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San Diego Military Advisory Council



**JASON BRAND**  
American Red Cross Southern California Region



**BRIAN CAHILL**  
Balfour Beatty



**SCOTT CHADWICK**  
City of Carlsbad



**BRETT CROZIER**  
Support The Enlisted Project (STEP)



**NICOLE D'AMBROGI**  
San Diego Legacy Law



**CHARLES B. DAVIS, MD, FAAP**  
Rady Children's Hospital-San Diego



**DEBRA DIVAN, MSN, RN, CEN**  
Neighborhood Healthcare



**JEFFREY FORBES**  
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**AMY FORSYTHE**  
Author



**JAY GARCIA**  
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**CORY GAUTEREAUX**  
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**JIM GRUNY**  
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**PRIME HALL**  
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**CHARLES WHITE**  
University of San Diego



**JEFF WIEMANN**  
Angels Foster Family Network



**BILL WILSON**  
Neurocrine Biosciences



**MARK BALMERT**

President and CEO  
San Diego Military Advisory Council

**R**ear Admiral Mark Balmert (Ret.) is president and CEO of the San Diego Military Advisory Council (SDMAC). Upon retiring from the Navy in 2009 following a more than 30-year career in the Navy, he became the director of strategic planning and business development for AMSEC, a subsidiary of Northrop Grumman and later a subsidiary of Huntington Ingalls Industries. In 2014, he joined BAE Systems as a program manager for San Diego Ship Repair. He served on the board of directors at SDMAC for many years and was the president of the board before becoming the SDMAC executive director in 2018, and then the president and CEO in 2020. Balmert earned a bachelor's degree in chemical engineering from the University of Notre Dame and a master's degree in finance and financial management services from the Naval Postgraduate School.



**JASON BRAND**

Director, Service to the Armed Forces & International Services  
American Red Cross Southern California Region

**A**s Service to the Armed Forces/International Services Director for the American Red Cross Southern California Region, Jason Brand oversees staff and volunteers serving military members, veterans and military families in San Diego and greater Southern California. Under Brand's leadership, the Red Cross Southern California Region provided more than 17,700 services in the local military community during the past fiscal year, including pre- and post-deployment briefings, Reconnection Workshops, welfare and morale programs, emergency financial assistance, homeless veteran outreach, and 24/7 emergency communications for service members. He has overseen the Hug-a-Hero doll program that provides dolls made in the likeness of a deploying parent. A 26-year veteran of the U.S. Coast Guard, Brand earned a bachelor's degree from the U.S. Coast Guard Academy and master's degrees from the University of Rhode Island and the U.S. Naval War College.



**BRIAN CAHILL**

President - California Division  
Balfour Beatty

**B**efore joining Balfour Beatty Construction, Brian Cahill was a U.S. Navy deep sea diver, where he served in Japan, Pearl Harbor and Little Creek, Virginia. He leveraged the G.I. Bill for education, earning a degree in aviation science. His military experience and acumen seamlessly transitioned into a distinguished construction career marked by safety emphasis, team leadership and collaboration. Cahill's background as a diver gave him a profound respect for protocols and safety in high-risk environments. In his 30-year tenure at Balfour Beatty, he's consistently risen through the ranks and is currently overseeing more than \$750 million in construction services annually as California Division President. Cahill's leadership style is rooted in service and philanthropy. He serves on the boards of trustees of Ronald McDonald Charities and Junior Achievement of San Diego & Imperial Counties. He can be reached at bcahill@balfourbeattyus.com.



**SCOTT CHADWICK**

City Manager  
City of Carlsbad

**A**s city manager of Carlsbad, Scott Chadwick exemplifies true leadership in ensuring the business of city government is thriving through structurally balanced budgets for the past five years. An Army veteran, Chadwick established a webpage highlighting pictures of staff and family members who are veterans, and he led the effort to start the planning and design efforts for the Veterans Memorial Park in the city. He has transformed the annual budget process with policies to safeguard financial health and spearheaded the city's first five-year strategic plan. Chadwick championed state legislation to allow employers to seek a temporary restraining order on behalf of an employee who is being harassed at work. Before becoming city manager of Carlsbad, Chadwick was San Diego's chief operating officer. He earned a bachelor's degree in political science and government from Purdue University.



**BRETT CROZIER**

Special Advisor  
Support The Enlisted Project (STEP)

**B**rett Crozier, a retired U.S. Navy captain, is a special adviser to Support the Enlisted Project (STEP), an experienced nonprofit executive, best-selling author and speaker, and former chief operating officer of Veterans Village of San Diego. During his 30-year Navy career, Crozier demonstrated a strong work ethic, outstanding leadership, and an unwavering dedication to fellow service members. In his prior role as the Chief Operating Officer of Veterans Village of San Diego, he spearheaded initiatives to combat veteran homelessness, oversaw substantial facility enhancements, orchestrated the annual Veterans' Stand Down event, and consistently aided veterans and their families in reintegrating into society and regaining independence. An amateur surfer, Crozier earned a bachelor's degree from the U.S. Naval Academy and a master's degree from the U.S. Naval War College.



**NICOLE D'AMBROGI**

Estate Planning and Probate Attorney  
San Diego Legacy Law

**A**n estate planning and probate attorney with San Diego Legacy Law and adjunct professor at Thomas Jefferson School of Law, Nicole D'Ambrogi served five years in the U.S. Navy. She is the author of "Estate Planning Simplified." With licenses in California and Arizona and a focus on veterans, D'Ambrogi has steered her firm's expansion while giving back to her community. She oversaw and directed the Veterans Legal Assistance Clinic volunteer team at Stand Down 2023 and revived the Veterans Self-Help Legal Clinic at the San Diego Law Library. D'Ambrogi earned a bachelor's degree in management from the University of Phoenix, and a law degree and master's degree from the Thomas Jefferson School of Law. She may be reached at nicole@sdlegacylaw.com or 619-550-3080.



