

## OF NOTE



Apple founders Steve Wozniak and Steve Jobs

### America's largest company

Apple, the computer company that started in a California garage in 1976, became worth \$3 trillion last week when its stock surpassed \$182 a share. That's roughly equal to the gross domestic product of Britain or India. And it's equivalent to about six JPMorgan Chases — the biggest American bank — or 30 General Electrics. Another tech giant, Microsoft, could follow Apple into the \$3 trillion club later this year.

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## Go Utah query finds Domo qualifies for incentive

**Brice Wallace**  
*The Enterprise*

The Governor's Office of Economic Opportunity (Go Utah) is moving ahead with a tax credit incentive for Domo related to an expansion project despite its founder and CEO saying in October that "there's no chance in hell I was ever going to leave" and that other CEOs of incentivized companies "didn't need it and they would have stayed anyway."

Go Utah said last week it had concluded an investigation into Josh James' statements at the Silicon Slopes Tech Summit to determine if there was a breach of contract between the company and the state.

In January 2021, the American Fork-based cloud-based software company was awarded an economic development tax increment financing (EDTIF) tax credit of up to \$23.3 million. The incentive was tied to the creation of up to 2,230 high-paying jobs over 10 years.

Go Utah said last week that the incen-

tive was based on specific contractual performance conditions, which have not yet been performed or satisfied. However, after a review by Go Utah and the state's assistant attorney general, Go Utah said it "did not find evidence of a breach, and Go Utah has recommended continuing the tax credit incentive as agreed in the contract."

During the review, Go Utah received from Domo two statements and confidential evidence protected under the Govern-

see GO UTAH page 15



BioFire Diagnostics employees work in "clean rooms" at the company's Salt Lake City laboratories. Attendees at the recent BioHive Summit got an update on the shortage of skilled employees in industries such as biotechnology and the efforts to let workers know about the opportunities.

## Solution to employee shortage? Let people know of opportunities

**Brice Wallace**  
*The Enterprise*

Industries' need for skilled workers in Utah is well-known. The solution is less so, but it exists.

Potential skilled workers are out there, but they need to better understand the opportunities available to them, according to a panel at a recent industry summit. Lots of people are simply unaware of training and education that can put them on a path to a solid career.

They include members of underserved

populations, high school graduates who want to get straight into a job but lack the needed skills and people who already work but not in a career that could lead to a better life.

Getting that wide range of people into training and education can help both them and the companies that need them, and industry can work with educators to get them going, speakers said.

"We have pockets of potential students," Vic Hockett, director of the state's

## Inland port bond sale generates plenty of takers

The Utah Inland Port Authority (UIPA) has successfully closed the sale its Crossroads Public Infrastructure District Tax Differential bonds, securing \$150 million in funding for public infrastructure. The board said the bonds were well-received and generated investor orders roughly five times greater than the amount of bonds available.

"This offering demonstrated the need for problem-solvers to address the supply chain challenges we're facing," said Jill Flygare, executive director of the Utah Inland Port Authority Crossroads Public Infrastructure District. "There is a huge opportunity to enhance logistics in Utah, and it is exciting to have so many national investors who want to be part of what we're doing."

Investment banking firm Piper Sandler's Special District Group was the underwriter of the transaction. The investor demand led to a lower interest rate, allowing the UIPA to save nearly \$17.5 million in interest costs compared to the originally anticipated rate, Flygare said.

"We're thrilled by the investor response and encouraged to see so much interest in supporting sustainable development that

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# St. George Area Chamber honors trio

The St. George Area Chamber of Commerce has announced its 2022 Areté award honorees. The organization said the honors are the highest recognition offered to business and community leaders in Washington County.

The 2022 Areté honorees include Stephen Wade, founder and chairman of Stephen Wade Auto Center; Wayne Provost, director of the Innovation Guidance and Solution Center at Dixie State University; and Terri Kane, former regional vice president of Intermountain Healthcare in Southern Utah.

"On behalf of the SGACC board of directors, we are excited to recognize these outstanding members of our community for their dedication to excellence and honorable efforts toward improving conditions in their sphere of influence," said Kyle Case, incoming chairman of the chamber.

"These individuals have had an enormous impact in our community and over the life of their careers," the chamber said in a release. "The Areté award recognizes individuals for their exemplary leadership, innovation in business and service in the community. They have lived up to their full potential, which is the definition of Areté."

"Our 2022 Areté honorees have changed the trajectory of the St. George area, creating thousands of jobs and spurring

unprecedented economic activity," said Don Willie, president and CEO of the St. George Area Chamber of Commerce. "More importantly, Stephen, Wayne and Terri are each humanitarians who have donated their time and resources to lifting individuals and organizations around them. It is our great honor and privilege to recognize their life's work during our annual Foundation Gala."

Stephen Wade, a first-generation auto dealer, moved to St. George in 1993 and opened Stephen Wade Honda/Mazda. Three years later, he opened an automotive collision center. By 2018, he grew Stephen Wade Auto Center significantly by adding Nissan, Chevrolet, Cadillac, Chrysler, Jeep, Dodge, Ram and Mercedes-Benz to his family of dealerships.

"Stephen has a special love for people, and is passionate about helping others and building strategic, mutually beneficial relationships and partnerships within the community," the chamber said. "One reason why he has become very influential in Southern Utah is due to his unwavering persistence in seeking out and finding solutions."

Provost has been referred to as "one of the most interesting people in the world." "Doc," as he's called by peers, has helped over 200 individuals through the

patent process at Dixie State University by helping with prototype construction and proof-of-concept analysis.

Since the passing of his 17-year-old son Dusty, Provost has dedicated his life to helping individuals and institutions to develop new ideas, including his most recent patent, the illuminated infusion line by the company MedLite ID.

Kane retired as regional vice president of Intermountain Healthcare for Southern Utah with more than 30 years of experience in nursing, hospital operations, corporate operations and executive leadership. Kane oversaw the hospital's transition to the new campus where St. George Regional Hospital currently resides. She was responsible for the development and deployment of best care practices and optimal care models across the organization.

With a foundation as a nurse, Kane has been recognized locally and nationally and served as president of the Neonatal Nurses National Association and received the Utah Hospital Association's Distinguished Healthcare Executive award and Intermountain's Nursing Excellence award.

The 2022 Areté honorees will be recognized at the St. George Area Chamber of Commerce Foundation Gala on Saturday, Jan. 15 at 6 pm.

## Moore named Big-D CEO

Big-D Cos., a Salt Lake City-based general contractor, has announced that Cory Moore has been named CEO. He replaces Rob Moore, who became the company's executive chairman.

"This is a significant announcement for our company and future. We have worked on our succession planning over the last decade and this strategic move is part of that plan and is a major step in realizing our goals," said Rob Moore.

"In a unanimous decision by the Big-D Cos. board of directors, Cory Moore will take global responsibility for its 14 offices nationwide. His job will ensure we continue to preserve our mission of being the most sought-after by our associates and customers. He will also continue to stimulate progress and drive Big-D's vision of growth and investment in our future," said a Big-D release.

"Cory is the right leader for Big-D," said Jack Livingood, Big-D's chairman of the board. "Cory's extensive experience along with his leadership and communication skills will help us grow our national footprint to better serve our customers. Big-D is in good hands with Cory."



Cory Moore

Cory Moore has been with Big-D for nearly 25 years during the company's growth. He has been involved in many of Big-D's most iconic projects and in recent years has been serving as the company's national president and a member of its board of directors.

"I am very excited for the opportunities and challenges ahead," said Cory Moore. "Big-D has a great business model and extraordinarily talented people. We are well-positioned to become one of the most sought-after construction companies in the business."

"Our future is bright, and leadership is strong at each of our Big-D family of companies' 14 offices. Already in eight states, we are in an upward trend for expansion and refreshed leadership is important to the livelihood of our company," said Rob Moore.

Founded in 1967, Big-D has a resume of thousands of completed projects with more than 1,500 employees and \$2 billion of annual revenue. Regional offices are in Salt Lake City, Ogden, Lindon and Park City; Pleasanton and Irvine, California; Tempe, Arizona; Las Vegas and Reno, Nevada; St. Paul, Minnesota; Bozeman, Montana; Boise and Idaho Falls, Idaho; and Jackson, Wyoming.

## Caldwell to head apparel company

Lions Not Sheep Apparel, an apparel brand based in Bluffdale, has hired Dan Caldwell as its new president and chief operating officer. Caldwell was the co-founder of TapouT, a combat sports brand based in California. He has 24 year of experience in the apparel brand industry.

Lions Not Sheep Apparel is a fast-growing global apparel and lifestyle company that has sparked a demand with products that "appeal to those patriots around the world who lead and create versus blindly following the masses," a company release said. A single T-shirt designed by company founder Sean Whalen with his personal mantra — Lions Not Sheep — launched the company.

"Dan brings incredible insight and knowledge of the ap-

parel business and has experience successfully building a highly visible global brand," said Whalen. "With triple-digit annual growth, Lions Not Sheep is quickly becoming a household name and Dan will help us take things to the next level."

Caldwell will oversee the company's day-to-day operations, implement strategic growth initiatives, strengthen the company's supply chains and develop production partnerships, Whalen said.

"I'm inspired by what the brand stands for because it's what I stand for," said Caldwell. "It's created a movement that people want to be a part of, and I believe that movement has contributed to its early success. We are going to build this into a global brand."



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# Utah's travel & tourism industry on path to recovery, Gardner report shows

The Kem C. Gardner Policy Institute at the University of Utah has released its annual travel and tourism report for 2021. The study, released in mid-December, showed that Utah visitor spending was down 29.8 percent to \$7.07 billion in 2020 due to the COVID-19 pandemic.

The spending decline negatively affected tourism jobs, wages and tax revenue.

Despite the adverse impacts of the pandemic, the report also indicated a healthy recovery during the first half of 2021, particularly in Utah's rural regions.

"Utah experienced record visitor spending in every year from 2009 to 2019, but the COVID-19 pandemic set annual visitor spending back 10 years and caused a statewide loss of 18,800 tourism-related jobs and millions in tax revenue," said Jennifer Leaver, senior tourism analyst at the Gardner Institute and lead author of the report. "Still, Utah's tourism industry fared better compared with the region and U.S. as a whole, attributable to our wide-open spaces, numerous outdoor recreation opportunities and effective marketing campaigns."

