

2026

Utah Chapter of Exit Planners
Member Directory



Exit
Planning
Institute®

Utah Chapter

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Membership Directory

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2026 Sponsors



Chapter Leadership



Rick Krebs

Business Sales Group
rick@bsalesgroup.com



Josh Hogge

Business Sales Group
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Brent Hawkins

Bennett Tueller Johnson & Deere
bhawkins@btjd.com



Chad Gardiner

Griffin Financial Group
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Charles Keepman

Ryan Valuation
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Chris Badger

Haynie CPAs
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Dallin Griffin

NFP Wealth Management
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Dave Moody

Meka
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Jacob Andra

Talbot West
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Chapter Leadership



Jed Morley

Backstory Branding
jed@backstorybranding.com



Marcus Johnson

Edward Jones
marcus.johnson@edwardjones.com



Niels Bybee

Dorsey & Whitney LLP
bybee.niels@dorsey.com



Patrick McMillan

The QofE Guy
patrick@QofEGuy.com



Savannah Whetman

Squire
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Scott Cunningham

Family Wealth Management
scott@familywm.net



Thom Hall

Carson Wealth
thomhall@carsonwealth.com



Travis Bowen

Bowen Law Professional
grouptbowen@bowenlaw.com



CALENDAR OF EVENTS

Full calendar for Utah and Salt Lake Counties



June - December 2026

Lunch is provided at 11:30 AM, and seminars are held from 12:00 - 1:00 PM.

Utah County

Disruptive Advertising

1064 N County Blvd Ste 400, Pleasant Grove, UT 84062

- Jun 2:** Capital Options For M&A And Shareholder Buyouts
- July 7:** Summer Break! No Event Scheduled
- Aug 4:** Esop Education Session: Succession Planning And Ownership Transition Strategies
- Sep 1:** Taking Your Business From Successful To Significant
- Oct 6:** Business Growth Framework: Stages And Their Problems
- Nov 3:** Section 1202 Stock Basics: Understanding Qsbs Tax Exclusion Opportunities In Today's Tech Market

Salt Lake County

First Floor Business Lounge

6510 S. Millrock Drive, Holladay UT 84121

- Jun 18:** Exit Planning Case Study
- Jul 16:** Referral Partner Roundtable: How To Get More Business Owner Leads
- Aug 27:** Seller Panel
- Sep 17:** Owner Succession And Building Leadership Teams
- Oct 15:** Spooky Deals: Deals That Died
- Nov 19:** Peer Share

Events are free for members! Use code UTAHMEMBER2026 to register.

Events count for 1.5 hours of Value Acceleration Knowledge Credit.

Ideas for future topics or speakers? Email jenny@bsalesgroup.com with details!

Need help? Email memberexperience@beyondCEPA.com.

2025 Awards

Scott Cunningham Wins Exit Planner of the Year

The Exit Planner of the Year award is for the chapter member who exhibits a collaborative spirit in all that he or she does, works to develop exit planning team members, and embodies the importance of exit planning in his or her work ethic.



Scott Cunningham

Aaron Larson Wins Utah Chapter Member of the Year



Aaron Larson

The Chapter Member of the Year award is for the chapter member who is a visionary - looking for ways to improve exit planning, is an innovator, and implementer of creative and new ways to do exit planning in his or her practice.



Brent Hawkins

Corporate Finance & M&A Attorney
Bennett Tueller Johnson & Deere

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Brent serves as a trusted point of contact for all matters that touch on transactional law, from formation to financing to sale, and all important strategic agreements in between.

In that capacity, he serves as a relationship partner and a consultant to clients, and connects them to the right resources at BTJD in areas such as tax, benefits, labor, licensing, real property, executive compensation and litigation, as well as other resources outside his firm. He draws from his experience serving virtually every industry and vertical of companies in the Intermountain West to bring a practical and business-oriented approach to client needs.

He has special focus and expertise on mergers and acquisitions, private equity transactions, venture capital and emerging company work, technology licensing and joint ventures, corporate governance, and executive compensation.

University of Chicago Law School (J.D., 1997, with honors), Member, University of Chicago Law Review, Brigham Young University (M.A., 1993, Managerial Economics, magna cum laude), Brigham Young University (B.A., 1992, Economics, magna cum laude).





Niels Bybee

M&A Attorney
Dorsey & Whitney LLP

Niels is a partner at Dorsey & Whitney LLP, where he advises clients on mergers and acquisitions, corporate governance, and financing transactions. He has extensive experience representing private, public, and emerging companies across industries such as software, real estate, manufacturing, and energy.

Niels is a Certified Public Accountant and has been recognized as a "One to Watch" in Mergers and Acquisitions Law by Best Lawyers® (2025).

He earned his J.D. summa cum laude from Brigham Young University's J. Reuben Clark Law School and holds both a B.A. and M.S. in Accounting from Brigham Young University's Marriott School of Business.

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Travis founded the Bowen Law Professional Group in 1984.

He has over 40 years of experience assisting high net worth business owners to design, build, and maintain advanced business, tax, and estate planning structures for their families and companies.

Travis represents clients from diverse backgrounds and industries with his proprietary Asset Protection System - a unique innovation that handles every aspect of a client's legal, tax, and business planning needs as the interconnected components they are.

He is the author of multiple articles, a frequent speaker at professional and public events, and serves as a faculty presenter at continuing education conferences.