**CHARLES B. DAVIS, MD, FAAP**

Senior Vice President and Physician Leader for Care Redesign and Managed Care  
Rady Children's Hospital-San Diego

**A** former deputy commander of Naval Medical Center San Diego, Dr. Charles B. Davis has expertise and experience in leadership, operations, medical policy, managed care, medical management and population health improvement. He is the senior vice president and physician leader for care redesign and managed care at Rady Children's Hospital and Rady Children's Health Network. He also serves as COO of Rady Children's Specialists of San Diego. Davis is the executive sponsor for BRAVE, Rady Children's first Veterans Team Resource Group, whose mission is to honor and support active duty, reserve, veterans and families alike by providing resources, advocacy and community outreach programs to improve their quality of life. A neonatologist and pediatrician with more than 30 years of clinical experience, Davis earned a bachelor's degree in economics and history from Williams College and a medical degree from Tufts Medical School.



**DEBRA DIVAN, MSN, RN, CEN**

Director of Nursing  
Neighborhood Healthcare

**A** former U.S. Army nurse, Debra Divan is director of Nursing at Neighborhood Healthcare, a private nonprofit. Divan joined Neighborhood Healthcare because of its mission to provide quality, compassionate, whole-person care to individuals and families, regardless of their circumstances. Her work has ensured that the organization's 50 nurses can service a record 87,000 patients in more than 400,000 visits across 20 locations in two counties. She has elevated the nursing operations, skill sets and operational capabilities to levels not seen before at Neighborhood Healthcare. Her mission-critical, sustainable, longstanding accomplishments also set the organization up for continued success in its nursing corps as it expands its reach. Divan helped Neighborhood Healthcare seamlessly assume the operations for three former Borrego Health facilities in Riverside County in September 2022, ensuring that tens of thousands of families did not lose access to quality healthcare.



**JEFFREY FORBES**

CEO  
The Patriot Group

**J**effrey Forbes, CEO, The Patriot Group, joined the U.S. Marine Corps in 2007, serving at U.S. embassies in Angola, South Africa, Mozambique, Iraq and Argentina before sustaining non-combat injuries that ultimately led to his honorable discharge. Forbes worked as a section leader with the Wounded Warrior Battalion at Naval Medical Center San Diego before he began working for One Source Supply Solutions (OSS). At OSS, he became one of the most trusted project managers and gained the experience to start the Patriot Group in 2020. Beginning with a handful of people, the Patriot Group has grown into a statewide organization with diverse operations in Northern and Southern California. The company is growing exceptionally fast and Forbes is the accelerant and the glue at the same time. He may be reached at jeff@go-patriot.com, or 760-445-0734.



**AMY FORSYTHE**

Author

**A**my Forsythe is an award-winning multimedia journalist and military veteran with more than 25 years of experience in storytelling, public speaking and multimedia content creation. Her work has appeared on Fox News Channel, CNN, MSNBC, ABC News, in Newsweek, Soldier of Fortune, Leatherneck magazine, and CENTCOM's Unipath magazine among others. Forsythe served nearly 18 years in the U.S. Marine Corps as a combat correspondent and has served in the U.S. Navy Reserve since 2010 as a public affairs officer with multiple deployments, including two deployments to Iraq and three to Afghanistan. She served as an adjunct professor creating curriculum and teaching social media, organizational development and entrepreneurship at the undergraduate, graduate and doctoral levels at California International Business University. Forsythe earned a bachelor's degree at California State University San Marcos and a master's degree from the University of San Diego.



**JAY GARCIA**

President & Founder  
Jay Garcia Group

**J**ay Garcia, President and Founder of Jay Garcia Group LLC, boasts seven years excelling in cybersecurity and data analytics. He's pioneered tech upskilling for veterans and students, championing diversity. His firm specializes in diverse workforce attraction, recruitment and retention. Leveraging 20 years of military service, he's crafted award-winning talent programs for major tech firms, merging HR, marketing, sales and technical skills. He oversees Alteryx's SparkED in the Americas-WEST and LAT-AM and holds titles such as George W. Bush Institute Scholar and Forbes Coaches Council Member. He's a two-time LinkedIn Top Voice, serves on VetCTAP's board, and advises CPaCE at Cal State Long Beach. Garcia holds a master's in psychology, a bachelor's in social & criminal justice, and various continuing education certificates. He also serves as a mentor for ACP and Veterati.



**CORY GAUTEREAUX**

Owner/Manager  
Firearms Unlimited California

**C**ory Gautereaux and his business partner started Firearms Unlimited, California in 2018 and have grown from operating out of their garage to running a successful storefront in El Cajon. Gautereaux is also a Registered Respiratory Therapist and a United States Army veteran. In the last year, Gautereaux has become more and more involved in his community through the East County Chamber, San Diego Young Republicans, and in his role as Secretary on the Campo/Lake Morena planning group. His experience as a veteran has given him the confidence to speak up for his local community and for the gun community and he has become an advocate for change in both. He hopes to one day grow the business large enough to be able to employ many veterans. He can be reached at cory@fucalifornia.com.



SAN DIEGO BUSINESS JOURNAL



# Congratulations

to **Charles B. Davis, MD** on being selected as one of The San Diego Business Journal's Top 50 Influential Veteran Business Leaders

**Charles B. Davis, MD**

Senior Vice President, Care Redesign;  
Chief Operating Officer, Rady Children's Specialists of San Diego, a Medical Foundation

**Dr. Davis** is the Executive Sponsor for **BRAVE**, Rady Children's first Veteran's Team Resource Group, whose mission is to honor and support active duty, reserve, veterans, and families alike by providing resources, advocacy, and community outreach programs to improve their quality of life. Dr. Davis had a successful 26 year career in Navy Medicine that included clinical, administrative and senior leadership positions.



Rady Children's<sup>®</sup> Hospital-San Diego



[RCHSD.ORG](http://RCHSD.ORG)



**JIM GRUNY**  
Community Liaison Officer  
Marine Corps Recruit Depot

Jim Gruny currently serves as the Community Liaison Officer for Marine Corps Recruit Depot San Diego and the Western Recruiting Region. In this capacity he advises and supports the commanding general and his subordinate commanders in maintaining a strong, positive and mutually supporting relationship between MCRDSD/WRR and the greater San Diego community. Previously, Gruny held a civilian position as Chief Operating Officer for Workshops for Warriors, a nonprofit providing transitioning service members and veterans advanced manufacturing training, recognized credentials and job placement services. He serves on multiple nonprofit and civic boards and committees and actively supports the San Diego region's military community through advocacy and hands-on volunteer efforts. Gruny holds a Bachelor of Arts degree in Economics from Vanderbilt University and a Master of Science degree in Management from the Naval Postgraduate School in Monterey.



