

### CalCPA's 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: [calcpa.org](http://calcpa.org)

### Forensic Services Section's (FSS) Mission

CalCPA's Forensic Services Section provides an expanded forum to facilitate participation and the exchange of ideas and resources to identify relevant current events and trends, analyze technical issues and interpret applicable standards: [calcpa.org/FSS](http://calcpa.org/FSS)

### CalCPA Membership Type

(select one: see reverse for descriptions)

- Executive  Professional +5
- Professional <5  Educator
- Retired  Temporarily Out of Workforce
- Associate (\*see special requirement below)
- Financial Professional
- Firm Administrator  Candidate
- Student

### FSS Membership Type

(select one if joining FSS)

- FSS Licensed  FSS Associate
- FSS Candidate  FSS Student

### FSS Sections (select all that you would like to receive information from)

- Business Valuation  Economic Damages
- Family Law  Fraud and Financial Investigations

## Choose your way to join:

1. **ONLINE** [calcpa.org/join](http://calcpa.org/join)
2. **EMAIL** [membershiptype@calcpa.org](mailto:membershiptype@calcpa.org)
3. **MAIL** California Society of CPAs  
Dept LA 25075  
Pasadena, CA 91185-5075
4. **FAX** 1 (650) 522-3062
5. **CALL** 1 (800) 922-5272  
Monday to Friday, 7 a.m.—5 p.m. PST



### For more information:

Questions on membership: [calcpa@calcpa.org](mailto:calcpa@calcpa.org)

View all membership types: [calcpa.org/membershiptypes](http://calcpa.org/membershiptypes)

View all chapters: [calcpa.org/chapters](http://calcpa.org/chapters)

FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_ LAST NAME \_\_\_\_\_

CUSTOMER ID (IF APPLICABLE) \_\_\_\_\_ DATE OF BIRTH (MM/DD/YY) \_\_\_\_\_

PREFERRED CHAPTER (SELECT ONE)  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 EMAIL \_\_\_\_\_  PERSONAL  WORK

SECONDARY EMAIL \_\_\_\_\_  PERSONAL  WORK

COMPANY \_\_\_\_\_ POSITION \_\_\_\_\_

COMPANY ADDRESS \_\_\_\_\_

COMPANY CITY, STATE, ZIP CODE \_\_\_\_\_

HOME/MAILING ADDRESS \_\_\_\_\_

HOME/MAILING CITY, STATE, ZIP CODE \_\_\_\_\_

PRIMARY PHONE  HOME  WORK  CELL  DIRECT OFFICE \_\_\_\_\_

ALTERNATE PHONE  HOME  WORK  CELL  DIRECT OFFICE \_\_\_\_\_

### CPA LICENSE INFORMATION

LICENSE # \_\_\_\_\_ STATE \_\_\_\_\_ STATUS \_\_\_\_\_ ORIGINAL ISSUE DATE \_\_\_\_\_ EXPIRATION DATE \_\_\_\_\_

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**YES! include my name in the Find a CPA directory.**

Visit [calcpa.org/findacpa](http://calcpa.org/findacpa) for more information.

### SCHOOL INFORMATION

COLLEGE/UNIVERSITY \_\_\_\_\_

UNDERGRADUATE DEGREE DATE \_\_\_\_\_ MAJOR \_\_\_\_\_

### ETHNICITY (OPTIONAL)

- AMERICAN INDIAN OR ALASKA NATIVE  HISPANIC OR LATINO
- ASIAN  MIDDLE EASTERN OR NORTH AFRICAN
- BLACK OR AFRICAN AMERICAN  NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER
- CAUCASIAN  OTHER

GENDER (OPTIONAL) \_\_\_\_\_

### \*ASSOCIATE MEMBERS ONLY SPONSOR INFORMATION (TO APPLY, TWO LICENSED CALCPA MEMBER SPONSORS ARE REQUIRED)

SPONSOR NAME \_\_\_\_\_ MEMBER NUMBER \_\_\_\_\_

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If your membership requires payment, please include with your application or activation may be delayed.