As former chairman of the Section on Taxation of the Utah State Bar, Travis remains an active member of the Sections on Business, Estate Planning, and Tax.

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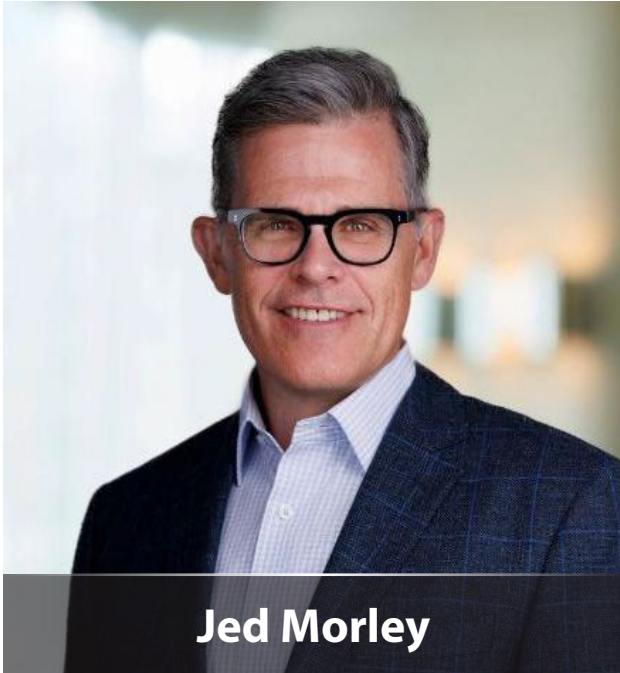


Travis Bowen

Asset Protection & Trust Attorney
Bowen Law Professional Group

2026 Membership

Brand Advisors



Jed Morley

Founder & CEO, Brand Advisor, CEPA
Backstory Branding

Jed is the founder and CEO of Backstory Branding, a brand strategy and messaging firm that multiplies the value of growthstage companies by getting their stories straight.

With over 20 years of experience, Jed has built category-leading brands like BambooHR, Consensus, Gabb, Grow, Havenpark Communities, Lucidchart, Property Management Inc. (PMI), SecurityMetrics, Tanner and Vasion.

His proprietary Backstory Brand Wheel Framework empowers leaders across industries to clarify their purpose, articulate their value, and codify their culture, driving alignment and accelerating growth for bigger impact and better exits.

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2026 Membership

Business Appraisers



Charles Keepman

Director, Valuations
Ryan Valuation

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Charlie is a Director at Ryan Valuation. He is responsible for leading a team focused on business valuation and consulting, including the development of financial models.

Charlie has extensive experience valuing companies ranging in size up to multibillion dollars in value and for a variety of purposes such as tax, financial reporting, and strategic initiatives. He has advised companies through the development of financial models to assist in strategic decisions, consider various alternatives and forecast financial statements.

Prior to joining Ryan Valuation, Charlie was a senior associate in the Transaction Advisory Services (TAS) group at Ernst & Young (EY), specifically in the Valuation and Business Modeling group, in the San Francisco Bay Area. While at EY, Charlie built many custom financial models and performed data analytics for M&A, tax, divestiture, and other strategic purposes. He also worked on several buy- and sellside due diligence engagements for multibilliondollar target companies.

Prior to joining EY, he interned for Citigroup in New York City.

Charlie received his B.S. in Finance from BYU and holds the Accredited in Business Valuation (ABV) designation sponsored by the American Institute of Certified Public Accountants (AICPA).

In Memoriam of
Honorary Chapter Member
Peter Christman

~
the man who started it all
~



2026 Membership

Business Brokers M&A Advisors



Dave Moody

CEO, CEPA
Meka Deal Flow

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[https://www.linkedin.com/
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CEO for Infinity Pools - a top 50 national pool company. Background including CFO level strategic finance leadership with deep experience executing across FP&A, operations finance, and M&A.

I've led and supported more than \$1.6 billion in buy-side and sell-side transactions while holding senior finance leadership roles in complex organizations ranging from \$500 million to \$20 billion in revenue.

I partner closely with CEOs and boards to improve decision-making, scale finance functions, and ensure companies are positioned for accelerated growth, strategic initiatives, recapitalization, or an exit.

I enjoy growing companies through M&A and organic initiatives, as well as experience optimizing P&L performance. As a finance leader I know what it takes to scale FP&A and reporting functions, drive operating rigor, forecast accuracy, and cash discipline. I focus on transaction readiness and translating financial insights into clear, actionable decisions to ensure company profitability as it grows.

With a Certified Exit Planning Advisor (CEPA) credential, I bring added focus on value creation, alignment between ownership and management, and strategies that support higher exit multiples.

Always up for thoughtful conversations with other CEOs, boards, investors, Private Equity Groups, Partners, investment bankers, and business leaders.

<https://exit-planning-institute.org/>

2026 Membership

*Business Brokers
M&A Advisors*



Dave McGill

Business Broker
Murphy Business Sales

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Exceed Expectations

Become Better Every Day

Create “WOW” Moments

I orchestrate smooth business sales to help Sellers ride into the sunset and Buyers charge into their next big adventure with confidence and clarity on both sides for the adventures ahead.

Jeff Eaves

Business Broker, CEPA, CVA
Business Sales Group

Jeff Eaves is a Business Broker for Business Sales Group. For more information about Jeff, please check out his LinkedIn page!