**PRIME HALL**  
Co-Founder/CEO  
Deep End Fitness

Prime Hall is co-founder and CEO of Deep End Fitness. He is a former Special Operations Marine Raider with combat experience in Iraq, Afghanistan and Asia. He was a water survival instructor for 10 years and trained thousands of Marines with water confidence. Hall's mission is to generate a positive shift in humanity through empowering a warrior class of people by whom a ripple effect of global impact is made. He is able to do this by working with those at the height of their industries and professions so they may have the greatest impact on those around them, in turn creating the greatest impact possible. Hall has worked with San Diego Padres players Joe Musgrove and Fernando Tatis to support their strength and conditioning and has even been featured on ESPN.



**KITJA HORPAYAK**  
Recruiting Manager - Veteran and Tech  
Sigma Defense LLC and  
Solute

Kitja Horpayak is Recruiting Manager for Sigma Defense LLC and Solute. He is a veteran who is passionate about helping San Diego active-duty service members in their transition to a civilian career. In the first three quarters of 2023, he accounted for 38.5% of total and he maintains an average of approximately five new hires per month, leading all in-house recruiters. Since retiring from the Navy, Horpayak has volunteered his time as a coach and a mentor that helps our members navigate the obstacles of preparing for the civilian job market. He had the support of great mentors and positive experiences during his transition, making him a firm believer in paying it forward, which is why he devotes his time to helping through programs such as FourBlock, Veterati and Sigma Defense Ambassador programs. He can be reached at kitja.horpayak@sigmadefense.com or 858-947-7042.



**PAUL IBARRA**  
Facilities Manager  
TrueCare

Paul Ibarra, Facilities Manager, TrueCare, is proud to lead a life of service. After serving his country in the U.S. Navy during Desert Shield/Desert Storm, he courageously dedicated 11 years of his life to serving his community as a firefighter. His passion for mission-driven, community-based work ultimately led him to a successful career with TrueCare where he oversees issues related to maintenance, repairs and construction. Recent career highlights include working closely with TrueCare executive and senior leadership teams to develop an Emergency Operations Plan to ensure a coordinated and efficient emergency response; assisting in the opening of two new healthcare centers; helping with tenant improvements to TrueCare's Mission Mesa campus; and converting the Mission Mesa WIC office into a new pediatric dental clinic. In 2022, Ibarra completed \$371,500 of capital projects at TrueCare.



**MELISSA JOHNSON**  
President, San Diego County  
Bar Association  
Johnson Heeder LLP

Melissa Johnson, Partner, Johnson Heeder LLP, turned devastation into triumph after being discharged from the military because of her sexual orientation. She moved to San Diego more than three decades ago, earned her degree from UC San Diego, and then earned her law degree. Her military background inspired a focus on workers' rights and employment law. Her story reflects her remarkable ability to overcome adversity and pursue her passion for workers' rights advocacy. Johnson is currently the President of the San Diego County Bar Association and is the first openly LGBT person appointed to the County of San Diego's Civil Service Commission. She will be inducted into the LGBT Center's Veterans Wall of Honor later this year. In the community, she mentors young lawyers and law students, embodying a commitment to empowerment and building the next generation of workers' rights advocates.



**DEVIN JOHNSON**  
CEO  
Miles 4 Meals

Devin Johnson is the Co-Founder and CEO of Miles 4 Meals, a nonprofit dedicated to food rescue and addressing food insecurity in San Diego. A retired U.S. Marine Corps logistics officer and a history scholar with a master's degree, Johnson's journey reflects his unwavering commitment to education and community service. Under his leadership, Miles 4 Meals has secured key partnerships, including in-kind donations and collaborations with local businesses, to combat food waste and hunger. The partnerships he cultivated with local ranchers and Dunkin' Donuts secured consistent food donations and have been instrumental in increasing Miles 4 Meals' food resources. He also utilized his military background to connect with military bases and galley facilities, exploring opportunities for food rescue partnerships within these institutions. Johnson's dedication to veterans and the community embodies the spirit of service and innovation.



**BOB KAMENSKY**  
CEO  
Feeding San Diego

Robert J. Kamensky is Chief Executive Officer for Feeding San Diego. Raised in a military family, Kamensky followed his father's example of service to country, serving as a Navy officer over a blended active and reserve career spanning 35 years. His military career culminated in achieving Flag Officer status as a Rear Admiral and as the startup Commander for Submarine Forces NATO. In his current role, Kamensky leads an extraordinary team of staff members, volunteers and donors in the fight against hunger among the most vulnerable across the County of San Diego. Feeding San Diego is the leading food rescue hunger relief organization in the region managing an agency network of over 300 organizations and distribution locations throughout the county. In 2023, Feeding San Diego delivered its highest volume of food since its inception in 2007 - over 41 million pounds.



**DON KNAUSS**  
Executive Chairman and Former CEO, Clorox  
Company, USD Chairman of the Board of Trustees  
University of San Diego

Donald R. Knauss is an American business executive. He retired from The Clorox Company, a multinational manufacturer and marketer of consumer and professional products, in 2015, having served as executive chairman from November 2014 until July 2015 and chairman and chief executive officer from October 2006 until November 2014. He was executive vice president of the Coca-Cola Company and president and chief operating officer for Coca-Cola North America from February 2004 until September 2006. Prior to his employment with the Coca-Cola Company, he held various positions in marketing and sales with PepsiCo and Procter & Gamble, and he also served as an officer in the United States Marine Corps. He currently serves as a director of the Kellogg Company and Target Corporation. Knauss also serves as the chairman of the board of trustees for the University of San Diego.



