



2025

Utah Chapter of Exit Planners  
Member Directory



Exit  
Planning  
Institute™

Utah Chapter





## Monthly Meetings

Jan 16: Scott Snider  
Feb 20: Software  
Mar 20: Case Study  
April 17: Seller Panel  
May 15: Member Only Roundtable  
June 19: Choice of Entity  
July 18: BREAK  
Aug 21: Cinderella Story  
Sept 18: ESOPs  
Oct 16: Estate Planning  
Nov 20: Member Only EPI Awards



# Chapter Leadership



**PRESIDENT**

**Rick Krebs**

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## Peter Christman 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.



**Niels Bybee**

## Utah Chapter Member of the Year



**Steven Cox**

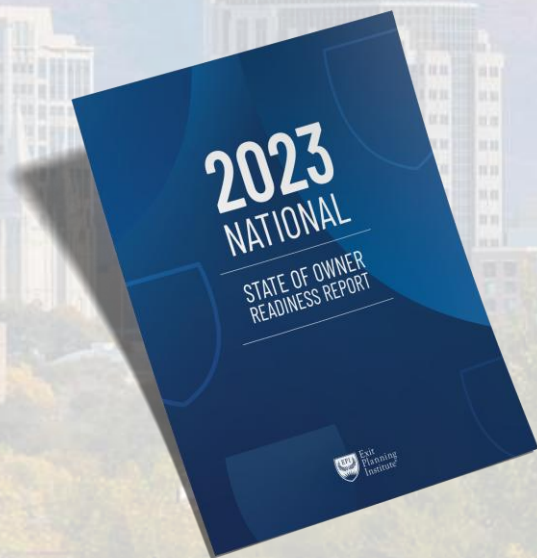
The Chapter Member of the Year award is for the chapter member who is a visionary - looking for ways to improve exit planning, is an innovator, and implementer of creative and new ways to do exit planning in his or her practice.



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## DIRECTORY

- Attorneys
- Business Appraisers
- Business Brokers and M&A Advisors
- Business Coaches
- Certified Public Accountants
- Financial & Wealth Advisors
- Fractional CFO, CRO, & Transaction Advisors
- Investment Bankers
- Tax Consultants
- Value Acceleration



## ATTORNEYS



**Brent Hawkins**  
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Co-founder

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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).

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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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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 multi-billion 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 sell-side due-diligence engagements for multi-billion-dollar 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

## BUSINESS BROKERS and M&A ADVISORS



**Diane Hartz Warsoff**  
CEPA, CBI, MBA

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As President of **Exit Factor of SLC & Utah County**, Diane empowers small to mid-size business owners to maximize their company's value. With over eight years of experience leading Transworld Business Advisors of Utah County, an award-winning business brokerage firm, she possesses the expertise to guide entrepreneurs through the entire business lifecycle – from acquisition and growth to successful exit. Diane is a Certified Business Intermediary (CBI), Certified Exit Planning Advisor (CEPA), and a Licensed Realtor, with certifications in LEAN process improvement and franchise consulting. Her extensive background in commercial finance and nonprofit management further enhances her ability to provide strategic guidance and achieve optimal outcomes for her clients.

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Meili is a Senior Business Broker at **Transworld Business Advisors – Utah County**. She successfully manages and oversees the marketing and sale of small businesses. Meili is a small business owner herself and most recently sold her business after a successful 6 years. In addition, she has extensive experience in the mining industry, serving as a consultant to various major mining companies throughout Indonesia, Guatemala, and USA, with a focus on HR, Succession Planning, Safety management and Compliance. She was a consultant with Accenture, working with various companies on specific projects to improve operations excellence and ensure successful ERP implementation for the clients. Those experiences have made her well versed in the operations and process analysis of various industries. Meili loves working with aspiring entrepreneurs and will leverage her personal experiences to help sellers find the right buyers and help buyers to find the right business for them. She is a Board Member of Utah Asian Chamber of Commerce.