According to the report, Utah's travel and tourism industry accounted for an estimated 119,600 total jobs in 2020, a 13.5 percent decrease from 2019. For the same period, the private travel- and tourism-related employment sector wages declined 10.4 percent, while private air transportation wages declined 4.7 percent.

The study found that visitor spending generated an estimated \$1.16 billion in total tax revenue, a 17.9 percent year-over-year decrease.

crease.

Taxable sales in the accommodation sector neared \$1.6 billion, a 25.5 percent year-over-year decrease while statewide hotel occupancy rates and daily room rates were down 26.3 percent and 15.9 percent, respectively.

Utah's state park visits increased 32.5 percent from 2019 to 2020, while national park visits were down 27.3 percent. Despite operating under pandemic conditions, Utah's 2020-21 ski season set a new record for the number of skier days (5.3 million).

Analysts expect travel in 2022 to continue to rebound.

"The pandemic has made our Red Emerald Strategic Plan more important than ever," said Vicki Varela, managing director of the Utah Office of Tourism. "Utahns and out-of-state visitors are passionate about our state's wonders. We are encouraging more immersive travel off the beaten path to create a perpetual visitor economy."

## Banner Ventures partners with Premier Plastics

Lehi-based Banner Ventures has acquired a significant stake in Salt Lake City's Premier Plastics LLC, a specialty plastic packaging manufacturer serving the medical, specialty food, retail/consumer goods and nutraceutical industries. Jim Holbrook, who founded Premier in 1989, retained "meaningful" ownership in the company and will continue as CEO, according to a release from Banner Ventures.

Banner Ventures is a private equity and venture capital firm focused on providing partnership capital to family-owned and founder-led businesses in the United States. The partnership will fuel Premier's "next phase of aggressive expansion," the release said.

"For the last 32 years, we have built Premier Plastics into a market leader without any outside capital. We have the team, the capability and the market reputation to double our scale in the near term — but to do so I needed to bring in capital partners," said Holbrook. "After considering all of our options, I felt like Banner was the right partner to continue building on our great legacy and success."

In addition to Banner Ventures, healthcare and manufacturing industry veterans Ron Labrum and Tony Orsini co-invested via Seventeen Capital LLC with the goal of driving additional growth in the medical device and supply categories.

"In addition to Ron's experience with Baxter and Cardinal Health, together we have helped scale businesses such as Fenwal and Flexan in the healthcare sector — and we firmly believe in Premier Plastics' ability to expand and scale to the next level," said Orsini, who will join the company's board of directors.

"This transaction is a great example of our partnership capital model," said Tanner Ainge, managing partner of Banner Ventures. "Premier Plastics has an incredible team, culture and


operating history that we are now thrilled to be a part of. Over the next several years we believe Premier is positioned to be the category leader for custom thermoforming solutions and we could not be more excited about partnering with founder and CEO Jim Holbrook and the entire Premier Plastics team."

"Our expansion plan is already underway," said Tyler Price, principal of Banner Ventures. "Acquisitions, new geographies, additional investments in production capabilities and a focused outreach to bring on new customers in the medical and consumer categories are all part of the growth strategy."

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# Scorpion survey finds strong support for local businesses during pandemic

Scorpion, an Internet marketing platform based in Lehi, has released the results of a survey conducted on its behalf by YouGov to gauge American opinions on a number of issues pertaining to local businesses, including what it takes to be seen and supported during a pandemic, mask mandates and vaccine expectations.

The survey found that Americans overwhelmingly continue to support local businesses through the pandemic. Of the 2,380 U.S. adults 18 and over surveyed, 68 percent said they actively support their local businesses, which included purchasing goods and services more often (34 percent) and in higher volume (29 percent) than before the outbreak, recommending the businesses to others (31 percent) and choosing locally owned businesses over nearby national chains and franchises (27

percent). Almost all of those questioned (97 percent) said they have maintained their active support of local businesses through the pandemic.

The survey revealed Americans have a much more nuanced attitude toward national chains and franchises operating in their areas, with only 20 percent of those surveyed automatically considering them true local businesses. When asked what nearby national chains and franchises needed to do to be seen and supported as local businesses, 40 percent said they needed to see those businesses contribute to their local communities. National or regional businesses can also benefit from proactive local support by offering goods and services specific to a given community (as reported by 29 percent of respondents), hiring employees that are either from or knowledgeable

about the area (26 percent), donating to local charities or community groups (23 percent) or offering more personalized service (21 percent).

The survey also suggested national chains and franchises could improve their status in the communities they operate in by improving in a few key areas where Americans feel locally owned businesses perform better than regional or national business. These areas include:

- Personal interactions: 58 percent feel local businesses perform best versus 8 percent who feel regional or national businesses perform best.
- Uniqueness of services offered: 48 percent versus 9 percent.
- Trust: 44 percent versus 8 percent.
- Responsiveness: 44 percent versus 12 percent.

• Familiarity: 42 percent versus 17 percent.

• Better service: 40 percent versus 10 percent.

• Quality of products/services offered: 31 percent versus 13 percent.

• Reliability: 31 percent vs. 15 percent.

The survey also explored how business owners should handle mask mandates as the threat of new and existing variants lingers:

• 41 percent said masking should be enforced among employees.

• 28 percent believe the employee should decide.

• 16 percent said it's enough to enforce masking only among employees who aren't vaccinated.

Americans demonstrated a similar stance when it comes to the customers of those businesses:

• 37 percent said all customers should be masked.

• 32 percent believe the customer should decide.

• 17 percent said it's enough to enforce masking only on customers who aren't vaccinated

American attitudes toward masking differed only slightly

when asked about local service providers coming into their homes:

• Of those who are willing to allow providers into their homes, 45 percent said they would ask the provider to wear a mask while 38 percent would let the individual decide. Thirteen percent would only require non-vaccinated providers to wear a mask.

• Overall, 38 percent reported feeling "very" or "slightly" comfortable asking providers whether they're vaccinated, edging out the 27 percent who said they would be "very" or "slightly" uncomfortable asking.

"We are incredibly heartened to see how far Americans will go to support their local businesses, particularly in times of crisis. It's a reminder of the good in the world. These survey results show that American small businesses will continue to thrive, thanks to the people who support them," said Scorpion CEO Daniel Street. "Our survey also revealed there are ways any company can contribute to their communities and be embraced as a local business. National chains and franchises may operate on a larger scale, but that doesn't mean they have to be disconnected locally."



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## Convenient Brands Buys Rome Tech, names James Rome pres.

Convenient Brands, a Draper-based platform of business technology companies that provide enterprise-level software to the automotive repair industry as well as integrated payment processing services, has acquired Rome Technologies of Pasadena, Maryland. Rome provides management software and consultation services to dealer-affiliated and independent auto collision centers across the U.S.

Convenient Brand also announced the promotion of James Rome from head of sales to president of Rome Technologies. He succeeds founder Scott Rome, who has retired but will continue with the company in an advisory capacity.

Founded in 1988, Rome's platform improves body shop efficiency and profitability, the company said. The platform maintains integrations with CDK, Reynolds & Reynolds, Dealerbuilt and other dealer management systems along with estimating software providers.

"Convenient Brands will support Rome with additional resources for sales, marketing, product development and a new integrated payment processing service, RomePay designed to make pay-

ment processing as easy and cheap as possible for its customers," a Convenient Brands release said.

"Rome is a terrific complement to our footprint in the auto-related software industry and expands the product suite that we can offer customers," said Brad Rhoades, president of Convenient Brands. "Speaking for the entire Convenient Brands team, we look forward to working with James and continuing the legacy of bringing value to Rome users with feature-rich software, ongoing consultation, support and coaching that helps customers reach their business goals. We would also like to congratulate Scott Rome on his retirement and on his impressive track record of building such a strong platform and team within the collision industry."

"Since 1988, our collision center management system has helped body shops increase profitability and improve efficiency with software-enabled consulting, education and training. With Convenient Brands fueling our growth, Rome is positioned to create new standards of competition in the North American body shop solutions market," said James Rome.

# Weave study: Ineffective customer communications can cost small businesses

Weave, a customer communications platform based in Lehi, has released a new study titled "The Modern Small Business: Communication for the Future." The company said the research illustrates how rapidly business communication is evolving and how technology is powering new ways for businesses to build customer relationships, remove inefficiencies and retain employees.

Weave commissioned an independent study of 1,500 U.S. small-business leaders and consumers in September to understand how business communication is evolving and what modern consumers expect from

small businesses — everything from scheduling and payments to reviews. The study specifically looked at small healthcare providers and home services businesses.

"While the global pandemic forced the rapid deployment of digital transformation tools, small healthcare practices and home service businesses are now realizing both the benefit of these tools to their bottom lines and also the potential missed opportunities if the trajectory of adoption doesn't continue," study authors said.

"Small businesses in particular are experiencing enterprise-level customer demands

at staggering rates. Technology can help preserve the integrity of small-business owners' No.1 priority: customer satisfaction," said Roy Banks, CEO of Weave. "Through modernizing every communication touchpoint from scheduling to service, all the way through reviews and payments, Weave can help them achieve the level of service their customers are demanding."

For healthcare companies, the survey found:

- 61 percent of patients are more likely to pay their clinic bill if they receive a text reminder with a link to pay.
- 58 percent of patients consider filling out paper intake forms "old fashioned."
- 74 percent of patients expect clinics to keep an accurate record of their health profile, but 42 percent of patients have noticed an error in their patient file because the clinic misunderstood the handwriting from their paper in-take form.
- 94 percent of clinics say that online reviews are important to their success, but only about half of them send reminders to patients to leave a

review.

• 33 percent of clinics spend over \$1,000 a month on communication technologies like phone systems.

The top findings for home services businesses included:

- 90 percent of customers say they are placed on hold when calling to make an HVAC service provider, electrician or plumber appointment.
- 86 percent of customers check the online reviews of a new HVAC service provider, electrician or plumber before re-

questing an appointment.

• Only 13 percent of customers consistently leave online reviews for an HVAC service provider, electrician or plumber but 53 percent would do it if they got a reminder.

Weave commissioned an independent market research firm to study 750 business leaders and 750 U.S. consumers. The margin of error for this study is plus or minus 3.6 percent. Online sampling was conducted in partnership with TrendCandy, a survey sampling company.

