

WESTMINSTER UNIVERSITY

Small Business Conference 2026



LEAD WITH CONFIDENCE

Attendee Guide

March 27, 2026 | 8 AM - 3 PM

Bill and Vieve Gore School of Business
Strategies for Navigating Today's Business Challenges



**WESTMINSTER
UNIVERSITY**

1840 South 1300 East, Salt Lake City, UT 84105 • westminsteru.edu

FAQs

How can I access the Jewett Center for Performing Arts for check in?

You can enter the building through two main entrances: The west entrance off 1700 S or the east entrance off main campus. **Check in and keynote speakers will all be in the Jewett Center for performing arts.**

How can I access the Bill & Vieve Gore School of Business building?

You can enter the building through two main entrances: the west entrance and the south entrance.

Where is the foyer?

The foyer of the Bill & Vieve Gore School of Business is located on the west side and can be accessed through the entrance facing Dumke Field.

Where can I find the breakout rooms?

All the breakout rooms will either be on the first or second floor of the building. They will be on the North Side of the Gore School of Business. There will be signs in the hallways to guide you to the correct location. Reach out to staff members for further assistance.

What are the parking options?

Parking is available at three locations:

- The Foster/Carleson lot, accessible from the roundabout at 1300 East.
- The North Parking Structure and the Dumke Field Parking Lot, both of which are on 1200 East and accessible from 1700 South.

How do I connect to WiFi?

Network: SmallBusinessConf26

Connection Instructions: Select the network and enter your name and email in the portal, you will then be sent an email verification to accept.

Lunch Details

Following the 1st breakout session in Gore School of Business, lunch will be served at 11:30 AM in the BVGSB middle hallway (hallway in between the foyer and atrium). Please wear your badge receive your meal. Lunch ends at 12:30 PM.

Assistance During the Event

Our staff, identifiable by Westminster lanyards and nametags, are available throughout the venue to assist you with any inquiries.

Stay Connected

For updates and more about the Bill & Vieve Gore School of Business and the Westminster Center for Wellness, follow us on social media @WestminsterBusiness and @Westminster_CFW on Instagram and @BillandVieveGoreSchoolofBusiness and @WestminsterCenterofFinancialWellness on LinkedIn.

Visual Schedule

<i>Time</i>	<i>Event</i>	<i>Location</i>
8-9 a.m.	Check-In	Jewett Center for Performing Arts
9-9:15 a.m.	Welcome — Opening Remarks Dax Jacobson, PhD, Dean, Bill & Vieve Gore School of Business	Vieve Gore Concert Hall
9:15- 10 a.m.	Keynote Speaker - Sara Jones, Inclusion Pro	Vieve Gore Concert Hall
10-10:30 am	Break and walk over to Bill and Vieve Gore School of Business for breakout sessions	Bill and Vieve Gore School of Business
10:30-11:30 a.m.	<p>Track A - AI/Technology: Differentiating in the Age of AI by Lauren Carris, Codingscape</p> <p>Track B - Confidence in Funding: Evolution of Tax/Accounting as an SMB by Sarah Barlow, My Tax Collective</p> <p>Track C - Entrepreneurial Confidence: The Confident Communicator: Elevating Your Business Through Better Speaking by Beth Wolfer, Give your Best Talk</p> <p>Track D - Ecosystems and Community: How to Build an Ecosystem by Rocky Donati and Tessa Arneson, Maven SLC</p> <p>Track E - Leading Through the Times: Ask the Professor - Management, Marketing, and Operations by Alysse Morton and Mike Keene, Westminster University</p> <p>Track F - Spanish Speaking Track: Deja de adivinar. Empieza a simular by Eduardo Henriques, Fisga AI</p>	<p>A: Gore 228 B: Gore 227 C: Gore 133 D: Gore 134 E: Gore Auditorium F: Gore 106</p>

Visual Schedule (Continued)