**Meili Myles**  
CBI



## BUSINESS BROKERS and M&A ADVISORS



**Mike Lee**  
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Mike helps small business owners prepare their business to achieve maximum value and get it sold once they decide the timing is right. As a CEPA and business broker at **First Choice Business Brokers**, Mike works with carefully chosen partners to guide owners through operational improvements, financial organization, and due diligence before going to market, reducing risks and increasing sale value. Most owners aren't ready when they decide to sell, risking lost value or failed deals. Mike changes that by helping owners build businesses that buyers are eager to purchase. If you're a business owner thinking about selling—or a financial advisor, CPA, attorney, etc. who is seeking a trusted partner—Mike would love to connect.

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Rick brings a unique blend of sales, entrepreneurial, and financial experience to the **Business Sales Group**. 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 sale-side and buy-side 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 sales-side advisor who helps Sellers avoid the pitfalls of selling a business.



**Rick Krebs**  
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## BUSINESS COACHES



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As a Certified Exit Planning Adviser with **Elevate Exit**, Aaron specializes in business growth and exit planning, and helps companies successfully scale and exit at higher multiples. His expertise in exit planning and value enhancement is specifically focused on business owners in the field of technology. With a comprehensive approach, Aaron works one-on-one with clients to develop tailored strategies that not only prepare their businesses for a successful sale but also maximize their value prior to exit. His expertise ensures that business owners can transition smoothly, while achieving optimal outcomes and securing their legacy.

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Maximizing business value isn't just about financial, it's about optimizing the intangibles that drive enterprise value. At **Thriving Business Coaching**, Jackson helps CEPAs and business owners do just that. On the sell-side, he improves talent, strategy, and operations to attract premium buyers. On the buy-side, his expertise with The Predictive Index (PI) helps reduce post-acquisition employee churn having reduced some client's post-acquisition employee churn from 50% to 10%, making transitions smoother and more profitable. A Certified Exit Planning Advisor (CEPA) and former Corporate Trustee and Business Negotiations Consultant with 15+ years in M&A, corporate trust, and strategic consulting, Jackson simplifies due diligence and turns complex exit plans into clear, trackable strategies.



**Jackson Frandsen**  
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## CERTIFIED PUBLIC ACCOUNTANTS



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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 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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# ANNUAL EXIT

READ THE INAUGURAL ISSUE



## FINANCIAL & WEALTH ADVISORS



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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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As a dedicated wealth advisor with **RTI Wealth Management**, Heidi specializes in helping business owners build, protect, and optimize their enterprise value through comprehensive financial planning and strategic investment management. Her expertise lies in boots on the ground experience to help owners identify critical financial decisions, that will take their business from successful to significant. With a client defined and purpose driven process, Lisa helps clients navigate complex financial landscapes, ensuring they have the tools and support needed to maximize business value while building lasting personal wealth.

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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 I serve include business owners who are considering various exit strategies, succession planning and legacy planning.



**Joe Cronley**  
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At **Carson Wealth**, Larz is part of an ensemble practice that sets itself apart by leveraging the collective expertise of multiple wealth advisors and CEPAs for each client case. This collaborative approach ensures that clients receive well-rounded and thorough financial guidance. Larz is passionate about assisting business owners in navigating complex financial landscapes and optimizing their wealth to align with their aspirations. He is a seasoned wealth advisor and financial planner with over two decades of experience in the industry. Holding the Certified Exit Planning Advisor (CEPA) designation, Larz specializes in tax mitigation strategies and business exit planning.

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Lisa is a Financial Advisor and Investment Manager with **Raymond James** and has 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. 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. An advocate for values aligned financial planning and investing, Lisa works with clients to customize portfolios for environment, social and governance (ESG) factors and to design wealth strategies with people, purpose, and planet at heart.



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Due to company compliance protocols, Lisa was unable to provide a personal bio. Please visit the following link for her information:

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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.



**Marcus Johnson**  
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With over 30 years of experience, Scott specializes in wealth management for individuals, families, retirees, business owners, executives, and non-profits. 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.

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Steven is a Certified Exit Planning Advisor (CEPA) specializing in Virtual Family Office, Financial Planning, and Wealth Management. Steven co-founded **SDP Personalized Planning** to help business owners and entrepreneurs ensure their business success translates to personal financial success while also regaining their time. He focuses on leveraging evolving financial planning technologies and coordinating teams of financial, tax, and legal experts to continually improve outcomes for the people he works with.



