



### CONVENIENT WAYS TO JOIN:

1. Online: [www.calcpa.org/join](http://www.calcpa.org/join)
2. Call: (800) 922-5272
3. Fax: (888) 868-8558
4. Mail completed application with payment to:  
**CalCPA; 1800 Gateway Dr., Ste. 200;  
 San Mateo, CA 94404-4072**

PLEASE REMIT LOWER PORTION WITH YOUR PAYMENT

Welcome to CalCPA	
Description	Total Due
Join CalCPA today and your membership is good until April 30, 2017!	

Membership dues are not tax deductible as charitable contributions. However, 95% of your membership dues may be deductible as a business expense. In compliance with the Omnibus Budget Reconciliation Act of 1993, 5% of your dues are allocated to lobbying expenditures and therefore are not tax deductible.

## Membership Application

Licensed CPA  
  Student  
  Candidate  
  Educator  
 I am *the* managing partner in my firm.  
  Firm Administrator

**Promo Code**

First Name \_\_\_\_\_ Middle Name \_\_\_\_\_ Last Name \_\_\_\_\_ Date of Birth [MM/DD/YY] \_\_\_\_\_

Mail Preference:  Business  Home

### BUSINESS INFORMATION:

Firm/Company \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
 Main Phone \_\_\_\_\_ Fax \_\_\_\_\_  
 Direct Phone \_\_\_\_\_

### HOME INFORMATION:

Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Cell Phone \_\_\_\_\_  
 E-mail \_\_\_\_\_

### REQUIRED LICENSED CPA INFORMATION: CPA License(s)

Original Issuance Date \_\_\_\_\_ State \_\_\_\_\_ License Number \_\_\_\_\_  
 Original Issuance Date \_\_\_\_\_ State \_\_\_\_\_ License Number \_\_\_\_\_

**ETHNICITY (Optional):**  African American  
  Latino  
  Caucasian  
  Asian  
 American Indian  
  Other \_\_\_\_\_

### REQUIRED SCHOOL INFORMATION:

College/University \_\_\_\_\_ Undergraduate Degree Date \_\_\_\_\_  
 Major \_\_\_\_\_

**MEMBERSHIP INFORMATION:** Please use lists on reverse side

Membership Type \_\_\_\_\_

Chapter Affiliation (select only one) \_\_\_\_\_

Position \_\_\_\_\_

Specify Industry/Firm Size \_\_\_\_\_

### PAYMENT INFORMATION:

Applicant Name \_\_\_\_\_

Member Type \_\_\_\_\_ Amount \_\_\_\_\_

Payment Method:  Visa  
  MasterCard  
  AMEX  
  Check (Payable to CalCPA)

Card Number: \_\_\_\_\_ Exp.: \_\_\_\_\_ CVV\*: \_\_\_\_\_

Cardholder's Name: \_\_\_\_\_

Signature: \_\_\_\_\_

\*3-digit number on back of Visa or MasterCard, or 4-digit number on front of AMEX

## MEMBERSHIP TYPES/DUES

### CPAs

**Executive** .....\$499

CPA who is an executive: managing partner, partner, owner, principal, sole practitioner, business and industry executive, president, vice president, director, consultant, controller, CEO, COO or CFO.

**Professional (Licensed > 5 years)** .....\$399

CPAs licensed more than five years not described in Executive membership type.

**Professional (Licensed < 5 years)** .....\$329

CPAs licensed less than five years not described in Executive membership type.

### Educators

**Educator** .....FREE

Must be employed full-time as a high school, college or university educator, principal, dean or guidance counselor. Part-time educators, principals, deans or guidance counselors are also eligible if not employed elsewhere.

### CPAs Not Working

**Retired** .....\$100

A retired CPA.

**Temporarily Out of Workforce** .....\$100

A CPA who is not working (i.e., in between jobs, caring for a dependent, etc.).

### Non-CPAs

**Associate** .....\$499

Not a licensed CPA, does not qualify as a Student or Candidate and meets Associate eligibility requirements.

**Firm Administrator Associate** .....\$100

Non-CPA, non-billable professional working as a firm administrator.

**Candidate** ..... FREE\*/\$50

Any person who has a bachelor's degree, has never been licensed in any state and is pursuing pathway to licensure via the California Board of Accountancy.

*\* First membership year for candidates is free. Membership in this category is limited to seven years. Any member who accrues seven years of candidate membership without becoming licensed transitions to an Associate member.*

**Student (e-membership)** .....FREE

Any person who is a full-time or part-time student and has never been licensed as a CPA, nor achieved a bachelor's degree.

*Graduate students pursuing CPA licensure fall under the Candidate membership category.*

**Note:** The above rates reflect dues for the membership year, May 1, 2016–April 30, 2017.

Please contact us if you need help determining your CalCPA membership type.

#### PREFERRED CHAPTER AFFILIATION:

- 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

### Primary Organization Relationship (please select your position)

- A/P Contact
- Advertiser
- Advisory Board
- CEO
- CFO
- Controller
- COO
- CPE Contact
- Director
- Dues Contact
- Educator
- Enrolled Agent/Tax Preparer
- Executive Director
- Firm Administrator
- Human Resources Professional
- Legislator
- Manager
- Managing Partner
- Marketing Professional
- Nonprofessional Staff
- Owner
- Partner/Principal/Shareholder
- Person In Charge
- President
- Professional Staff
- Senior
- Sole Practitioner
- Solo Practitioner
- Staff
- Supervisor
- Tax Support
- Vice President

### Individual Type (please select your type)

- Attorney
- B&I Professional
- Banker
- Consultant
- Educator
- Financial Services Professional
- Government Employee
- Nonprofit Professional
- Public Accounting Professional
- Retired
- Student
- Third Party

## Thank you for your membership in CalCPA.

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calcpa@calcpa.org

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