[https://www.linkedin.com/
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2026 Membership

Business Brokers M&A Advisors



Josh Hogge

M&A Advisor, Valuation Specialist
My Biz Value
Business Sales Group

With over 16 years of experience, Josh brings a systems engineering approach to business valuation and M&A advisory.

At My Biz Value, Josh acts as an “interpreter” between a company’s technical operations and its financial narrative, ensuring that business owners can articulate their full value during a sale.

His background leading technology teams in highly regulated industries like aviation and medical devices gives him a unique perspective on the detailed analysis required for a successful transaction. Josh applies rigorous, topdown analysis to translate complex operational strengths into a clear value proposition. He helps owners prepare for the due diligence process by creating a strategic roadmap designed to highlight a company’s competitive advantages and maximize its market value.

Josh earned his Master of Science in Systems Engineering from Johns Hopkins University and his Bachelor of Science in Mechanical Engineering from the University of Maryland, Baltimore County.

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Rick brings a unique blend of sales, entrepreneurial, and financial experience to Business Sales Group and My Biz Value.

After graduating from Utah State University with a Bachelor’s and Master’s Degrees, he began his career as a CPA, working in Nevada and Utah where valuable financial experience was gained.

As a business owner he started Liberty Mortgage, a mortgage bank licensed in 23 states nationwide. He eventually sold the successful company and has been in the M&A space helping people sell their businesses since July 2010.

During his first year with BRC, he listed and sold more businesses than the entire office combined. As a saleside and buyside advisor for Mergers and Acquisitions transactions Rick’s advisory, accounting, and management skills are invaluable when advising sellers as they maneuver the intricate details of the deal through closing.

Rick is also a Certified Negotiation Expert which helps him negotiate the most favorable terms for clients in a transaction. Rick was quoted by FORBES as an expert saleside advisor who helps Sellers avoid the pitfalls of selling a business.

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Rick Krebs

CEPA, CPA
Business Broker, M&A Advisor
My Biz Value
Business Sales Group

—
Co-Founder
EPI Utah Chapter



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Jacob Andra, CEO - Talbot West

Jacob Andra is the CEO of Talbot West and a sought-after speaker and thought leader in applied AI in M&A. In his role at the head of Talbot West, he bridges the gap between legacy operations and tech-enabled valuation.

He partners with exit planners to deploy technical solutions to automate workflows, reduce key-man risk, and expand EBITDA multiples for their clients.

Moving beyond theoretical consulting, Jacob uses a rigorous, engineering-first approach to identify and patch operational liabilities prior to diligence.

He is also the co-founder of M&A platform BizForesight and host of The Applied AI Podcast.

www.talbotwest.com

Jon Spiesman

Founder, Certified Executive Coach
One Percent Better Leader

I use proven coaching frameworks to target measurable improvement areas for your leadership. True organizational change starts through courageous change with senior leaders like you.

To learn more about Jon Spiesman, please visit his LinkedIn profile:

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2026 Membership

Certified Public Accountants



Andrew Averett

CPA, CEPA
Upper Limit Consulting

At Upper Limit Consulting, Andrew helps entrepreneurs prepare for maximum valuations and keep more once they've sold.

Andrew is a CPA who picks up where most accountants and advisors leave off and helps business owners turn their numbers into their competitive advantage. Too often no one owns the financials in a business, and so the real user of the financial information is the IRS. Well let's flip that so the business owner is the primary user and benefactor.

Through education and strategic advisory, business owners begin to use their financial information to know what's working and what's not working in a business and where to focus their efforts to have a direct impact on the bottom line.

We combine a great defense (reducing taxes) and a solid offence (increasing the valuation and multiple) that uses your accounting to hold you accountable to your goals and smooth, valuable exits.

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Chris Badger

CPA - Haynie CPAs

Chris Badger, CPA, is a CFO Solutions Director at Haynie & Company, bringing extensive experience in financial reporting, board management, and business development. Chris is a seasoned senior accounting professional with a diverse background spanning multiple industries, including manufacturing, financial services, high-tech, and oil and gas.

Chris holds a Bachelor of Arts degree from the University of Utah and an MBA from the Keller Graduate School. Chris began his career in public accounting with Arthur Andersen in tax before transitioning into controller and CFO roles. A licensed Certified Public Accountant, he also shares his knowledge as an instructor for the Becker CPA Review course, teaching auditing and financial reporting.

Chris's expertise includes strategic corporate management, financial and operational reporting, and board and investor relations. In addition to his accounting acumen, Chris has significant experience in human resources, health insurance benefits, and retirement plans, including 401(k)s, Top Hat plans, ESOPs, and both Qualified and Non-Qualified Profit Sharing Plans. He has also overseen IT functions, customer service, and administrative operations.

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2026 Membership

Financial & Wealth Advisors



Caleb Duron

President & Founder
Everlast Wealth

For over a decade, I have been teaching, training, and mentoring financial representatives throughout the US to assist clients with a variety of financial concepts and strategies.

I help individuals, families, and business owners forge wealth strategies that last — blending retirement income, insurance, and estate planning to align your finances with your purpose.

Since 2013, I've guided clients through holistic financial planning with clarity and confidence at every stage of life.

My mission is simple: Protect with strength. Grow with wisdom. Pass on with intention.

