



STEINBECK FAMILY BUSINESS SEMINAR

UCLA

**Harold and Pauline Price Center
for Entrepreneurship & Innovation**

INVESTING IN THE FUTURE

The Steinbeck Family Business Program offers a series of workshops and conferences focused on leading effective and profitable family-owned (or otherwise closely held) businesses.

The largest 500 family businesses generate \$7.28 trillion in revenue and employ over 24 million people. These businesses together constitute the third largest economic contribution in the world, therefore, these families in leadership roles significantly shape the future of their communities.

UCLA

Anderson
School of Management

A G E N D A

MAY 19

3:00PM - 3:10PM WELCOME

ALFRED E. OSBORNE, JR.

Professor and Faculty Director, Price Center for Entrepreneurship & Innovation, UCLA Anderson

HOLLY HAN ('02)

Director of Special Projects and Steinbeck Family Business Seminar, Price Center, UCLA Anderson

3:10PM - 4:00PM

MONETIZING THE METAVERSE AND WEB3 (D313)

Businessweek called Aleksander Shurick Agapitov a Video Game Junkie with a \$3 Billion Payment Powerhouse. Xsolla provides game developers and publishers with payment, billing, distribution, and marketing tools to sell in-game digital items such as “skins” that change a character’s appearance or virtual pets on a global basis. It is privately held and headquartered in Los Angeles with offices and R&D facilities around Europe and Asia. Xsolla has partnered with companies like Twitch, Ubisoft, Epic Games, and PUBG Corporation to broaden its services portfolio, which now includes payments, e-commerce, antifraud, analytics, customer support, content optimization & distribution, authentication, and more.

In February, Agapitov launched a metaverse-based project called X.LA. Like Xsolla, it will incentivize those who create in the metaverse. The X.LA Foundation has an objective in evolving traditional corporate partnerships and assisting people all over the world in becoming equal benefactors for their work, creations, and services through the use of novel Web 3.0 technologies and concepts. Join us to learn more.



ALEKSANDR
“SHURICK”
AGAPITOV

Founder of Xsolla and
Founder and CEO of X.LA



MODERATOR:
ALEXANDRE
CARON ('23)

President, Family Business
Association, MBA Candidate,
UCLA Anderson



MODERATOR:
HOLLY
HAN ('02)

Director of Special Projects and
Steinbeck Family Business Seminar,
Price Center, UCLA Anderson

MAY 19

4:00PM - 5:00PM

INNOVATION: LEARNING THROUGH FAILURE (D313)

How can the fear of failure stymie success? This session will discuss some of the impediments to innovation and what firms can do to innovate more effectively.



**OLAV
SORENSEN**

Joseph Jacobs Chair in Entrepreneurial Studies;
Professor of Strategy; Faculty Research Director,
Price Center for Entrepreneurship & Innovation

5:00PM - 6:00PM COCKTAIL RECEPTION (BRISKIN PLAZA)

MAY 20

8:00AM - 8:45AM BREAKFAST (BRISKIN PLAZA)

8:45AM - 9:30AM

UNDERSTANDING YOUR CUSTOMER (D313)

Los Angeles-based NorthStar Moving Company provides luxury award-winning local, long distance and international moving and storage services. CODET Vision Institute offers cutting-edge ophthalmic care with world-class physicians, state-of-the-art technology and innovation, and efficient and warm patient care in Mexico. Both companies employ specific strategies to be successful in challenging markets.

Amy Siadak, President of House of Marketing Research, who helps non-profits, private companies and Fortune 500 companies, will host a conversation about identifying the right customer and the importance of customer service with Daniel Chayet, CEO of CODET Vision Institute and Laura McHolm, Co-Founder and Chief Marketing Officer of NorthStar Moving Company.



**DANIEL
CHAYET ('13)**

CEO, CODET
Vision Institute



**LAURA
MCHOLM**

Co-Founder and
Chief Marketing Office,
NorthStar Moving Company



**MODERATOR
AMY
SIADAK**

President and CEO,
House of Marketing Research

9:30AM - 10:30AM

INVESTING AND ECONOMICS IN UNPRECEDENTED TIMES (D313)

COVID-19 and its variants. Ukraine. Supply chain disruptions. Higher inflation. Sharp increases in interest rates. Upcoming midterm elections. Labor markets in transition. In an environment of so much uncertainty and risk, what might the economy and investment markets hold in store as we look out to the remainder of 2022 and beyond. Professor Eric Sussman will cover the complex market, economy, regulations and technology, and offer predictions. Sussman has been voted Teacher of the Year 15 times by Anderson's MBA students and was awarded the Citibank Teaching Award in 1998, the Neidorf Decade Teaching Award in 2008 and the University-wide Distinguished Teaching Award in 2015. He has also been recognized by Bloomberg Businessweek as one of the Top Ten Most Popular Business School Professors in the country.



