UVU

BUSINESS + ECONOMIC FORUM 2025

Digital Program

LOCATION
UVU Young Living Alumni Center

DATE
Wednesday, May 21, 2025

CHECK-IN
8:00 AM

FORUM
8:30 AM - 4:00 PM

CONNECT
EXPLORE
ENGAGE

GIFT PLANNING ADVANCEMENT BOARD MEMBERS

- **VICKY HOPPER** | UVU Planned Giving
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Welcome to the 2025 UVU Business & Economic Forum

Dear Friends and Colleagues,

Welcome to the 2025 Utah Valley University (UVU) Business & Economic Forum. We're honored to have you join us today as this event brings together a diverse community of business leaders, financial professionals, and UVU advocates who share a common interest in shaping Utah's future.

At UVU, we believe education is the most powerful engine for economic mobility and community prosperity. As you'll see throughout today's sessions, UVU is not only producing graduates with the skills employers need—we are fueling innovation, entrepreneurship, and economic growth throughout the region. Our alumni are already contributing meaningfully to your businesses, your networks, and your communities—and with your continued engagement, that impact will only grow.

This forum is designed to do more than inform - it's meant to connect. We hope you'll explore the many ways you and your clients can engage with UVU: through internships, mentoring, guest speaking, or strategic philanthropic partnerships. UVU is strongest when we collaborate with professionals and business owners like you who understand the value of long-term investment — in students, in ideas, and in the future.

You'll leave today with valuable stories, resources, and tools that will empower you to share UVU's mission and charitable giving opportunities with your clients and organizations. We've introduced the UVU Resource Toolkit — a convenient, all-in-one website that provides key information on ways to connect with UVU programs, centers, and services. It also provides essential charitable giving resources and impact reports for UVU's EverGREEN fundraising campaign. With this toolkit, you'll gain a deeper understanding of how philanthropy shapes the future for UVU students and the broader community.

We appreciate your presence today. Thank you for believing in UVU, in our students, and in the future we're building together. When we unite our efforts, the possibilities ahead are bright.

Warmly,

Dr. Kyle A. Reyes
Vice President of Institutional Advancement
CEO, UVU Foundation

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#UVUBeforum

Wifi Access:

Network: Wolverine-Wifi

No Password Required

MORNING SCHEDULE

8:00 AM	**Registration + Breakfast**
8:30 AM	**Opening Remarks** **Curtis Blair** | Utah Valley Chamber of Commerce
8:40 AM	**Keynote + Panel** CE Credit Approved: CEPA, CLE, CPE **Utah Valley University's Impact in Utah + Beyond** **Dr. Kyle Reyes** | Utah Valley University **Impact Panel** **Scott Peterson, ChFC®** | Peterson Wealth Advisors **Ryan Law, MS, CFP®, AFC®** | UVU Money Success Center **Seth Jenson, PH.D.** | UVU Baugh Entrepreneurship Institute **Lexi Shipley** | Fidelity Investments, UVU PFP Alum
9:40 AM	**Session 1** CE Credit Approved: CEPA, CFP, CLE, CPE, PACE **Donor-Advised Funds: A Strategic Tool for Philanthropy** **Sarah Barnes** | UI Charitable Advisors
10:40 AM	**Refreshment Break**
11:00 AM	**Session 2** CE Credit Approved: CEPA, CFP, CLE, CPE, LIFE, PACE **Unique Tax + Financial Planning Opportunities with Charitable Trusts Where Giving + Getting Meet** **Geoff Germane, JD** | Kirton McConkie

