



www.calcpa.org
(800) 922-5272

Thinking ahead. Making it happen.

2011–12 OFFICERS

CalCPA Chair
Eduardo L. Jordan, CPA

First Vice Chair
Johanna Sweaney Salt, CPA

Treasurer
Richard Simitian, CPA

Past Chair
Conrad M. Davis, CPA

CalCPA CEO
Loretta Doon, CPA

www.calcpa.org
(800) 922-5272

CalCPA Vision

CalCPA efforts cause its members to be viewed as leaders in professional competency and integrity by clients, employers, the public and government officials.

CalCPA Mission

To increase the value and promote the integrity of the CPA profession, contribute to the success of our members and strengthen client, employer, public and government trust in CalCPA member advice, work products and opinions.

Strategic Priorities

The following strategic priorities support CalCPA's vision and mission as well as the organization's long-term success.

- Advocate for members on issues that affect the profession.
- Enhance and promote the visibility of the profession and CalCPA.
- Attract, educate and support CPAs in their professional and personal development.

Who We Are

CalCPA has more than 38,000 members. Our CPA members practice in the following areas:

- Public Accounting 68%
- General Industry 21%
- Other/Retired 8%
- Government 1.5%
- Education 1.5%

Our public practice members practice in the following size firms:

- Small—10 or fewer CPAs 33%
- Solo/Sole 25%
- Large/Local—11+ CPAs 15%
- Big 4/International 11%
- Large/Multi-office—11+ CPAs 11%
- Reg'I/Nat'I 5%

CHAPTERS

CalCPA's 14 chapters engage members with local and chapterwide meetings to exchange professional knowledge, earn low-cost CPE and connect with their peers.

**Bakersfield Central Coast Channel Counties East Bay Fresno
Inland Empire Los Angeles Orange County/Long Beach
Peninsula Silicon Valley Sacramento San Diego
San Francisco San Joaquin Silicon Valley San Jose**



CalCPA TIMELINE

- 1901**
First California Accountancy Act
- 1909**
The California State Society of Certified Public Accountants incorporates
- 1939**
Society drops "State" from name, becoming the California Society of Certified Public Accountants
- 1959**
Group Insurance Trust formed
- 1966**
Education Foundation begins
- 1986**
CAMICO organized
- 1992**
Landmark *Bonnie Moore* and *Bily* decisions by the California Supreme Court
- 1996**
CalCPA.org goes live
- 1997**
Creation of GIT Multiple Employer Welfare Arrangement
- 2001**
Two new pathways established for CPA licensure in California
- 2002**
CPAs march on Sacramento
- 2003**
Financial literacy initiative launches
- 2004**
CalCPA Institute formed
- 2008**
CalCPA membership surpasses 32,000
- 2009**
CalCPA celebrates its centennial
- 2011**
CalCPA membership surpasses 38,000

As our members' needs change, so do we.

In the Beginning

The California Society of Certified Public Accountants, the biggest CPA organization in California and the largest state CPA society in the nation, has a proud history as a nonprofit corporation for more than 100 years. From humble beginnings with 36 members and only a few hundred dollars in its coffers, CalCPA has flourished and grown to more than 38,000 members as the role of CPAs as financial professionals has become more defined and integral to the California economy.

Establishing Integrity

From the earliest days, CalCPA helped to establish the CPA license as the guardian of the public interest, whether it was to assure shareholders of their right to reliable financial statements and material corporate information or to advise individuals seeking financial advice or fair treatment on their tax obligations.

In 1945, the Legislature amended the California Accountancy Act to grant the attest function exclusively to CPAs. It also established a new Board of Accountancy that was charged with adopting rules of professional conduct for CPAs and to establish a system of regulation for the profession in California that still exists today.

In 1992, in response to public confusion, CalCPA supported the *Bonnie Moore* case, in which the California Supreme Court held that only CPAs may advertise as accountants, protecting consumers who, according to surveys, believed that all accountants were CPAs.

A Legacy of Answering the Call

CalCPA has a legacy of answering the profession's call. In 1959, it formed the Group Insurance Trust of the California Society of Certified Public Accountants. After almost 50 years, the GIT remains exclusively dedicated to providing quality and cost-effective group health and welfare programs to owners and employees of CalCPA-member firms.

In 1966, CalCPA created the California Certified Public Accountants Foundation for Education and Research to recognize that CPAs needed to keep up on legislative changes and to continue to improve their services. In 1993, it became a separate entity, the California CPA Education Foundation.

In the early 1980s, CPAs were faced with a mounting liability insurance crisis. In response, CalCPA created a mutual insurance company owned by and for CPAs, dedicated to assuring its members professional liability coverage at stable rates. The company would operate solely for the benefit of its members. Accordingly, any excess revenue, after claims payments and administration, belongs to its policyholders. CAMICO opened its doors to California in 1986 and now serves CPAs nationwide.

Advocacy for the Public, Business and CPAs

CalCPA always has advocated for the highest ethical and professional standards for California CPAs, working closely with the California Board of Accountancy and state Legislature to ensure the interests of the public, business and CPA community are served.

In 2004, CalCPA formed CalCPA Institute, a supporting 501(c)(3) organization, to create a home for its scholarship programs, financial literacy initiative and educational efforts, including leadership training and development and outreach to colleges and universities.

In 2006, CalCPA and the Education Foundation named Loretta Doon, CPA, CEO of both organizations and strengthened the infrastructure of each by increasing shared services to provide more seamless delivery of support to members and customers and to ensure the organizations' long-term success.

In 2009, CalCPA celebrated 100 years serving the profession.

In 2011, CalCPA remains committed to our members' success and strengthening our profession.