achieve the highest income in its 79-year history in 2023. Rosemary enjoys volunteering to help younger finance professionals develop their careers. She is an FP&A Advisory Council member for the Association for Financial Professionals, which focuses on advancing the success of finance professionals worldwide. She mentors finance students at CSU San Marcos and happily hired a former mentee to join Momentum CFO in 2023, a testament to the impact of effective mentorship.

MOMENTUM CFO



**DIANE LITTLE**  
Vice President of Accounting,  
Billing & AR  
AMN Healthcare

Diane Little, an executive with 30 years of experience, leads a group of over 250 dedicated team members in accounting, finance operations and reporting for AMN Healthcare, a \$4 billion healthcare industry leader. In her five years with AMN, Diane played a crucial role in evaluating acquisitions, spearheading continuous improvement projects, and mentoring leaders. Before AMN, as VP Finance for a wind energy firm, she also orchestrated acquisitions and divestitures in renewable energy. Beyond her professional achievements, Diane actively champions diversity, leading AMN's women's empowerment Employee Resource Group. She has a history of leadership in organizations like Jack and Jill of America, Inc., and currently serves on the board of directors for the Neighborhood House Association in San Diego. A dedicated CPA, Diane holds an accounting degree from Santa Clara University, an MBA from Indiana University, complemented by Harvard and Cornell executive leadership certifications.

AMN  
Healthcare



**CATHY LOCKE**  
Credit and Collection Management  
Procopio

Cathy Locke is an integral part of Procopio's executive team, including legal administrator at San Diego credit association and paralegal at local law firm Hinchy, Witte, Wood, Anderson and Hodges, office administrator at law firm Bleiler and Reiter. Cathy is currently credit and collection manager at Procopio, Cory, Hargreaves & Savitch since November 1989. A member of national association of credit management (NACM) since 1986 and past president of the credit and financial division of NACM as well as Co-founder of The Law Firm Forum, A group of financial law firm professionals from all over the country. Just really a nice Canadian-American who works really hard. Procopio is committed to helping clients reach their full potential while striving always to provide the highest level of client service. Our deep bench of about 200 seasoned and diverse attorneys offer practical legal solutions to clients around the world.

Procopio



**HANNAH MANE**  
Manager  
Aldrich CPAs + Advisors

Hannah Mane joined the firm in 2014 and provides tax compliance, consulting, and financial planning services. She works primarily with private, closely-held businesses and owners in various industries. Hannah has also been integral to launching Aldrich's business valuations services. Hannah received her bachelor's degree in economics with an emphasis in accounting from the University of California, Santa Barbara. Aldrich, formerly known as AKT, is a Top 100 regional firm of advisors, independent Certified Public Accountants and business consultants providing tax, accounting, business advisory, valuation and employee benefit consulting services to private, public and nonprofit organization. Serving clients throughout the west from locations in Oregon, California, and Alaska. We specialize in a variety of industries including healthcare, manufacturing, construction, telecommunications and electric utilities, public sector, agribusiness, privately held growth oriented and emerging companies among others.

Aldrich



**JEANNE MANN**  
President  
Mann & Associates APC

Jeanne Mann, president of Mann & Associates APC, is a California Certified Public Accountant. Her firm offers a range of accounting, audit, tax, and consulting services for construction, nonprofit, franchise, biotech, and healthcare. Jeanne actively participates in the California Society of CPA (CalCPA). Notably, she was the second woman president of its San Diego Chapter. She was also honored as an SBA Accountant Advocate of the Year. As a member of the Private Companies Practice Section of the American Institute of Certified Public Accountants (AICPA), her firm participates in reviews of its quality control procedures. Jeanne receives both trade and business honors. The most recent being a 2024 SD METRO Women of Influence and San Diego Business Journal 2023 Top 50 Finance Women. She is a tried-and-true 25-year original member of local Parrothead Club, annually raising more than \$25K - \$50K. In addition, Jeanne is the pro bono treasurer of the global Jindo Love Dog Rescue nonprofit.

Mann & Associates APC



**NICHOLE MAYER**  
Wealth Management Advisor  
Westpac Wealth Partners

Nichole Mayer has had an extensive and diverse career within finance. Specializing in leading executives and business owners in attaining financial balance for their present needs and future retirement. Offering a collaborative planning approach includes asset coordination, wealth accumulation, tax strategies, retirement income planning and business succession. Nichole actively engages in the community by conducting seminars for professional associations within the healthcare and construction verticals. Additionally, offering workshops within Fortune 500 companies for their diverse alliances. She leads two industry focused groups furthering collaboration amongst professionals. A unique engagement involved the STEAM summer camp held on USD campus, summer of 2023, as she contributed to an educational discussion with girls aged 10-14. Her leadership in finance emphasizes the importance of education and spreading influence within the community.

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