## Government affairs vet Hill named NFIB director

Business owner, lobbyist, political strategist and former Kaysville city councilman Casey Hill has been named state director of the National Federation of Independent Business (NFIB). The NFIB is the nation's — and Utah's — largest association of small-business owners.

"Casey Hill is a tenured government affairs specialist and advocate for small business," said Barbara Quandt, NFIB Utah senior state director. "He came highly recommended by officials at all levels of Utah state and local government."

Hill was elected to the Kaysville City Council at the age of 23. Since leaving elected office, he has represented clients in the fields of healthcare, insurance, law, municipal government, business, retirement, environmental and tax issues. In 2009, he became vice president of government relations for the Utah Medical Association and spent three years involved in the development and implementation of healthcare reform and healthcare policy in the state. During this same period, he represented a wide array of businesses on tort reform issues as president of the Utah Civil Justice League.

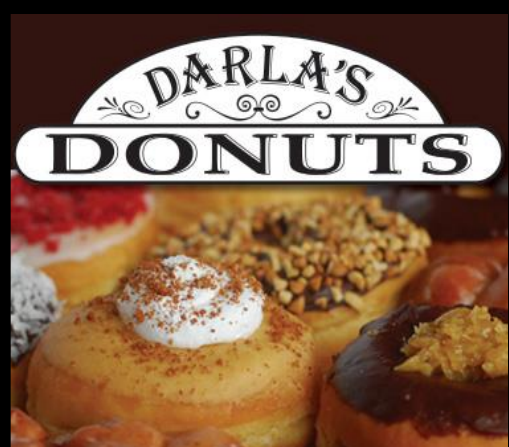
From 2012 through 2018, Hill was senior vice-president of government relations for EnergySolutions, managing its legislative efforts. In 2019, he started Red Hill Strategic Inc. and in 2021 joined Lincoln Shurtz to form Lincoln Hill Partners. The Lincoln Hill team is now working with clients in a wide array of areas, including real estate development, medical, legal, energy, environmental protection, technology, as well as local city and county issues. He also works with pharmaceutical, banking, business development and veterinarian companies.

Hill is a graduate of Weber State University and has a master's degree in business management from the University of Utah.

"Small businesses are the engine of Utah's economy," said Hill. "It's an honor to be working for them with an association that has been the voice of small business for 78 years. I look forward to continuing their educational mission helping policymakers understand that small businesses are not smaller versions of big businesses. They have unique challenges and needs."

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## Business Tech

# Everything you need to know about phishing, smishing and vishing

Cyberattacks are on the rise. As all kinds of cyberattacks become more prevalent, businesses and individuals risk sharing personal information or company information with the wrong person.

When it comes to businesses, a common cyberattack can cost as much \$4.25 million. On top of that, companies need to learn how to keep sensitive company infor-



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mation safe in the new work-from-home dynamic.

Outside of businesses, individuals aren't aware of how a cyberattack can impact their personal well-being. One study showed that 44 percent of people don't believe they are a worthwhile target for hackers to attack.

Hackers don't need much to succeed. All it takes is one individual to be fooled by their tactics to get the per-

sonal or sensitive data they need.

### What is Social Engineering?

Social engineering is when someone makes an active effort to exploit an individual in hopes of receiving personal or company-specific information. These hackers work to gather specific information about the individual and use it to build trust to try to receive what they're looking for. Hackers pretend they are someone they aren't, posing as a friend, colleague, boss or company. From there, they contact you asking for

credit card information, passwords or access to company files.

There are three common methods of social engineering:

### Phishing

Phishing is when you receive an email from someone pretending to be someone they aren't. If you work for a company, they may request access to passwords or sensitive data that could lead to a data breach. Phishers will generally act as executives or someone from the accounting team at work and ask for a favor of some sort that would provide them with what they're looking for.

For individuals, phishers may ask for your credit card number, Social Security or passwords. They may pretend to be a business you recently shopped with, saying you owe money. These emails could claim you won a large sum of money and your credit card number is needed to claim the prize. Either way, it is important to be aware of the language within these emails.

Here are a few things to look out for when you receive a phishing email that seems misplaced:

- If the email content sparks a sense of urgency or requires your immediate attention.
- Contains unusual hyperlinks or attachments.
- Claims something that is "too good to be true."
- Has a strange or poorly written subject line.
- Came from an email that's outside of your organization.
- Has misspellings, bad grammar or makes an illogical request.

### Smishing

Have you ever gotten a strange text message from a random number claiming you won money or your phone bill was recently paid? Maybe it was coming from a business but it wasn't the usual phone number you receive text messages from. Smishing is a form of phishing where phishers will ask for personal information or data via text message. These commonly have a hyperlink included and come from unfamiliar numbers. If you receive any short message service updates from businesses, you may be especially susceptible to falling for these types of attacks.

### Vishing

Fraudulent phone calls happen all the time. From fake IRS calls to telemarketing attacks, these types of fraudulent activity are considered vishing. Vishing is when phishers use voice messages and calls to gather personal data from you or your company. Be cautious as the numbers often seem ordinary and don't look like a threat. However, if you answer the call and end up giving any of your personal information, you can be in some real trouble.

### Phishing Attack Prevention Tips

Phishing attacks are everywhere and the best way to prevent them is to become more aware of their presence. Here are a

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# Succeeding in Your Business

## Year-End Tax Planning for 2021 (Part 1 of 2)

As we reach the end of the second COVID year, it's hard to even think of another income tax deadline in three to four months.

But as Mark Twain once observed, the only two things you can count on in life are death and taxes.

The good news: If your small business was clobbered by the COVID pandemic and government shutdowns, you shouldn't have to pay a lot in taxes for 2021.

The bad news: Sometimes our income tax laws work in crazy ways.

I'm indebted to my good friend John D'Aquila, a Certified Public Accountant and head of D'Aquila and Co. LLP in Jacksonville, Florida ([www.daquilallp.com](http://www.daquilallp.com)), for sharing some of his year-end tax tips with me and allowing me to share them with you.

### American Rescue Plan Act

As COVID has continued to impact businesses, Congress passed the Consolidated Appropriations Act 2021 at the end of December 2020 and the American Rescue Plan Act this March. A major highlight of ARPA is a provision allowing businesses to fully deduct expenses paid with the proceeds of a forgiven Paycheck Protection Program loan, effectively overriding earlier guidance. The ARPA followed up by extending and modifying certain refundable payroll tax credits for both businesses and self-employed individuals, which are discussed in depth below.

As a result of this latter change, the IRS has revised Form 941-X to allow businesses to correct COVID-related employment tax credits reported on Form 941 earlier in the year. Reviewing your payroll tax returns to ensure that your business took full advantage of these credits, and filing any amended returns that may be necessary "should be one of your top year-end tax planning priorities," according to D'Aquila.

### Section 179: Expensing and Depreciation Deductions

Depending on what the income of your business looks like for 2021, there are two go-to deductions that general-

ly take priority when trying to reduce income for tax purposes: the Section 179 deduction, where your business can elect to deduct the entire cost of cer-



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tain property acquired and placed in service during the year, and the bonus depreciation deduction, where 100 percent

of the cost of business property may be expensed. Under the Section 179 expensing option, your business can immediately expense the cost of up to \$1,050,000 of "Section 179" property placed in service in 2021. This amount is reduced dollar for dollar (but not below zero) by the amount by which the cost of the Section 179 property placed in service during the year exceeds \$2,620,000.

The bonus depreciation rules apply unless the business specifically elects out of those rules. Electing out might be preferable when a business expects a tax loss for the year and the bonus depreciation would just increase that loss, or where it might be advantageous to push depreciation deductions into future years. For example, where the owner of a pass-through entity to whom these deductions would flow expects to be in a higher tax bracket in future years, such deductions might be of more use in those future years. If applying both the Section 179 deduction and the bonus depreciation deduction to an asset, the Section 179 deduction applies first.

If you are in the market for a vehicle, the purchase of a sport utility vehicle weighing more than 6,000 pounds can trigger a bigger deduction than if a smaller vehicle is purchased. This is because vehicles that weigh 6,000 pounds or less are considered listed property and the related first-year deduction is limited to \$18,200 for cars, trucks and vans acquired and placed in service in 2021. For vehicles weighing more than 6,000 pounds, however, up to \$26,200 of the cost of the vehicle can be immediately expensed.

If you leased a passenger automobile in 2021 with a value of more than \$51,000, the deduction available for that lease expense is reduced. In such cases, the lessee must include in gross income an amount determined by a formula the IRS issues each year.

### Energy-Efficient Building Deduction

If your business made any energy-efficient improvements to a building during 2021, such as installing property that is part of 1. an interior lighting system; 2. heating, cooling, ventilation and hot water systems; or 3. the building envelope, an energy-efficient building deduction, which was made permanent in the CAA,

may be available. The rules are pretty complicated, though, so talk to your accountant or tax professional about this.

Cliff Ennico ([crennico@gmail.com](mailto:crennico@gmail.com)) is a syndicated columnist, author and former host of the PBS television series "Money Hunt."

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# Industry Briefs

Industry Briefs are provided as a free service to our readers. Company news information may be sent to [brice@slenterprise.com](mailto:brice@slenterprise.com). The submission deadline is one week before publication.

## BANKING

• **Bank of Utah**, Ogden, has named **Peter Lee** as mortgage loan officer for Brigham City, Tremonton and Ogden. Lee has been in the banking industry since 1994 and has helped with purchases and refinance loans



Peter Lee

for 20 years.

• **D.L. Evans Bank** has appointed **Cindy Beecher** to residential mortgage lending sales manager for the Northern Utah area. Beecher has 30 years of banking experience. She earned her business management degree while attending Salt Lake Community College and her interior design degree at Weber State University.



Cindy Beecher

## EDUCATION/TRAINING

• **Nightingale College**, a Salt Lake City-based institution focused on distance and blended-learning programs for nursing education, will host an accreditation visit by the **National League for Nursing Commission for Nursing Education Accreditation** (NLN CNEA) on March 14-16. CNEA will be conducting a virtual site visit of the Practical Nursing Diploma Program. The program is pursuing accreditation from the NLN CNEA.

## INVESTMENTS

• **Allset**, Lehi, has raised \$3 million in funding to grow its service that helps service professionals automate and increase tips

through a personalized mobile messaging platform. The company was established in 2020.