AFTERNOON SCHEDULE

12:00 PM	**Lunch Break**
12:30 PM	**Session 3** CE Credit Approved: CEPA, CFP, CLE, CPE, PACE **Investing in a Challenging World** **Cary Wasden, CEPA®** | Keeler Thomas
1:30 PM	**Session 4** CE Credit Approved: CEPA, CFP, CLE, CPE, LIFE, PACE **Navigating Tax Law Changes: From Blind Chutes to Guided Success** **Angie Morris, CPA** | MyCPA
2:30 PM	**Refreshment Break**
2:50 PM	**Session 5** CE Credit Approved: CEPA, CFP, CLE, CPE, LIFE, PACE **What Every Business Owner Should Know** **John Unice CFP®, HDP™, CEPA®** | Keeler Thomas
3:50 PM	**Closing Remarks** **Curtis Blair** | Utah Valley Chamber of Commerce

UVU FACTS

STUDENTS ENROLLED IN FALL 2024: 46,809

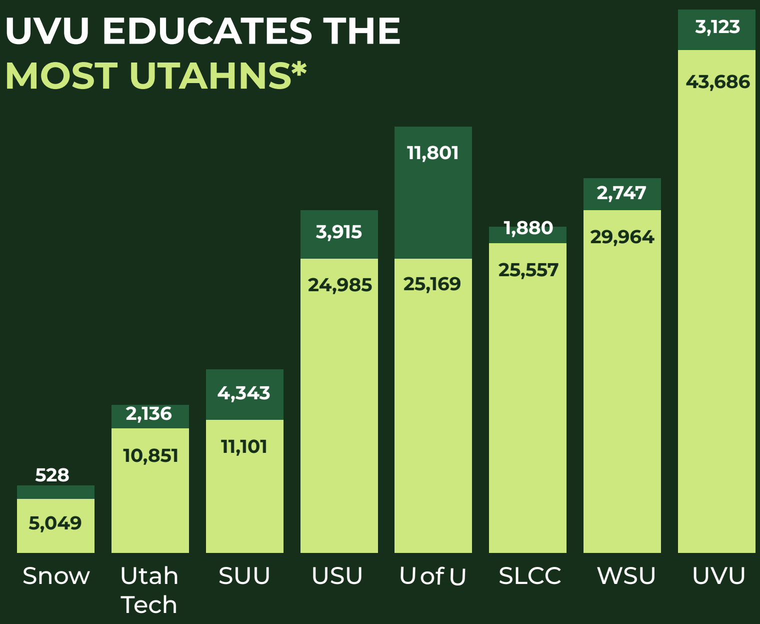
74% of UVU alumni live in Utah 10 years after graduation

12,000 grads in class of 2025

84% employed in Utah

77% employment related to their degree

UVU EDUCATES THE MOST UTAHNS*



*Source: Utah System of HIgher Education Headcoun

Provide for your loved ones and
CREATE A LASTING LEGACY!

Create a Legacy and support Utah Valley University (UVU) students and receive potential tax benefits, depending on the gift type chosen.

Gift Types:

1. **IRA Rollover Gift:** If you are 70 ½ or older, you can make a gift to UVU from your IRA.
2. **Gift of Securities:** Donate your old stock (with a low basis) that has appreciated in the rising market and avoid capital gains tax.
3. **Life Insurance Gift:** Eliminate an old or unneeded life insurance policy by making a gift of the cash balance to support UVU students.
4. **Life Income Gift:** Contribute to a gift annuity or charitable remainder trust and receive lifetime payments. Ask us for a free illustration with your benefits.
5. **Charitable Bequest:** Make a gift to support UVU students that costs you nothing today. Provide for your loved ones first and then UVU with a bequest in your will or trust.
6. **Beneficiary Designation Gift:** Designate UVU as a full or partial beneficiary of your unused retirement assets, securities accounts, bank accounts, or life insurance.

For questions, please contact Vicky Hopper at (801) 863-5426 or vicky.hopper@uvu.edu.

EVERGREEN UVU

For more information on creating a lasting legacy, visit uvgift.org

CONTINUING EDUCATION

CE Credit Qualification

Each 60-minute presentation qualifies for one Continuing Education (CE) credit. Attendance is verified through a QR code system—participants must scan the provided QR code at both the start and end of the session, answer the required questions, and submit the survey to complete the verification process.