**ISAAC LEE**  
Senior VP Operations  
Soapy Joe's Inc.

Isaac Lee is the Senior VP of Operations at Soapy Joe's Car Wash. A Marine Corps combat veteran and decorated lieutenant colonel with 20 years of service, Lee transitioned out of the military in 2017. He followed his passion for leadership and operational excellence to Soapy Joe's, where he has scaled the business 100% over four years. Lee puts employee development at the forefront of everything he does as he promotes high-performance teams, resulting in a strong positive culture where all employees can thrive. His people-first approach as an executive leader means Lee diligently coaches and develops field crews while simultaneously developing efficient operating systems such as new site development, facilities maintenance and supply chain for the company. Lee also dedicates time to veteran and military nonprofits Support the Enlisted Project and Marine Executive Association Camp Pendleton.



**PAUL LOSKA**  
CEO and co-founder of GIS  
Surveyors Inc.  
GIS Surveyors, Inc. (GSI)

Paul Loska is the CEO and Co-founder of GIS Surveyors Inc. His 30 years of land surveying expertise has built a thriving geospatial solutions company. Under his leadership, the company has expanded to more than 50 employees and multiple offices across California and Seattle, providing services to municipalities, utilities and government agencies. He has diversified the company's services by incorporating cutting-edge technologies to stay at the forefront of the geospatial industry. Loska's military background as an artillery surveyor in the U.S. Marine Corps instilled in him qualities of leadership, problem-solving and attention-to-detail skills. He is a licensed land surveyor and is committed to giving back, serving veterans and participating in charitable activities. He enjoys spending quality time along the Colorado River with his wife and six children. He can be reached at 858-243-0521 or ploska@gissurveyors.com.



**WILLIAM LU**  
Project Manager  
NIWC PAC

Will Lu is a Project Manager at the Navy Information Warfare Center Pacific. He joined Booz Allen Hamilton after the Navy, focusing on Quality Assurance and Process Improvement. His professional proficiency continued to climb after being promoted within the first year and taking over the military veterans group. He was quick to leverage company-provided education programs to help him master his role. Throughout his time at Booz Allen Hamilton, Will worked on learning new software, data analytics, and data visualization. This allowed him to fill several gaps that existed within his program. Lu is a recipient of the Society of Asian Professionals and Engineers Promising Professional Award and the Jefferson Award. He serves as an advisory board member for the Armed Services YMCA San Diego and as a chapter lead for the San Diego Veterans Beer Club.



**HERNÁN LUIS Y PRADO**  
Founder and CEO  
Workshops for Warriors

Hernán Luis y Prado is the Founder and CEO of Workshops for Warriors. He created the nonprofit school to help his comrades embrace a new mission and transform them into the future American manufacturing workforce. His expertise, leadership experiences and knowledge of manufacturing and engineering processes led to the development of a unique curriculum and accelerated education program that became his school. He served in the U.S. Navy for 15 years where he was awarded the Navy Achievement Medal and Combat Action Ribbon. He was recognized by the White House as a Champion of Change and was selected by the SBA as the Small Businessperson of the Year for California. In 2023, Hernán was a featured speaker at TEDx San Diego and testified before the U.S. House Committee on Veterans' Affairs. He can be reached at 619-550-1620 or info@wfw.org.



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# Tips to help Veteran small business owners access capital – one of their top barriers

*By Ronald Uy*

This Veterans Day we celebrate Veteran small business owners and the many contributions they make to the economy and our local communities.

According to the U.S. Census Bureau (2023), Veteran-owned businesses make up over 5% of all businesses nationwide, with approximately 3.3 million employees and approximately \$177.9 billion in annual payroll. Despite their many contributions and successes, Veterans are often faced with obstacles as they establish and operate their business ventures.

According to the 2022 National Survey of Military-Affiliated Entrepreneurs: Veteran Entrepreneurial Ecosystem released in March 2023, access to capital is the top barrier facing new and existing Veteran-owned businesses. Here are a few tips to help Veteran small business owners access capital:

## **Develop a business plan.**

Having a business plan is an essential first step – it explains what product or service the business is offering, business financial goals, and how the business may tackle any environmental or market risks. Business plans lay out what the desired goal is and how it will be accomplished.

It also serves as a resource for potential investors and lenders – articulating current financial status, sources of revenue and how to meet revenue projections.

## **Get financially organized.**

It is important to establish a checking and savings account specifically for the business and separate from personal account(s). A solid financial foundation creates a solid business platform and allows business owners to establish

credit and financial stability. Plus, personal and business finances matter and can have an impact on financing. On the business side, a bank will determine if the business is generating a positive cash flow. On the personal side, a bank will want to know if there is enough income to support not only the current debt but also the debt that is being requested. Having accurate financials are crucial to determining the business financial need.

## **Build relationships with critical partners.**

It takes a village! Make sure partners are aligned to support the business including an attorney, a CPA, as well as a small business banker. Good relationships with these partners are important in navigating business lifecycle changes as the business grows and helping determine if financials are in order before applying for funding. Utilizing resources to build other relationships can also help with potential financing options, such as connecting with a Community Development Financial Institution (CDFI) who can also help a small business access capital.

## **Demonstrate a consistent and positive flow of funds over time.**

Positive cash flow is critical to short- and long-term financial success. Small business owners need to make the most of their cash by monitoring expenses, collecting payments quickly, and using resources that can make cash flow management more convenient. Owners should draft a cash flow projection to provide added control over cash flow and get a clearer picture of the company's financial health.

Planning is key for Veteran small business owners looking to access capital. In fact, planning and preparing business finances in advance might be the most crucial part in getting a “yes” and access to the funding needed!

Veteran business owners shouldn't wait until capital is needed to start looking for it. Instead, they should get financially organized, create a plan, reach out to partners, and take advantage of the many online resources available for small businesses.



*Ronald Uy is Wells Fargo's Small Business Acquisition Manager for San Diego & Inland Empire. His team cover companies with gross revenues ranging from \$1-10mn in those respective areas and 4 employees. Ronald enjoys many ways of giving back to his community; Midnight Mission and the Red Cross.*

*Contact him to discuss your small business and banking needs at (619) 946-3121 or [Ronald.Uy@wellsfargo.com](mailto:Ronald.Uy@wellsfargo.com).*

**WELLS FARGO**



**SEAN MAHONEY**

Regional Chief Executive Officer, American Red Cross Southern California Region  
American Red Cross Southern California Region

Sean Mahoney is the Regional Chief Executive Officer for the American Red Cross Southern California Region. His region serves San Diego, Imperial, Orange, Riverside and San Bernardino Counties. Mahoney oversees all lines of service for the organization, including Disaster Services, Biomedical Services, Training Services, International Services and Service to the Armed Forces. In the last fiscal year, the Southern California Region has responded to hundreds of disasters — locally and nationally — and helped thousands of people affected by emergencies and enrolled more than 119,000 people in Red Cross training. Prior to the Red Cross, Mahoney served as the executive director of zero8hundred, an organization he launched in 2014. Mahoney is a veteran himself, having retired at the rank of captain after 27 years in the U.S. Coast Guard. He can be reached at sean.mahoney@redcross.org.