## MANUFACTURING

• **Clarus Corp.**, a Salt Lake City-based designer, developer, manufacturer and distributor of outdoor equipment and lifestyle products, has promoted **Aaron J. Kuehne** to executive vice president and chief operating officer and named **Michael J. Yates** as chief financial officer. As COO, Kuehne will have responsibility for Clarus' operating model, business integration and optimization as well as the company's operational support functions. He joined Clarus in 2010 and has served as chief financial officer, secretary and treasurer since 2013 and as executive vice president since March 2021. Yates has nearly 35 years of financial management, executive leadership, accounting and M&A experience. He most recently worked at IDEX Corp., where he held multiple accounting and financial executive leadership positions, including most recently serving as chief accounting officer, a role which he held since 2010. Other positions at IDEX included interim CFO and corporate controller. Prior to IDEX, Yates worked at PricewaterhouseCoopers and KPMG.

## MILESTONES

• **EAssist Dental Solutions**, a Salt Lake City-based company offering remote dental billing and patient billing services for dental offices, has announced it exceeded \$1 billion in insurance collections for dental practices nationwide in 2021. Its client base includes more than 2,000 general and specialty dental practices, as well as dental service organizations.

## PARTNERSHIPS

• **Banner Ventures**, a Lehi-based private equity and venture capital firm, has announced a partnership with **Premier Plastics**

LLC, based Salt Lake City, and founder **Jim Holbrook**. Premier Plastics started in 1989 and provides specialty plastic packaging in the Intermountain West, with a particular focus in the medical device and consumer packaging sectors. Holbrook retains a meaningful ownership stake in Premier and will continue to serve as CEO during this next phase of expansion. In addition to Banner Ventures, healthcare and manufacturing industry veterans **Ron Labrum** and **Tony Orsini** co-invested via **Seventeen Capital LLC** with the goal of driving additional growth in the medical device and supply categories. Orsini will join the Premier Plastics board of directors. Financing for the transaction was provided by **Key Bank**, and **McGuire Woods** advised Banner Ventures on the deal. Premier Plastics and Holbrook were advised by **Forbes M+A** and **VLP Law Group**.

Bank. The drive was expanded to nationwide this year. Extra Space Storage is a real estate investment trust that owns and/or operates 2,054 self-storage properties.

## REAL ESTATE

• **Utah Community Credit Union** (UCCU) has sold the **UCCU Financial Center** at 333 N. Digital Drive, Lehi, to **Yama Points LLC**. Financial terms were not disclosed. The Class A, seven-story office building totals 74,257 square feet. It will be rebranded as **Drive Tower**. Lehi-based **Drive Wealth Advisers**, which provides custom financial planning for founders, executives and high-net-worth families, will occupy the entire top floor of the building, or 10,755 square feet. In addition to Drive Wealth Advisers, Drive Tower is fully leased to multiple credit tenants in the real estate, solar and medical industries. In addition to the rebranding, the building's new ownership is planning ongoing upgrades such as interior design improvements and facility improvements that include upgraded parking and electric vehicle amenities. The transaction announcement was made by **JLL's** Utah office. JLL Executive Vice President David Nixon represented Yama Point in the acquisition. Josh Martin of **Colliers International** represented UCCU.

## RECOGNITIONS

• **USANA Canada's** general manager, **Tracie Graham**, was recently presented with the **Ivan P. Phelan Award** from the **Canadian Direct Selling Association**. The award is DSA's highest recognition and honors people who have made a significant contribution to the direct

selling industry in Canada. Two USANA associates, **Seta Der Artinian** and **Hubert Krause**, also earned the DSA "**Mark of Distinction**," which recognizes independent salespeople or teams who uphold the values of trust and integrity vital to the direct selling industry. Der Artinian and Krause have been with USANA Health Sciences since its launch in Canada over 25 years ago. Salt Lake City-based USANA offers nutritional supplements and skin-care products.

## RESTAURANTS

• **Mountain Mike's Pizza**, a California-based pizza chain, has opened its second Orem location at 41 West University Parkway, at the corner of University Parkway and Main Street. It is owned by **RVTC Enterprises LLC**, a local franchise group run by Utah residents and dairy farmers Robert Viveiros and Tony Cabral. The 3,400-square-foot restaurant features 11 big-screen televisions, a kids' area with arcade games, a private party room, and a seated bar counter serving a variety of beers and wines. Mountain Mike's Pizza has more than 240 locations.

## SERVICES

• **Siskin Enterprises** and **PermaPlate**, both based in Salt Lake City, have launched **PermaPlate Furniture**, a new division that will be providing innovative administrative and protection plan solutions for the furniture industry. PermaPlate Furniture will offer retailers sales support by offering complimentary warranty education, sales associate training, in-store and online marketing creatives, and account management support.



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## PHILANTHROPY

• Employees of **Extra Space Storage**, based in Salt Lake City, from across the U.S. participated in a **virtual food drive** that raised over \$50,000 in two weeks, with the company matching employee donations. The donation will help provide at least 500,000 meals. The food drive was in partnership with **Feeding America**, a nationwide network of 200 food banks and 60,000 food pantries and meal programs. Feeding America has a food bank in almost every market there is an Extra Space Storage, including **Utah Food Bank** in Salt Lake City. In past years, the Extra Space team working in the corporate office in Salt Lake City partnered with the Utah Food Bank to hold a traditional food drive. In 2020, due to COVID changes, the headquarters team hosted their first virtual food drive and raised over \$22,000 for the Utah Food



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# Calendar

Calendar listings are provided as a free service to our readers. Information about upcoming events may be sent to [brice@slenterprise.com](mailto:brice@slenterprise.com). The submission deadline is one week before publication.

## Jan. 11, 7:15-9 a.m.

**Speaker Series**, an ACG (Association for Corporate Growth) Utah event. Speaker is Angie White, COO and co-founder at Beddy's. Location is Marriott City Center, 220 S. State St., Salt Lake City. Cost is \$30 for nonmembers for the first two breakfast meeting attendances, \$45 for nonmembers after attending two meetings at the discounted rate. Details are at [www.acg.org/utah/events](http://www.acg.org/utah/events).

## Jan. 11, 10-11 a.m.

**"How to Do Market Research,"** part of the nine-week "First Step to Next Step" program presented by the Women's Business Center of Utah. Event takes place online via Zoom. Free. Details are at [wbcutah.org](http://wbcutah.org).

## Jan. 11, 11 a.m.-1 p.m.

**"What It Takes to Get Your Venture Deal Closed,"** a VentureCapital.Org event featuring experts discussing how to find an ideal investor, navigate due diligence and ultimately get a round closed. Panelists are Jolene Anderson, Vector Point Ventures; Pat LaPointe, Frontier Angels; John Richards, Startup Ignition; and others to be announced. Cost is \$30. Event takes place online. Registration can be completed at [Eventbrite.com](http://Eventbrite.com).

## Jan. 11, 11:45 a.m.-1 p.m.

**Annual State of the Cities**, a Point of the Mountain Chamber of Commerce event featuring economic development directors from Lehi and Saratoga Springs discussing "The Future of North Utah County." Location is Hilton Garden Inn, 3150 N. Hotel Loop, Lehi. Details are at [thepointchamber.com](http://thepointchamber.com).

## Jan. 11, 11:55 a.m.-12:55 p.m.

**Monthly Women in Business Luncheon**, a Cache Valley Chamber of Commerce event. Check website for location. Cost is \$14 for WIB members, \$16 for nonmembers. Details are at [cachechamber.com](http://cachechamber.com).

## Jan. 11, noon-1:30 p.m.

**"Focused Business Conversations for Women,"** a Women's Business Center of Utah event. Topic is creating a Facebook group for a business to engage with an audience on a more informal and personal level. Location

is Sizzler, 199 N. Main St., Cedar City. Free (pay for lunch). Details are at [wbcutah.org](http://wbcutah.org).

## Jan. 12, 10 a.m.-noon

**"Good Work. Good Money,"** presented by the Park City Chamber and Women's Business Center of Utah and focusing on the imaginary conflict between values and dreams of success. Event takes place online. Details are at [wbcutah.org](http://wbcutah.org).

## Jan. 12, 11:30 a.m.-1 p.m.

**"Let's Do Lunch,"** a South Valley Chamber event. Speaker is Jason Hewlett, co-founder of The Promise Institute. Location is the South Valley Chamber, Mountain America Corporate Office, 9800 S. Monroe St., Sandy. Cost is \$7.50 for members, \$10 for nonmembers. Details are at [southvalleychamber.com](http://southvalleychamber.com).

## Jan. 12, noon-1:30 p.m.

**General Membership Luncheon**, a Utah Valley Chamber event. Speakers Mallory Bateman, director of demographic research at the Kem C Gardner Policy Institute, and former Gov. Gary Herbert will discuss the growth and prosperity of Utah County. Location is DoTerra Headquarters, 389 S. 1300 W., Pleasant Grove. Cost is \$20. Details are at [thechamber.org](http://thechamber.org).

## Jan. 12, 5-6 p.m.

**"Manage Risk, Protect Your Business,"** a Small Business Development Center (SBDC) event. Location is Provo/Orem SBDC Center at Utah Valley University in Orem. Details are at <https://clients.utahsbdc.org/events.aspx>.

## Jan. 12, 6-7 p.m.

**"All You Need to Know About Employee Benefits,"** a Small Business Development Center (SBDC) event. Location is Provo/Orem SBDC Center at Utah Valley University in Orem. Details are at <https://clients.utahsbdc.org/events.aspx>.

## Jan. 12, 6 p.m.

**Tech Town Hall**, a Utah Tech Leads event. Speaker is Utah Sen. Jake Anderegg discussing the upcoming legislative session and how to engage with local leaders. Location is Silicon Slopes, 2600 Executive Parkway, Suite 140, Lehi. Free. Registration can be completed at [Eventbrite.com](http://Eventbrite.com).

## Jan. 13, 8 a.m.-noon

**2022 Utah Economic Outlook & Public Policy Summit**, presented by the Salt Lake Chamber and the Kem C. Gardner Policy Institute. Keynote speaker

is Mary C. Daly, president and CEO of the Federal Reserve Bank of San Francisco and host of the podcast "Zip Code Economies." Location is Grand America Hotel, 555 S. Main St., Salt Lake City. Cost is \$80 for members, \$100 for nonmembers. Sponsorships are available. Details are at [slchamber.com](http://slchamber.com).