**ERIC
SUSSMAN**

Adjunct Professor,
UCLA Anderson

10:30AM - 10:45AM BREAK

10:45AM - 11:30AM CONCURRENT BREAKOUT SESSIONS

INVESTING CAPITAL IN TODAY'S CHALLENGING ENVIRONMENT FOR SUCCESSFUL FAMILY BUSINESS OWNERS AND ENTREPRENEURS (A301)

Ryan Martinez will moderate a discussion with Brian Haloossim around the current economic outlook, investment challenges and how business owners are successfully investing in the current environment. This session will include an overview on Bernstein's economic and market outlook along with a discussion on alternative, tax-efficient, and thematic investment trends.

AB | Bernstein is a leading global investment management and research firm with \$780 Billion under management. In addition to managing capital for institutional investors, Bernstein manages money for successful business owners and entrepreneurs.



**BRIAN
HALOOSSIM**

Senior Managing Director,
Bernstein Private Wealth
Management



**RYAN A.
MARTINEZ**

Principal, Bernstein Private
Wealth Management

10:45AM - 11:30AM CONCURRENT BREAKOUT SESSIONS

THE CASE FOR CULTURE: WHY CULTURE IS KEY TO BUSINESS SUCCESS AND HOW TO CRAFT IT WITH INTENTION (D313)

Employees spent the pandemic reflecting on their needs and aspirations, and many are not satisfied with the way things were. As companies figure out their return to office strategies post-pandemic, we talk about how to maintain a strong company culture in a hybrid work environment.

Bolton is a full-service insurance broker that handles the employee benefits, property and casualty and risk management needs for thousands of clients



TAYLOR BRIDGES
Employee Benefits Broker,
Bolton & Company



KAREN GIFFORD
Chief People Officer,
Nobell Foods



JACQUELINE ROTH
Director of Employee Benefits,
Bolton & Company



JONATHAN SCHRETER ('00)
Executive Vice President,
Bolton & Company

11:30AM - 12:15PM

LEADERSHIP IN A 75 YEAR OLD FAMILY OWNED FARM (D313)

According to the USDA, between 1982 and 2007, land used in agriculture dropped from 54 to 51% of total U.S. land area, while farming used 30% less hired labor and 40% less operator labor. Yet farmers managed to increase output by nearly 50%. A family owned farm must evolve to survive and thrive. Join us for a discussion with Charles Muranaka of Muranaka Farm, Inc., third generation of the business that his grandparents founded in 1947. The farm leads the industry as one of the largest growers and shippers of green onions, radishes, cilantro and other vegetables to retailers such as Sprouts Farmers Market, Albertsons and Smart & Final.



CHARLES MURANAKA
Executive Vice President,
Muranaka Farm, Inc.



**MODERATOR:
HOLLY HAN ('02)**
Director of Special Projects and
Steinbeck Family Business Seminar,
Price Center, UCLA Anderson

12:15PM - 1:15PM NETWORKING LUNCH (BRISKIN PLAZA)

1:15PM - 2:00PM CONCURRENT BREAKOUT SESSIONS

LOCKING IN HUMAN CAPITAL: HOW TO COMPENSATE YOUR KEY EMPLOYEES LIKE FAMILY (D313)

This session will provide ideas for innovative and effective compensation structures which treat your key employees like owners without giving them equity. It will show you how to design a long-term incentive plan which can recruit, reward, and retain top talent while growing your enterprise value and giving your key people all of the financial benefits of ownership without the burden. You will walk away with an understanding of two ways to financially reward your key people and set up an actionable plan to get them to think more like owners and participate in long term profitability that they help create.



**CHRIS
RHYME**

Founder and Partner,
The Business Transition Group



**CHRISTOPHER
WELTON ('12)**

Wealth Management Advisor,
Northwestern Mutual

NAVIGATING FAMILY DYNAMICS IN THE SUCCESSION PROCESS (A301)

Succession planning is one of the biggest challenges facing family businesses. 32% of family businesses were apprehensive about the transfer of the business to the next generation, and 9% see the possibility of family conflict as a result (PwC Family Business Survey 2012). Lari Zelinsky-Bloom, CEO of Zelinsky Company, one of the largest painting and drywall companies in Hawaii, with Celine Casamina of Business Consulting Resources, will share her succession experience sandwiched between transitions, which included numerous family dynamics among multiple generations, spouses, siblings, and in-laws.



**LARI
ZELINSKY-BLOOM**

CEO, Zelinsky Company



**MODERATOR:
CELINE
CASAMINA**

Consultant,
Business Consulting Resources

2:00PM - 2:15PM BREAK

2:15PM - 3:15PM

"BOND. JAMES BOND." MEET THE FAMILY BEHIND THE 007 FRANCHISE (GRAND SALON)

In 1962, Sean Connery introduced Ian Fleming's character to movie audiences around the world with the iconic line, "Bond, James Bond". Now more than 25 films later, Albert R. Broccoli's EON Productions Ltd celebrates its sixtieth anniversary as the creator of the longest, continuous film franchise in history.

EON Productions Ltd was originally founded by Albert R. "Cubby" Broccoli and Harry Saltzman to produce the film "Dr No". Little did they know it would turn into such a global franchise.