(801) 332-9670

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Dallin is an Associate VP and Wealth Management Advisor with NFP (an Aon company) and has acted as a trusted advisor to families and business owners for over 14 years.

He gets really excited when a family is charitably inclined and either wants to aggressively grow their business using the Rewild® philosophy or exit their business. Investing time up front to really understand a family's situation and goals allows Dallin to help them cut through the noise and focus on what is most important.

He thrives off helping those he works with to understand their options and the pros and cons to each option. When making recommendations, he does so as if they are family.

In addition, Dallin works with colleagues internally at NFP to help provide business insurance, corporate retirement planning and employer benefits.

Dallin enjoys mountain biking, golfing, and ice hockey.

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Dallin Griffin

CFP, CEPA
Associate Vice President,
Wealth Management Advisor
NFP, an Aon Company

2026 Membership

Financial & Wealth Advisors



Ellenore Knight Baker

Wealth Manager, CFP, CEPA

Vice President

Carter Financial Management

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www.carterwealth.com

Ellenore encourages her clients to achieve their financial and life goals in a risk-mitigating manner. As a trusted and experienced financial planner with Carter Financial Management, she understands that families can face jurisdictional challenges.

Her clients come from many locales and include CEOs of small and large businesses and executive women in many fields. Business owners looking to retire in security are especially helped by her expertise.

Ellenore started her career as a floor trader for Goldman Sachs on the New York Options Exchange, the New York Mercantile Exchange, and the International Petroleum Exchange, where she created hedging strategies for domestic and international clients using commodities, financial futures, and options.

Ellenore has been heavily involved in women's organizations and served as Chairperson of the Dallas (now Texas) Women's Foundation, where she currently serves on the Investments Committee. She is Treasurer of the Women's Leadership Alliance and was previously active on the board of Greenhill School and the Vestry of the Church of the Incarnation.

Ellenore earned her MBA in Finance and International Business from New York University, her CFP Certification from Southern Methodist University and her Private Wealth Advisor credentials through Raymond James in their inaugural class. Ellenore splits her time between Dallas and Park City.

Joe and his team work at Edward Jones collaboratively to help clients accumulate wealth, organize their wealth, grow their wealth, protect their wealth and transfer their wealth in a tax efficient manner to the next generation and to organizations that bring meaning to their lives.

Joe prides himself in delivering exceptional client service. This is his passion, and he does what he does so that his clients can spend their time pursuing their passions.

His ideal client is approaching or currently in retirement. His ideal client seeks a seasoned financial advisor that works in concert with their tax and legal professionals in order to keep them on track throughout their lives. Clients Joe serves include business owners who are considering various exit strategies, succession planning and legacy planning.

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Joe Cronley

Financial Advisor, CFP, CEPA

Edward Jones

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2026 Membership

Financial & Wealth Advisors



John Redd

Financial Advisor, CEPA®, AAMS®

Edward Jones
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john.redd@edwardjones.com

While growing up in Texas, I often heard my father refer to his stock broker. I didn't know what that was exactly, but I knew it was a good thing as it seemed to have a lot to do with how my dad supported us. I came to understand that the bulk of my parents' net worth had to do with investments. My father had been consistent in buying his company stock over the years, as well buying other stocks. He didn't have a pension or a 401(k) when he retired, but he had built a nice nest egg through smart investing.

I earned a bachelor's degree in psychology from Southern Utah University and a master's degree in recreational therapy from Indiana University.

I met my wife, Nicole, while working on my undergraduate degree. We were married in 1995. Nicole and I have four children. We enjoy traveling, the outdoors and overlanding.

After schooling and working as a therapist for a while, I became acquainted with an Edward Jones financial advisor. The first time he talked to me about what he did and the company he worked for, I thought, "Wow, I need to do that and I need to work for them." I started with Edward Jones on September 3, 2001. As it turns out, this is exactly where I am supposed to be. I always wanted to help families and I wanted to make a difference. Our team does that every day.

As a team we help seven- and eight-figure entrepreneurs create lasting joy in their lives through increased lifestyle and financial freedom. We do this by removing their stress about money, increasing their cash flow and freeing up their time, so they can focus on what matters most.



2026 Membership

Financial & Wealth Advisors



Laura Harkort

CFP®, CEPA®, AAMS®, CRPS™

Edward Jones

www.edwardjones.com

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I began my career with Edward Jones in 2009, building a practice defined by long-term relationships, disciplined strategy and a highly personalized client experience. Over the years, I've had the privilege of advising multiple generations of families — helping them fund education, pursue meaningful experiences and ultimately retire with confidence and dignity.

My approach begins with a deep understanding of what matters most to each client, aligning every financial decision with those priorities. With a background in finance and economics, I construct customized portfolios in close partnership with my clients — integrating thoughtful planning with disciplined investment management.

My vision is to redefine what's possible for the families I serve — transforming complexity into clarity, and wealth into a purposeful, enduring legacy.

