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**BUSINESS TIMES.**

PROUDLY SERVING SANTA BARBARA, VENTURA AND SAN LUIS OBISPO COUNTIES \$1.50

October 28-November 3, 2005

*Welcome to the sixth Who's Who in Banking & Finance*

**Lance Helfert**

**PRESIDENT  
WEST COAST ASSET MANAGEMENT**



Lance Helfert leads the team of Warren Buffett-inspired stock pickers at West Coast Asset Management, an investment firm in Ventura with \$350 million in assets under management.

Helfert, 32, helped start West Coast Asset Management with Kinko's founder Paul Orfalea in 2000. The firm provides individually managed stock portfolios, with a minimum investment of \$1 million. Helfert and the firm's other owners personally invest in each stock they choose for their clients.

Some of the firm's holdings, according to recent filings with the U.S. Securities and Exchange Commission, include The Arden Group, Starbucks, Tootsie Roll, Neiman Marcus, ChevronTexaco and Exxon Mobil Corp.

Helfert recently joined Stone Canyon Venture Partners as a managing director, an equity-based small business investment corporation with a \$90 million fund.

Helfert holds a bachelor's degree from Pepperdine University. He is a member of the Santa Barbara Investment Forum, Pepperdine's Estate Planning Network and is on the Ventura Economic Development Committee.



WEST COAST ASSET MANAGEMENT, INC.