Saltzman left the partnership in 1975 after nine films and Cubby continued to produce the films as a family operation. To this day, the franchise is produced by Cubby's daughter, Barbara Broccoli, and stepson, Michael G. Wilson, as well as involving several other family members in executive positions.

James Bond became the fabric of everyday life for the Broccoli-Wilson family. Barbara was seven when she realized that James Bond, who was discussed regularly at the dinner table, was not a real person. Barbara and her brother Michael have since produced the most successful Bond films ever made, including Casino Royale, Quantum Of Solace, Skyfall, Spectre and No Time To Die.

Michael began his film career as a production assistant on Goldfinger during his school's summer holiday and later, as a lawyer, became instrumental in helping the family to sort out legal issues that led to United Artists purchasing Saltzman's stake in the business. At the time, he took a leave of absence from his law firm for what was meant to be six months but turned into a fifty year engagement! He has co-written many of the Bond film screenplays as well as co-producing and his engineering background has come in handy for many of the complex action sequences, beginning with the opening of Moonraker in which Bond is thrown from an aeroplane without a parachute.

David G. Wilson, Michael's son, spent his summers working on Bond films as a teen, starting with "License to Kill" in Mexico City. Returning from Japan in 1994, he joined EON Productions Ltd as an Assistant Director on GoldenEye. Since then, he has worked in production, licensing, merchandising and script development. Join us for a conversation with David and a discussion about the franchise.



**DAVID
WILSON**

Partner at Tyr Ventures;
Assistant Producer,
James Bond Movie Series



**MODERATOR
ALFRED E.
OSBORNE, JR.**

Professor and Faculty Director,
Price Center for Entrepreneurship
& Innovation, UCLA Anderson

3:15PM - 3:30PM CLOSING

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Aleksandr
(‘Shurick’)
Agapitov

ALEKSANDR (‘SHURICK’) AGAPITOV IS THE FOUNDER AND CEO OF X.LA, a new enterprise that includes the gaming industry’s leading platform Xsolla. X.LA is an innovation, incubation, and acceleration hub focused on ideas around the use of blockchain technology, cryptocurrency, NFTs, and other vital, inventive solutions in video games and beyond.

Agapitov started Xsolla in 2015 to connect the global gaming community through technology, creativity, experience, and financial components. As the gaming industry’s leading platform, Xsolla connects and adds value and opportunity for game developers, publishers, IP holders, and investors worldwide. Today, Xsolla’s products and services operate in more than 200 countries and territories with the support of more than 20 languages and over 700 payment methods.

Born in 1984, Agapitov grew up in Perm, Russia - a challenging environment within the old Soviet Union. At 15, he drew upon his entrepreneurial spirit, strengths in math, and belief in the power of education to start an online currency exchange service, transitioning into the area of digital gaming and aggregation. He moved to the United States with his wife Yana in 2009.

Xsolla continues to grow its footprint across customers, gamers, and the investment community. Agapitov also carries a strong interest and investment portfolio in healthcare science and technology, specifically with life extension.

Agapitov studied Mathematics and Computer Science at the University of Perm with post-graduate education at Harvard Business School, Wharton, and UCLA Anderson School of Management.



Lari
Zelinsky-Bloom

LARI ZELINSKY-BLOOM IS CEO OF ZELINSKY COMPANY AND 100% SHAREHOLDER, which is a family owned and operated commercial/Industrial painting and drywall contracting company. Lari started with her father’s company in 2002, learned the business and took over operations in 2006.

Lari and her husband John Bloom started working at Zelinsky Company with no formal business education or construction background. Lari’s background was commercial lines insurance and John’s was Sales. Since then Lari and John together along with her father’s mentoring, dedicated employees and hard work has managed to grow the company as it stands today, which is one of the largest painting and drywall companies in Hawaii.



Alexandre Caron

ALEX is a first year MBA student at UCLA Anderson. Originally from Montreal, Alex studied industrial engineering and worked at Accenture consulting for four years in the financial services industry. He worked on digitizing multiple different business processes and integrating fintech startups within larger financial institutions where he developed a passion for financial technology. This summer, Alex will be working at Intuit in a Product Manager role to pursue his passion for FinTech. Alex is also involved part-time in his family business focused on manufacturing, consumer goods and investment management.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Taylor Bridges

TAYLOR BRIDGES, EMPLOYEE BENEFITS BROKER, BOLTON

With a background in marketing, recruiting, and client relations, Taylor Bridges is practiced at curating experience-driven results. As an Employee Benefits Broker with Bolton, she specializes in fostering cultures where employees can thrive through a total-rewards approach. Her knowledge of talent recruitment and retention allows her to effectively partner with companies on the optimization of their benefits programs so that no matter where employees might be working from, they are engaged. Taylor has been instrumental in employee training and development in her previous roles at Bolton, and is passionate about exploring innovative benefit solutions that will create impact. She holds a Bachelor of Arts in Business Administration from Azusa Pacific University and is active with several industry associations, including the Professionals in Human Resources Association (PIHRA), Hacking HR Los Angeles and Culture Amp Los Angeles Chapter.