Types + Hours of CE Credit Available

Each session offered at the event qualifies for the following credit hours:

- **CEPA:** Up to 6 hours
- **CLE:** Up to 6 hours
- **CPE:** Up to 6 hours

Refer to session

- **CFP, PACE:** Up to 5 hours
- **LIFE:** Up to 3 hours

CE Credit Approval Process

1. **Member Number:** If not provided at registration, submit your ID number and requested CE type within one week to Vicky Hopper.
2. **Certified Attendance:** Check in using the QR code at the beginning of each session.
3. **Evaluation:** Complete and submit the session evaluation using the QR code provided at the end of the presentation to complete your attendance verification.
4. **Certificates:** You'll receive a certificate of attendance via email within two weeks.
5. Conference Documentation: Use the digital program as supporting documentation.
6. **Handouts:** If any are provided by presenters, they will be available on the resource toolkit within two weeks after the forum.
7. **Steps required per profession:** Attendance verification and credit hours will be submitted on your behalf within two weeks. Final submission procedures for each respective authoritative agency are as follows:

   - **CEPA:** Submitted directly to the Exit Planning Institute.
   - **CLE:** Submitted directly to the Utah Supreme Court Board of Continuing Legal Education.
   - **CPE:** Participant required to submit the certificate and approval number to the CPE Audit services. Verification of attendance will be submitted to UACPA.
   - **CFP:** Submitted directly to the CFP board.
   - **PACE:** Participant required to submit credit hours earned to the American College of Financial Services.
   - **LIFE:** Credit will be submitted to the Utah Insurance Department and will be posted on participant's Sircon account.

Questions

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

KEYNOTE

8:40 AM - 9:40 AM

UTAH VALLEY UNIVERSITY'S IMPACT IN UTAH + BEYOND

This session will showcase how Utah Valley University is shaping the future of business, innovation, and economic growth. Attendees will gain valuable insights into UVU's impact on the local and regional economy as opportunities to collaborate and leverage university resources for success are explored. Key topics include:

- **UVU'S ECONOMIC IMPACT**
  Learn how the university drives local and regional economic growth.
- **WORKFORCE DEVELOPMENT**
  Discover how UVU's educational and internship programs are preparing a pipeline of skilled professionals to meet industry demands.
- **ENTREPRENEURSHIP & INNOVATION**
  Gain insights into UVU's incubators and accelerators that foster business growth and job creation.
- **BUSINESS OPPORTUNITIES**
  Explore ways to leverage UVU's resources for business expansion and economic success. demands.

***CE Credit Approved: CEPA, CLE, CPE**

Curtis Blair EMCEE

Utah Valley Chamber of Commerce
President & CEO

Curtis B. Blair is the president and CEO of the Utah Valley Chamber of Commerce and co-founder and investor of Cards2Life. Previously, he was the co-founder and president of Froghair, a principal of Hoodoo Capital, and co-founder of Fuze Fiber. Curtis is active in the community and currently serves as a board member of AdoptionLife.org, Southern Utah University, and several Utah Valley University (UVU) boards including the Foundation Board, Alumni Association Board of Directors, and the Wolverine Club Board. He previously served on the UVU Board of Trustees from 2013 to 2016. Curtis holds a bachelor's degree from Brigham Young University.

Dr. Kyle Reyes

Utah Valley University
Chief Executive Officer I UVU Foundation
VP, Institutional Advancement

Dr. Kyle A. Reyes serves as Vice President of Institutional Advancement at Utah Valley University (UVU)—the largest university in the state of Utah with over 46,000 students. During his 20+ years at UVU, Kyle has served as VP of Student Affairs, Senior Diversity & Inclusion Officer, and Chief of Staff to the President. Dr. Reyes is also a tenured Associate Professor of Education at UVU and taught courses in Multicultural Education, Family & Community Partnerships, and Arts-based Integration. His book, *Lenses of Humanity: How Reflection, Connection, and Empathy Can Heal Our World*, was published by Green Leaf Book Group in October 2024.

