

Business @ Bishop Ranch

Northern California's Most Dynamic Business Community

SPOTLIGHT: FINANCIAL SERVICES

February 2010 / March 2010



[American Investors Company](#)
Bishop Ranch 2 | 925.866.2882

American Investors Company is one of the largest privately owned securities firms headquartered in the San Francisco Bay Area. Since 1966, the full-service, general securities and investment advisory firm has been providing clients access to a full line of non-proprietary securities products, investment brokerage, financial planning and asset management services.



[First Allied Securities](#)
Bishop Ranch 2 | 800.499.5489

Approaching 1,000 financial advisors in 500 locations throughout the United States, First Allied Securities is fast becoming recognized as a premier broker/dealer for successful financial advisors. The privately held company was founded in 1994 with a vision of providing independent financial advisors with cutting-edge technology, innovative products and superior service.



[Reliance Financial](#)
Bishop Ranch 2 | 925.236.9500

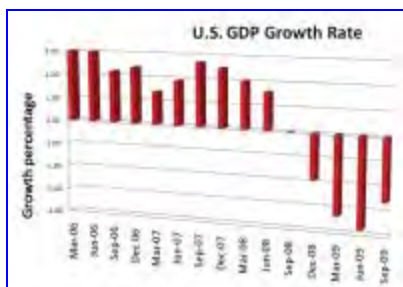
Reliance Financial was founded in 2004 by two close friends and budding entrepreneurs. Today, the company focuses on continuously educating its clients and ensuring they have the right mortgage securing their most valuable asset. All of its professionals have gone through rigorous mortgage training as Certified Mortgage Planning Specialists.

FINANCIAL SERVICES STATS

48 companies
located at Bishop Ranch

2 **Fortune** 500
companies

at Bishop Ranch, including one *Fortune*



EXECUTIVE PROFILE

Rich Arzaga

Title: Founder and CEO
Company: [Cornerstone Wealth Management, Inc.](#)
Location: BR12
Number of Employees: 4
Year Founded: 2004
Years at Bishop Ranch: 4
Business: Financial Services

Business philosophy: Master the basics, live outside of the box and serve others with the highest care possible.

Suggestions for up-and-coming executives: Make sure that you're wired for the work you want to do and hire excellent people for work outside your area of interest or skill. Be honest about your strengths and weaknesses.

Greatest business challenge: Keeping away from drilling down on details.

Business goals: To serve as

3.5 times

increase in market value for the 29 largest U.S. financial services companies from March to September 2009 ([New York Times](#))

U.S. GDP growth rate from March 2006 to September 2009 ([Click to enlarge](#))



Finance industry contributions to U.S. GDP from 1980 to 2008 ([Click to enlarge](#))

one of the most valuable assets in our clients' financial lives.

Definition of good leadership: A blend of qualities that include hard work and results, great listening and communication skills, personal accountability, direct and honest relationships, the pursuit of excellence and an attitude that it is OK to be paranoid about good business.

Best way to motivate staff: Keep the dialogue flowing and keep the door open.

Best decision ever made: Pursuing and marrying my college friend.

Like best about job: Serving as personal CFO for families and business owners—it is a real honor.

Like least about job: Nothing worth complaining about.

Characteristic you admire: Clear, fluid thinking.

Dealing with disappointment: It depends. But most likely, persevere.

Personal interests: My life is pretty boring. I love work, teaching and being with my family. I can do each all day long without ever running out of energy.

Recent books read: *A Smart Girl's Guide to Money: How to Make It, Save It, And Spend It*, published by American Girl Books.

Favorite vacation spot: Bora Bora for its warm sand, clear water, colorful fish, rugged landscape.

FINANCIAL SERVICES@BR

Account Now

American Honda Finance Corp.

American Investors Company

Bank of America

[Blue Star Investments](#)

California Financial Advisors

Cannon Beach Consultants

Certified Planners

Chevy Chase Bank, FSB

Controller's Group, Inc.

