

PLEASE REMIT LOWER PORTION WITH YOUR PAYMENT



CONVENIENT WAYS TO JOIN:

1. **Online:** calcpa.org/join
2. **Mail** with payment to:
CalCPA; 1710 Gilbreth Rd.;
Burlingame, CA 94010
3. **Fax:** (650) 522-3062
4. **Call:** (800) 922-5272

Welcome to CalCPA	
Description	Total Due
The CalCPA membership fiscal year is May 1, 2017 to April 30, 2018.	

Membership dues are not tax deductible as charitable contributions. However, 96% of your membership dues may be deductible as a business expense. In compliance with the Omnibus Budget Reconciliation Act of 1993, 4% of your dues are allocated to lobbying expenditures and therefore are not tax deductible.

2017-18 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 _____

Card Number: _____ Exp.: _____ CVV*: _____

Cardholder's Name: _____

Signature: _____

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

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

MEMBERSHIP TYPES/DUES

CPAs

Executive\$510

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)\$410

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

Professional (Licensed < 5 years)\$340

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

Educators

EducatorFREE

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\$510

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

Financial Professional\$200

Never been a licensed CPA, does not qualify as a Student, Candidate or Associate member and meets Financial Professional category eligibility requirements.

Firm Administrator Associate\$100

Not a licensed CPA, non-billable professional working as a firm administrator at a public accounting firm.

Candidate FREE*/\$50

Any person who has a bachelor's degree, has never been a licensed CPA 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 a Financial Professional member.*

Student (e-membership)FREE

Any person who is a full- or part-time student and has never been a licensed 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, 2017–April 30, 2018. Please contact us if you need help determining your CalCPA membership type.

PREFERRED CHAPTER AFFILIATION:

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

Primary Organization Relationship (please select your position)

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

Individual Type (please select your type)

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

Put your CalCPA Membership Dues
on Cruise Control



**AUTO
RENEWAL**

Enroll Today
calcpa.org/autorenewal

Thank you for your membership in CalCPA.

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