Celine Casamina

CELINE CASAMINA, CONSULTANT, BUSINESS CONSULTING RESOURCES

Celine was born and raised in Hawaii, and grew up with a strong tie to family values – as well as the family business founded by her parents. The Casamina family started the mortgage company, House of Finance, with the goal of helping families reach their dreams of owning a home. Celine spent summers with her siblings helping at the family business – starting at the copy machine, and working her way up to interacting with clients – and very early on was inspired by the entrepreneurial mindset and work ethic of her parents.

She has a sincere passion for launching innovative business ideas, and implementing processes for sustainable growth. Celine has had experience working in Hawaii's startup economy, leading the business development efforts of a freshly-launched app which was accepted into the cohort of a premier startup incubator, then moving on to provide assistance to other startup ventures in Hawaii.

Prior to joining BCR, Celine was actively involved in the launch of one of Hawaii's first co-working spaces, leading the Hawaii division of a larger Southern California based operation. Through this role she gained extensive experience in property and construction management, sales and business operations, detailed tracking of metrics and deliverables, and the ability to work with an extremely diverse clientele base. Through her experiences in the startup sector, she has become proficient in managing the full process of a project from ideation to implementation to management and tracking. Celine uses her expertise at BCR to help with various clients across the private, public, and non-profit sectors in their Strategic Planning, Leadership Succession and Development, and Operational efforts.

Celine has studied at the University of San Francisco, and the American Business School of Paris, and holds a degree in Marketing and Management from the Shidler College of Business at the University of Hawaii at Manoa. While she loves traveling and learning about other cultures, practices, and markets, Celine is proud to call Hawaii home, and she is committed to contributing to its unique community.

In her spare time, Celine volunteers at various nonprofit organizations, such as Sustainable Coastlines, and finds relaxation in the form of hiking, yoga, and being in the ocean.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Daniel Chayet

DANIEL CHAYET IS AN ENTREPRENEURIAL BUSINESS PROFESSIONAL, experienced across multiple functions, industries, and company life cycle stages. He is currently CEO of CODET Vision Institute in Tijuana, Mexico, which has grown 3x under his leadership since 2016. Before CODET, Daniel held roles at Abbott Labs (Chicago, IL) and Calhoun Vision (now RxSight, Aliso Viejo, CA). He received his undergraduate degree from University of Michigan in 2007 and MBA from UCLA Anderson in 2013.



Karen Gifford

KAREN GIFFORD, CHIEF PEOPLE OFFICER OF CALIFA FARMS

Karen is an executive coach and organizational development professional with 30 years' experience as a human resources operating executive. Karen takes workplace and individual challenges as engagement opportunities for internal transformation and values alignment. As a top HR leader at Virgin Orbit, Virgin Galactic, SpaceX, Electronic Arts, Califia Farms, Ampaire, and most recently Nobell Foods, she helps purpose driven companies develop the leadership, people, processes, and systems needed to accelerate performance.

On the personal side she is a vegan, environmentalist, and animal lover. Karen lives in Pasadena with my husband, tweenaged daughter, and rescue dog Roxy. In her spare time she is focused on building her future farm in Sequim, Washington where one day she aspires to rescue animals, as well as facilitate coaching and mindfulness retreats among the beauty of the Olympic Peninsula.



Brian Haloossim

BRIAN HALOOSSIM IS A SENIOR MANAGING DIRECTOR and has been overseeing the West Coast private client practice since 2008. He joined the firm in 2003 as a financial advisor in the Los Angeles office, providing investment planning and management for high-net-worth individuals and families, closely held business owners, and nonprofit groups, and was named Principal in 2007. Previously, Haloossim was the assistant director of development at Campbell Hall, where he was also a member of the endowment finance committee. Prior to that, he was head basketball coach at a college preparatory school and served as assistant men's basketball coach for Division I California State University, Northridge. Haloossim earned a BA from the University of California, Los Angeles, and an MBA from Pepperdine University.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Holly Han

HOLLY HAN ('02), DIRECTOR OF SPECIAL PROJECTS AND STEINBECK FAMILY BUSINESS SEMINAR, PRICE CENTER, UCLA ANDERSON

Holly Han is an entrepreneur and business strategist who founded and led media, technology, consumer products and fashion businesses in New York and Los Angeles for over two decades. Han began her career at Vera Wang and developed product for Bloomingdale's and Anthropologie, authoring the Vault Career Guide to the Fashion Industry. She received her MBA from the UCLA Anderson School of Management, where she received fellowships from the Young Presidents' Organization and Asian Business League. She also holds degrees from the University of California, Berkeley and the Fashion Institute of Technology, with additional studies at Caltech and Parsons School of Design, and was a professor at Marylhurst University's MBA program.