**MELISSA MALONE-MONTGOMERY**

Chief Operating Officer  
Options For All

As the COO, Malone-Montgomery has a record of driving results, closing gaps in processes, overseeing \$25M budgets and generating multi-million dollar savings. Her outstanding track record of accomplishments and her multifaceted contributions demonstrate her exceptional leadership and business acumen. Malone-Montgomery's strategic vision is apparent through her leadership. Her decision to discontinue low ROI efforts while channeling resources into higher-value markets led to a remarkable increase in client growth rates. She was commissioned as a Human Resources after graduating from the Military Academy at West Point. She served as Postal Platoon Leader for U.S. Post Offices in South Korea, Testing and Operations Officer at the Military Entrance Processing Station, and Personnel Strength Manager. She holds PMP, SPHR and 6-Sigma Master Black Belt certifications.



**JEFFREY W. MARTIN**

Chairman and Chief Executive Officer  
Sempra

Jeffrey W. Martin is the Chairman and CEO of Sempra. He leads 20,000 employees at the Fortune 500 premiere energy infrastructure company that focuses on sustainable business practices and helping advance the global energy transition through electrification and decarbonization. Martin learned the importance of serving an ideal greater than himself as a captain in the U.S. Army. Leveraging his experience in the military, Martin's success can be seen in his leadership style and beliefs. As a veteran, Martin brings unique and different perspectives to the business. His multicultural and multinational experience contributes to his understanding that a more inclusive culture can lead to greater innovation, performance and growth. Under Martin's leadership, Sempra has earned numerous recognitions, including Fortune's World's Most Admired Companies and VIQORY's Military Friendly Employer, silver ranking and Military Friendly Spouse Employer for 2023.



**JAMES MCPHERSON**

Program Manager  
General Atomics Aeronautical Systems, Inc.

James McPherson is a Program Manager at General Atomics Aeronautical Systems Inc. (GA-ASI). With a background in the U.S. Navy, McPherson transitioned seamlessly to civilian aerospace management. He played a pivotal role in bringing Link-16 electronics capabilities to USMC MQ-9A training exercises for the first time, enabling improved communication and coordination. He holds a Master of Science in Aeronautics, a Master of Science in Strategic Leadership, a Bachelor of Science in Political Science and an Associate Degree in Applied Science with a focus on electro-mechanics. He is committed to education, industry engagement, innovative solutions and operational excellence. McPherson engages with industry organizations such as the American Institute for Aeronautics and Astronautics and AFCEA where he moderates panels and contributes to discussions that advance the aerospace and defense sectors. He can be reached at 858-287-0042 or james.mcperson@ga-asi.com.



**QUINLAN MELVIN**

Director  
The Michaels Organization

Quinlan Melvin is a Director at The Michaels Organization. He has participated in the acquisition of more than 10,000 affordable units valued at \$1.2B through a joint venture between The Michaels Organization and Urban Investment Group within Goldman Sachs. He oversees 3,100 single-family homes within the military housing portion of the Michaels portfolio in California and 1,700 homes in Kansas. He's helped professionalize the disposition process as well as the asset management analysis and reporting process for the affordable housing portfolio consisting of more than 60,000 doors in the U.S. Melvin is involved in the ground-up development of 220 market rate units in El Cajon. Prior to his transition into real estate, he was a submarine officer in the U.S. Navy. He can be reached at 303-513-2879 or qmelvin@tmo.com.



**CHRIS MERWIN**

Director of Operations and Security  
R3 Strategic Support Group

Chris Merwin is the Director of Operations and Security at R3 Strategic Support Group.

Merwin joined R3 as a Navy Explosive Ordnance Disposal (EOD) Program Manager in early 2022. In his initial role, he managed a diverse team that provided training, logistics, maintenance and staff support to Navy EOD units and Underwater Construction Teams. He was later promoted to his current role where he now provides leadership across all facets of R3's portfolios. He is responsible for the budgeting and performance of more than 25 separate contract programs. He retired from the Navy as a captain after 29 years of service. He commanded EODMU TWELVE, deploying the unit to Iraq in support of Counter IED efforts in 2009, and EOD Group ONE where he was responsible for advancing the Expeditionary Mine Countermeasures concept and developing the Navy EOD Leadership Continuum.



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**BRIAN CAHILL**  
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**ALEX MONTELBANO**  
Founder & CEO  
Kove

Alex Montelbano is the founder and CEO of San Diego-based craft-brewed beverage company Kove. Following a seven-year stint in the U.S. Navy, Montelbano enrolled in SDSU's Extended Studies Business of Craft Beer program and began working in local breweries. Eventually, he fell in love with the alternative beverage scene. Under Montelbano's leadership, Kove has grown in popularity in areas surrounding San Diego and in only 60 days, was made available in over 100 major retailers including Costco, Sprouts, BevMo and Total Wine across San Diego County as well as local restaurants and bars. While scaling his brand, Montelbano remains committed to the greater impact Kove has in supporting both local and wide scale efforts. The company identifies as a 1% For the Planet company, working with local foundations to further initiatives that benefit the environment.



**TONY MANZANO**  
Safety Director  
TrueCare

Tony Manzano is safety director at TrueCare, where he is a dedicated healthcare professional. He had four years of service with the U.S. Navy, and those days were marked by accolades that include the Good Conduct Award, Meritorious Service Award, 100 Days at Sea and West-Pac 1996. He also received Petty Officer 3rd class in two years (E4) before receiving an honorable discharge. He holds a bachelor's degree in criminal justice from St. Leo University and a master's in business administration from the University of Phoenix. As Safety Director, Manzano ensures patients and team members enjoy a safe, comfortable healthcare setting with minimal risk. His efforts directly contribute to the quality of care, regulatory compliance, and preventing adverse events at TrueCare. His work improves the experience for thousands of patients annually as they seek care.