<i>Time</i>	<i>Event</i>	<i>Location</i>
11:30-12:30 p.m.	Lunch and Networking	Gore Atrium and Surrounding Spaces
12:30-1:30 pm	<p>Track A - AI/Technology: The Unfair Advantage: How Small Businesses Win with AI by Patrick Phillips, Westminster University</p> <p>Track B - Confidence in Funding: Ask the Professor-Finance by Rachel Young and Matthew Crouse, Westminster University</p> <p>Track C - Entrepreneurial Confidence: The Scientific Founder: Applying Lessons from the Natural World to Entrepreneurship by Amanda Schochet</p> <p>Track D - Ecosystem and Community: Banking on Women Panel with Deborah Marzano (Banking on Women Director), Darci Alston (Tooele Valley Counseling), and Alysa Peterson (Synchrony Bank)</p> <p>Track E - Leading Through the Times: Improving Culture: a 5-step experience design global framework of how to improve culture, connection and engagement in your team or event by Bahaa Chmait</p>	<p>A: Gore 227 B: Gore 134 C: Gore 228 D: Gore Auditorium E: Gore 133</p>

Visual Schedule (Continued)

<i>Time</i>	<i>Event</i>	<i>Location</i>
1:30-1:45 p.m.	Break	Gore Foyer
1:45 -2:45 pm	<p>Track A - AI/Technology: Stop Guessing. Start Simulating by Eduardo Henriques, Fisga AI</p> <p>Track B - Confidence in Funding: Trends in Financing Panel with Dr. Rick Haskell (WGU University), Doug Keefe (Utah Microloan Fund), Bill Kirth (Rectify Partners/Rectify Capital LLC), Michael von Ballmoos (Ryan Valuation)</p> <p>Track C - Entrepreneurial Confidence: Entrepreneurial Journey Panel with Dr. Amy Frugé (Converge PT), Kimo Pokini (Ruff Haven Crisis Sheltering), and Caro Nilsson (Local Artist and Entrepreneur)</p> <p>Track D - Ecosystem and Community: Chambers of Commerce Panel with, Jacob Buck (LGBTQ Chamber), Emilio Manuel Camu (Asian Chamber), Tereza Bagdasarova (South Salt Lake Chamber), Ann Marie Wallace (Women's Business Center of Utah), and Alyn Toalepai (Pacific Islander Chamber)</p> <p>Track E - Leading Through the Times: How SMBs Can Navigate The Current Ecosystem and Interact with Policy Makers by Paul Jolley</p> <p>Track F - Spanish Speaking Track: De Pequeño a Grande: Una Guía Práctica para Financiamiento y Crecimiento by Jeremiah Cannedy</p>	<p>A: Gore 227 B: Gore 134 C: Gore 228 D: Gore Auditorium E: Gore 133 F: Gore 106</p>

Speakers & Topics

Opening Remarks. 9:00 AM - 9:15 AM



Opening Speaker

Dax Jacobson, PhD, Dean, Bill & Vieve Gore School of Business

Vieve Gore Concert Hall

Dax Jacobson is Dean of the Bill & Vieve Gore School of Business at Westminster University in Salt Lake City, Utah. As Dean, Dax is focused on strengthening entrepreneurial ecosystems. Dax's teaching and research interests include leadership, entrepreneurship, and strategy. He advises business big and small, urban and rural, private and non-profit. He has a passion for rural entrepreneurs in the American West and is involved in programming, research, and podcasts related to rural and other overlooked entrepreneurial ecosystems. Dax has a dual degree in Finance & History from Utah State University and an MBA and PhD from Bentley University.

Keynote Remarks. 9:15 AM - 10:00 AM



Keynote Speaker - Resilient Leadership in the Age of Acceleration

Sara Jones, Inclusion Pro

Vieve Gore Concert Hall

Sara Jones is CEO of InclusionPro®. She is an award-winning leader and TED speaker. With 25+ years of experience, leaders have trusted her to consult on big decisions and bring clarity to complex challenges. She has consulted hundreds of clients over the past 9 years. Sara draws on deep experience across business, technology, content, revenue, and law—connecting the dots between strategy and results. Her vision is to align mission, people, and strategic outcomes—so that purpose, people, and performance move together.

Session I. 10:30 AM - 11:30 AM



Differentiating in the Age of AI

Lauren Carris, Codingscape

Room 228

Lauren is an Executive Product & Learning Leader and a champion of Pro-Human AI for the Future of Work. She works at the intersection of product strategy, software development, and workforce evolution, helping organizations build modern technology without losing the essence of the human experience -- for technology workers and consumers. At Codingscape, Lauren partners with companies to modernize products, elevate engineering cultures, and design leadership systems that grow alongside rapidly advancing AI.