## Jan. 13, 11 a.m.

**"Accelerate Your Global Sales with STEP,"** a World Trade Center Utah event, in partnership with the U.S. Small Business Administration, and focusing on how the State Trade Expansion Program (STEP) grant program can help businesses grow overseas. Event takes place online. Details are at [wcutah.com/step-grant](http://wcutah.com/step-grant).

## Jan. 13, 4-5 p.m.

**Utah Outdoor Classroom Grant Workshop**, a Utah Office of Outdoor Recreation event featuring an overview of the grant; offering resources in planning, building and curriculum development; and highlighting the available online resources from the Utah Outdoor Classroom toolkit and the Outdoor Classroom Design Guide. Joining to present the benefits of outdoor education and insights into outdoor classroom planning are Alex Porpora, executive director of the Utah Society for Environmental Education, and Hilary Lambert, CEO of the Wasatch Mountain Institute. Grant funding is dedicated to permanent, built infrastructure that can support student learning and is limited to \$500-\$10,000. Eligible applicants include nonprofits, public K-12 schools and tribal organizations. The grant period opens Jan. 18 and closes March 18. Event takes place online. Free. Registration can be completed at [Eventbrite.com](http://Eventbrite.com).

## Jan. 13, 5-7 p.m.

**"Business After Hours,"** an Ogden-Weber Chamber of Commerce event. Attendees will participate in networking and then can attend the Weber State University basketball game at a discounted price. Free for employees of chamber members and first-time guests, \$10 for nonmembers. Details are at [ogdenweberchamber.com](http://ogdenweberchamber.com).

## Jan. 13, 6-8 p.m.

**"Business Essentials,"** a Small Business Development Center (SBDC) event. Location is Provo/Orem SBDC Center at Utah Valley University in Orem. Details are at <https://clients.utahsbdc.org/events.aspx>.

## Jan. 14, noon-1 p.m.

**"Silicon Slopes Conversations,"** a Silicon Slopes event. Speaker is Alan Matheson, executive director of the Point of the Mountain State Land Authority. Location is Silicon Slopes, 2600 Executive Parkway, Suite 140, Lehi. Details are at [siliconslopes.com](http://siliconslopes.com).

## Jan. 17, 10-11 a.m.

**"Business Model and Pivoting,"** part of the nine-week "First Step to Next Step" program presented by the Women's Business Center of Utah. Event takes place online via Zoom. Free. Details are at [wbcutah.org](http://wbcutah.org).

## Jan. 18, 11 a.m.-1 p.m.

**"Fire Up Your Funding,"** part of the "Utah Business Fit" series and hosted in collaboration with the Small Business Development Centers of Utah and Salt Lake, Summit, Kaysville and Morgan counties with the Women's Business Center of Utah. Moderator is Bryce Hansen, who organized the Utah Crowdfunding Summit from 2015-2019. Panelists are Clint Stoker and Blake and Mara Hansen. Location is the Kaysville Small Business Development Center, 450 Simmons Way, Kaysville. Online option via Zoom is also available. Details are at [wbcutah.org](http://wbcutah.org).

## Jan. 18, 11:25 a.m.-1 p.m.

**Leadership Luncheon**, a Cache Valley Chamber of Commerce event. Speaker Rebecca Dilg, director of the Utah Broadband Center within the Governor's Office of Economic Opportunity, will discuss "Broadening Broadband in Cache Valley." Location is The Riverwoods Conference Center, 615 Riverwoods Parkway, Logan. Cost is \$16 for members and \$17 for nonmembers preregistered, \$20 for members and \$22 for nonmembers not preregistered. Details are at [cachechamber.com](http://cachechamber.com).

## Jan. 18, 11:30 a.m.-1 p.m.

**Women in Business**, a South Valley Chamber event. Speaker is Elisa Garn, chief brand architect at Me Degreed. Location is All-Star Entertainment, 12101 S. State St., Draper. Cost is \$7.50 for members, \$10 for nonmembers. Details are at [southvalleychamber.com](http://southvalleychamber.com).

## Jan. 19, 8 a.m.-4 p.m.

**"Time Management,"** part of the Salt Lake Community College Frontline Leader Workshop Series. Attendees will analyze and explore strategies to use precious resources of time and energy more efficiently and effectively. Location is SLCC's Westpointe Campus, 1060

N. Flyer Way, Salt Lake City. Cost is \$250. Details are at <http://www.slcc.edu/workforce/courses/index.aspx>.

## Jan. 19, 11:30 a.m.-1 p.m.

**Business Alliance Luncheon**. Location is Boondocks Fun Center, 525 Deseret Drive, Kaysville. Cost is \$20. Registration is required. Details are at [davischamberofcommerce.com](http://davischamberofcommerce.com).

## Jan. 19, 5-6 p.m.

**Corporate Tour**, a Utah Black Chamber of Commerce event. Location is Mortenson Construction, 222 S. Main St., Suite 500, Salt Lake City. Details are at [utahblackchamber.com](http://utahblackchamber.com).

## Jan. 19, 5:30-6:30 p.m.

**Tax Planning Clinic**, a Small Business Development Center (SBDC) event that takes place online. Details are at <https://clients.utahsbdc.org/events.aspx>.

## Jan. 19, 6:30-7:30 p.m.

**QuickBooks Workshop**, a Small Business Development Center (SBDC) event that takes place online. Details are at <https://clients.utahsbdc.org/events.aspx>.

## Jan. 20, 8-9:30 a.m.

**"The Site Ready Utah Program: Shovel-Ready is the New Incentive,"** a ULI (Urban Land Institute) Utah event. The program locates and certifies sites for future large-scale projects. The certification process is managed by the Economic Development Corporation of Utah (EDCUtah). Speakers include Theresa Foxley, EDCUtah CEO, and Elvon Farrell, community strategist. Location is the Gallivan Center, 239 S. Main St., second floor, Salt Lake City. Open to ULI members and nonmembers. Cost is \$25 for member public, YLG and students and \$30 for private-sector members; \$35 for nonmember public, YLG and students and \$40 for private-sector nonmembers. Details are at <https://utah.uli.org/events-2/>.

## Jan. 20, 8-11 a.m.

**"Tech Pop Up Shop Day at the State Capitol,"** a Utah Tech Leads event that is an opportunity for companies to showcase to the Legislature and tech community. Location is the Utah State Capitol, 350 State St., Salt Lake City. Free. Registration can be completed at [Eventbrite.com](http://Eventbrite.com).

## March 1, 10-11 a.m.

**"Financial Statements,"** part of the nine-week "First Step to

**CALENDAR**

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Next Step” program presented by the Women’s Business Center of Utah. Event takes place online via Zoom. Free. Details are at [wbcutah.org](http://wbcutah.org).

**Jan. 20, 11:30 a.m.-1 p.m.**

**2022 Annual Meeting**, a Davis Chamber of Commerce event. Location is Megaplex Theatres at Legacy Crossing, 1075 W. Legacy Crossing Blvd., Centerville. Cost is \$20 for chamber members, \$30 for nonmembers. Details are at [davischamberofcommerce.com](http://davischamberofcommerce.com).

**Jan. 20, 11:45 a.m.-1 p.m.**

**“Connect 4 Lunch,”** a Point of the Mountain Chamber of Commerce event. Location is La Puente Mexican Restaurant, 101 NW State St., American Fork. Details are at [thepointchamber.com](http://thepointchamber.com).

**Jan. 20, 4-6 p.m.**

**South Valley Chamber Business Institute Open House**, for past and new attendees prior to a monthly, nine-class course that begins Feb. 17 and takes place 8:30 a.m.-4 p.m. at various locations in the South Valley region. Institute is designed to provide attendees with a deeper understanding of the critical and essential issues affecting communities in Salt Lake County. Cost is \$1,000 for chamber members, \$1,500 for nonmembers. Details are available by emailing Karla Rogers at [karla@southvalleychamber.com](mailto:karla@southvalleychamber.com).

**Jan. 25, 8:30-10 a.m.**

**“Better Your Business” Employer Seminar**, presented by the Utah Department of Workforce Services Workforce Development Division and the Wasatch Front South Employer Connection Advisory Board. Speaker Mark Knold, chief economist for the Department of Workforce Services, will provide an update on the state of the economy for 2022. Event takes place online. Free. RSVPs can be completed by emailing [jlay@utah.gov](mailto:jlay@utah.gov).

**Jan. 25, 10 a.m.-noon**

**“QuickBooks Basics: Account Setup Tips & Tricks,”** a Women’s Business Center of Utah event. Presenter is Amy Henry of Bountiful Bookkeeper. Event takes place online. Free (available statewide). Details are at [wbcutah.org](http://wbcutah.org).

**Jan. 25, 11 a.m.-1 p.m.**

**Business Women’s Forum 2022**, a Women’s Business Center of Utah event with the theme

“You’d Be Prettier If You Smiled and Other Lies Women Learn about Positivity 2.0,” Presenter is Elizabeth McMillan. Location is Hilton Garden Inn Salt Lake City Downtown, 250 W. 600 S., Salt Lake City. Cost is \$30 for Salt Lake Chamber members, \$40 for nonmembers. Details are at [wbcutah.org](http://wbcutah.org).

**Jan. 25, 11:30 a.m.-1 p.m.**

**2022 Athena Leadership Award Ceremony & Luncheon**, an Ogden-Weber Chamber of Commerce event. Award recipient is Raquel Da Silva, executive director of Family Promise of Ogden. Location is Timbermine, 1701 Park Blvd., Ogden. Cost is \$30. Details are at [ogdenweberchamber.com](http://ogdenweberchamber.com).

**Jan. 25, 2-3:30 p.m.**

**“Starting Your Business 101,”** a Small Business Development Center (SBDC) event that takes place online. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Jan. 25, 6-7:30 p.m.**

**“Schedule for Success” Workshop**, a Small Business Development Center (SBDC) event. Location is Provo/Orem SBDC Center at Utah Valley University in Orem. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Jan. 26, noon-1 p.m.**

**“Solve the Business Puzzle: Collect Your Money Faster,”** a Women’s Business Center of Utah event. Speaker is Nicole Hicks of Building Credit Solutions. Event takes place online via Zoom. Free. Details are at [wbcutah.org](http://wbcutah.org).

