BUSINESS + ECONOMIC FORUM 2026

Digital Program

LOCATION
UVU Young Living Alumni Center

DATE
Thursday, May 7, 2026

CHECK-IN
8:00 AM

FORUM
8:30 AM - 4:00 PM

A lifelong passion led Satya Kraus to become one of the country's most successful motorcycle component makers. It also led him to Zions Bank. It's a relationship that helps Kraus and hundreds of other companies meet — and exceed — their business goals.

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Stop by your local Zions Bank branch to learn more about our **1.50% rate discount on select SBA loans** or visit zionsbank.com/SBA to learn more.*

*New loans only. Eligible loan types: All SBA 7a loans, including SBA express Lines of Credit. Must comply with all SBA eligibility and collateral requirements. Offer is for a discount equal to 150 bps/1.50% below the rate listed on the SBA Loan Pricing Guide. The promotional rate will be for the in effect term of the note. Offer valid through December 31, 2026. Other terms and conditions apply. Offer subject to change.
Subject to credit approval and SBA approval. Terms and conditions apply. See banker for details.
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Welcome to the 2026 UVU Business & Economic Forum

Dear Friends and Colleagues,

Welcome to the 2026 Utah Valley University (UVU) Business & Economic Forum. It is an honor to welcome such an influential group of business leaders, financial experts, and community advocates. We gather today not just to discuss the economic landscape, but to celebrate the powerful synergy between higher education and Utah's thriving industry.

This year marks a historic milestone for our institution. We have recently concluded and celebrated the success of EverGREEN, UVU's first-ever comprehensive capital campaign. This achievement is a testament to the generosity of partners like you who believe in our mission. The impact of this campaign is already visible across our campuses—in new facilities, expanded scholarships, and enhanced programs that ensure our students are "market-ready" the moment they graduate.

At UVU, we remain committed to being the state's primary engine for economic mobility. As you engage with today's sessions, you will see how we continue to fuel innovation and entrepreneurship throughout the region. Our alumni are your employees, your partners, and your future leaders. By bridging the gap between the classroom and the boardroom, we are building a resilient and prepared workforce.

This forum is designed to foster those vital connections. I invite you to explore how you and your organizations can continue this momentum, whether through mentoring, internships, or strategic philanthropy. To assist you, we continue to offer the UVU Resource Toolkit, a convenient digital hub where you can find impact reports and tools to help your clients and networks engage with UVU's ongoing mission.

Thank you for being an essential part of the UVU family. Your support has brought us through a record-breaking era of growth, and together, the possibilities for our students and our community are brighter than ever.

Warmly,

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

CONNECT EXPLORE ENGAGE

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- **CARY WASDEN** | Keeler Thomas
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Wi-Fi Access:

Network: Wolverine-Wifi

No Password Required

#UVUBeforum

MORNING SCHEDULE

8:00 AM	**Registration + Breakfast**
8:20 AM	**Opening Remarks** **CURTIS BLAIR** | Utah Valley Chamber of Commerce
8:30 AM	**Session 1** CE Credit Approved: CEPA, CFP, CLE, CPE, LIFE, PACE **Headwinds Facing Family Business Owners** **JOHN UNICE CFP®, HDP™, CEPA®** | Keeler Thomas
9:35 AM	**Refreshment Break**
9:45 AM	**Session 2** CE Credit Approved: CEPA, CFP, CLE, CPE, LIFE, PACE **Maximizing the Value of a Family-Owned Business** **CASEY MONSEN CFP®, MBA, CEPA®** | Keeler Thomas
10:50 AM	**UVU Highlights** **COLLEGE OF HEALTH AND PUBLIC SERVICE**
11:25 AM	**Lunch Break & Exhibit Interactions**