Evolution of Tax/Accounting as an SMB

Sarah Barlow, My Tax Collective

Room 227

Sarah is the founder of My Tax Collective, an accounting and tax advisory firm that helps small business owners go from financial chaos to clarity — with bookkeeping, tax filing, and proactive tax planning built around their goals. Sarah is passionate about making tax strategy accessible, meeting business owners where they are and helping them build the financial foundation they need to grow with confidence.



How to Build an Ecosystem - Maven Founders

Rocky Donati & Tessa Arneson, Maven

Room 134

Maven is a community that empowers women through the creation of safe spaces and intentional connections rooted in love and curiosity. Tessa is a big dreamer and community builder who leads with heart. As the co-founder of Maven, she has transformed a small Pilates studio into a thriving ecosystem of 100+ women-owned businesses, redefining what it means to build with purpose. Rocky is a creative strategist whose past journey of success and burnout through male-dominated industries led her to co-found Maven and reimagine what leadership looks like—empowering women to step into their power with unwavering authenticity.



The Confident Communicator: Elevating Your Business Through Better Speaking

Beth Wolfer, Give Your Best Talk

Room 133

Beth Wolfer serves as head speaker coach for TEDxSaltLakeCity and runs Give Your Best Talk, LLC, offering private coaching and company workshops. She's led a 30-year fundraising career, currently as a planned giving officer for Best Friends Animal Society. She and her dog Edgar are a therapy team for Intermountain Therapy Animals, where Beth also serves on the board.



Ask the Professor - Managing, Marketing, & Ops

Alysse Morton and Mike Keene, Westminster University

Gore Auditorium

Join our marketing and management professors from Westminster University for an open-ended conversation on managing, marketing, and operating your small business with confidence. You'll have the opportunity to ask your burning questions to experts in their respective fields.



Scenario Modeling (Spanish Session)

Eduardo Henriques, Fisga

Room 106

Eduardo Henriques es Fundador y CEO de Fisga. Inmigrante nacido en los Estados Unidos y criado en Venezuela, Eduardo creó Fisga para resolver un problema que veía repetirse en negocios de todo tamaño: equipos tomando decisiones costosas basadas en la intuición, y pagando las consecuencias después.

Fisga ayuda a dueños de negocios y equipos a poner a prueba sus ideas antes de comprometer dinero, tiempo o reputación. ¿Funcionará esto? ¿Quién realmente lo quiere? ¿Qué podría salir mal? Esas respuestas no deberían llegar después del lanzamiento. Eduardo tiene una licenciatura de la Universidad de Alabama y un MBA de Westfield Business School.

Session II. 12:30 PM - 1:30 PM



The Unfair Advantage: How Small Businesses Win with AI

Patrick Phillips, Westminster University, Vasion, & TrueIntellect.ai

Room 227

Patrick Phillips is the CIO and Chief AI Officer at Vasion and the founder of TrueIntellect.ai, where he helps organizations move from AI curiosity to AI execution. With a career built on solving real business problems through technology, Patrick has led AI strategy and implementation at scale across multiple industries. He also teaches at Westminster University's Gore School of Business, where he brings the same practitioner-first mindset into the classroom, focusing on practical application over theory. Patrick's philosophy is simple. AI is not magic. It is leverage. And the businesses that figure that out first will be the ones still standing in ten years.



Ask the Professor: Confidence in Finance

Rachel Young and Matthew Crouse, Westminster University

Room 134

Join us for an open panel discussion with finance professors from Westminster University. You will have the opportunity to ask any questions you may have about finance, advice, and leading your business with confidence. Take the opportunity to get advice from experts in the field!



The Scientific Founder: Applying Lessons from the Natural World to Entrepreneurship

Amanda Schochet

Room 228

Amanda is a computational ecologist turned entrepreneur and science communicator. After working with Earth-observing satellite data at NASA she founded MICRO, a fleet of six-foot-tall science museums to teach systems-thinking in the places where people live their daily lives. Since 2022 she has run a consulting practice helping startups and new initiatives within larger organizations go from 0-1. Learn more from her TED Talk, "How bumblebees inspired a network of tiny museums."



Leadership By Design

Bahaa Chmait, Public Speaker and Community Builder, JOYMOB Events

Room 133

Bahaa Chmait is a TEDx speaker and experience designer who helps groups build real trust and connection through fun, interactive keynotes and practical, experience-first workshops. He's designed human-centered experiences for organizations like Hilton Hotels, Sundance Film Festival, Silicon Slopes and eBay. Bahaa brings an engaging, interactive approach that makes learning fun, and when learning is fun, it sticks. Audiences walk away energized with practical tools they can use immediately.



