

# WHO'S WHO IN PROFESSIONAL SERVICES

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## Region's business owners count on our top CPAs and attorneys

Welcome to the 2014 edition of Who's Who in Professional Services.

This special report focuses on key legal and accounting advisors to companies across the Tri-Counties, making it a must-read issue for anyone seeking business-to-business legal or accounting services in the region.

For this year's report, we have built on last year's significant upgrade to our database and method for selecting Who's Who members. We are also building on a the major changes that have taken place within the ranks of law firms and CPA firms in the Ventura, Santa Barbara and San Luis Obispo county region.

Our annual publication of Who's Who in Professional Services gives us a chance to reassess the roles of the movers and shakers in these very important firms, which are the backstops for our business community.

To research this Who's Who section, we use the Business Times' Top 25 lists as a cornerstone to contact the region's top law firms and CPA practices. We also solicit nominations from our readers and have added a number of new people to the section this year.

To qualify, an attorney or CPA must have his or her principal office or place of business within the Ventura, Santa Barbara and San Luis Obispo county region. A

qualified candidate also must offer his or her services to a range of clients — we did not consider nominees who are employed as a CFO or general counsel at a single organization.



**HENRY DUBROFF**

Editor

We select Who's Who candidates based on the quality and quantity of their effort advising clients, and we also factor in community outreach efforts and pro bono work.

The section would not be possible without the support of our sponsors, Bartlett, Pringle & Wolf, Montecito Bank & Trust and Cappelletto & Noël.

The section was organized and produced by Special Reports Editor Erika Martin and the cover was designed by Advertising Graphic Designer Elizabeth Willhite.

Our special reports calendar continues with Who's Who in Healthcare, Insurance and Biomedicine on Nov. 7 and our annual Tax & Financial Planning Guide on Nov. 21.

Our December lineup includes Who's Who in Nonprofits & Foundations, followed by the grand finale for our editorial calendar, the Top 25 Book of Lists, which publishes on Dec. 26.

• Contact Editor Henry Dubroff at [hdubroff@pacbiztimes.com](mailto:hdubroff@pacbiztimes.com).

A word from our sponsor

Montecito Bank & Trust is the oldest and largest locally owned community bank in the tri-counties. Founded in 1975, with nine branch offices from Solvang to Westlake Village, the bank offers a variety of competitive deposit and lending solutions for businesses and consumers, and online services including mobile banking and cash management. Our Wealth Management Division provides full investment management as well as trust and estate services.

We are dedicated to making the communities we serve better places to live and work, and our associates strive to fulfill this mission each and every day by offering financial solutions to our customers, delivered with the highest quality of service. We believe in the importance of investing in our communities in various ways — from our ongoing volunteerism, financial outreach programs and nonprofit support to our special community giving programs including Anniversary Grants<sup>SM</sup> and Community Dividends<sup>®</sup>.



A word from our sponsor

### Perspective. Integrity. Expertise. Character.



Successful service professionals know what it takes to help clients achieve their goals. They invest their time and energy staying current in an ever-changing world, going beyond just keeping up.

Service professionals who withstand the test of time have unique challenges with building service teams, complying with employment laws and addressing succession planning to ensure the longevity of the business, all without taking their eye off the ball to provide valuable insight to clientele. Balancing growth and service, working in the business and working on the business, being the best and building the next generation of experts; these are the common threads that weave throughout the professional services sector.

It can take years, even decades, to build a successful reputation. Time is money. Integrity is key. And passion is the fuel to persevere as a service professional.

We applaud those who are being recognized as top service professionals in this special issue. We understand what it took to get there and wish you continued success always.

Scott Hadley, CPA  
Managing Partner  
[www.bpw.com](http://www.bpw.com)



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### Warning Signs of Lender Misconduct

During the banking crisis in the late 1980s and early 1990s, some lenders were accused of using heavy-handed tactics against business borrowers they no longer wanted to lend money to. Many of these borrowers were manipulated by lenders until they were forced to default or produce personal collateral in an attempt to save their business. A legal practice, "lender liability," came into its own at the time. Lenders were sued over breach of contract and fraud and were forced to pay hundreds of millions of dollars in damages to their borrowers.

We're seeing similar lender misconduct today. Possible warning signs of lender liability include when a lender:

- requires increased accounts receivables or collateral without sufficient justification;
- refuses to advance the full amount available under a loan;
- suddenly requests the borrower to sign a waiver for past misconduct by the bank;
- reduces credit lines or changing loan terms without warning; and
- demands performance that is not required in the loan documents.