**BRET MORRISS**  
Managing Partner  
CAST Capital

Bret Morriss is managing director at CAST Capital Partners, managing all investments, commercial services and brokerage/advisory teams. Morriss is actively involved throughout the community as a member of professional organizations and serves as a board member to several nonprofit organizations that support both military and civilian initiatives. He is an entrepreneur and real estate finance professional who has executed more than \$2 billion in commercial real estate transactions. His professional accomplishments stand on their own but he is more than just a successful business leader. As a lieutenant colonel in the U.S. Marine Corps Reserve, Morriss has more than 3,000 hours and 850 combat hours in more than 20 aircraft including a dozen different turbine and piston powered helicopters. He can be reached at [Bret.Morriss@cast-cap.com](mailto:Bret.Morriss@cast-cap.com)



**GREG NAMROW**  
CEO & Founder  
TRACTIC

Greg Namrow, the Founder and CEO of TRACTIC, a leading real estate asset management company, identified a significant problem that real estate investors and owners were facing and developed a platform to help them better assess how their deals were performing which has proven to be impactful in the real estate industry. Key accomplishments for Namrow include an 18% increase in portfolio returns, an 11% increase in annual revenue, and the successful integration of new technologies into his company's real estate asset management platform. His U.S. Marine Corps duty provided him with a robust skill set, from strategic planning to team management, which has been invaluable in navigating the complexities of the real estate industry. He pursued further education, from American University and USD, giving him the tools to understand market dynamics, investment strategies and risk assessment.



**OCTAVIO NAVARRO**  
President  
AggreGateway

Octavio Navarro is the President of AggreGateway, and has more than 18 years of experience in the information technology field. Navarro served six years in the U.S. Navy as an operation specialist. While serving, he worked with radar consoles, electronic warfare, electronic navigation and voice radio communication systems. After four deployments throughout six years in his military career he was honorably discharged and transitioned into computer networks. As a network engineer, Navarro works on design, system integration and management of local and wide area networks for clients in the private, utilities, transportation, education and government verticals. He is chapter president of the U.S. Veterans Business Alliance, is on the board of directors of the U.S. Navy League, is a member of the National Veteran-Owned Business Association and the Hispanic San Diego Chamber of Commerce. He can be reached at [onavarro@aggregateway.com](mailto:onavarro@aggregateway.com)



## Congratulations to Melissa Malone-Montgomery's Achievement as a Top 50 Influential Veteran Business Leader!

Melissa Malone-Montgomery's transformation from a freshly-enlisted Human Resources Specialist to a distinguished business leader is truly inspiring. After extensive training from high school enlistment to her time at West Point, Melissa held significant roles in the military, including overseeing three US Post Offices in South Korea. Her vast military expertise seamlessly transitioned to the civilian sector, where she rose through the ranks at Bechtel Construction, eventually leading their Global Continuous Improvement department.

Now, as the Chief Operating Officer of a major CA state-wide non-profit, Melissa continues to exemplify the unparalleled leadership veterans bring to the business world.

Congratulations to Melissa on her well-deserved accolade!







University of San Diego®



# Congratulations, DON KNAUSS!

Thank you to Don Knauss, a Top 50 Veteran Business Leader of Influence, for your remarkable leadership at the University of San Diego and your unwavering commitment to our students!

*Donald R. Knauss served as an artillery officer in the U.S. Marine Corps from 1976 to 1981 and retired with the rank of Captain. He leveraged his military experience into a distinguished business career, which culminated in being named CEO and Executive Chairman of The Clorox Company.*

*Mr. Knauss and his wife, Ellie, generously invested more than \$50 million to not only build the Knauss Center for Business Education at USD, but also to name the Knauss School of Business.*

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**NEIL O'CONNELL**  
Executive Director  
Mt. Soledad National Veterans Memorial

Neil O'Connell is executive director of the Mt. Soledad National Veterans Memorial. He served in the U.S. Marine Corps for 32 years, rising to the rank of sergeant major for 13 years. Shortly after retiring from the Marines at Camp Pendleton in February 2012, he was recruited to serve on the board of the Mount Soledad Memorial Association. During his tenure he has dedicated his time supporting the Memorial Day and Veterans Day ceremonies and conducted numerous Veterans Honor Ceremonies, membership development and fundraising in support of the memorial, serving as the president of the board of trustees. He serves on the board of the San Diego Nice Guys, is a past president of the Friendly Sons of Saint Patrick of San Diego and former vice president of the MCRD Museum Foundation. He can be reached at [neiloconnell@soledadmemorial.org](mailto:neiloconnell@soledadmemorial.org)



**STEVEN OTTO**  
Partner  
Crosbie Gliner Schiffman Southard & Swanson LLP (CGS3)

Steven Otto is a partner at CGS3. With more than 20 years of legal experience, he joined the firm's real estate transactions group in 2021. Prior to his association with CGS3, he acted as a senior in-house attorney for Pinnacle West Capital Corporation and was associated with several top tier San Diego law firms. With special expertise in structuring complex transactions — Otto's experience spans the acquisition, development, leasing, licensing and sale of office, industrial and retail portfolios, and mixed-use office/retail projects — he has successfully negotiated numerous master developer and merchant builder agreements as well as private party development agreements for retail shopping complexes and residential developments. His clients have included international firms and public companies, REITs, developers, and private joint ventures. He has had a key role supporting one of the largest nuclear power generating sites in the country. He can be reached at [sotto@cgs3.com](mailto:sotto@cgs3.com)



**TRACY OWENS**  
Vice President  
Navy League San Diego Council

Tracy Owens, Vice President at Navy League San Diego, is a 30-year U.S. Navy veteran, recognized leader and true asset to the community. Her extensive background has honed her expertise, enabling her to advance the interests of and advocate for our sea services, while fulfilling her passion to serve. During her career, she embodied the true spirit of the Navy by supporting critical operations during Desert Shield, Desert Storm, Operation Iraqi Freedom and Global War on Terrorism. In her role as vice president of the Navy League, she has been instrumental in increasing awareness and promoting advocacy for the sea services. Her strong leadership has resulted in stronger relationships and an increased level of awareness and advocacy within the community and she successfully improved at-risk programs from 20% to 100% compliance.