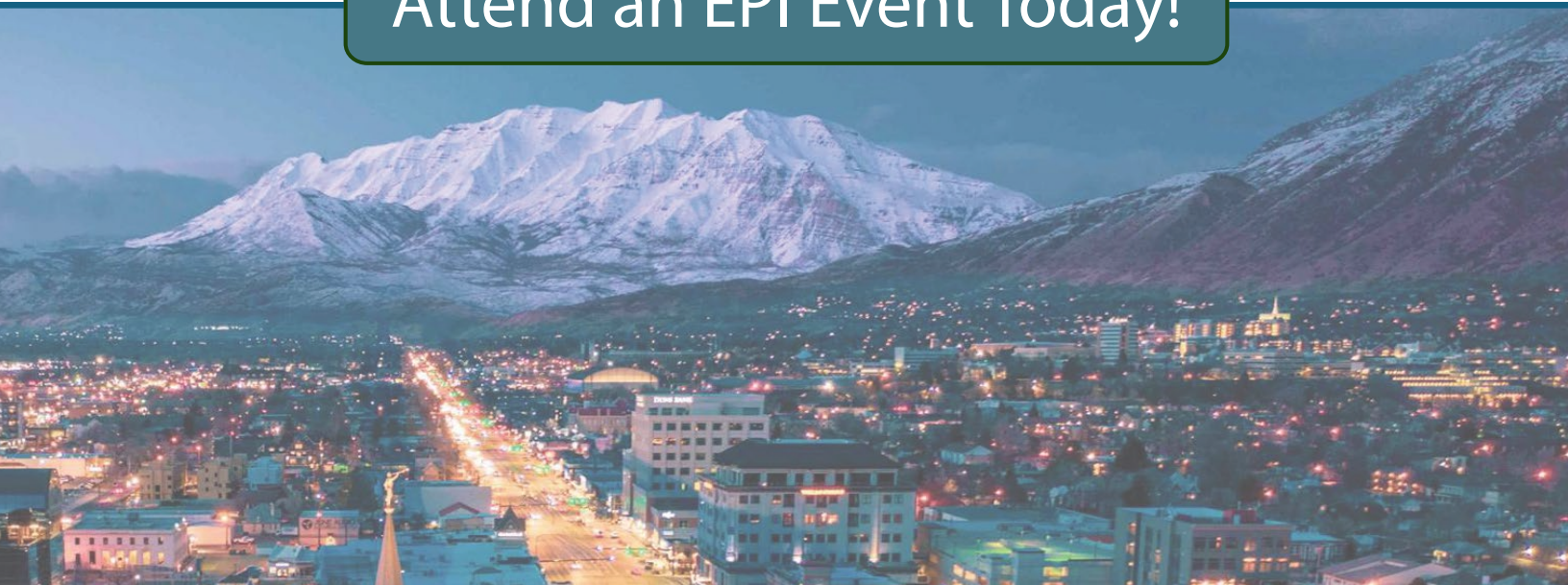
I focus on serving high net worth individuals and families who are either in retirement or within five to 15 years of transitioning. These clients have built significant wealth and are focused on generating sustainable income, preserving capital and creating a tax-efficient legacy for future generations and the causes they value most.

My Branch Office Administrator Nicole and I are committed to exceptional service and thoughtful execution, often collaborating with CPAs, attorneys and other trusted professionals to implement coordinated strategies.

This work is more than a profession — it's a commitment to ensuring our clients can focus their time and energy on what matters most.

Outside of the office, I enjoy exploring the outdoors, working in my garden and either chasing — or being chased by — our three children, depending on the day.

Attend an EPI Event Today!



2026 Membership

Financial & Wealth Advisors



Lincoln Franke

Regional Sales Director
Blue Ridge Associates

lincolnf@oneblueridge.com

With over 33 years of experience in retirement plan and ESOP consulting, Lincoln Franke serves as a Regional Sales Director at Blue Ridge Associates.

Lincoln focuses on partnering with advisors and employers to custom-design retirement programs that meet each business's unique needs. He specializes in working with mature business owners to implement high-impact retirement savings strategies that leverage tax advantages, while also providing guidance on tax-efficient exit planning, including business transitions through ESOPs, to help finance retirement and preserve legacy.

Prior to joining Blue Ridge, Lincoln held senior sales leadership roles at Great West (now Empower) and OneAmerica, where he spent over two decades supporting advisors and clients across the country with both traditional retirement plans and ESOP solutions. His consultative approach and extensive experience make him a trusted resource for advisors and employers alike.

Lincoln earned a bachelor's degree in Finance and Marketing from the Leeds School of Business at the University of Colorado. He is an active member of the Western Pension & Benefits Council and the Exit Planning Institute, reflecting his commitment to both technical excellence and business transition planning.

www.oneblueridge.com

Lisa Schneider

AAMS®, AIF®, CEPA

Lisa is an Accredited Asset Management Specialist, Accredited Investment Fiduciary, and Certified Exit Planning Advisor with decades of business leadership and financial management experience distilling complex data into actionable results for her diverse clientele who reside in multiple states and internationally.

A strategic solutions finder and insatiably curious, Lisa understands how to find and mind the gaps that are essential to building and preserving wealth and most importantly, to living well. Whether applying tailored investment, tax and risk management or retirement and estate planning strategies, she may be seen as the chief financial navigator and financial guardian for CEOs and business owners, retirees, trust beneficiaries, philanthropists, and non-profits. Lisa is passionately committed to aligning her clients' purpose & objectives with meaningful and measurable outcomes.

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President, Lumina Wealth Advisors
Wealth Management Advisor, RJFS



Marcus Johnson

CFP, CPWA, CEPA, AAMS

Financial Advisor

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At Edward Jones, Marcus helps very successful business owners, executives, and their families make informed decisions with their money.