Banking on Women Panel

*Deborah Marzano, Banking on Women Director
Darci Alston, Tooele Valley Counseling
Alysa Peterson, Synchrony Bank*

Gore Auditorium

Join our banking on Women Director and alumni for a panel discussing the Banking on Women program and how it has transformed and supported women in small business in our community.

Session III. 1:45 PM - 2:45 PM



Trends in Small Business Finance Panel

*Richard Haskell, Western Governors University
Doug Keefe, Utah Microloan Fund
Bill Kirth, Rectify Partners/Rectify Capital LLC
Michael von Ballmoos, Ryan Valuation*

Room 134

What’s the smartest way to fund your next stage of growth? Debt, Equity, or Joint Venture



Many small businesses hit a ceiling not because the product isn’t strong, but because the financing path isn’t clear. Understanding valuation, funding structures, and partnership opportunities can help you make smarter decisions—and avoid costly missteps.

Join “Trends in Small Business Finance” panel under this year’s theme: “Lead with Confidence” in a changing and uncertain economy to learn more about finance in the small business space.



How SMBs Can Navigate the Current Ecosystem and Interact with Policy Makers

Paul Jolley, Utah’s Governor’s Office of Economic Development

Room 133

Paul Jolley serves as Director of Utah’s Governor’s Office of Economic Development. With extensive experience in finance and operations and his background as an entrepreneur, he oversees funding initiatives served as a catalyst in driving \$700M+ in economic impact across Utah and supports small businesses and entrepreneurs in creating and sustaining jobs.



Entrepreneurial Journey Panel

***Kimo Pokini, Ruff Haven Crisis Sheltering
Dr. Amy Frugé, Converge Physical Therapy
Caro Nilsson, Local Artist***

Room 228

Join us for a panel with local entrepreneurs to discuss what it takes to start your own business! Panelists will discuss the ups and downs of entrepreneurship and how they came to find success and confidence in their small businesses. The audience will have the opportunity for questions at the end of the discussion.



Scenario Modeling (English)

Eduardo Henriques, Fisga

Room 227

Eduardo Henriques is the Founder & CEO of Fisga. A US-born immigrant raised in Venezuela, Eduardo built Fisga to solve a problem he kept seeing across businesses of every size: teams making expensive decisions based on gut feel, and paying for it later. Fisga helps business owners and teams pressure-test their ideas before committing money, time, or reputation to them. Will this work? Who actually wants it? What could go wrong? Those answers shouldn't come after you've already launched. Eduardo holds an undergraduate degree from the University of Alabama and an MBA from Westfield Business School.



De Pequeño a Grande: Una Guía Práctica para Financiamiento y Crecimiento (Spanish Session)

Jeremiah Cannedy, 30 Avenues

Room 106

Jeremiah Cannedy is an angel investor and business consultant who helps entrepreneurs understand what it takes to grow and fund a business. As a Pre-Screening Committee Member at SLC Angels, he evaluates early-stage healthcare, technology, and services companies, giving him direct insight into what investors look for and what holds businesses back. Through his consulting firm, 30 Avenues, he works directly with founders to build fundable business models and growth strategies. His background spans Tax and Regulatory operations at Goldman Sachs and Morgan Stanley to Strategy and Corporate Development inside the Office of the President at Western Governors University, where he led initiatives that generated \$16.5M in revenue and secured \$10M+ in capital. He holds an MBA from Westminster University and a Bachelor's in Economics from the University of Utah.



Utah Chambers of Commerce Panel

Jacob Buck, The Utah LGBTQ Chamber of Commerce

Tereza Bagdasarova, South Salt Lake Chamber of Commerce

Emilio Manuel Camu, The Utah Asian Chamber of Commerce

Ann Marie Wallace, Women's Business Center of Utah

Gore Auditorium



Participate in a panel discussion with representatives from Utah Chambers of Commerce. Panelists will be sharing the importances of building ecosystems and community within the work of your business and what avenues of support and programing the chambers contribute the community of small businesses in Utah. Panelists will share their Chamber's respective initiatives and plans for strengthening their existing relationships and creating new ones.