**ROBERT POLSTON**  
Battalion Commander  
US Army Reserve

Robert Polston is a talent acquisition leader who has had an outsized impact in the military community through the recruiting and hiring of military veterans into the private sector. He has worked for both large and small companies over the last 20 years and led teams that have designed and implemented award-winning veteran recruiting and recognition programs. His efforts have led to thousands of veterans being hired over the years. Polston is active in the U.S. Army Reserve with the rank of lieutenant colonel and currently holds the title of Battalion Commander. In 2011, he was called to active service in Afghanistan, and was later awarded the Army's Combat Action badge. He started an award-winning and nationally recognized veteran recruiting program for Intel and also continued to promote hiring veterans at subsequent companies. He can be reached at [rpolston55@gmail.com](mailto:rpolston55@gmail.com)



**SANDY PURDON**  
President/Executive Producer  
H. P. Purdon & Company, Inc. DBA Big Bay Boom July 4th Fireworks Show

Purdon, a former officer in the U.S. Marines, came up with the idea of an iconic July 4th fireworks show called the Port of San Diego Big Bay Boom July 4th Fireworks Show that has performed more than 22 annual shows producing a significant economic impact for San Diego, including hotels, restaurants, cruise charters, the Midway Aircraft Museum, Maritime Museum and airport. Purdon produces this event without staff from his home office in Point Loma. He raises the \$650,000 of sponsorship, private contributions and government funds from the city, county and Port of San Diego. The Armed Services YMCA of San Diego supports the nonprofit applications for this event and receives the funds and pays the approved expenses. This charity then keeps the net funds each year. The Armed Services YMCA has received more than \$1.2 million since 2021. He can be reached at [sandy@hppurdon.com](mailto:sandy@hppurdon.com)



# Congratulations, Amy Forsythe



on being selected as SDBJ's Veteran Business Leader of Influence in 2023. Thank you for shining a light on our community with your exceptional leadership and storytelling abilities. Your contributions are truly inspiring.



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**CONGRATULATIONS** to Jeff Forbes, President and CEO of The Patriot Group in San Diego, CA, a certified minority and disabled veteran-owned company. The Patriot Group oversees operations through its divisions, including Patriot Supply and Logistics, Patriot Safety Services, and Patriot Construction Cleanup. Your leadership and dedication are driving positive change, reflecting your commitment to service and success.



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**DAN SHEA**  
Executive Committee Member  
Lucky Duck Foundation

Dan Shea is CEO at Feeding San Diego. He is also a member of the executive committee of the Lucky Duck Foundation and a U.S. Army veteran.

A prominent business and community leader, Shea has decades of high-level leadership and entrepreneurial experience. In a career that has included hospitality, the automotive industry and consulting, Shea found the most fulfillment in the nonprofit industry. Shea strives to provide dignified and humane solutions to reducing homelessness and feeding people.

Shea has lived in San Diego for decades and has long worked behind-the-scenes on an issue that is personal to him: homelessness. Since 2016, he has worked closely with Peter Seidler, majority owner of the San Diego Padres, in partnership with the Lucky Duck Foundation, to advocate for strategies and programs that prevent and reduce homelessness.



**SEAN SOUTHARD**  
Founding Partner  
Crosbie Gliner Schiffman  
Southard & Swanson LLP (CGS3)

Sean Southard is founding partner of Crosbie Gliner Schiffman Southard & Swanson LLP (CGS3) and a U.S. Navy veteran. Southard represents institutional investors, developers, public homebuilders and entrepreneurial individuals. Over the past 20 years, he has successfully completed major leasing transactions totaling more than 5 million square feet of space across all sectors of commercial real estate, including retail, industrial and office. He also has extensive experience in the negotiation and documentation of other types of agreements relating to the use and development of real property.

He graduated from the University of San Diego with a B.A. in international relations and then served as a surface warfare officer in the Navy with tours in Iraq and Somalia. He earned a J.D. from Loyola Law School in Los Angeles. He can be reached at [ssouthard@cgs3.com](mailto:ssouthard@cgs3.com) or 858-367-7676



**DAN'L STEWARD**  
CAPT USN (Retired)  
Support the Enlisted Project  
(STEP)

Dan'l Steward is a retired U.S. Navy captain. Steward served 20 years in the Navy as a SEAL and retired as a captain in 1994. He transitioned to the manufacturing and defense sectors before returning to the Naval Special Warfare community where he has served in several positions with the Office of Naval Research (ONR), Naval Special Warfare Command (NAVWARCOM), and the Strategic Capabilities Office (SCO) of the Office of Secretary of Defense (OSD). He is an active member of the Coronado Rotary Club, Emerald Keepers and many other causes that improve the lives of those in his community. His efforts on behalf of Support the Enlisted Project (STEP) have produced more than \$400,000 in grants from organizations such as the Salvador Foundation that further STEP's mission of building financial security amongst our military families in San Diego.



**RUSS THOMPSON**  
Military Community  
Outreach  
San Diego Loyal Soccer Club

Russ Thompson is Military Community Outreach Manager with the San Diego Loyal Soccer Club. A retired Naval Aviator who effectively advocates for active duty, veteran and retired military members and their families, he uses the platform of professional sports to recognize those who serve our nation. Thompson uses every tool at his disposal to ensure their issues are constantly in the public eye.

As a child growing up in a career Navy family, and then raising a family during his own career as a Naval Aviator, Thompson had a wealth of experience to draw from when creating an effective military community outreach program. Through relationships built with military and veteran service organizations, as well as with military, government and business leaders, he has helped to improve military members' quality of life in San Diego.



**CHRIS THORNE**  
CEO  
North San Diego Business  
Chamber

Chris Thorne is the CEO of the North San Diego Business Chamber. Born and raised in Phoenix, Thorne joined the U.S. Navy at the age of 17, spending more than 30 years serving across the U.S., Asia, the South Pacific, the Middle East, Europe and Africa. Following his military service, he founded Chris Thorne Consulting, a human resources small business with a focus on military community talent programs. Thorne has also served on multiple nonprofit boards and committees.