Han was a co-founder of MyShape, an innovative online retailer with over 700,000 members backed by Draper Fisher Jurvetson and Tenaya and featured in The New York Times and The Wall Street Journal. As COO of SmartWear, she developed a new class of patented energy-generating textiles in partnership with DuPont, Nike, the NIH, NSF and NASA. She restructured luxury chocolatier John Kelly Chocolates as COO, with a focus on profitability and targeted expansion. She was a founding account director for the Taproot Foundation in Los Angeles, providing pro bono consulting for deserving nonprofits. As the managing director of 64North, she led business strategy, branding and digital media for clients including MIT, Target, Yves Saint Laurent and Motown's Berry Gordy. She is the vice president on the board of directors for CHAMPS Charter High School of the Arts.



Ryan A. Martinez

RYAN A. MARTINEZ, CFP®, is a Financial Advisor and Principal at Bernstein Private Wealth Management. He works closely with family business owners, entrepreneurs, and corporate executives as their outsourced CFO and confidant. By proactively recognizing issues and opportunities, he empowers his clients to make educated, well-informed decisions that result in a more meaningful life and legacy for them and their families. Prior to beginning his career as a financial advisor, Ryan successfully led a business unit for a Fortune 100 Best Company to Work For. He earned a BS, cum laude, in business with a minor in economics from California Polytechnic State University, San Luis Obispo. He is a CERTIFIED FINANCIAL PLANNER™, and has completed the advanced financial planning program at Boston University. Ryan is passionate about giving back to the community. He serves on the Dean's Advisory Council at Cal Poly, San Luis Obispo College of Business, as well as on the boards of the Latino Deal Makers. In addition, he acts as an advisor to the UCLA Steinbeck and University of Hawaii's Family Business Center, and was the past president of the Los Angeles Estate Planning Council. His involvement in these organizations helps him develop key learnings, best practices, and resources that he can share with his clients. Ryan resides in West Los Angeles with his wife, Amanda, and their two young sons. They enjoy adventure travel and outdoor activities..

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Laura McHolm

LAURA MCHOLM, CO-FOUNDER AND CHIEF MARKETING OFFICER OF NORTHSTAR MOVING COMPANY
One of the few women at the helm of a moving company, Laura McHolm had an unlikely start as co-founder of NorthStar Moving Company.

Laura began university at the age of 16. After graduating from the University of California at Berkeley she taught basic programming on Apple computers, then worked in marketing for Atari while the company was still in its infancy, and after law school, she worked as a corporate intellectual property lawyer. In the mid-1990s she moved away from the Fortune 500 to fulfill her more creative, entrepreneurial spirit and co-founded NorthStar Moving® Company with her husband.

Laura coined the phrase “eco-luxury moving services” and is changing the way we move by selling the red carpet treatment. Her fastest growing privately held company is the go to mover for A-List celebrities, The Getty and other movers and shakers and has been featured in Elle Décor, The Hollywood Reporter, Vanity Fair, The Robb Report, Fortune Magazine, CNN Money, NBC Nightly News and more. Honored with more awards for service than any other moving company, Laura has broken the long-held notion of moving and storage as burly men doing one job – lifting heavy things.

Laura has been consistently nominated for multiple awards including: Los Angeles Times B2B 2021 Inspirational Women Awards, Entrepreneur of the Year 2019 by the Los Angeles Business Journal and Community Leader 2019 by The National Association of Women Business Owners - Los Angeles (NAWBO-LA).



Charles Muranaka

CHARLES MURANAKA, EXECUTIVE VICE PRESIDENT OF MURANAKA FARM, INC., runs the family business that his grandparents founded in 1947. The farm leads the industry as one of the largest growers and shippers of green onions, radishes, cilantro and other vegetables to retailers such as Albertsons, Sprouts Farmers Market and Smart & Final. Muranaka Farm prides itself on value, the best quality at the least expensive price 365 days a year without compromising quality or consistency.

As a boy, Charles roamed the fields and harvested the radishes with the lowest production yield out of everyone because his little hands were bothered by the prickly tops. Summers were spent on the farm moving irrigation pipe, prepping the land for crops and folding cartons for shipping. After graduating from UCLA with a BA in Economics, he was hired in the purchasing department. His father Roy and uncle Harry ran the business together for many years along with various cousins. Charles learned every aspect of the business from the effect of weather patterns on agriculture to unions on the labor market. Charles hopes that his sons choose to continue the traditions of Muranaka Farm.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Chris Rhyme

CHRIS RHYME STARTED THE BUSINESS TRANSITION GROUP in 2015 after practicing law and working at a Denver-based, lower middle market investment bank. He brings this experience to bear assisting closely held business owners in comprehensive exit planning, executive compensation planning as well as personal, business, and estate planning. Chris received his Juris Doctor from Pepperdine University School of Law and was the Editor-in-Chief of the Business and Entrepreneurship Journal. He also speaks nationally for Vistage and other business organizations. In his free time, Chris enjoys spending time with his wife, Whitney, and his three kids – Samson, August, and Rosalyn.



Jacqueline Roth

JACQUELINE ROTH, DIRECTOR OF EMPLOYEE BENEFITS, BOLTON & COMPANY

Jacqueline Roth leads Bolton's Employee Benefits division. She works closely with Bolton's Employee Benefits brokers and service teams to ensure client experience consistency and develop solutions for emerging industry challenges. Jacqueline brings a unique perspective to her role by also being an active Employee Benefits Broker with an established client base she continues to serve. She sets the tone with a client-first focus in evolving Bolton's Employee Benefits service strategy and approach.