WESTMINSTER UNIVERSITY

PARKING

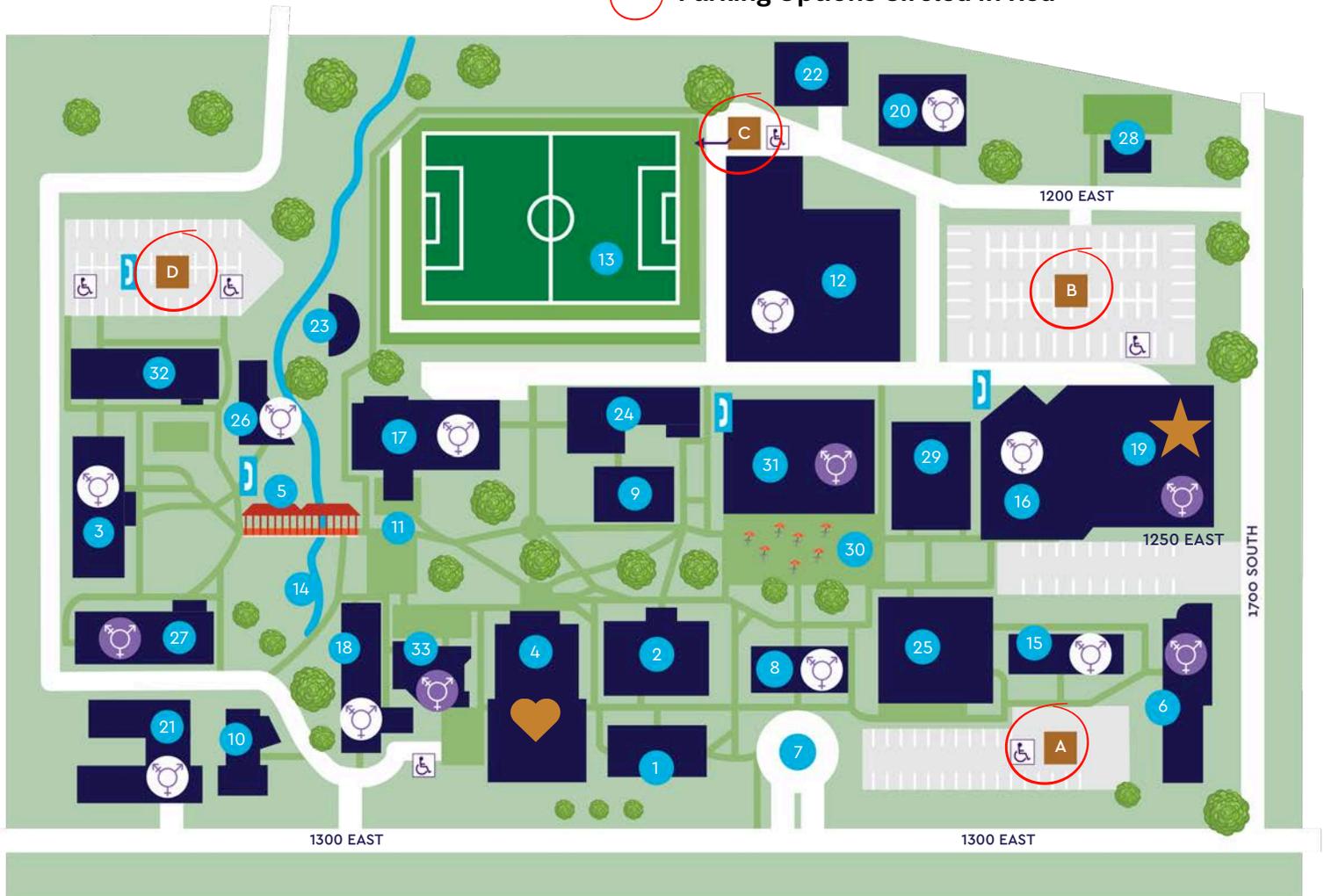
- A** Foster/Carleson Lot
- B** North Parking Structure
- C** Dumke Field Parking
- D** Lower Nunemaker Lot

- Accessible Parking Only
- Emergency Phone
- Gender-Neutral Bathroom
- Accessible Gender-Neutral Bathroom