AFTERNOON SCHEDULE

12:15 PM	**Session 3** CE Credit Approved: CEPA, CFP, CLE Ethics, CPE Ethics, LIFE, PACE **How to Cheat Your Way to the Highest Levels of Professional Ethics** **GREG KYTE, CPA** | Oh My Fraud Podcast Co-Creator
1:20 PM	**Session 4** CE Credit Approved: CEPA, CFP, CLE, CPE, PACE **Optimizing Tax Outcomes Through Donations of Private and Illiquid Assets** **PHOENIX HAFFEN** | UI Charitable Advisors
2:20 PM	**Refreshment Break**
2:35 PM	**UVU Highlights** **How UVU Impacts the Community** **CANDICE GARDNER** | Utah Valley University
2:55 PM	**Session 5** CE Credit Approved: CEPA, CFP, CLE, CPE, PACE **Navigating the US and Global Economy: Key Drivers, Risks, and Opportunities in 2026** **CARY WASDEN CEPA®** | Keeler Thomas
3:55 PM	**Closing Remarks** **CURTIS BLAIR** | Utah Valley Chamber of Commerce

UVU FACTS 2024-2025

46,809
TOTAL ENROLLMENT
(14.3% INCREASE OVER 5 YEARS)

41%
ARE FIRST-GENERATION

#1 IN UTAH FOR PRODUCING LOCAL **ENTREPRENEURS**
(Switch on Business, 2024)

#1 BEST VALUE COLLEGE IN UTAH
(Research.com, 2025)

#1 IN UTAH FOR **ONLINE PROGRAMS**
(Newsweek, 2025)

UVU EDUCATES AND GRADUATES MORE UTAHNS THAN ANY OTHER UNIVERSITY.

74% OF UVU ALUMNI LIVE IN UTAH 10 YEARS AFTER GRADUATION, CONTRIBUTING TO UTAH'S THRIVING ECONOMY.
UVU Business Intelligence and Research Services (BIRS)

Care for Those You Love. Shape the Future.

Honor the people who matter most to you while opening doors for Utah Valley University students. Thoughtful planning today can strengthen your family's future and expand educational opportunities for generations to come.

For questions or personal assistance, contact
Vicky Hopper
(801) 863-5426 | vicky.hopper@uvu.edu

Learn more at uvgift.org

Ways to Make an Impact

Gifts from Your IRA
If you are age 70½ or older, you may direct assets from your IRA to support UVU and potentially reduce taxable income.

Appreciated Securities
Donate stocks or other securities that have increased in value and help students while avoiding capital gains tax.

Life Insurance Contributions
Turn an unneeded policy or policy value into meaningful support for student success.

Income-Producing Gifts
Establish a charitable gift annuity or charitable remainder trust and receive reliable income while advancing UVU's mission.

Future Gifts Through Your Estate
Include UVU in your will or trust at no cost today, after first providing for loved ones.

Beneficiary Designations
Name UVU as a beneficiary of retirement accounts, investment accounts, or life insurance with a simple designation.

UVU PLANNED GIVING

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 the end of the session, answer the required questions, and submit the survey to complete the verification process.

Types and Hours of CE Credit Available

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

- CEPA: Up to 5 hours
- CLE: Up to 5 hours
- CPE: Up to 5 hours
- CFP, PACE: Up to 5 hours
- LIFE: Up to 2 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**: Complete and submit the session evaluation using the QR code provided at the end of the presentation.
3. **Certificates**: You'll receive a certificate of attendance via email within two weeks.
4. **Conference Documentation**: Use the digital program as supporting documentation.
5. **Handouts**: If any are provided by presenters, they will be available on the website on the "speakers tab" within two weeks after the forum.
6. **Steps required per profession**: Attendance verification and credit hours will be submitted on your behalf within two weeks of the event. 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**: Attendance submitted directly to UACPA. Participant required to submit the certificate and approval number to the Division of Professional Licensing (DOPL) at year-end.
    - **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

DIGITAL TOOLKIT

Business and Economic Forum Digital Resource Toolkit

The Business and Economic Forum Digital Resource Toolkit is your centralized gateway to Utah Valley University. Designed specifically for business owners, founders, and trusted advisors, this page brings together the most relevant UVU connections, programs, and engagement opportunities in one easy-to-navigate place.