**Jan. 26, 5:30-6:30 p.m.**

**“Teamwork Trifecta: Building a Powerhouse Team,”** a Small Business Development Center (SBDC) event that takes place online. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Jan. 27, 8:30-11 a.m.**

**ConnectShare B2B Networking Event** designed for business leaders and decision-makers. Location is the Miller Conference Center, 9750 S. 300 W., Sandy. Details are at [www.connectshare.com](http://www.connectshare.com) or by contacting Randy Hunt of the ConnectShare Advisory Board at [randy@clearpath-strat.com](mailto:randy@clearpath-strat.com).

**Jan. 27, noon-1 p.m.**

**Women in Business Meeting**, a Box Elder Chamber of Commerce event. Contact the chamber for meeting location. Cost is \$10. Details are at [boxelderchamber.com](http://boxelderchamber.com).

**Jan. 27, 5-6 p.m.**

**Legal Clinic**, a Small Business Development Center

(SBDC) event that takes place online. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Jan. 27, 6-7 p.m.**

**Intellectual Property Clinic**, a Small Business Development Center (SBDC) event that takes place online. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Jan. 29, 6-9 p.m.**

**Utah Manufacturers Association Annual Awards Banquet**. Theme is “The Roaring ’20s.” Social hour begins at 6 p.m., followed by dinner at 7 p.m. Location is Little America Hotel, 500 S. Main St., Salt Lake City. Cost is \$300 per couple, \$1,500 for a table of 10. Details are available at <https://umaweb.org/event/umas-annual-awards-banquet/>.

**Feb. 1, 6:30-8 p.m.**

**WordPress Workshop**, a Small Business Development Center (SBDC) event. Location is Provo/Orem SBDC Center at Utah Valley University in Orem. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Feb. 2, 8 a.m.-noon**

**DISC Training**, a Salt Lake Community College Employee Development Workshop. DISC is a simple, practical, easy-to-remember model for effective communication that examines behavior as driven by needs and allows people to adapt to specific situations. Location is SLCC’s Westpointe Campus, 1060 N. Flyer Way, Salt Lake City. Cost is \$225. Details are at <http://www.slcc.edu/workforce/courses/index.aspx>.

**Feb. 2, 11:30 a.m.-1 p.m.**

**Business Alliance Luncheon**. Location is Boondocks Fun Center, 525 Deseret Drive, Kaysville. Cost is \$20. Registration is required. Details are at [davischamberofcommerce.com](http://davischamberofcommerce.com).

**Feb. 3, 8-9 a.m.**

**“Coffee Chat with the CEO,”** a Park City Chamber/Bureau event. CEO Jennifer Wesselhoff will be available for friendly, informal conversation about how the chamber can most effectively serve businesses and the community. Location is Kimball Junction Visitor Information Center, 1794 Olympic Parkway Blvd., Park City. Free. Details are at <https://www.visitparkcity.com/members/chamber-bureau-events/rsvp/>.

**Feb. 3, 6-8 p.m.**

**“Entrepreneur 101,”** a Small Business Development Center (SBDC) event. Location is Provo/Orem SBDC Center at Utah Valley University in Orem. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Feb. 4, 6-11 p.m.**

**“Evening In Harlem,”** a Utah Black Chamber of Commerce event. Location is The Leonardo, 209 E. 500 S., Salt Lake City. Cost is \$50. Details are at [utahblackchamber.com](http://utahblackchamber.com).

**Feb. 8, 11:55 a.m.-12:55 p.m.**

**Monthly Women in Business Luncheon**, a Cache Valley Chamber of Commerce event. Check website for location. Cost is \$14 for WIB members, \$16 for nonmembers. Details are at [cachechamber.com](http://cachechamber.com).

**Feb. 8, noon-1:30 p.m.**

**“Focused Business Conversations for Women,”** a Women’s Business Center of Utah event. Topic to be announced. Location is Sizzler, 199 N. Main St., Cedar City. Free (pay for lunch). Details are at [wbcutah.org](http://wbcutah.org).

**Feb. 9, 11:30 a.m.-1 p.m.**

**“Industry Forum: Non-profits,”** a Park City Chamber/Bureau event for nonprofit partners to have an open discussion with Jennifer Wesselhoff, chamber/bureau CEO. Location is Blair Education Center at Intermountain Park City Hospital, 900 Round Valley Drive, Park City. Free. Details are at <https://www.visitparkcity.com/members/chamber-bureau-events/rsvp/>.

**Feb. 9, 4-5 p.m.**

**Venture Capital Collab**, a Utah Black Chamber of Commerce event. Location is The Shop, 350 E. 400 S., Salt Lake City. Details are at [utahblackchamber.com](http://utahblackchamber.com).

**Feb. 9, 6-8 p.m.**

**“Ms. Biz: What You Need to Succeed,”** a Women’s Business Center series that continues Feb. 16 and 23 and March 2. Event takes place online via Zoom. Details are available by contacting Debbie Drake at [debbie@wbcutah.org](mailto:debbie@wbcutah.org).

**Feb. 10, 6-8 p.m.**

**“Business Essentials,”** a Small Business Development Center (SBDC) event. Location is Provo/Orem SBDC Center at Utah Valley University in Orem. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Feb. 11, 5-7 p.m.**

**Business After Hours**, a Utah Black Chamber of Commerce event. Location and other details to be announced at [utahblackchamber.com](http://utahblackchamber.com).

**Feb. 15, 9-11 a.m.**

**“Pay the IRS Less Without Going to Jail,”** a Small Business Development Center (SBDC) event that takes place online. Cost is \$12. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Feb. 15, 10-11 a.m.**

**“Hearing Loss Diversity: Deconstructing Misconceptions,”** a Women’s Business Center of Utah event focusing on accommodation for people with some kind of hearing loss. Event takes place online via Zoom. Free. Details are at [wbcutah.org](http://wbcutah.org).

**Feb. 15, 11:25 a.m.-1 p.m.**

**Leadership Luncheon**, a Cache Valley Chamber of Commerce event. Location is The Riverwoods Conference Center, 615 Riverwoods Parkway, Logan. Cost is \$16 for members and \$17 for nonmembers preregistered, \$20 for members and \$22 for nonmembers not preregistered. Details are at [cachechamber.com](http://cachechamber.com).

**Feb. 15, 5-7 p.m.**

**Business After Hours Mixer**, a Park City Chamber/Bureau event. Location and other details will be announced at <https://www.visitparkcity.com/members/chamber-bureau-events/rsvp/>.

**Feb. 15, 5-6 p.m.**

**Corporate Tour**, a Utah Black Chamber of Commerce event. Location is WCF Insurance, 100 W. Towne Ridge Parkway, Sandy. Details are at [utahblackchamber.com](http://utahblackchamber.com).

**Feb. 15, 6:30-8 p.m.**

**“How to Make Your Website Sell, So You Don’t Have To,”** a Small Business Development Center (SBDC) event. Location is Provo/Orem SBDC Center at Utah Valley University in Orem. Details are at <https://clients.utahsbdc.org/events.aspx>.

**Feb. 16, 8 a.m.-4 p.m.**

**“Managing Conflict,”** part of the Salt Lake Community College Frontline Leader Workshop Series and focusing on recognizing and utilizing proactive communication techniques to manage the impact of conflict in the workplace. Location is SLCC’s Westpointe Campus, 1060 N. Flyer Way, Salt Lake City. Cost is \$250. Details are at <http://www.slcc.edu/workforce/courses/index.aspx>.

**Feb. 16, 11:30 a.m.-1 p.m.**

**Business Alliance Luncheon**. Location is Boondocks Fun Center, 525 Deseret Drive, Kaysville. Cost is \$20. Registration is required. Details are at [davischamberofcommerce.com](http://davischamberofcommerce.com).

**Feb. 16, 5:30-6:30 p.m.**

**Tax Planning Clinic**, a Small Business Development Center (SBDC) event that takes

see CALENDAR next page

# Make the most of charitable giving with your IRA

When we think about leaving a charitable giving legacy, making a bequest from our estate naturally comes to mind. However, individual retirement accounts (IRAs) can be an attractive and flexible way to manage charitable gifts and meet estate planning needs.

Here are several approaches that can enable you to achieve important family goals and make the most of your charitable giving via your IRA:



**RAMEZ  
HALTEH**

## Trusteed IRA

Many IRA owners want to see their funds last for as long as possible following their death, which enables their IRAs to benefit from growth on a tax-deferred basis. When your beneficiary takes control of the IRA assets upon your death in an IRA, however, they can withdraw all or part of the IRA funds at any time. There's nothing to prevent the rapid dissipation of funds. In addition, a beneficiary in an IRA is responsible for investing the IRA assets after the death of the original owner. That could be a problem if the beneficiary does not have the knowledge to make sound financial decisions.

Trusteed IRAs are designed to address these issues by giving the IRA owner greater control over the account even after death.

In the case of a trust as beneficiary of an IRA or plan, if the election is made to base post-death distributions on the beneficiary's life expectancy, the oldest beneficiary of the trust (i.e., the one with the shortest life expectancy) generally must be used for this calcu-

lation.

In the case of a charity as beneficiary, this life expectancy payout method is not available. This is because a charity is not an individual and therefore has no life expectancy to calculate annual distributions. The charity will have to take required post-death distributions from the IRA or plan at the fastest possible rate, generally either in a lump sum or according to one of the following methods:

- If you pass away prior to your required beginning date for required minimum distributions (RMDs), the charity must distribute the IRA or plan funds within five years after your death (the "five-year rule").

- If you pass away after your required beginning date for RMDs with a charity as beneficiary, the IRA or plan funds must be distributed over your remaining single life expectancy, calculated in the year of death (maximum 17 years).

For any other type of beneficiary, these post-death distribution options would be considered unfavorable from a tax standpoint, because they generally accelerate distributions. Therefore, because a qualified charity named as beneficiary doesn't pay income tax, it does not matter how quickly or slowly the IRA or plan funds are distributed to the charity, the result will be the same.

What happens if you have named both a charity and an individual as beneficiaries of your IRA or plan? Is the individual beneficiary allowed to use the life ex-

pectancy method to distribute his or her share? The answer is maybe. It depends on whether certain rules are followed. If you have left your IRA or plan to a charity and one or more individuals in fractional amounts (as opposed to dollar amounts), the account may be divided into separate accounts up until Dec. 31 following the year of your death. Then, the individual beneficiary can use his or her own life expectancy for his or her separate account. Or, the benefits due to the charity can simply be paid out to the charity before Sept. 30 following the year of your death. If the charity has been fully paid off by the date indicated above, it is no longer considered a beneficiary for distribution purposes.