- Check in and Keynote Speaker Location

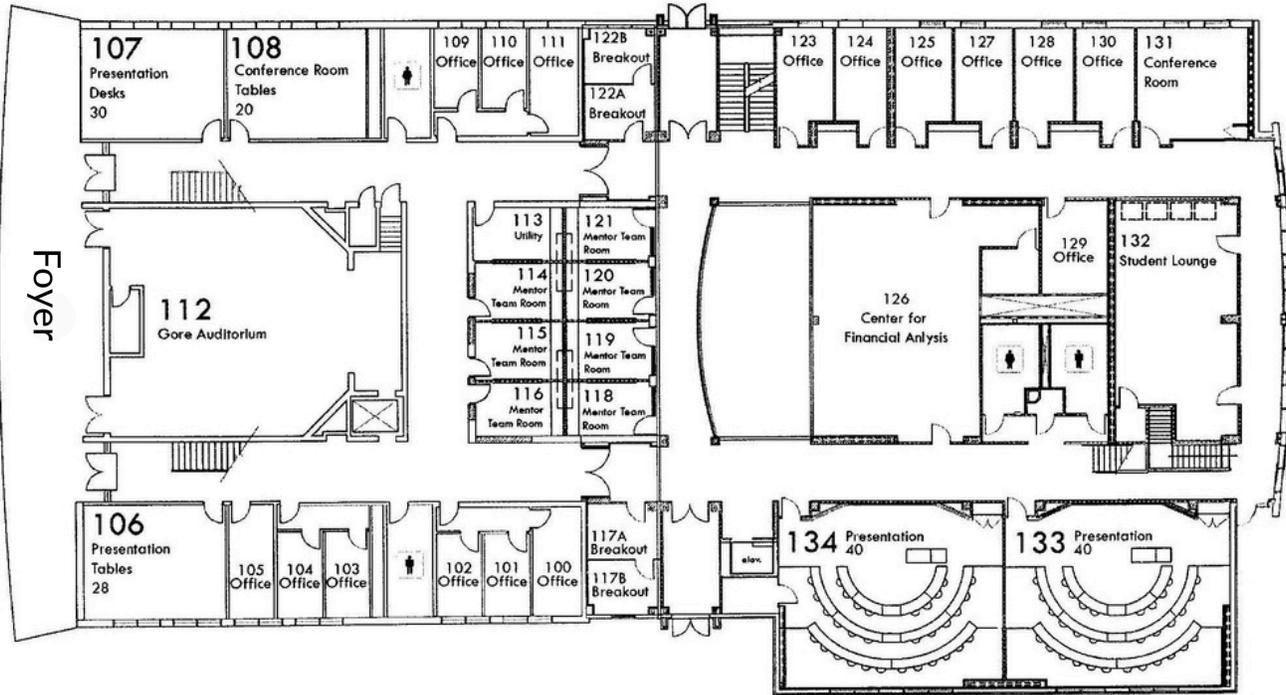
-Breakout Session and Lunch Location

-Parking Options Circled in Red

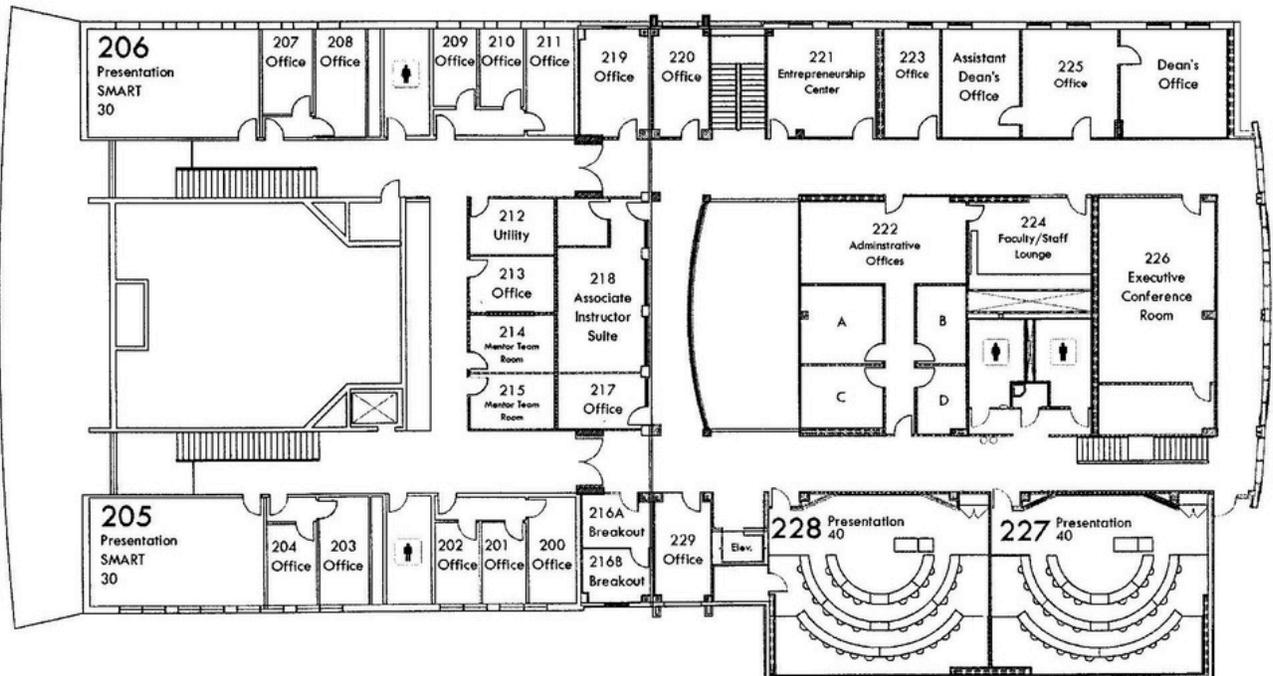


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| <ul style="list-style-type: none"> 1 Bamberger Hall (Administration) 2 Nightingale Hall 3 Behnken Hall
One accessible: laundry facilities 4 Bill and Vieve Gore School of Business 5 Black Bridge 6 Carleson Hall
Two non-accessible: main lounge (locked, ask RA for key) 7 Converse Circle 8 Converse Hall
Two accessible: fourth floor 9 Dick Science Building | <ul style="list-style-type: none"> 10 Dolores Doré Eccles Ceramic Center 11 Dolores Doré Eccles Plaza 12 Dolores Doré Eccles Health, Wellness, and Athletic Center (HWAC)
One non-accessible: weightroom
Two accessible: first floor (including family restroom) 13 Dumke Field (Elevated) 14 Emigration Creek 15 Foster Hall
Three non-accessible
Three accessible: floors two, three, and four 16 Gillmor Hall