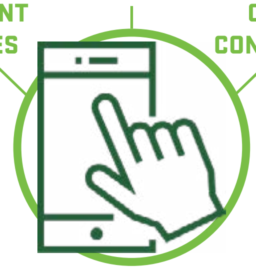
Whether you are looking to strengthen your talent pipeline, connect with faculty expertise, access campus-based business resources, or explore strategic and philanthropic partnerships, the toolkit makes it simple to engage with UVU in meaningful, practical ways. It highlights key points of contact across campus, outlines pathways to collaborate with students and programs, and provides timely resources aligned with the needs of today's business and advisory community.

More than a reference page, the toolkit serves as an ongoing connection tool. It equips financial professionals with charitable and planning resources they can use with clients, helps business leaders identify opportunities to support and shape the next generation of talent, and reinforces UVU as a collaborative partner in economic growth, innovation, and community impact.

For anyone who wants to stay connected beyond the Forum and leverage the full breadth of UVU's expertise and opportunities, the Digital Resource Toolkit is the place to start—and return to often.

Click the link below to access the toolkit:

Business & Economic Forum 2026 UVU Resource Toolkit



SESSION 1

8:30 AM - 9:30 AM

Headwinds Facing Family Business Owners

Most business owners expect to transition out of their companies within the next five to ten years, but national research shows that few have a written plan, clear personal readiness, or a true understanding of their transition options. With up to 80 percent of an owner's net worth tied to the business and half of all exits happening involuntarily, these gaps often result in diminished value, forced exits, failed sales, and lasting seller regret.

This high-impact presentation reframes traditional exit planning as Value Optimization Planning — a forward-thinking, present-focused approach that builds business value now, increases personal wealth, reduces tax exposure, protects assets, and aligns decisions across business, personal, and financial domains. Attendees will learn how to identify intangible value drivers, assemble a coordinated "Dream Team" of advisors, shift outdated paradigms, and begin closing value, wealth, and protection gaps immediately.

Whether you're a business owner seeking more clarity, control, and freedom, or an advisor aiming to elevate your service and deepen client relationships, this session provides the roadmap and tools to focus on What Matters Most and position every decision for maximum long-term impact.

***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 2026

SESSION 2

9:50 AM - 10:50 AM

Maximizing the Value of a Family-Owned Business

In this engaging session, owners and advisors will discover what truly drives business value — and the practical steps you can take now to strengthen governance, financial performance, operations, and strategic direction. You'll learn how buyers, investors, and successors evaluate a company, uncover the most common pitfalls that limit value, and gain clear strategies to close gaps before it's time to transition.

The presentation also demystifies today's seven primary succession and exit options, helping families understand which paths align with their goals, dynamics, and desired legacy.

Participants will leave with both a 3–5 year roadmap and a focused 90-day action plan to begin maximizing value immediately. Whether you're planning for growth, preparing for succession, or advising business owner clients, this session delivers actionable insights to build a stronger, more resilient, and more transferable business — starting today.

***CE CREDIT APPROVED: CEPA, CFP, CLE, CPE, LIFE, PACE**

Casey Monsen CFP®, MBA, CEPA®
Keeler Thomas
Partner

Casey Monsen has been a financial services professional for nearly two decades. He has a strong focus on client development and delivering industry-defining, high-touch client experience. Since 2008, he has built his work around forming meaningful relationships and helping clients navigate complex decisions with confidence.

Casey began his career as a financial advisor with Beneficial Financial Group and later continued in that role with Allegis Financial Partners. In 2011, while still affiliated with Allegis, he founded Monsen Group Wealth Management. In 2014, Casey became affiliated with Andina Family Offices as an independent financial advisor and went on to serve as Chief Operating Officer beginning in January 2017. In 2022, he became a managing partner and played a key role in negotiating the merger that formed Andina Advisors.

Casey holds a bachelor's degree in accounting from Utah State University and later completed his MBA at Weber State University. He also holds the CFP® designation, an indicator of the strength of his expertise and commitment to serving clients.

Casey comes to Keeler Thomas in 2026 with a focus on strong growth and continuing to deliver elevated client service. Outside of professional work, Casey enjoys spending time outdoors with his wife and two children.