If borrowers see some of these signs, they must educate themselves on what is included in their loan documents and then send letters and e-mails to their lender demanding a stop to activities hurting their business. Everything should be documented. If a lender knows the borrower understands its rights and has the appropriate documentation to help prove a strong lender liability case, it may be enough to convince the lender to negotiate new favorable loan terms or at least cease its misconduct.

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**Monico Casillas**

Damitz, Brooks,  
Nightingale, Turner  
& Morrisset  
Santa Barbara

Monico Casillas, CPA, started his accounting career with Damitz Brooks Nightingale Turner & Morrisset in Santa Barbara in 1998.

He concentrates his consulting and compliance work on tax matters affecting partnerships, C and S corporations, and small-business owners. Casillas has performed consulting and compliance work in a variety of industries, including manufacturing, agriculture, real estate development and private equity.

He is a member of the American Institute of CPAs and the California Society of CPAs and has been involved with the board of directors of the Santa Barbara Flower & Nursery Growers Association and Cancer Hope Foundation.

**Bridget Foreman**

Bartlett, Pringle  
& Wolf  
Santa Barbara



Bridget Foreman joined Bartlett, Pringle & Wolf LLP in 2003, becoming a partner in 2009. Her specialties include tax planning strategies for closely held businesses, individual taxation for high-net-worth individuals and the hospitality industry.

As partner in charge of the firm's tax department and real estate practice, Foreman's business expertise focuses on partnership taxation and entity structure. She integrates tax planning, compliance and consulting services for her clients as well as orchestrates the efforts of their other advisers, including investment managers, attorneys, bankers and insurance agents.

Foreman is past president of the board of trustees for Child Abuse Listening Mediation.

**Scott Hadley**

Bartlett, Pringle  
& Wolf  
Santa Barbara



Scott Hadley is the managing partner at BPW and has led the consulting services group since 1997.

Hadley leads the consulting service group at BPW and chairs the professional services practice. Through his previous experience as a senior auditor and consultant with KPMG and his time working at BPW, Hadley has developed a blend of technical knowledge and accounting expertise, which has led him to specialize in designing accounting systems and business processes.

Scott is a graduate of UCSB and holds a bachelor's degree in business economics. His postgraduate professional education has included software development, database design and certifications in various business and accounting software packages.

**Jeff Harris**

Nasif, Hicks, Harris  
and Co.  
Santa Barbara

Jeff Harris is a partner at Santa Barbara-based accounting firm Nasif, Hicks, Harris & Co., where he has worked for 24 years. He performs auditing, tax and consulting services for closely held high-tech firms and small international businesses.

Harris has played an integral role in helping clients raise more than \$1 billion through public offerings, sales of their businesses or venture financing during the past seven years.

Before joining the Santa Barbara firm, he worked as an audit senior for the Silicon Valley office of Deloitte, Haskins & Sells for three years.

Harris received a bachelor's degree from UC Berkeley and an MBA from CSU Hayward.

**Jeff Hass**

Farber Hass Hurley  
Camarillo



Jeff Hass and partner Pat Farber founded Farber Hass Hurley in 1990. The firm has offices in Camarillo, the San Fernando Valley and Valencia.

Farber Hass has experience with small

registration statements, equity and debt offerings, private placements, S-1 registrations and filings with the SEC, M&A, due-diligence and Erisa Benefit Plan audits. The firm's list of clients has included Balance Bar, Natrol Vitamins, Wells Fargo Retail Finance, Bank of America Retail Finance and Advanced Photonix.

Hass is the firm's audit and accounting partner. He began his career with nine years at Ernst & Young, followed by four years at Deloitte & Touche. He holds a bachelor's degree from Loyola Marymount Los Angeles.

**Greggory Hutchins**

Holthouse Carlin  
& Van Trigt  
Westlake Village



As a tax partner at Holthouse Carlin & Van Trigt, Greggory Hutchins specializes in providing tax consulting and compliance services for high-net-worth individuals and owner-managed businesses across

a variety of industries.

With more than 25 years of experience in public accounting, Hutchins started his career in KPMG's tax department, where he left as a senior manager to help establish the Westlake Village office of Holthouse Carlin & Van Trigt.

He is a member of the executive committee at the firm and is on the board of directors for Moore Stephens North America, as well as various other privately and publicly held companies representing a number of diverse businesses.



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