Jacqueline is passionate about fostering personal development and growth within Bolton and is active within the insurance industry with the Council of Insurance for Agents and Brokers as well as serves on an advisory committee with the Council of Employee Benefits. Jacque enjoys the advocacy on the hill she gets to do as an advocate for the business and employers. She also is a frequent presenter on emerging trends, employer insurance and communication. Jacqueline holds a Bachelor of Arts degree in Communication from Azusa Pacific University, and serves on the Immigration resource advisory board.



Jonathan Schreter

FOR THE PAST 14 YEARS, JONATHAN SCHRETER ('00) HAS SERVED COMMERCIAL PROPERTY AND CASUALTY RISKS, primarily for charter and independent schools (K-12) and higher education clients, as well as middle-market businesses in the technology, manufacturing and entertainment industries. With a diverse background that began in marketing and advertising, Schreter combines creative thinking and analytics to offer a consultative approach to risk management. He works with progressive school and business leaders, who appreciate his commitment to mitigating unexpected losses.

Schreter earned his MBA from the UCLA Anderson School of Management in 2000 and his Certified Insurance Counselor (CIC) designation from the National Alliance for Insurance Education & Research in 2010. He was president of Insurance Brokers and Agents San Fernando Valley, is the current president of the UCLA Anderson Alumni Network in Los Angeles and serves as treasurer of the executive committee for the board of directors of Inner-City Arts, a nonprofit program that unlocks the creative potential of inner-city children in downtown Los Angeles.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Amy Siadak

AMY SIADAK IS THE PRESIDENT AND OWNER OF HOUSE OF MARKETING RESEARCH, INC. ("HMR"), a data collection and focus group company located in Pasadena, California that collaborates with other research companies and end clients throughout North America, Europe, and Asia. HMR's specialties include multi-ethnic and multi-lingual research. In addition to English language studies, HMR executes projects in Spanish, Mandarin, Cantonese, Korean, Vietnamese, Japanese, and Tagalog. HMR serves clients in varied industries and works with clients ranging from closely held corporations to Fortune 500 corporations, including non-profits, consumer products companies, advertising agencies, and national and regional research firms. HMR's managers and interviewing team have over forty years combined experience in qualitative and quantitative market research.

Amy is a member of the American Marketing Association, Marketing Research Association, Qualitative Research Consultants Association, Filipino American Chamber of Commerce, Asian Business Association, and UCLA Anderson's CEO Forum.



Chris Welton

CHRIS WELTON IS A WEALTH MANAGEMENT ADVISOR & MANAGING DIRECTOR, Silicon Valley at Northwestern Mutual where he leads a team who work together with their clients to implement a financial plan that integrates risk management, wealth management, tax-efficient strategies, and estate planning. Chris earned an undergraduate degree in Political Science, Magna Cum Laude from Amherst College in Massachusetts, an MBA from UCLA's Anderson School of Management and holds both Chartered Financial Analyst (CFA) and Certified Financial Planner (CFP) designations. He and his wife Rosa are avid health nuts, love to cook, and enjoy having people over for lively discussions and good food!



David G. Wilson

DAVID G. WILSON, PARTNER, TYR VENTURES; ASSISTANT PRODUCER, JAMES BOND MOVIE SERIES

David G. Wilson has over forty years of experience in feature film development and production. Starting off as a production runner in his teens over summer break, he later moved to Japan after university to work for director Shohei Imamura, and then in London at EON Productions Ltd, producers of the James Bond 007 film series.

Over the decades he has held many roles as a lead programmer, journalist, screenwriter, newspaper publisher, film and documentary producer, licensing and merchandising manager, and the Head of Creative and Business Affairs at the EON Screenwriters Workshop.

David currently resides in San Francisco as the CEO of Shared Experience Art Machine, a mass collaboration collective, the General Partner of Tyr Ventures, LLC, a boutique venture capital firm investing in entertainment technology building autonomous communities, and VP of Global Business Affairs at Danjaq, LLC, the holding company for the James Bond film franchise and the family office for the Broccoli/Wilson investments. He is also an advocate of Web3 and decentralized cooperatives.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Alfred E. Osborne, Jr.

ALFRED E. OSBORNE, JR., is UCLA Anderson's senior associate dean for external affairs, with oversight of a variety of key initiatives for the school, including resource development, alumni relations, corporate initiatives and executive education.

Osborne also holds an appointment as professor of global economics, management and entrepreneurship, and is the founder and faculty director of the Harold and Pauline Price Center for Entrepreneurship & Innovation. The Price Center serves to organize faculty research, curricula and student activities related to the study of entrepreneurship and new business development at UCLA Anderson.

Osborne served as UCLA Anderson's interim dean from July 1, 2018, to July 1, 2019.