Marcus, paired with advanced technology and in collaboration with a team of experts, uses an established process to help address clients' key concerns: wealth preservation, wealth enhancement through tax mitigation and cash flow planning, effective wealth transfer, wealth protection, divorce, catastrophic loss and maximizing charitable impact.

Scott Cunningham

CIMA, CPWA, CEPA

Managing Partner

Family Wealth Management

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With over 30 years of experience, Scott specializes in wealth management for individuals, families, retirees, business owners, executives, and nonprofits.

As a Managing Partner at Family Wealth Management, he offers a comprehensive approach to investment management, retirement planning, and tax planning strategies and creates personalized plans tailored to your past, present, and future financial goals to help you look at the possibilities.

Scott's holistic solutions are designed to maximize income and provide the financial flexibility you need. He is committed to providing independent, objective, and cost-effective advice.



2026 Membership

Financial & Wealth Advisors



Susan Wade

CEPA

As a Certified Exit Planning Advisor or CEPA® professional, I work closely with successful individuals, families and business owners to align their wealth, business and personal goals into a cohesive long-term strategy. Whether you are building wealth, preparing for a future transition or preserving what you've created, planning is not a one-time event; it's an ongoing, collaborative process.

I take a personalized, relationship-driven approach, meeting with clients regularly to refine strategies, set expectations and adapt to changing circumstances. From disciplined investment management to thoughtful wealth planning that includes risk management, tax-efficient strategies and legacy considerations, I help ensure each piece of your financial life works together.

In addition, I advise on corporate retirement plans, helping organizations benchmark performance, reduce unnecessary costs and improve the overall experience for both leadership and employees. A well-structured plan can play a key role in attracting, retaining and supporting top talent.

Financial Advisor, Edward Jones

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Thom Hall

CEXP, CFP, ChFC

Managing Partner, Certified Financial Planner & Advisor, Chartered
Carson Wealth

Thom is a Partner at Carson Wealth. He founded Thom K. Hall Financial Group in 2000 and combined forces with Signal Wealth in 2018. Signal Wealth partnered with Carson Wealth in 2022.

Thom has been advising clients on how to protect and manage wealth for over 25 years. Thom excels at developing a uniquely customized approach for each client's planning needs, objectives, and goals. With Thom, the entire process revolves around the client.

He believes that financial planning is about a person's values and not just their money. His focus is on protecting a family's purchasing power, not merely their principal, and to develop the right financial plan for an individual's situation by utilizing tools that help manage taxes, market volatility, and risk.

Thom has taught sound financial principles over the years through educational seminars to the families we serve, and to numerous corporations and federal agencies. He shares strategies that assist his clients in overcoming emotional decisions and helping to protect his client's income in their retirement years, served as the past president of the Utah Chapter of the Financial Planning Association.



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2026 Membership

*Fractional CFO, CRO, &
Transaction Advisors*



Annette Sonnenburg

Senior Accountant, Fractional CFO
Squire

Annette Sonnenburg has been offering business consulting and fractional CFO services to clients for more than 20 years. With a background in accounting and finance, she knows how to get your business on the right track.

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The Rocklin Group, specializes in Sales, Revenue Strategy, and Value Acceleration. Gary's work focuses on maximizing Customer Capital and Social Capital to drive success for small to medium-sized businesses (\$5M-\$50M ARR).

As a former small business owner with three personal business exits, Gary deeply understands the unique challenges SMBs face. After 19 impactful years with a Fortune 50 company, and 12 years as an entrepreneur, Gary now dedicates his expertise to supporting business owners and SMBs as a business consultant, Fractional CRO, Sales Leader, Exit Planning advisor, and Value Acceleration coach.

Through his firm The Rocklin Group and Sales Xceleration, Gary is passionate about helping business leaders achieve recordbreaking success while navigating their unique paths to growth.



Fractional CRO
The Rocklin Group

Sales
Xceleration

Gary West

CEPA, MBA

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2026 Membership

Fractional CFO, CRO, & Transaction Advisors



Patrick McMillan

CEPA, MBA
Fractional CFO & Transaction Advisor
The QofE Guy

Patrick, widely recognized as the “QofE Guy” (Quality of Earnings), is a finance aficionado with a zest for numbers and strategic guidance.

As an independent transaction advisor with more than two decades of experience, Patrick specializes in Quality of Earnings, financial due diligence, and transaction support for buyers, sellers, searchers, independent sponsors, and business owners.

Patrick has advised on, reviewed, or contributed to more than 175 transactions totaling over \$2.5 billion in combined value. He helps clients identify financial risks, understand sustainable earnings, and approach transactions with greater clarity and confidence.

Known for his infectious smile and approachable style, Patrick makes complex financial topics accessible and engaging. His favorite shirt, “Warning: may start talking about EBITDA,” says it all.

