



ORANGE COUNTY TRUSTED ADVISORS

SEASONED EXPERTS SERVING PRIVATELY-HELD
BUSINESSES & OWNERS IN SOUTHERN CALIFORNIA

INTEGRITY

adherence to moral and ethical principles
soundness of moral character

TEAM

collaboration of experts working towards
the client's goals

SUCCESS

achievement of the goals set by the client
in the most expeditious manner

OUR SERVICES

- FINANCIAL
- RISK MANAGEMENT
- REAL ESTATE
- LEGAL
- BUSINESS CONSULTING
- MERGERS & ACQUISITIONS
- ORGANIZATION

MISSION

Our mission is to be the most comprehensive expert business solutions provider serving privately held, mid-market companies and their business owners in Southern California.

WHY US?

Business challenges are rarely one-dimensional. Our team is comprised of diverse, seasoned business expert advisors and their companies. We collaborate and craft multi-dimensional solutions that are optimized for our unique clients. **The best solutions, the best people, the most successful outcome.**

VALUES

We strongly believe in living out our values: integrity, honest, and accountability. This is evident with our OCTA team and our respective organizations. Our plumbline standard is always, "What is best for the client?"

DAVE BROWN

Founding Partner
Brown & Streza, LLP

ESTATE ATTORNEY



MATT BROWN

Partner
Brown & Streza, LLP

ESTATE ATTORNEY



GREG ENDSLEY

Partner
Madison Street Partners

COMMERCIAL REAL ESTATE



STEVEN GRAHAM

Partner
Snell & Wilmer, LLP

COMMERCIAL, CONSTRUCTION,
REAL ESTATE LITIGATION



BRAD HALL

Partner/Managing Director
MGO CPAs

PUBLIC ACCOUNTING, TAX AUDIT,
TAX PLANNING



IRA HERMANN

Financial Advisor
Capstone Partners

INSURANCE INVESTMENTS,
WEALTH MANAGEMENT



DAVID LUVISA

Managing Director
Keystone Capital Markets, Inc.

MERGERS & ACQUISITIONS,
FINANCING, RECAPITALIZATION



DAVID PLOURDE

Regional Executive Vice President
American Business Bank

COMMERCIAL BANKING: LINE OF
CREDIT, TERM LOANS, DEPOSIT SERVICES



MICHAEL SILVIO

Partner
MGO CPAs

TAX CREDITS & INCENTIVES,
TAX PLANNING



PETER STEPHAN

Executive Vice President
EGPS, Inc.

401K DESIGN, PROFIT SHARING,
CASH BALANCE PENSION STRATEGIES



RICHARD STREZA

Managing Partner
Brown & Streza, LLP

BUSINESS LAW, TAX PLANNING,
RISK MANAGEMENT



WILLIAM TOM

Managing Partner
InfoQuest Management Consulting

EXECUTIVE SEARCH & COACHING,
ORG DEV, SUCCESSION PLANNING



LARRY WEBB

Executive Vice President
Sullivan Curtis Monroe

COMMERCIAL RISK MANAGEMENT



MICHAEL YI

Managing Director
Newport Valuations

BUSINESS VALUATIONS, ESOP,
FINANCIAL ADVISORY



We are an affiliate of expert business advisors representing the most commonly needed business services. Each professional has over 30 years of expertise supporting mid-sized, privately held businesses and their owners. Each of our firms have sterling industry reputations, earning each of us the moniker of **"Trusted Business Advisor"** by our clients.