Osborne's areas of academic expertise include social entrepreneurship and the development of a leadership approach that applies business models and methodologies to the nonprofit world. Under his leadership, the Price Center created a number of management development programs, including five in partnership with health care giant Johnson & Johnson: the UCLA/Johnson & Johnson Head Start Management Fellows Program, the UCLA/Johnson & Johnson Advanced Management Institute for Head Start, the UCLA/Johnson & Johnson Health Care Institute, the UCLA/Johnson & Johnson Health Care Executive Program and the Management Development Institute for health care organizations in sub-Saharan Africa. Several related, innovative programs include the Institute for the Study of Educational Entrepreneurship and the UCLA/Los Angeles County Office of Education Head Start Leadership Institute.

A deep belief in the value of entrepreneurship has guided Osborne's vision for what is possible throughout his decades-long tenure at Anderson. In addition to founding the Price Center, he facilitated infusion of an entrepreneurial approach to leadership into the Anderson culture and curriculum, including and transcending the notion of business startups.

Osborne combines his emphasis on innovation with a deep belief in the value of a broad-based diversity that includes not only demographics, but also a wide range of ideas.

Osborne is an active participant in the business community, serving as a director of Kaiser Aluminum, Wedbush Inc. and the First Pacific Advisors family of mutual funds. His nonprofit affiliations include serving as a trustee of the Geffen Academy at UCLA, Fidelity Charitable, the Harvard Westlake School and the Los Angeles Police Memorial Foundation. He served many years on the corporate boards of the Times Mirror Company, US Filter Corporation, Greyhound Lines Inc., Nuverra Environmental Solutions Inc., First Interstate Bank of California, Nordstrom Inc. and K2 Inc., among others.

While on sabbatical from UCLA in the 1970s, Osborne was an economic fellow at the Brookings Institution and directed studies at the Securities and Exchange Commission that contributed to changes in Rule 144, Regulation D and other exemptive requirements to the securities laws designed to lower costs and improve liquidity and capital market access to venture capitalists and emerging-growth firms alike.

Osborne's research interests also include venture capital and private equity, family and closely held business, and the role of boards of directors in private, public and not-for-profit organizations.

A corporate governance expert, Osborne established a Director Education and Certification Program designed to help officers and directors of public, private and nonprofits prepare for the fiduciary duties and legal responsibilities of governance. This program also addresses best practices and topical issues confronting directors.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Olav Sorenson

OLAV SORENSON, PROFESSOR OF STRATEGY AND FACULTY RESEARCH DIRECTOR, PRICE CENTER FOR ENTREPRENEURSHIP & INNOVATION, UCLA ANDERSON

Olav Sorenson joined the UCLA Anderson faculty in 2020. His primary stream of research pertains to economic geography, focusing on how entrepreneurship influences the growth and competitiveness of regions within countries, and on why some regions appear more supportive to entrepreneurs than others. "I was in graduate school in the mid-1990s at Stanford, in Silicon Valley, and it seemed like everybody and their brother was getting involved in a startup," Sorenson says. "That's really what got me interested in entrepreneurship and interested in 'Why Silicon Valley?' What was different about Silicon Valley than other places?"

Sorenson has called attention to unexpected consequences of the fact that social capital plays an important role in entrepreneurial success. Largely in recognition of this research, Sorenson received the 2018 Global Award for Entrepreneurship Research. His secondary streams of research have addressed the relationships between basic science and innovation and how organizations can better learn from their interactions with customers and from their manufacturing experience.

In total, Sorenson has delivered nearly 400 research presentations and has had more than 90 papers published on these subjects, in journals such as Science, the American Journal of Sociology, the Journal of Financial Economics, the Review of Economics and Statistics, Administrative Science Quarterly, the Strategic Management Journal and Research Policy. Sorenson serves as a department editor for Management Science and as a deputy editor at the American Sociological Review. He has also served in editorial positions at more than a dozen other journals.

Sorenson's Venture Capital Strategy course is a version of one he's taught since 2005. "My goal with that course is to do something that's a little different from the typical venture capital course, which is usually about valuation and contract terms," says Sorenson. "This course comes more from the perspective of someone who would be an active venture capital or angel investor, and some of the types of strategic decisions that are involved with that." He'll also be teaching Entrepreneurship and Venture Initiation, an introductory entrepreneurship course.

In addition to his research and teaching responsibilities, Sorenson joins the Harold and Pauline Price Center for Entrepreneurship & Innovation as faculty research director. In that role, he plans to build on the curricular offerings of the Price Center and create a research arm dedicated to entrepreneurial studies. Sorenson also plans to mentor student entrepreneurial teams within the Anderson Venture Accelerator and those participating in the school's Business Creation Option field study.

From 1999 to 2005, Sorenson taught strategy courses at UCLA Anderson. Prior to returning to Anderson, he held the Frederick Frank '54 and Mary C. Tanner Professorship at the Yale School of Management and, before that, the Jeffrey S. Skoll Chair in Technical Innovation and Entrepreneurship at the University of Toronto. He has also served on the faculties of London Business School and the University of Chicago, and has held visiting appointments at the Hong Kong University of Science and Technology, SDA Bocconi, Universidad Carlos III, Melbourne Business School, Singapore Management University, the National University of Singapore, BI Norwegian Business School, the Stanford Graduate School of Business and INSEAD.