UVU | BUSINESS ECONOMIC FORUM 2026

SESSION 3

12:15 PM - 1:15 PM

How to Cheat Your Way to the Highest Levels of Professional Ethics

Ethical dilemmas are everywhere in business. Some are obvious, others are subtle, but even small ethical choices can create outsized consequences. In this engaging and thought-provoking presentation, Greg Kyte explores the behavioral psychology behind why good people sometimes make questionable decisions — and what we can do about it. Drawing on research and real-world examples, Greg introduces practical “ethics hacks”: non-obvious, science-backed strategies that help individuals and teams increase integrity, accountability, and better decision-making in everyday work. Attendees will leave with fresh insight, useful tools, and a renewed sense of how small shifts in behavior can lead to meaningful cultural change.

***CE CREDIT APPROVED: CEPA, CFP, CLE ETHICS, CPE ETHICS, LIFE, PACE**

Greg Kyte, CPA
Oh My Fraud Podcast Co-Creator
Controller/CFO | Riverwoods Medical Art Center

Greg is a licensed CPA, a working standup comedian, and a veteran podcaster. His most recent podcast project, Oh My Fraud, launched in 2022 and quickly became one of the premier true crime podcasts covering white-collar crime. Greg has twice been included in Accounting Today’s list of the Top 100 most influential people in the accounting profession. As a standup comedian, Greg has performed countless shows and was once the opening act for Weird Al Yankovic. He currently lives in Orem, Utah, with his wife and two cats; and at age 53, he started training as a stuntman with Spearhead Stunts in Lindon, Utah.

UVU WOODBURY SCHOOL OF BUSINESS

A PLACE TO SECURE YOUR FUTURE

GAIN THE TOOLS TO BUILD FINANCIAL STABILITY.

uvu.edu/woodbury

SESSION 4

1:20 PM - 2:20 PM

Optimizing Tax Outcomes Through Donations of Private and Illiquid Assets

Donating appreciated assets instead of cash can be a significantly more tax-efficient way to support charitable causes. Many founders, employees, and investors hold private or illiquid assets that may eventually be sold during liquidity events such as acquisitions, tender offers, or IPOs. If these assets are sold first, the owner typically pays capital gains taxes before making a charitable donation. By instead donating a portion of the asset before the sale through a Donor-Advised Fund (DAF), donors can receive a tax deduction based on the asset's fair market value while avoiding capital gains taxes on the donated portion.

***CE CREDIT APPROVED: CEPA, CFP, CLE, CPE, PACE**

Phoenix Haffen
UI Charitable Advisors
Partnerships Manager

Phoenix is the Partnerships Manager at UI Charitable, where he cultivates relationships with advisors, donors, and institutions to expand the reach and impact of charitable giving. His work bridges wealth management and social impact, focusing on making philanthropy more accessible and effective. He played a key role in developing innovative approaches to donor-advised funds, helping donors give efficiently and impactfully. Phoenix holds a BA in Economics from the University of Utah.

SESSION 5

2:55 PM - 3:55 PM

Navigating the US and Global Economy: Key Drivers, Risks, and Opportunities in 2026

In this clear and approachable session, participants will gain a grounded understanding of the economic forces shaping business, households, and long-term planning in the coming year. The presentation breaks down complex trends — inflation, interest rates, labor markets, consumer behavior, and global pressures — into practical insights leaders can actually use.

Attendees will learn how to interpret key economic indicators, anticipate potential shifts, and build strategies that remain resilient in both stable and uncertain environments. The session highlights what's driving current market dynamics, what to watch in the months ahead, and how organizations can position themselves for strength regardless of the broader economic climate.

By the end, participants walk away with a clearer picture of the economy's direction and a set of actionable considerations to support informed planning, growth decisions, and long-range financial strategy.

***CE CREDIT APPROVED: CEPA, CFP, CLE, CPE, PACE**

Cary Wasden, CEPA®
Keeler Thomas
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 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.

SURVEYS

Scan or click the QR code to take the related survey.

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