**Steven Cox**  
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Steven started his career in wealth management in 1992 at Merrill Lynch, where he remained for 29 years before affiliating his practice **Williams Townsend & Stout Wealth Management Partners** with **Raymond James** in 2021. He primarily works with high-net-worth individuals and families, including business owners and families with intergenerational wealth goals. He also works with institutional clients supporting their investment and employee benefits programs. Goals like creating a good retirement, preserving the legacy of a family business, or maintaining health and independence in age are common, but contain multitudes of nuances unique to each person. To best serve those differences, Steven believes his clients should have a personalized financial plan, dutifully managed, and adjusted to keep up with life and the currents of the market.

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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.



**Thom Hall**  
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## FRACTIONAL CFO, CRO, & TRANSACTION ADVISORS



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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 record-breaking success while navigating their unique paths to growth.

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Patrick is a finance aficionado with a zest for numbers and strategic guidance. As a CFO and transaction advisor at **Ampleo**, Patrick brings over two decades of experience to the table. He is widely recognized as the "QofE Guy" (Quality of Earnings). Patrick delivers expertise across CFO, CMO, HR, sales tax, valuation, marketing, transaction advisory, and turnaround/restructuring services. His passion for numbers rival others' love for chocolate or coffee, as evidenced by his favorite shirt proclaiming, "Warning: may talk about EBITDA." Patrick excels at guiding teams and companies through exponential growth. His meticulous approach to financial due diligence has been pivotal in facilitating M&A transactions exceeding \$2 billion in combined valuation.



**Patrick McMillan**  
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## FRACTIONAL CFO, CRO, & TRANSACTION ADVISORS



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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.



## INVESTMENT BANKERS & CONSULTANTS



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As an investment consultant and branch manager with **Raymond James**, Andrew has over 20 years of experience. He splits his time between managing investment portfolios, providing purposeful planning, and researching/writing on how family-owned business prepare the next generation to be good stewards of wealth. Having been mentored by pioneers in the field has given Andrew a deep passion for his work. He has been tutored by Richard Orlando of Legacy Capitals, received dual certificates in Family Business and Family Wealth Advising, trained as a 21/64 certified advisor, became a Certified Private Wealth Advisor, and received training from the Institute for Preparing Heirs. In addition to his own proprietary family wealth strategies, Andrew has gathered and developed some of the best tools in the industry.

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Garit is a Managing Director at **Forbes Partners**. He has more than 25 years of experience as an M&A professional. He is known for his expertise in advising consumer product company owners on successful strategies for maximizing shareholder value, while accounting for the human “needs and wants” present in business transactions. Prior to joining Forbes, he managed the M&A Advisory Services Group at Colliers International. Garit began his M&A career as a senior associate at Interwest Capital Advisors, a regional financial services advisory firm. Garit has also founded and operated companies in the consumer and business services industries, giving him distinct insights into businesses from the viewpoints of an owner, manager, and entrepreneur. He received his Masters degree from the University of Utah in Business Administration and Organizational Development.



**Garit Lawson**  
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Maxwell is a dynamic business development and innovation leader with over a decade of experience in technology, entrepreneurship, and strategic partnerships. He previously held the Vice President of Partner Development role at a custom software agency. He bridged technical expertise with client relationships, guiding partners through costly digital transformation initiatives, product development, and team-building processes. As a Venture for America Fellow, Maxwell was recognized as part of an elite group driving innovation and job creation in emerging markets. A graduate of Boston College with a degree from Carroll School of Management and a concentration in Information Systems. Since joining **DBD Investment Bank**, Maxwell has focused on building trust with clients and strategic partners to help privately owned or founder-led businesses maximize enterprise value. DBD delivers the following advisory services: Capital Formation, Debt Restructuring, Buy and Sell Side M&A.





## TAX CONSULTANTS



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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.

## VALUE ACCELERATION

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With over 35 years of experience working in accounting and wealth management, Duane is skilled in investment management, tax minimization, succession planning, and wealth protection. In 2002, Duane started his own business serving great savers, high net worth individuals and business owners. His firm became Signal Wealth Advisors and most recently partnered with Carson to become the **Carson Wealth** office in Salt Lake City, UT. He is a Managing Director, EOS Visionary and a Succession and Wealth Advisor. Investment advisory services offered through CWM, LLC, an SEC Registered Investment Advisor.



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