



# Stage 1 Financial

**EMERGENCY CORONAVIRUS MEETING**  
**GOVERNMENT STIMULUS + DISASTER RELIEF**

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# Today's Speakers



Guest Speaker

**Ann Stawicki**

Vice President – Burnham Benefits

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Ann has more than 20 years of experience in healthcare delivery. She works with C-suite executives to develop long-term, high-return benefit plans that achieve corporate goals, by lowering costs and maximizing results. Ann enables clients to provide effective employer wellness plans, outsource benefits administration, and provide quality employee communications in self-funded and fully-insured settings.

Industry Experience: Since October 2005

Education: Bachelor of Science in Health Science from San Diego State University; Master of Public Health (MPH) in Health Services Administration from San Diego State University

Duration at Burnham: Since July 2012

Notable Quality/Achievement in the Benefits Industry/Designations: Ann is passionate about the community and volunteers at numerous non-profit organizations.

# Today's Speakers



Guest Speaker

**Simon Oh**

SVP & SBA Loan Production Office  
Manager – Hanmi Bank

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Established in 1982 in Los Angeles, Hanmi Bank was originally founded to serve the underserved immigrant community in Koreatown. From our humble beginnings as the first Korean-American bank, Hanmi Bank has grown to embrace and support the dreams of all Americans. Today, we serve our customers in diverse markets through our coast-to-coast network of branches, loan production offices and loan centers.

Our mission is to provide quality financial services to support your American dream. We pride ourselves on being experts in business banking. As a trusted partner to small businesses and an advocate of strong local communities, we have dedicated ourselves to helping small businesses grow and thrive for nearly four decades. Hanmi Bank offers a wide array of products and services to fit your needs, including SBA Lending, Commercial Real Estate Lending, Equipment Leasing, Specialty Lending, Treasury Management Services and much more.

Guest Speaker

**Kris Alvarez**

SVP & Credit Manager at Hanmi Bank  
– Hanmi Bank

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Please contact Simon for any  
questions



# Today's Speakers



Guest Speaker

**Karla Kraft**

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**Stradling**  
Attorneys at Law

Karla Kraft is a shareholder in Stradling's Business Litigation and Employment practice groups.

She represents public and private corporations of all sizes, banking institutions, the Judicial Council, and other organizations and prominent individuals in a broad range of litigation matters. Her particular areas of emphasis include defending class actions, including a wide variety of consumer class action complaints; commercial real estate disputes; corporate, shareholder and partner disputes; breaches of corporate merger agreements and other business-to-business contractual disputes; trade secret matters; and unfair competition.

Karla also regularly counsels public and private companies ranging from emerging growth startups to multinational corporations on a full spectrum of employment issues including discrimination, harassment, retaliation, wrongful termination and wage-and-hour matters. She works with employers in the prelitigation phase of potential disputes, and defends employers in individual and class action lawsuits.

Karla regularly lectures for California's Continuing Education of the Bar and other legal organizations, and sits on the Board of Governors of the Association of Business Trial Lawyers, Orange County Chapter.

Karla previously served as law clerk to the Honorable William Fremming Nielsen of the U.S. District Court, Eastern District of Washington. Prior to joining Stradling, she practiced in the litigation departments of Hodel Briggs Winter LLP and Paul Hastings LLP.

# Today's Speakers



Guest Speaker

**Mark Skaist**

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**Stradling**  
Attorneys at Law

Mark L. Skaist is a shareholder in Stradling's Corporate and Securities practice group and former Co-Chair of the department.

Mark's practice focuses on mergers and acquisitions, public and private securities offerings, venture capital transactions, commercial transactions, and general corporate representation (including technology licensing and development and distribution transactions). Mark also works with private equity funds in acquisition transactions and advises clients on matters involving corporate governance and employee compensation.

His clients range from emerging companies to publicly traded companies, as well as a number of venture capital and private equity firms.

In 2017 and 2018, Mark was named to the Orange County Business Journal's annual OC 500 book, a list that includes Orange County's most influential business and civic leaders in nearly every industry sector. He was selected for inclusion in the Best Lawyers 2019 and 2020 lists of Best Lawyers in America in the area of venture capital law and was named a "Southern California Super Lawyer" by Super Lawyers for 2014-2017.

# Today's Speakers



Guest Speaker

**Azad Virk**

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**Stradling**  
Attorneys at Law

Azad Virk is a shareholder in Stradling's Corporate and Technology Transactions practice groups.

Azad's practice focuses on a variety of corporate, commercial and intellectual property transactions, including the formation of startups, equity and debt financings, mergers and acquisitions, joint ventures, strategic alliances, intellectual property and technology transactions across multiple industries.

His clients include companies in the following industries:

- High technology
- Pharmaceutical
- Medical device
- Biotechnology

Azad practiced law in India before relocating to the United States, counseling clients on intellectual property issues and representing a diverse range of clients in intellectual property, corporate and technology-related litigation before various courts and tribunals.

Azad was named a "Southern California Rising Star" by Super Lawyers from 2015-2019.

# Today's Speakers



Guest Speaker

**John Wicker**

Associate – Stradling Law

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**Stradling**  
Attorneys at Law

John Wicker is an associate in Stradling's Employment Law practice group.

John has extensive experience defending a broad range of employment-related claims, including discrimination, harassment, wrongful termination, retaliation, breach of contract, unfair competition and wage and hour cases. He also has experience both prosecuting and defending trade secrets matters, and has successfully represented clients in state and federal courts, administrative proceedings, mediations and arbitration hearings.

John also has a strong background counseling employers on a wide variety of matters, such as employee terminations, accommodating employees with disabilities, workplace investigations and audits, overtime exemptions under federal and state law, employee handbooks, wage and hour matters, the organization of retirement and medical benefits plans, supervisor trainings and various employment contracts and agreements.

Prior to joining Stradling, John worked at two different employment defense firms and served as an Assistant Deputy to the Honorable Don Knabe of the Los Angeles County Board of Supervisors.

John was named a "Southern California [Rising Star](#)" by Super Lawyers in 2018.



# Today's Hosts



Host

**Katy Triefenbach**

Managing Partner, CEO –  
Stage 1 Financial

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Katy and Jeremy are the Co-Founders of Stage 1 Financial. As a combined team, this dynamic duo has spent more than 30 years in a variety of roles in and outside of the United States.

Their primary objective is to focus on young fast-growing companies, and more importantly, their owners. Helping to make individuals successful in achieving their dreams is the founding principle on which Stage 1 Financial was created.

The accounting, finance, and reporting solution for investor backed brands, Stage 1 Financial delivers a fully-integrated, outsourced finance and accounting solution that aligns with your organization's strategic priorities.

Our team spans the US with bases in Anaheim, Denver, Boston, and Philadelphia to help us ensure enough coverage for quality face-to-face time with most of our clients. Our local teams are always ready to host meetings or hop on the phone. We are here to help you and strive for the best customer service.



Host

**Jeremy Triefenbach**

Managing Partner, CFO –  
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