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# Trusted Advisors 2014



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## TRUSTED ADVISORS 2014

## Publisher's Letter

**W**e're excited to announce the 2014 Trusted Advisors

Awards honorees. Once again we have singled out and honored the outstanding accountants, attorneys, business bankers, insurance professionals and wealth managers helping their clients to thrive here in the greater San Fernando Valley region.



These individuals, all of them well-deserving of the "trusted advisor" mantle, are recognized by the San Fernando Valley Business Journal for their commitment to high-quality client service, their longevity as professionals in their chosen fields, and their commitment to overall excellence.

With the many great professionals providing services in our area, it's not easy to single out a select few to be honored. We collect and examine a long list of nominees and review each within his or her respective professional category. Within each category, there are individual awards criteria. Certified public accountants and attorneys have annual billing requirements, business bankers have a portfolio threshold, insurance professionals are required to meet minimum annual premium revenue, and wealth managers have to maintain a minimum portfolio as well. While the size of the client account was certainly considered during the awards selection process, the key driver was client and referral source testimonials. Reading through the submitted material is ultimately what steered us in the direction of our honoree selections.

I want to thank the members of our advisory committee for helping us identify our honorees. It was no easy task by any means. It required each member to read through a few hundred pages of biographical information, statistics, client testimonials and professional experience.

At our annual Trusted Advisors Awards event on Wednesday, August 20 at the Universal Hilton Hotel in Universal City, we proudly announced the 2014 class of Trusted Advisors, whose stories are also detailed in the pages of this special supplement to the San Fernando Valley Business Journal.

Congratulations once again to each of our 2014 honorees!

Best regards,

Josh Schimmels  
Associate Publisher

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**Todd Van der Wel, CPA**  
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California Society  
of CPAs



**Melissa White**  
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for the South Valley  
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**Michele Grace**  
Senior Vice President  
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Business Banking  
Chase Bank

TRUSTED ADVISORS 2014

SPECIALTY AWARD

## TRAILBLAZER AWARD

For Starting a New Enterprise, Being the First to Try Something New and/or Leading the Profession Forward

### **Adam Grant**

Attorney & Shareholder

**Alpert Barr & Grant APLC**

**A**dam D.H. Grant is a trusted advisor to his clients, his peers, his family and his community. His seemingly limitless energy, his thorough understanding of the law, and his genuine concern for his clients' wellbeing have secured him a highly regarded and thriving practice. His clients are assured that he will exhaust all legal avenues available to find them a fair and reasonable solution to their concerns. He has earned a reputation for being a no-nonsense litigator who gets the job done. On many occasions opposing parties have been so impressed by his work that they have specifically sought out his services for other legal matters.

An innovator and trailblazer in his field, in the last two years Grant recognized the increased need and great potential of the mobile app law category. In this short amount of time, he honed his skills and expertise in this still developing and very specialized legal segment and has positioned himself as an expert in the category of mobile app privacy laws.

Grant understands that litigation can be a daunting, complex and costly exercise for any litigant. His thorough approach to resolving disputes is always crafted with the client's perspective and company's culture in mind. Clients know that with his over 20-years of legal experience, he is able to explain any aspect of the litigation process and address any concerns they may have. Furthermore, Grant understands the gravity of pursuing litigation, and what this means for the clients' business and their personal wellbeing. With this in mind, he knows and counsels his clients on how best to proceed for an equitable and expeditious conclusion to their disputes so that they may move forward with their lives and their businesses.



"To say that Adam is a 'trusted advisor' doesn't go far enough. My family has trusted Adam for a lifetime. My wife was mentored by Adam as far back as summer camp! Really, it's true! About 10 years ago I needed to get a lawyer for our quickly growing small business. Camp is one thing, but my business is the culmination of a lifetime of work. So the decision to work with a lawyer who is a friend wasn't taken lightly. I don't work with Adam because he's a friend, I work with him because he's a great lawyer who I trust completely."

**MIKE WILLARD**  
CEO  
Sportstec Inc.