## Third-Party Trusts and Special Needs

In a third-party trust, you designate the trust as the IRA beneficiary and select the trust's beneficiary. In most cases, when you name an IRA beneficiary that isn't an individual such as a trust or a charity, the entire amount of your IRA must be distributed to that beneficiary within five years after your death.

However, the IRS will usually look beyond the trust to find the real IRA beneficiary if special IRS rules are followed and a see-through trust is established. See-through trusts are generally structured as conduit trusts, where all distributions received by the trustee from the IRA may be passed on to the beneficiary. As a result, the trust beneficiary rather than the trust is considered the IRA's beneficiary. Because the trust beneficiary's life expectancy and not the trust's will be used to calculate

RMDs, the five-year payout rule is avoided.

Third-party trusts are often used to help family members with special needs who need help with daily living. A special needs trust supplements benefits the person with special needs who may receive from government programs. The trust distributions need to be made in a manner to support the individual without disqualifying them from further participation in the programs they have qualified for as a result of their disability.

An IRA-funded special needs trust set up as a conduit trust is established by the person who placed the IRA funds in the trust, i.e., the IRA owner. There is no limit to the size of the trust fund and the funds can be used for a wide range of the beneficiary's needs.

A third-party trust used for a special needs beneficiary differs from a first-party trust. In the former, because the funds in the trust never belonged to the beneficiary, the government is not entitled to reimbursement for Medicaid payments made on behalf of the beneficiary after they die. In a first-party trust, the assets in the trust were owned by the beneficiary before being placed in the trust, and funds are used for the beneficiary's benefit while they are living. Upon death, however, any remaining trust assets are used to reimburse the government for the cost of the beneficiary's medical care.

Many families select a non-profit as the trustee to provide support for the beneficiary and coordinate benefits. A parent often converts a 401(k) to an IRA, which then goes to a charity that manages it via a trust. If the chari-

ty is named as the beneficiary rather than the dependent with special needs, the five-year rule is triggered. However, elections are not an "all or nothing" proposition, meaning an IRA owner can name multiple beneficiaries for the trust, of which the special needs trust beneficiary may be one. Working with a specialist is essential to ensure that the right language is used, the correct beneficiaries are designated and the five-year rule is not triggered.

## Qualified Charitable Distribution

Qualified charitable distributions (QCDs) enable you to make tax-advantaged donations from your IRA during your lifetime.

An individual who is 70 1/2 or older can take a non-taxable distribution of up to \$100,000 from their IRA if that distribution is made directly to a charity.

Unlike donor-advised funds and private foundations, public charities generally qualify for a non-taxable distribution. There is no requirement that the entire amount must go to one charity or be made in one transfer, and eligible donors may give as much as \$100,000 in gifts in a given year.

The distribution can satisfy or help satisfy the RMD from your IRA. And because the qualified charitable distribution is excluded from your adjusted gross income for the year in which it is taken, you gain an important tax break. It is important to remember to itemize charitable contributions, as otherwise you will gain no income tax benefit at all.

Ramez Halteh is the Key Private Bank leader in Utah.

## CALENDAR

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place online. Details are at <https://clients.utahsbdc.org/events.aspx>.

### Feb. 17, 11:30 a.m.-1 p.m.

**2022 Athena Award Luncheon**, a Davis Chamber of Commerce event. Location is the Davis Conference Center, 1651 N. 700 W., Layton. Details are at [davischamberofcommerce.com](http://davischamberofcommerce.com).

### Feb. 23, 10 a.m.-4 p.m.

**MAPR's Annual Southwest Regional "Meet the GCs Event,"** a face-to-face construction business networking event presented by the Mountainlands Area Plan Room. Supply chain subs and suppliers can meet general contractors and key vendors from all over the region in an open-house-style opportunity. Location is Hilton Garden Inn

next to the Dixie Convention Center, St. George. Free. Details are at [MeetTheGCs.com](http://MeetTheGCs.com) or (801) 288-1188.

### Feb. 24-25

**38th Annual Investors Choice Capital Conference**, a VentureCapital.Org event featuring up to 30 startups pitching their companies to an investor audience. Ski day and investor reception take place Feb. 24 at Solitude Ski Resort. Conference takes place Feb. 25 at the Grand America Hotel, 555 S. Main St., Salt Lake City. Virtual option for conference is available. Costs vary. Registration can be completed at [Eventbrite.com](http://Eventbrite.com).

### Feb. 24, 8:30-11 a.m.

**ConnectShare B2B Networking Event** designed for business leaders and decision-makers. Location is the Miller Conference Center, 9750 S. 300 W., Sandy. Details are at [www.connectshare.com](http://www.connectshare.com)

com or by contacting Randy Hunt of the ConnectShare Advisory Board at [randy@clearpath-strat.com](mailto:randy@clearpath-strat.com).

### Feb. 24, noon-1 p.m.

**Women in Business Meeting**, a Box Elder Chamber of Commerce event. Contact the chamber for meeting location. Cost is \$10. Details are at [boxelderchamber.com](http://boxelderchamber.com).

### Feb. 25-27

**"Becoming an Outdoors Woman,"** a Utah State University Extension event. BOW is a non-profit educational program offering hands-on workshops to adult women ages 18 and older. The BOW workshop is a three-day, multi-course event where women have the opportunity to learn a variety of outdoor skills. Location is Holmstead Ranch Resort, 1000 E. Holmstead Ranch Road, Central. Costs range from \$250 to \$400. Registration can be completed at [Eventbrite.com](http://Eventbrite.com).

### March 1-2

**2022 Intermountain Deal-Source Summit and Ski Event**, an ACG (Association for Corporate Growth) Utah event featuring middle-market deal flow content, multiple networking and meeting opportunities and activities. Theme is "Celebrating Utah Dealmakers." Location is Pendry Hotel Park City, 3720 N. Sundial Court, Park City. Cost through Jan. 14 is \$275 for ACG members, \$375 for nonmembers, \$1,395 for private equity group and \$995 for intermediary capital providers. Details are at <https://www.acg.org/utah/events/2022-intermountain-dealsource-summit-and-ski-event>.

### March 2-May 4

**Executive Certificate of Global Business Management**, presented by The Mill Entrepreneurship Center at Salt Lake Community College. The 10-week course takes place Wednesdays, 5:30-8:30 p.m., at

9690 S. 300 W., Sandy. Cost is \$995. Registration deadline is Feb. 23. Details are available by emailing [venita.ross@slcc.edu](mailto:venita.ross@slcc.edu).

### March 2, 11:30 a.m.-1 p.m.

**Business Alliance Luncheon**. Location is Boondocks Fun Center, 525 Deseret Drive, Kaysville. Cost is \$20. Registration is required. Details are at [davischamberofcommerce.com](http://davischamberofcommerce.com).

### March 3, 9-10 a.m.

**Morning Speaker Series**, an Ogden-Weber Chamber of Commerce event. Event takes place online via Zoom. Free for chamber members and first-time guests. Details are at [ogdenweberchamber.com](http://ogdenweberchamber.com).

### March 3, 6-8 p.m.

**"Entrepreneur 101,"** a Small Business Development

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## CALENDAR

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Center (SBDC) event. Location is Provo/Orem SBDC Center at Utah Valley University in Orem. Details are at <https://clients.utahsbdc.org/events.aspx>.

### March 4, 5-7 p.m.

**"First Friday,"** a Utah Black Chamber of Commerce networking event. Location is The Shop, 350 E. 400 S., Salt Lake City. Cost is \$10 for members, \$20 for nonmembers. Details are at [utahblackchamber.com](http://utahblackchamber.com).

### March 8, 11:55 a.m.-12:55 p.m.

**Monthly Women in Business Luncheon,** a Cache Valley Chamber of Commerce event. Check website for location. Cost is \$14 for WIB members, \$16 for nonmembers. Details are at [cachechamber.com](http://cachechamber.com).

### March 9-10

**Entrepreneur & Investor Life Sciences Summit 2022,** presented by BioUtah, BioHive and the PIVOT Center at the University of Utah and designed to bring investors and innovators together to showcase Utah's entrepreneurship. Summit takes place March 9 at the Peterson Eccles Alumni House on the University of Utah campus. Ski day is March 10. Details to be announced.

### March 9, 8 a.m.-5 p.m.

**"Lean Office with Simulation,"** a Salt Lake Community College Employee Development Workshop. Participants will learn improvement solutions for overlooked processes that have an impact on every system, process, employee and customer within an organization. Location is SLCC's Westpointe Campus, 1060 N. Flyer Way, Salt Lake City. Cost is \$325. Details are at <http://www.slcc.edu/workforce/courses/index.aspx>.

### March 9, 5-7 p.m.

**"Business After Hours,"** an Ogden-Weber Chamber of Commerce event. Free for employees of chamber members and first-time guests, \$10 for nonmembers. Details to be announced at [ogdenweberchamber.com](http://ogdenweberchamber.com).

### March 10, 11:30 a.m.-1 p.m.

**Women in Business Luncheon,** a Davis Chamber of Commerce event. Cost is \$20 for members, \$30 for guests. Details to be announced at [davischamberofcommerce.com](http://davischamberofcommerce.com).

### March 15-April 5, 8 a.m.-5 p.m.

**Lean Six Sigma - Green Belt,** a Salt Lake Community College Employee Development Workshop taking place on Tuesdays. Participants will learn

methodologies for waste reduction and process improvement skills and apply problem-solving and quantifiable tools through Lean Six Sigma strategies. Location is SLCC's Westpointe Campus, 1060 N. Flyer Way, Salt Lake City. Cost is \$1,450. Details are at <http://www.slcc.edu/workforce/courses/index.aspx>.

### March 15, 11:25 a.m.-1 p.m.

**Leadership Luncheon,** a Cache Valley Chamber of Commerce event. Location is The Riverwoods Conference Center, 615 Riverwoods Parkway, Logan. Cost is \$16 for members and \$17 for nonmembers preregistered, \$20 for members and \$22 for nonmembers not preregistered. Details are at [cachechamber.com](http://cachechamber.com).

### March 15, noon-1 p.m.

**Local First Collab,** a Utah Black Chamber of Commerce event. Location is The Shop, 350 E. 400 S., Salt Lake City. Details are at [utahblackchamber.com](http://utahblackchamber.com).