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

Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ CVV\*\*: \_\_\_\_\_

Cardholder's Name: \_\_\_\_\_ Billing Zip Code \_\_\_\_\_

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

# MEMBERSHIP TYPES

## CPAs

**EXECUTIVE (\$530)**—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 +5 (\$430)**—CPAs licensed more than five years, not described in Executive membership type.

**PROFESSIONAL <5 (\$355)**—CPAs licensed less than five years, not described in Executive membership type.

**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 (\$110)**—A retired CPA.

**TEMPORARILY OUT OF WORKFORCE (\$110)**—A CPA who is not working (i.e., in between jobs, caring for a dependent, etc.).

## NON-CPAs

**ASSOCIATE (\$530)**—Not a licensed CPA, does not qualify as a Student, Candidate or Financial Professional member, has two licensed CPA member sponsors and meets any one of the following criteria: foreign licensee; non-CPA serving on state or chapter committee(s) of CalCPA; or non-CPA professional working in consulting, legal, government or banking services.

**FINANCIAL PROFESSIONAL (\$205)**—Never been a licensed CPA, does not qualify as a Student, Candidate or Associate member, has a bachelor's degree and meets any one of the following criteria: a professional employee at a CPA firm; anyone working under the direct supervision of a CPA in industry, government or education; a financial professional in industry, government or education, or legal, banking or financial consulting services; or an IT professional.

**FIRM ADMINISTRATOR (\$110)**—Not a licensed CPA, non-billable professional working as a firm administrator at a public accounting firm.

**CANDIDATE (FREE/\$50)**—Anyone with 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.

*NOTE: 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)**—Anyone who is a full- or part-time student, has never been a licensed CPA and has not achieved a bachelor's degree.

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

## FORENSIC SERVICES SECTION (FSS) MEMBERSHIP

**FSS LICENSED (\$190)**—A CalCPA Executive, Professional +5, Professional <5, Educator, Retired or Temporarily Out of Workforce member.

**FSS ASSOCIATE (\$230)**—A non-CalCPA member or a CalCPA Associate, Financial Professional or Firm Administrator member.

**FSS CANDIDATE (FREE/\$50)**—A CalCPA Candidate member.

*NOTE: Membership in this category is limited to seven years. Any member who accrues seven years of candidate membership without becoming licensed transitions to a Forensic Services Section Associate member.*

LICENSED MEMBERS RECEIVE A FREE 4-HOUR ETHICS COURSE.  
[calcpa.org/ethics4free](http://calcpa.org/ethics4free)

For fiscal year May 1, 2020 to April 30, 2021: Membership payments are not tax deductible as charitable contributions. However, 95% of your membership payments may be deductible as a business expense. In compliance with the Omnibus Budget Reconciliation Act of 1993, 5% of your payments are allocated to lobbying expenditures and therefore are not tax deductible.

## CONTINUING EDUCATION SAVINGS [calcpa.org/education](http://calcpa.org/education)

### 4-HOUR ETHICS COURSE (valued at \$201)

[calcpa.org/ethics4free](http://calcpa.org/ethics4free)

CalCPA members\* are eligible to receive a FREE 4-hour ethics course.

Select from courses in webcast or self-study format to meet either your 4-hour ethics license renewal requirement or technical CPE hours. No promo code required.

\*This offer is exclusively available to Executive, Professional +5, Professional <5, Temporarily Out of Work Force and Retired member types who have paid their CalCPA membership fees with "Member" member status and excludes any member type with "Life" or "Suspended" member status.

### VPE8 (eight hours of CPE, valued up to \$455)

[calcpa.org/VPE8](http://calcpa.org/VPE8)

Enjoy this member perk: Licensed members joining or renewing for the first time are eligible to receive a FREE VPE8, valid for up to 8 hours of CPE through CalCPA (limit one per member).