Since assuming the role as CEO of North San Diego Business Chamber, Thorne has set upon a path of aggressive growth and engagement. Building on the previous successes, Thorne immediately sought out areas of strength and opportunity to provide value to the chamber membership and the community at large.

He can be reached at [chris@sdbusinesschamber.com](mailto:chris@sdbusinesschamber.com) or 760-533-0348



SAN DIEGO  
858.367.7676 | WWW.CGS3.COM

**Congratulations to our partners Steven Otto and Sean Southard for their recognition as Veteran Business Leaders of Influence!**

Both former U.S. Navy officers, Steven and Sean are talented attorneys with experience in complex transactional real estate and corporate matters – playing an essential role in the continued success of CGS3. With expertise across all segments of commercial real estate, each is well deserving of this recognition by the San Diego Business Journal.

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**SHAWN VANDIVER**

Founder & President of AfghanEvac  
VP, External Affairs of  
Athenian Group

Shawn VanDiver is Founder and President of AfghanEvac and VP of External Affairs for Athenian Group. VanDiver is the force behind the nonprofit organization that was created amidst the chaos of the U.S. departure from Afghanistan. With a global coalition of partners in both the public and private sectors, this Navy veteran created this influential group from his home office in San Diego when his friend Lucky was stranded in Afghanistan with his wife and young children. With his work, U.S. allies are finding their way out of a dangerous country and are realizing the promises made to them beginning years ago, all while bridging governmental gaps through sheer grit and commitment.

VanDiver's accomplishments include lobbying Congress and successfully raising funds for a nonprofit that only came to exist in 2021, turning it into a functional organization.

He can be reached at shawn@afghanevac.org or 619-756-9518.



**EVAN WAHL**

Director, Project Management  
and Site Strategy  
Catalent Pharma Solutions

Evan Wahl is a seasoned U.S. Marine Corps veteran and life science professional with more than eight years of experience in the pharmaceutical and biotech sector. He retired from the U.S. Marine Corps as a lieutenant colonel, and a fixed and rotary wing aircraft commander (pilot). Recognized for demonstrating an aptitude for leading project management teams, as well as for creating robust processes to aid with current R&D operations and site strategies, he has a history of contributing directly to company growth and expansion throughout his career.

Professional focal points include project management, business strategy, Lean Six Sigma, Good Manufacturing Practices (GMP) knowledge, training and client relations/customer excellence. Wahl graduated with a B.S. in Cognitive Science/Psychology from Carnegie Mellon University, and an M.S. in Executive Leadership from University of San Diego.



**CHARLES WHITE**

Director of Environmental  
Health & Safety  
University of San Diego

Charles White is Director of Environmental Health & Safety for the University of San Diego. After retiring from a 21 year career with the U.S. Navy, White has used his military experience and formal education to successfully move along his path from a damage control firefighter to his current management job.

White has more than 15 years of experience in fire protection systems and hazardous waste identification. He is the university's principal safety consultant ensuring workplace safety for more than 1,000 employees and 9,000 students. He is a graduate of the U.S. Navy Senior Enlisted Academy class 201. He earned a master's degree in business administration and completed several OSHA certifications at the UC San Diego OSHA Training Institute. He successfully established an agreement between USD and the Veterans Green Project to handle electronic recycling.



**JEFF WIEMANN**

Executive Director  
Angels Foster Family Network

Jeff Wiemann is Executive Director of Angels Foster Family Network, a nonprofit organization with a primary focus of providing stable and caring homes for infants and toddlers in San Diego County through fostering.

Wiemann received a bachelor's degree in systems engineering from the U.S. Naval Academy; he served as a U.S. Navy officer on active duty for eight years. He further honed his leadership skills and knowledge by obtaining a master's degree in executive leadership from the University of San Diego. A personal connection drew him to Angels Foster Family Network, as his own family had previously fostered through the organization before he joined their team in 2013. Wiemann and his wife reside in La Mesa, where they cherish their roles as parents to four children. He can be reached at jwiemann@angelsfoster.org



**BILL WILSON**

Vice President, Operations  
Neurocrine Biosciences

Bill Wilson is Vice President of Operations at Neurocrine Biosciences. Prior to joining, Wilson held IT positions at Mycogen Corporation and the Department of Defense. He served in the U.S. Army and Virginia National Guard. Wilson studied business management at Methodist University and the University of Hawaii.

Wilson has been with Neurocrine since 1996, when there were 60 employees. As the head of operations, he oversees a team of approximately 30 and the company's seven facilities in San Diego, Washington, D.C. and London, supporting more than 1,300 employees who hold on-site, hybrid and remote positions. He has overseen the growth of the IT organization, and has been responsible for its facilities, including the building of the largest biotech headquarters in San Diego, Aperture Del Mar. He can be reached at bwilson@neurocrine.com or 858-617-7754



# PEOPLE ON THE MOVE

HIRINGS, PROMOTIONS, BOARD MEMBERS AND SPECIAL ANNOUNCEMENTS IN SAN DIEGO

## J.P.Morgan PRIVATE BANK

**BANKING**

New Hire



**Brandon Gill**

Brandon Gill has joined J.P. Morgan Private Bank in San Diego as a Vice President and Banker. Brandon provides trusted advice to affluent individuals including business owners and real estate developers. Utilizing a holistic approach, Brandon addresses challenges and opportunities that accompany substantial wealth. Brandon joins the firm from First Republic Bank.

[privatebank.jpmorgan.com/san-diego](http://privatebank.jpmorgan.com/san-diego)

**BANKING**

New Hire



**Mark James**

Mark James has joined J.P. Morgan Private Bank in San Diego as a Vice President and Banker. Mark partners with business owners and affluent families to address all aspects of their financial scenarios, and provides catered strategies to grow and protect their wealth. He joins the firm from First Republic Bank.

[privatebank.jpmorgan.com/san-diego](http://privatebank.jpmorgan.com/san-diego)

# SAN DIEGO BUSINESS JOURNAL



The San Diego Business Journal and the Community of Business proudly support Veterans Day.