### March 15, 5-6 p.m.

**Corporate Tour,** a Utah Black Chamber of Commerce event. Location is Zions Bank, 1 S. Main St., Salt Lake City. Details are at [utahblackchamber.com](http://utahblackchamber.com).

### March 16, 7:15-9 a.m.

**2022 Partners in Education Appreciation Breakfast,** hosted by the Ogden-Weber Chamber of Commerce and its Partners in Education sponsors. Location is Ogden Eccles Convention Center, 2415 Washington Blvd., Ogden. Free. Registration deadline is March 4. Details are at [ogdenweberchamber.com](http://ogdenweberchamber.com).

### March 16, 8 a.m.-4 p.m.

**"Business Writing,"** part of the Salt Lake Community College Frontline Leader Workshop Series. Participants will consider critical writing skills to achieve clarity, organization, readability and accuracy in business messaging. Location is SLCC's Westpointe Campus, 1060 N. Flyer Way, Salt Lake City. Cost is \$250. Details are at <http://www.slcc.edu/workforce/courses/index.aspx>.

### March 16, 11:30 a.m.-1 p.m.

**Business Alliance Luncheon.** Location is Boondocks Fun Center, 525 Deseret Drive, Kaysville. Cost is \$20. Registration is required. Details are at [davischamberofcommerce.com](http://davischamberofcommerce.com).

### March 22, 2-5 p.m.

**Utah Valley Job Fair,** a Utah Valley Chamber event. Location is Utah Valley Convention Center, 220 W. Center St., Exhibit Hall A, Provo. Details are at [thechamber.org](http://thechamber.org).

### March 23-April 13, 8:30 a.m.-4:30 p.m.

**PMP Certification Exam Prep,** a Salt Lake Community College Employee Development Workshop taking place on Wednesdays. This intermediate course prepares participants to successfully pass the PMP exam by reviewing the concepts and principles of project management. Students will study project management methods in accordance with PMI requirements and a syllabus to study for the 2021 200-question PMI PMP examina-

## BIOHIVE

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Talent Ready Utah program, said at a workforce panel during the 2021 Renalytix BioHive Summit, presented by BioHive and BioUtah.

"We have untapped resources of human capital throughout the state that currently aren't included in that success story of Utah. We have a lot of underserved populations, underrepresented populations, that we want to get into that education pipeline. We want to help get these folks into four- and five-star job occupations, into sustainable living wages, and in order to do that, these partnerships that we have with industry, this collaboration, there's never been a greater need for this sort of collaboration and work and looking for solutions to expand these pipelines."

Jenni Abbott, assistant vice president of workforce training and education at Salt Lake Community College, said getting all types of people involved can help address the state's worker shortage. The number of manufacturing job postings increased 51 percent from the summer of 2020 and the summer of 2021 in Salt Lake County alone, she said, and the number of Utahns over age 25 attending college has tripled over the past decade.

"So there are more students who are coming in their late 20s or 30s who have not found their career path and are looking for training so that they can get into jobs where they really need to be able to find something," she said.

The need is most acute in a "middle-skills" level, between jobs that require a high school education and those that need a bachelor's degree, she said.

"That's where the gap in workers is right now in Utah, in those middle-skills jobs. ... That's an important gap and that's where I think training comes in so critically," Abbott said.

But that group is part of a "variety of audiences" that can benefit from collaborations among industry, education and government,

Location is SLCC's Miller Campus, 9750 S. 300 W., Sandy. Cost is \$1,195. Details are at <http://www.slcc.edu/workforce/courses/index.aspx>.

### March 24, 8:30-11 a.m.

**ConnectShare B2B Networking Event** designed for business leaders and decision-makers. Location is the Miller Conference Center, 9750 S. 300 W., Sandy. Details are at [www.connectshare.com](http://www.connectshare.com) or by contacting Randy Hunt of the ConnectShare Advisory Board at [randy@clearpath-strat.com](mailto:randy@clearpath-strat.com).

according to the panelists.

Some high school grads wanting to work right now nonetheless need training before entering the workforce. Adults "who didn't figure it out or didn't try what they really wanted" often are working two to three jobs to make ends meet, Abbott said.

"When we can find people like that and say, 'Let us help you find a career that's long term, a single job where you can grow,' that changes their lives, that changes an entire community because they have an opportunity," she said.

People who work to match talent with industry needs face many challenges, including understanding that required skills change as technology advances, to the point that sometimes people are training for careers that don't even exist yet.

"Things are so dynamic now with how the economy is evolving and how technology is evolving, that our pipeline needs to include opportunities for a first job [and] your next job," said Yvette Woodland, economic service area director at the Utah Department of Workforce Services. "We know that labor availability is a huge concern, and the staffing shortages and competition for tech talent is just huge."

Employers and trade organizations can get involved in a variety of ways, including job-shad-

### April 7, 8-9 a.m.

**"Coffee Chat with the CEO,"** a Park City Chamber/Bureau event. CEO Jennifer Wesselhoff will be available for friendly, informal conversation about how the chamber can most effectively serve businesses and the community. Location is Kimball Junction Visitor Information Center, 1794 Olympic Parkway Blvd., Park City. Free. Details are at <https://www.visitparkcity.com/members/chamber-bureau-events/rsvp/>.

owing, mentorships, internships, apprenticeships and sometimes simply basic exposure to "what jobs looked like." Work-based learning — an "earn while you learn" model — has added advantages, including helping a new worker discover a particular company's culture and advancement opportunities.

Employers offering good training for both new and existing employees "creates a loyalty to the company," Abbott said. "And I'm sure as employers know, it's not just about getting talent. It's also about keeping talent. That's one of the biggest challenges there is right now."

Panelists said getting the word out about skills-building opportunities is a challenge. Hockett said organizations working with education, industry and government are "trying to reach students early and often."

"I think something that is important that we teach people is, not every great job requires a bachelor's degree, and what it means to be 'educated' is different for every single person and 'success' means very different things to everybody, and that is perfectly OK," Hockett said.

"Our job is to make sure those educational opportunities are available to all students and bring in everyone into the Utah success story."

## BIZ TECH

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few things individuals and companies can start doing today:

- Change passwords regularly.
- Don't give out personal information unless you trust and can verify a website or email.
- Don't click on links in emails.
- Don't open attachments.
- Always check with the individual in person if you're unsure.

If you fall for a phishing attack, you'll want to contact your financial institutions and freeze your credit cards to prevent fraudulent activity.

If you're a business owner, your employees may benefit from annual cybersecurity awareness training. These types of classes can keep cyberattacks top of mind for employees and help them in their professional and personal lives.

Remember: The best way to prevent phishing attacks of any kind is to become more aware of them. Be cautious with the emails, calls and text messages you receive. If you feel like something is off, most likely something is.

Bahar Ferguson is president of Wasatch I.T., a Utah provider of outsourced IT and managed compliance services for small and medium-sized businesses.



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## GO UTAH

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ment Records Access and Management Act (GRAMA), the agency said.

Among EDTIF program criteria is competition, meaning that incentivized companies must have considered other locations outside Utah for their expansion projects. But James' comments in October made it clear that leaving Utah was not an option for Domo, even as he understated the maximum amount of the Domo tax credit.

"I don't understand why the state gave me over \$10 million to stay in Utah," he said, "I just ... it's incomprehensible to me. There's no chance in hell I was ever going to leave, but I got \$10 million in tax credits from the state of Utah to stay. And I'll take it. If everyone else is taking it, I'll take it."

He also spoke about the tax incentive program more broadly.

"But I'm also happy to give it (the tax credit) back if we can get rid of that law and we can stop paying people from outside the state to come in and hire my employees that I want to try to hire or take them away. I just don't understand that part of the (state) budget that we use, and every CEO that I know that has taken \$10 million-plus from the state, every single one of them was laughing about it because they didn't need it and they would have stayed anyway."

James said he understood

that the incentives program was established "when the state needed to do it" an attempts to land technology companies and American Express. "I know there was a reason for it. It just don't think that reason exists anymore — my humble opinion. I wanted to at least plant that seed. I complain about it sometimes and I always get funny looks."

Despite those statements, Go Utah concluded that evidence provided by Domo established competition. The company is operating in competitive states, has evaluated expansion to California and Washington for the EDTIF contract awarded in January 2021, and is actively assessing corporate growth outside Utah, it said.

"Our office did not find evidence of a breach, and Go Utah has recommended continuing the tax credit incentive as agreed in the contract," Go Utah said last week.

"We take these matters very seriously," said Dan Hemmert, Go Utah's executive director. "I

would like to thank those from our team and the Attorney General's office for their thorough work investigating this situation. Every company has to go through a rigorous process to receive a post-performance tax incentive and meet specific requirements. We remain committed to the state's corporate retention and recruitment program (known as EDTIF) and to its efficient and effective administration on behalf of the Legislature."

Go Utah said last fall it would push to better educate the public about its incentives program. Despite for nearly two decades making incentives post-performance — incentivized companies get a portion of their incentives only after creating promised high-paying jobs or other contracted criteria — many in the public believe that Go Utah awards companies with upfront cash. And few companies actually meet the criteria to receive the maximum tax credit amount, Go Utah has said.

## PORT BONDS

from page 1

will facilitate job growth, reduce traffic and improve air quality within the Utah Inland Port jurisdictional boundaries," said Benj Becker, vice president of the Piper Sandler Special District Group. "This deal represents important manufacturing and distribution job creation, re-

moving diesel trucks from our roads and providing critical infrastructure to alleviate supply chain constraints and further the improvement of Utah quality-of-life characteristics."

The bond closing gives UIPA approximately \$112 million in revenue to kick off proposed projects, including a planned transloading/crossdock facility. The facility aims to leverage existing infrastructure and Union Pacific's in-



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termodal rail hub to provide a cost-effective, efficient and sustainable option for cargo owners to move freight.


UIPA said proceeds of the bonds may also apply to the acquisition of rail infrastructure and rail expansion, a Foreign Trade Zone (FTZ) and U.S. Customs facility, and to support telecommunications infrastructure as part of UIPA's Intelligent Crossroads Network. These projects

give greater access for the logistics industry, while also enhancing livability, reducing air emissions associated with idling cars, and deconflicting at-grade railroad crossings, the board said.

UIPA's board created the Crossroads Public Infrastructure District (PID) in October as a funding mechanism for publicly owned infrastructure within UIPA's jurisdictional area in the Salt Lake Valley.



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