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Lance Helfert
President
West Coast Asset
Management

Banking, finance stars profiled in special section's seventh edition

Lance Helfert leads the team of Warren Buffett-inspired stock pickers at West Coast Asset Management, an investment firm in Ventura with more than \$500 million in assets under management.

Helfert, 33, 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.

Helfert holds a bachelor's from Pepperdine University.

The co-author of "The Entrepreneurial Investor," he is a member of the Santa Barbara Investment Forum and the board of Junior Achievement of Southern California, and former board member of the Make a Wish Foundation.

Who's Who in Banking & Finance made its debut in the fall of 2000 when the Business Times was just six months into its first year of publication.

However, from our earliest days, we have been impressed by the people at the top of the local, regional, national and international financial institutions that populate our region. We have learned that our financial services companies provide the platform for the growth of small businesses that are the hallmark of our economy. They provide a stable employment base and crucial support for nonprofits across the Tri-counties. Their outreach efforts include support for important regional efforts such as the University of California Economic Forecast Project.

During the past year, banking and financial services have made news in their own right, with mergers, executive changes and the formation of new institutions.

Financial institutions have helped create the "look your customer in the eye" culture of tri-county business. It is a culture that values relationships as much as technology. They've empowered the niche companies that create the lion's share of private-sector jobs in the region.

We see a bright future ahead for the financial services industry in our dynamic corridor. The investment advisory sector seems destined to be a growth industry as the region continues to attract retiring baby boomers. To put together this year's section, Staff Writer Barbara Pearson looked at dozens of banking and financial services entities involved in the capital markets.

We aim for a balance of people that reflect both senior management and key relationship managers across our region.

From some fairly humble beginnings, our family of Who's Who sections now encompasses Commercial Real Estate

& Construction, Professional Services, Business Leadership, Financial Management and Health Care & Insurance Services, which will be published in early December. Our upcoming special reports lineup includes our annual Tax & Financial Planning Guide on Nov. 16 and the granddaddy of all special reports, the Top 25 Book of Lists, will appear with our final edition of 2007 on Dec. 28.

Who's Who in Banking and Finance would not be possible without the support of our sponsor, Wells Fargo. The section was researched and written by Pearson along with Stephen Nellis, Emily Rancer and Laura Ritter. It was produced by Managing Editor Ray Estrada and the cover was designed by Ashley Dunsmore. If you have any comments or suggestions, please feel free to call me at (805) 560 6950, ext. 222, or e-mail at hdubroff@pacbiztimes.com.

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HENRY DUBROFF
Editor



Congratulations!

*West Coast Asset Management
would like recognize all of those nominated for*

Who's Who in Banking & Finance



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