

Free Financial Literacy Programs

Californians Count on California CPAs

CPAs are the trusted advisers, valued employees and preferred providers of financial and advisory services to a wide spectrum of businesses and individuals throughout California. They have the knowledge, expertise and unique perspective to make sense of the complex challenges facing Californians and provide objective information for practical solutions.

CalCPA Wants To Help You Connect With Your Constituents

Through CalCPA Institute's community outreach and financial literacy programs, CalCPA provides trained CPAs to help your constituents better understand what they need to know to effectively manage their financial well-being. We encourage you to use the expertise of CalCPA members as a resource to help build a strong economic base in your local community.

Free Service to Your Community

CalCPA financial literacy workshops are a free service provided by CalCPA members to serve your constituents. CalCPA can provide valuable financial information that will bring a positive impact to your community. At your request, CalCPA can partner with you to provide successful, high quality financial literacy workshops. Each year the number of financial literacy events scheduled throughout California grows. While it is always a good time to host these community events, the breaks in the legislative session schedule are an ideal time to schedule an event.

Workshops are Customizable for the Needs of Your Community

CalCPA works with you and your staff to provide trained CPAs for customized financial literacy events as a free resource to help Californians understand and manage their financial well-being. CalCPA will work with you to determine how to best structure a financial literacy workshop for your district by catering to your district's specific needs. Whether it is veterans, students, retirees or low-income Californians barely making ends meet, CPAs from the community work to provide the resources and knowledge tailored to each community's unique need.

In recent years, CalCPA has partnered on financial literacy workshops at the request of the following legislators:

- Senate President pro Tempore Kevin de León
- Sen. Toni Atkins
- Sen. Bill Dodd
- Sen. Ed Hernandez
- Sen. Ben Hueso
- Sen. Bill Monning
- Sen. Jeff Stone
- Sen. Scott Wilk
- Asm. Travis Allen
- Asm. Ian Calderon
- Asm. Kansen Chu
- Asm. Ken Cooley
- Asm. Jim Cooper
- Asm. Matt Dababneh
- Asm. James Gallagher
- Asm. Jacqui Irwin
- Asm. Kevin Mullin
- Asm. Adrin Nazarian
- Asm. Jay Obernolte
- Asm. Patrick O'Donnell
- Rep. Paul Cook
- Former Asm. Mike Gatto
- Former Asm. David Hadley
- Former Asm. Das Williams

CalCPA members stand ready to assist and serve as a resource in growing financial literacy in California.

CalCPA's financial literacy materials are included in your packet and can be viewed online: www.calcpa.org/fl. To schedule or find out more about coordinating a workshop please contact David Lo, CalCPA Strategic Relations Manager, at david.lo@calcpa.org or at (818) 546-3559.