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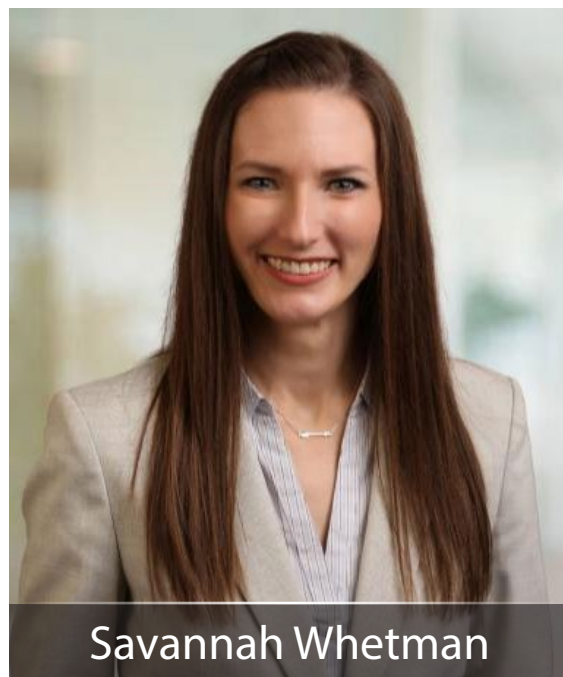
Savannah has worked at Squire for the last four years and is an advisory supervisor.

She provides accounting services such as controller and fractional CFO to a range of clients in size and industry.

She assists client’s accounting staff in preparing their financial statements to go to market. This includes preparing adjusted EBITDA calculations, revenue recognition according to ASC 606 regulations, and moving financials to correct accounting principles.

She has experience in multiple accounting and CRM systems such as NetSuite, Sales Force, QuickBooks and others.

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Savannah Whetman

Senior Accountant, Fractional CFO
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Chad Gardiner

Senior Managing Director
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Chad has over 23 years of investment banking experience, specializing in both M&A and Leverage Finance advisory engagements.

Over the course of his career, Chad has executed over 60 M&A and capital raising transactions, resulting in more than \$7 billion in value.

Chad is unique in his middle-market investment banking focus and experience advising on leverage finance transactions. Common engagements include M&A financing, capital raising and strategic investments.

His leverage finance experience includes:

1. Acquisition financing for Staffing 360 with Private Credit
2. Shareholder buyout for Atlas Medstaff with Private Credit
3. ABL financing for Atlas Medstaff with Nation Bank
4. Majority recap of Nebraska Vet Services with Private Credit and Equity
5. ABL financing for Miller Veterinary Supply with Non-Bank ABL Fund
6. LBO financing for El Pollo Loco

Chad earned a B.A. in Accounting from Brigham Young University.



2026 Membership

Tax Consultants



Adam Posey

Partner
Squire

Adam worked with Pinnock, Robbins, Posey & Richins for 16 years before joining Squire in July, 2018 when the two firms merged.

Adam earned his Bachelor of Science in Accounting from Utah State University and his Masters of Business Administration from the University of Utah.

Adam specializes in partnership, corporation, trust, and individual income tax return preparation and planning. Adam enjoys assisting his clients with entity restructuring, business transaction planning, and small business accounting services.

He focuses on helping privately held businesses, their owners, and families solve problems and reach their financial goals.

Adam is a member of the American Institute of Certified Public Accountants and the Utah Association of Certified Public Accountants.

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Blake is a partner at HCVT and has over 40 years of experience in tax consulting, specializing in federal, state, and local tax incentives. He leads the firm's Qualified Opportunity Zone (OZ) consulting, having formed over 200 Qualified Opportunity Funds (QOFs) and 200 Qualified Opportunity Zone Businesses (QOZBs) while advising hundreds of clients.

Blake is a recognized thought leader featured in US News & World Report and other publications, with extensive expertise in real estate, manufacturing, healthcare, and energy.

A frequent lecturer and contributor to industry outlets, Blake holds a master's in taxation from USC and a bachelor's in accounting from CSU Long Beach.

He is the managing partner of HCVT's Utah regional offices.

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Blake Christian

CPA, MBT, Tax Consulting Partner
HCVT

2026 Membership

Value Acceleration



Ashli Buxton

Founding Partner, CEO
Structiv Partners

Ashli is a Founding Partner and CEO of Structiv, and a Certified Exit Planning Advisor (CEPA) with over three decades of experience leading and scaling small to mid-sized technology companies.

Ashli's early career was focused on the buy-side, including 28 founder-led purchases. She brings first-hand experience across the full lifecycle of a business, from growth through transition and beyond.

Ashli has worked closely with business owners and leadership teams to navigate complex decisions, reduce risk, and position businesses for stronger outcomes. Her perspective is grounded in both operating experience and direct involvement in transactions, giving her a clear view of what drives successful transitions and where they often fall short.

She is passionate about helping business owners grow and transition their businesses with clarity, structure, and most importantly, without regret. Ashli holds a Bachelor of Science in Finance and a Master of Business Administration from Western Governors University.

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Steve Potter is a Certified Exit Planning Consultant with over 25 years of experience building profitable companies in the high-tech, manufacturing, and business service industries. He helps guide business owners to unlock their company's full value and achieve the highest selling price at exit.

Our Exit Factor clients have experienced remarkable improvements in both their personal and professional lives through our proven program. These results include doubling their free time, increasing their business value by over 50%, and selling their business 5 months faster than normal.

Running and growing a business takes skill and dedication, but preparing it for sale requires a different focus that can seem overwhelming. At Exit Factor SLC and Utah County, our team will support you every step of the way to prepare for a successful sale and exit.

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Steve Potter

CEPA, Certified Consultant
Exit Factor

BUSINESS + ECONOMIC FORUM 2026

LOCATION

UVU Young Living Alumni Center
1062 W 800 S, Orem, UT

DATE

Thursday, May 7th

CHECKIN-IN

8:00 AM

FORUM

8:30 AM - 4:00 PM

The 2026 UVU Business & Economic Forum is the premier gathering for Utah's business community.