PANEL

Scott Peterson, CHFC® PANELIST

Peterson Wealth Advisors
Founder and Managing Partner

Scott Peterson is the founder and managing partner of Peterson Wealth Advisors. He graduated from Brigham Young University in 1986 and is a Chartered Financial Consultant™. Scott and his team of Certified Financial Planners™ specialize in financial management for retirees. Scott has broken ground in the retirement planning industry as the architect of the Perennial Income Model™, a planning tool that helps retirees manage their investments throughout retirement. Scott wrote the book on managing money during retirement entitled, *Plan on Living: The Retiree's Guide to Lasting Income & Enduring Wealth*. Scott is a teacher at heart and is a regular presenter at BYU's Education Week. Scott and the Peterson Wealth Advisor's team teach classes at various universities and companies to the employees who are preparing to retire. Peterson Wealth Advisors currently manages the finances for more than 700 households of retirees spread across the United States.

Ryan Law, MS, CFP®, AFC® PANELIST

Utah Valley University
Director | Woodbury School of Business, Money Success Center

Ryan is an award-winning educator who teaches the Financial Counseling courses as part of the Financial Planning program at Utah Valley University (UVU). He is also the Director of the UVU Money Success Center. Ryan received his bachelor's degree from Utah State University in Family Finance and master's degree in Personal Financial Planning from Texas Tech University. His goal is to teach financial planners, coaches, and counselors how to use simple, evidence-based practices to provide outstanding client care. In addition to finance, he enjoys learning and teaching about communication, financial psychology, habits, change and similar topics. Ryan is a Certified Financial Planner™ (CFP®) professional and an Accredited Financial Counselor (AFC®). Ryan served on the AFCPE (Association for Financial Counseling and Planning Education) Board of Directors from 2017-2021 where he served as Treasurer and President. Ryan is the author of the books *Student Loan Planning, Make Positive Changes,* and co-editor of the book *Financial Counseling.*

Seth Jenson, PH.D. PANELIST

Utah Valley University
Director | Woodbury School of Business, Baugh Entrepreneurship Institute

Dr. Seth Jenson recently joined the UVU Baugh Entrepreneurship Institute as the Director from the University of Oxford, where he lectured and researched entrepreneurial strategy and innovation ecosystems. He has consulted and collaborated with elite entrepreneurship programs worldwide, including LSE, Oxford, Harvard, MIT, Stanford, Berkeley, Techstars, and MassChallenge, as well as multiple state government and regional programs. As a leader in the Bolder Way Forward initiative, Seth helps shape Utah policy to close entrepreneurial gender gaps and foster diverse leadership. He completed his bachelor's at BYU in Finance and graduate degrees in Sociology (MSc) and Business Strategy (PhD) at Oxford.

Lexi Shipley PANELIST

Fidelity Investments
Personal Financial Planning (PFP) Alumna

Lexi Shipley graduated earlier this month from Utah Valley University with a bachelor's degree in Personal Financial Planning. Over the past year, she served as President of UVU's Personal Financial Planning Student Association, leading initiatives to support student engagement and professional development. Lexi is preparing to sit for the CFP® exam later this year and will begin UVU's MBA program in the fall. Her professional experience includes a financial planning internship at Frandsen Morrill Advisors, a local Provo firm, and her current full-time role at Fidelity Investments. During her time at UVU, Lexi was awarded two prestigious $10,000 scholarships: the Deena Jo Heide-Diesslin Foundation Diversity Scholarship through the CFP® Board, and the Charles Schwab RIA Talent Advantage Scholarship.

UVU RESOURCE TOOLKIT

Business + Economic Forum Digital Resource Toolkit

Explore UVU's Business + Economic Forum Digital Toolkit—a curated collection of campus connections, partnership opportunities, and engagement resources designed to help you take the next step. From building your talent pipeline and accessing business-focused campus services to finding ways to connect with or provide support for UVU and its students, this toolkit is your gateway to meaningful collaboration with UVU.