Five accessible: levels 1, 2 and 3 17 Giovale Library
One accessible: main floor | <ul style="list-style-type: none"> 18 Hogle Hall
Two accessible: main lounge 19 Jewett Center for the Performing Arts and Emma Eccles Jones Conservatory
Two non-accessible: behind Black Box Theatre 20 Kim T. Adamson Alumni House
Three accessible: one upper level, two lower level 21 L.S. Skaggs Integrated Wellness Center
One accessible: upper level Maintenance Building 22 Malmsten Amphitheater 23 Malouf Hall 24 Meldrum Science Center 25
Two non-accessible: fourth floor | <ul style="list-style-type: none"> 26 Nunemaker Place
One accessible: main floor 27 Olwell Hall
One accessible: laundry facilities 28 Organic Garden and Bicycle Collective 29 Payne Gymnasium 30 Richer Commons 31 Shaw Student Center
One non-accessible basement: first floor 32 Stock Hall 33 Walker Hall
Two non-accessible |
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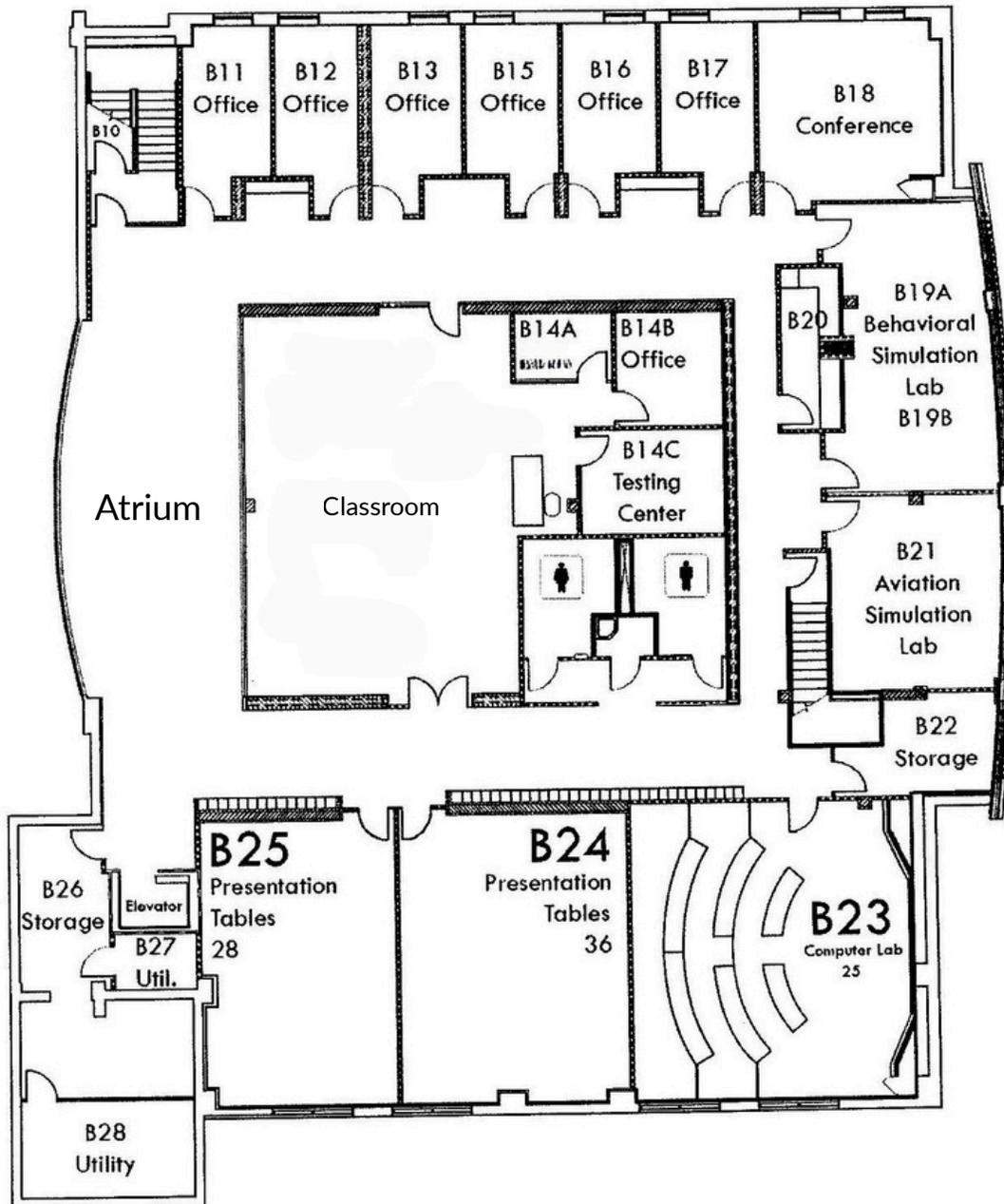
Gore Main Level