Sorenson received his bachelor's degree from Harvard College and his master's and doctoral degrees from Stanford University. He has also received an honorary doctorate from Aalborg University.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Eric Sussman

Accepting an offer to teach as a means of earning some additional income may have been one of Eric Sussman's more auspicious decisions. Currently an adjunct professor of accounting and real estate at UCLA Anderson, Sussman first taught a certified public accountant exam review course after graduating from Stanford's Graduate School of Business and accepting a position with a small real estate investment firm. It was a role he thoroughly enjoyed. So when he was first offered a lecturer's position at Anderson by his mentor and former teacher, David Ravetch, he jumped at the opportunity.

Since 1995, Sussman has been teaching courses in the areas of cost/managerial accounting, financial accounting, financial statement analysis, equity valuation, corporate financial reporting and real estate investment and finance to undergraduate, graduate and executive education students. In addition, he has advised numerous MBA and fully employed MBA field study teams and led student travel groups to Brazil, China, Dubai, Saudi Arabia and Abu Dhabi. He has also served as a guest lecturer at UC Berkeley, George Washington University and the Helsinki School of Economics, and created a series on accounting and finance for the Great Courses (the Teaching Company).

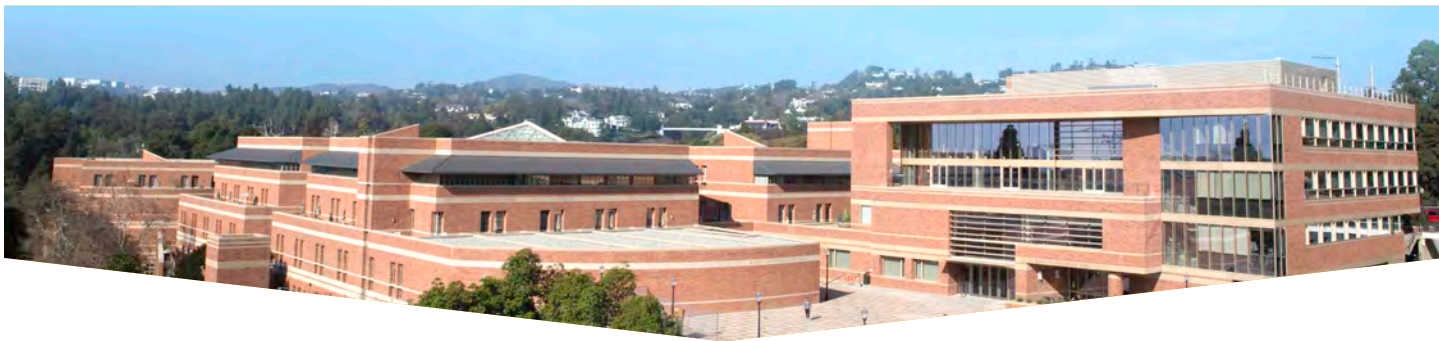
Throughout his teaching career, Sussman has remained active in the real estate industry. He is president of Amber Capital Inc., manager of Fountain Management LLC and Clear Capital LLC, and managing partner of the Pacific Value Opportunities and Clear Opportunity Fund, which have acquired, rehabilitated, developed and managed more than 2 million square feet of residential and commercial real estate over the past 20 years. The firms' portfolio at present consists of industrial, multifamily and single-family residential, and retail properties.

Sussman is also audit committee chairman and former chair (2012–2018) of the board of trustees of Causeway Capital's group of funds (International Value, Emerging Markets, Global Value, Global Absolute Return Funds, International Opportunities and International Small Cap), which collectively have more than \$15 billion in assets. He sits on the board of Pacific Charter School Development Inc. and was former chairman of the Presidio Fund and former audit committee chair of Atlantic Inertial Systems Inc., a producer and manufacturer of electromagnetic sensors.

As an aside, Sussman created Insight FSA™, an analytical software tool that automatically and critically measures, evaluates and reports upon the financial accounting and corporate reporting risk for public companies via EDGAR Online.

With his wide range of expertise, Sussman has consulted for large and small firms, nationally and globally, and is a frequent lecturer on varied financial, accounting and corporate reporting topics. He has served as an expert witness and consultant for commercial litigation involving matters of corporate financial reporting and disclosure, audit effectiveness, valuation, real estate due diligence and related practices, and overall damage analyses. He is a licensed CPA in California.

Sussman relies on his real-world experiences to make his classes relatable and exciting, aspects that are not lost on students or faculty. He is an eight-time winner of the MBA Teaching Excellence Award, a seven-time winner of the FEMBA Teaching Excellence Award and recipient of numerous other teaching awards and national honors.



Thank you to Jay Steinbeck, the Harold and Pauline Price Center for Entrepreneurship & Innovation, the Steinbeck Family Business Seminar Advisory Committee, the UCLA Anderson Family Business Association, Marketing and Communications, our marketing partners and everyone who contributed to making this seminar a success.

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