Click the link below to access:

Business & Economic Forum 2025
UVU Digital Resource Toolkit

Every gift makes an impact.

Learn more at
uvu.edu/evergreen

EVERGREEN
UVU

SESSION 1

9:40 AM - 10:40 AM

Donor-Advised Funds:
A Strategic Tool for Philanthropy

Donor-Advised Funds (DAFs) are a flexible and tax-efficient charitable giving vehicle. By learning specific strategies to properly utilize a DAF, financial professionals can help clients maximize their philanthropic impact while optimizing their financial planning in alignment with their values and long-term goals.

***CE Credit Approved: CEPA, CFP, CLE, CPE, PACE**

Sarah Barnes
UI Charitable Advisors
Chief Innovation Officer

Sarah joined UI Charitable Advisors as the Chief Innovation Officer and is focused on establishing best practices across the organization. She came with many years of experience working for financial services firms including Salomon Brothers, Salomon Smith Barney, and Citigroup. She has held roles on the buy-side and the sell-side, both as an advisor and as an investor. She has also held a number of operating roles at large organizations, including Leucadia Corporation and Overstock.com, and smaller ventures such as Daily Bread LLC, Zane Benefits, and Next Gear Solutions. She earned a BA from Wellesley College and an MBA from Harvard Business School.

UVU BUSINESS ECONOMIC FORUM 2025

SESSION 2

11:00 AM - 12:00 PM

Unique Tax and Financial Planning Opportunities with Charitable Trusts

Where Giving and Getting Meet

This session provides valuable insights into leveraging charitable trusts for tax-efficient giving and financial planning. Understanding the opportunities for charitable planning, such as qualified charitable distributions from IRAs and donations of appreciated property, can help optimize tax benefits. The session will also cover the intricacies of charitable remainder trusts (CRTs) and charitable lead trusts (CLTs), explaining how they can be used to manage income, maximize deductions, and plan for retirement or wealth transfer.

By diving deeper into the characteristics and strategic uses of CLTs and CRTs, attendees can learn how to tailor these tools to their clients' needs, ensuring effective philanthropy and financial planning. This knowledge is crucial for providing comprehensive advice to clients and enhancing the financial professional's expertise, ultimately leading to better client outcomes and business growth.

***CE Credit Approved: CEPA, CFP, CLE, CPE, LIFE, PACE**

Geoff Germane, JD
Kirton McConkie
Shareholder/Attorney

Geoff Germane is a member of the firm's Tax and Estate Planning practice section. His focus is on estate, tax, business, and asset protection planning. He advises individuals and business owners on legally sound strategies to protect their assets and reduce or eliminate taxes. He counsels clients on legacy planning to maximize intergenerational wealth and reduce family stress and tension. Mr. Germane is certified as an Accredited Estate Planner® with the National Association of Estate Planners and Councils and as an Estate Planning Law Specialist with the Estate Law Specialist Board.

SESSION 3

12:30 PM - 1:30 PM

Investing in a Challenging World

This presentation will enhance participant's understanding of financial markets and investment strategies and will cover key trends, economic indicators, market timing and strategies to manage risk and optimize returns using practical examples of market acceptance and portfolio performance analysis.

***CE Credit Approved: CEPA, CFP, CLE, CPE, PACE**

Cary Wasden, CEPA®
Utah Valley University & Keeler Thomas
Professional in Residence | Senior Partner

Cary Wasden is a Senior Partner of Keeler Thomas. Cary directs the Enterprise Solutions program, a service dedicated to working with small businesses and their owners to help them better understand their business' value and how it can be optimized. Cary also serves as a member of Keeler Thomas' investment committee. Cary Wasden is a seasoned Wall Street analyst and entrepreneur. Cary studied at Brigham Young University for his bachelor's and master's degrees. He also attended The Ohio State University for additional graduate training. He worked for thirty years as an investment analyst on Wall Street where he was a top-ranked analyst in the world and was credited with being the analyst that uncovered Enron. Cary has started, led, and exited several entrepreneurial ventures. He also teaches finance at Utah Valley University. Cary is a Certified Exit Planning Advisor (CEPA®). Cary has been a professional in residence at Utah Valley University since 2015.