Cornerstone Wealth Management

CTX Mortgage

Edward Jones & Company

Engs Commercial Finance

[FGD -- Financial Group Direct](#)

First Allied Funding Group, Inc.

First Allied Securities

First Data Merchant Services Corporation

GPS Capital Management

Green Tree Servicing LLC

International Assignee Services

JDN Capital Management, L.P.

Kearney-Burch Financial Services, Inc.

Keystone National Group LLC

Legacy Planners, Inc.

Lincoln National Corporation

[Marshall Moheballi, ATP](#)

Martin Wolf Associates

[Maureen Hughes, CFP](#)

New Spring Financial Planning, LLC

NLR Investment Services

[Paychex North America, Inc.](#)

Performance Lending & Investment

Plaza Home Mortgage, Inc.

[Presidium Partners, LLC](#)

RABTAX

Reliance Financial

RG Capital Management, LLC

RSA Investments, Inc.

Securities America

Sigma Partners

Sound Benefit Solutions

Starmont Asset Management, Inc.

Stephenson Financial Services

Toyota Motor Credit Corp.

Valentine Capital

NEWS@BR

- [Americap Development Partners](#) is proud to announce its newest partner, Bay Area industry leader Mark Rowson. Rowson is well-known in the local development community, having most recently served as president of Warmington's Northern California division, and is the current Eastern Division president of the Home Builders Association of Northern California.
- [The Corporation for Manufacturing Excellence \(Manex\)](#) has been selected by the Alameda County Workforce Investment Board to [conduct assessments and provide recommendations](#) for business performance improvements. The company will work to identify core competencies and possible sources of income to replace lost revenue due to the shutdown of New United Motor Manufacturing Inc.
- [Ford Motor Company](#), a global automotive manufacturer, [captured two awards](#) at the North American International Auto Show. The 2010 Ford Fusion Hybrid and 2010 Ford Transit Connect received the North American Car and Truck of the Year awards, respectively. Ford is one of only three automakers in the past 17 years to have won both awards.
- [InfoBeans](#), an IT solutions company, [has announced plans](#) to sponsor San Francisco's April 2010 DrupalCon event. The three-day conference, held in San Francisco's Moscone Center, features numerous seminars, training sessions and information exchanges for Drupal developers of all skill levels.
- [Nestlé, USA, Inc.](#), worldwide food and beverage manufacturer, has [agreed to acquire](#) Kraft Foods' frozen pizza business in the United States and Canada for \$3.7 billion in cash. In the deal, Nestlé will get the DiGiorno, Tombstone, California Pizza Kitchen, Jack's and Delissio products.
- [Day & Zimmermann](#), a nationally recognized provider of industrial, defense and workforce solutions, [has named John DiMarco](#) as president of its Government Services division. DiMarco will be responsible for the continued growth of this business unit, which includes the government and commercial security businesses, the Mason & Hanger business and the Defense Support Services joint venture.

NEW@BR



Bishop Ranch welcomes [Big Picture Creative](#) to Bishop Ranch 8. The company delivers high-level communications strategies for branding, print communication, trade shows and events, and more.



Bishop Ranch also welcomes [Controller's Group](#) to Bishop Ranch 6. A full-service executive search firm, Controller's Group specializes in accounting and finance hiring.

EVENTS@BR



Celebrate Heart Health Month

Learn how to keep your heart at its best with Hill Physicians. Our registered dietician, Lisa Bellini, will address nutrition and physical activity; she'll also answer your questions and provide quick and simple tips for creating a healthy lifestyle. Registered nurses will be on hand offering free blood pressure screenings. Please call 925.543.0100 to sign up.

Tuesday, February 9, noon-1 p.m.
2409 Camino Ramon (BR9)
Hill Physicians, 1st floor Education Center
FREE, including light lunch

CONTACT BISHOP RANCH

Submit news about your company to business@bishopranch.com. For more information about Bishop Ranch tenants located here, visit www.bishopranch.com.

Bishop Ranch is managed by Sunset Development:
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San Ramon, CA 94583