Join us for sessions focused on maximizing business value, preparing for both planned and unexpected transitions, avoiding costly pitfalls, and understanding what buyers, investors, and successors truly look for.

What You'll Gain:

- Practical insights you can apply immediately, whether leading a business or advising one
- Clear roadmaps to strengthen and grow your business over the next 3-5 years
- Continuing education credits
- Meaningful connections with business owners, financial professionals, and industry leaders

Register and learn more at uvu.edu/beforum

Early Bird Registration | \$100

Available until April 17th

Regular Registration | \$125

Begins April 18th

Special Alumni Registration | \$100

Breakfast and lunch provided!

Questions?

Vicky Hopper at (801) 863-5426 or
Vicky.Hopper@uvu.edu

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Keeler Thomas
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Owner Should Know



Casey Monsen CFP®, MBA, CEPA®
Keeler Thomas
Maximizing the Value of a
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Greg Kyte CPA
Oh My Fraud Podcast
How to Cheat Your Way to the
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Phoenix Haffen
UI Charitable Advisors
Optimizing Tax Outcomes Through
Donations of Private and Illiquid Assets

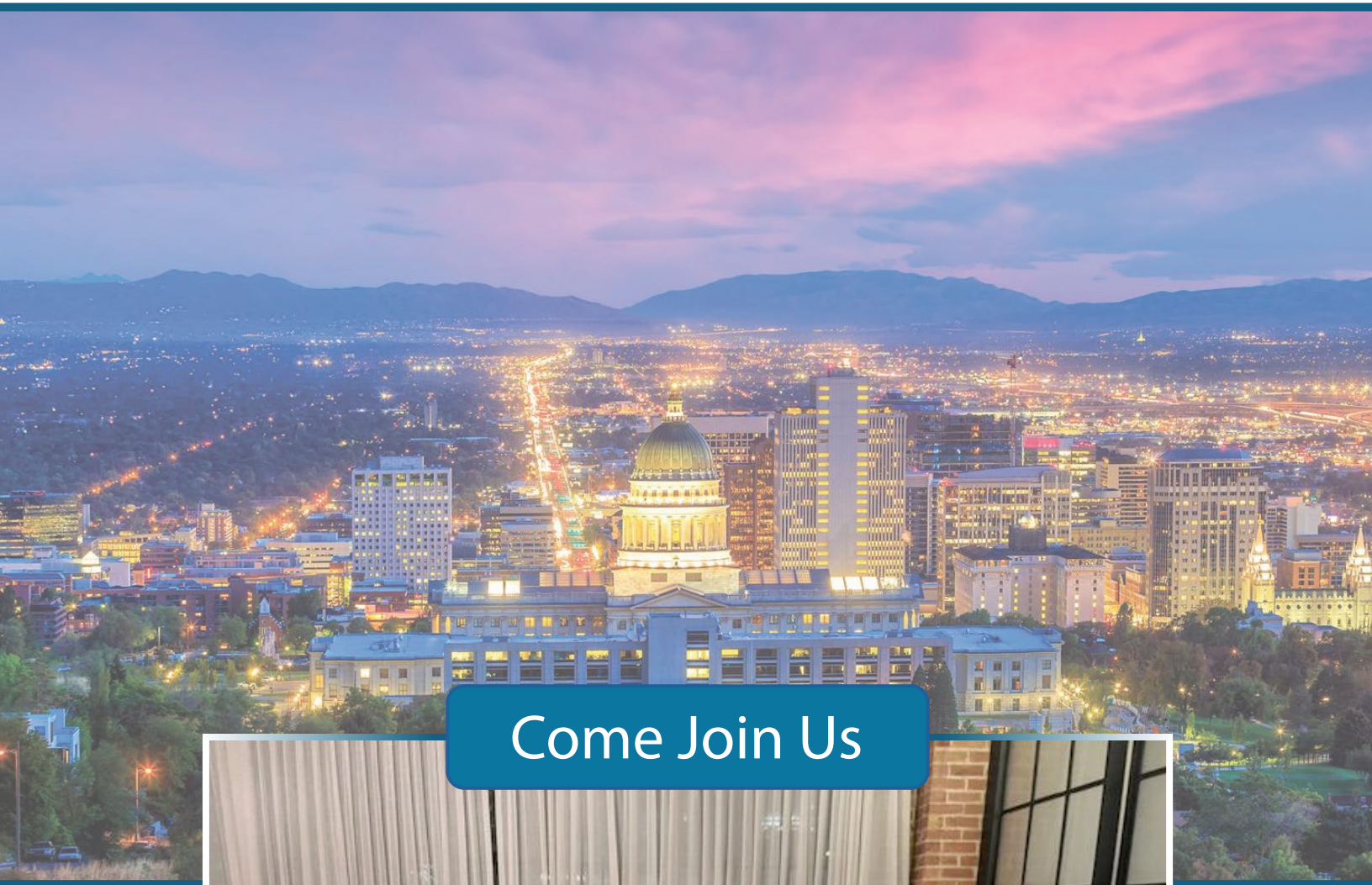


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Utah Valley University & Keeler Thomas
Economic Outlook: What Today's Trends
Mean for Tomorrow's Decisions



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