UVU WOODBURY SCHOOL OF BUSINESS

A PLACE TO SECURE YOUR FUTURE

GAIN THE TOOLS TO BUILD FINANCIAL STABILITY.

uvu.edu/woodbury

SESSION 4

1:30 PM - 2:30 PM

Navigating Tax Law Changes: From Blind Chutes to Guided Success

Attending this presentation is essential for financial professionals who want to stay ahead of the curve in navigating the complex and ever-changing tax landscape. You'll gain a deep understanding of the 2017 tax law, its upcoming expiration, and the potential impacts on your clients. The session will also cover proposed changes by President Trump and provide actionable strategies to optimize tax planning, including charitable donations, income timing, and estate tax preparation. Equip yourself with the knowledge and tools to guide your clients confidently through these transitions and ensure their financial well-being.

***CE Credit Approved: CEPA, CFP, CLE, CPE, LIFE, PACE**

Angie Morris, CPA
MyCPA Accounting
Partner

Angie Morris graduated from Brigham Young University with a MAcc. She is a member of the AICPA and the UACPA. She enjoys working with clients to minimize their taxes and helping them to understand their financial world. She has served as the treasurer of the Utah Association of CPAs, the Utah Valley Chamber of Commerce and the Utah Valley Estate Planning Council. She also served as President of the Women's Business Network and the UACPA Southern Chapter and was also the Chair for the Housing Authority of Utah County. Angie loves spending time at Lake Powell, cheering for the Duke Blue Devils men's basketball team, and a St. Louis Cardinals fan. March Madness is the best time of year, but it sure creates conflicts with the CPA world!

UVU BUSINESS ECONOMIC FORUM 2025

SESSION 5

2:50 PM - 3:50 PM

What Every Business Owner Should Know

This presentation will benefit business owners and financial advisors alike. The focus on exit planning addresses critical challenges, such as accurately valuing the business, preparing for a successful sale within the family, or within the business, or to an outside buyer, and ensuring a smooth transition. We will introduce The UVU Family Enterprise Center and its mission: to provide education and insights on economic conditions, networking with other family business owners, legal and tax updates, business value optimization, funding business growth, and exit planning for family-owned businesses.

The Center will provide essential knowledge and networking to navigate the complexities of running and/or transitioning a family business. This presentation will introduce business owners to the insights needed to thrive, grow, and secure their legacy for future generations, and supports advisors to assist their clients in this critical process.

***CE Credit Approved: CEPA, CFP, CLE, CPE, LIFE, PACE**

John Unice CFP®, HDP™, CEPA®
Keeler Thomas
Senior Partner

John is a Principal, Co-founder, and Senior Partner of Keeler Thomas. He has been educating and working in the financial, estate, and business planning industry for over 40 years. A highly respected and sought after presenter, John taught financial and family continuity principles over the years in numerous venues across the United States. He is a published author and co-author. John directs the comprehensive wealth management programs (Family Office Services) for the firm's clients. He spearheaded the firm's Family Legacy emphasis which is creating continuity of wealth and unity for families from generation to generation. John has extended the Family Legacy emphasis into the Keeler Thomas Business Value Optimization service. Business value optimization, succession, purchase strategies, funding expansion and growth needs, are most effective when driven and sustained by the family's shared vision for the future. Mr. Unice earned a bachelor's degree in economics from Brigham Young University. He is a Certified Financial Planner™ (CFP®), a Certified Heritage Design Professional ™(HDP) and holds the Certified Exit Planning Advisor (CEPA®) designation.

UVU BUSINESS ECONOMIC FORUM 2025

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For more information,
please visit thechamber.org