

PLEASE REMIT LOWER PORTION WITH YOUR PAYMENT

### 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 Drive, Ste 200;  
 San Mateo, CA 94404-4072**

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.

## Associate Membership Application

**Promo Code**

First Name	Middle Name	Last Name	Date of Birth [MM/DD/YY]
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**ELIGIBILITY:** You qualify for CalCPA Associate membership if you meet any one of the following criteria and have two CPA member sponsors:

- Non-CPA owner of a CPA firm;
- Billable professional employed in a CPA firm;
- Public Accountant (PA);
- Anyone working under the direct supervision of a CPA in industry, government or education (Bachelors degree or equivalent);
- Foreign Licensee;
- Non-CPAs serving on State or chapter Committee(s) of CalCPA; or
- Non-CPA professional working in financial, legal or banking services.

**SPONSOR INFORMATION:** Two CPA member sponsors are required to apply.

Sponsor Name	Member Number
Sponsor Name	Member Number

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

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

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

Position \_\_\_\_\_

**HOME INFORMATION:**

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

E-mail \_\_\_\_\_

**ALMA MATER INFORMATION:**

School \_\_\_\_\_ Degree Type/Year \_\_\_\_\_

**MAIL PREFERENCE:**  Business  Home

**BUSINESS INFORMATION:**

Firm/Company \_\_\_\_\_

Address \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Main Phone \_\_\_\_\_ Fax \_\_\_\_\_

Direct Phone \_\_\_\_\_

**PAYMENT INFORMATION:**

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

Member Type	Amount
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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

**Payment Method:**  Visa  Master Card  AMEX  Check (Payable to CalCPA)

## MEMBERSHIP TYPES/DUES

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#### 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, 2015–April 30, 2016

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

### Financial Leadership Forum/Business and Industry Members (please select your specified area of business)

- Agriculture
- Automotive
- Aviation
- Banking/Financial Services
- Biotech
- Construction
- Consulting
- Education
- Entertainment
- Gaming
- Government Contractor
- Health Care
- Hospitality/Rec/Leisure
- Import/Export
- Insurance
- Litigation/Valuation/Forensic
- Manufacturing/Distribution
- Media
- Not-for-Profit
- Real Estate
- Restaurant/Food Service
- Retail
- Technology
- Telecom/Communications
- Transportation
- Utilities
- Winery/Vineyard
- Other

### 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.**