Gore Second Level



Gore Lower Level



Westminster Center for Financial Wellness

Learn more about all the great projects we are working on here at the Westminster Center for Financial Wellness!



Business Certificate Series

The Business Certificate Series, offered by Westminster's Center for Financial Wellness and the Bill and Vieve Gore School of Business, is tailored for non-business students seeking career advancement through business terminology. It includes free online courses in accounting, finance, and entrepreneurship available in live, hybrid, or self-paced formats. These non-credit courses provide practical knowledge and prepare students for further education or skill enhancement.



Gore Consulting

Gore Consulting offers free assistance from well-trained undergraduate and graduate consultants to small businesses, helping with projects like marketing plans and cash flow projections. Under Professor Richard Haskell, BVGSB students gain hands-on experience, enhancing their business understanding and professional skills. This program not only benefits students with practical experience but also provides valuable insights to support local entrepreneurs, fostering both student readiness and business success.



Tax Clinic

The Westminster Tax Clinic Holds all three IRS grants, VITA, LITC, and TCE. With these grants we are able to serve low-moderate income taxpayers, seniors ages 60+, and low-income taxpayers. With over 4 sites open 6 days a week, our tax clinic has been able to reach far and wide in our community. In 2024, over 2,700 taxpayers were served through VITA services and over \$3.6 million in refunds was secured for low-income taxpayers. Check out for information by scanning the QR code.



And Much More !

Deal Flow Reports, the Small Business Conference, etc...

Banking on Women

The Banking on Women™ program seeks to empower female entrepreneurs by providing them with the knowledge and resources necessary to create opportunities for themselves, transform their lives, and make their dreams a reality. Hosted by the Utah Microloan Fund, this 15-week course provides the tools, support, and financial resources women need to plan, launch, and grow their own businesses. Topics covered include market research, marketing, financial management, growth management, and leadership.

Thank You to All of Our Cosponsors!



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