



## **STATE COMMITTEE AND SECTION MISSION STATEMENTS**

The following committees have been approved for operation. An asterisk denotes that it's a state committee with corresponding chapter committees.

### **\* ACCOUNTING PRINCIPLES AND ASSURANCE SERVICES**

Determine CalCPA's position concerning proposed accounting principles and assurance services and generally be CalCPA's official voice on financial accounting, assurance services and reporting matters. Inform the members of CalCPA about accounting, assurance services and other reporting issues through chapter technical sessions and electronic and other effective means of communication.

2017-19 Chair: Matthew J. Lombardi

### **COMMUNICATIONS ADVISORY**

The Communications Advisory Committee collaborates with and provides creative input to CalCPA regarding communications content, policy and delivery.

2017-19 Chair: J. Russell (Rusty) Roy

### **\* ESTATE PLANNING**

To foster the high quality of services provided by members of CalCPA in the field of estate planning, through advocacy, education and the delivery of resources to CalCPA members.

2016-18 Chair: Erin Fukyto

### **FINANCIAL LITERACY**

To improve the financial literacy of Californians.

2017-19 Chair: Ashley L. Casey

### **GOVERNMENT RELATIONS**

To review state legislation and regulations pending or proposed affecting the CPA profession and determine appropriate CalCPA action in accordance with CalCPA policy. To initiate the introduction of legislation and regulations in subject areas approved by CalCPA Council. To administer CalCPA's legislative relations grassroots program and liaison with state agencies. To coordinate CalCPA's efforts with the efforts of the AICPA on federal issues.

2016-18 Chair: Jennifer Ziegler

### **\* GOVERNMENTAL ACCOUNTING AND AUDITING**

Participate in the profession's effort to improve the quality of financial reporting on governmental entities by providing practical guidance to CPAs in the area of governmental accounting and auditing.

2016-18 Chair: Dennis Kauffman

### **\*MANAGEMENT OF AN ACCOUNTING PRACTICE**

Create a community of CalCPA members who are current, former and future firm owners and leaders. The committee will promote best practices in the management of an accounting firm through the sharing of information, resources and experiences.

2016-18 Chair: Paul Nienow

### **MEMBERSHIP**

The mission of the Membership Committee of the California Society of CPAs is to attract, integrate, and retain members in CALCPA

2017-18 Chair: Lewis E. Sharpstone

### **\* PERSONAL FINANCIAL PLANNING**

To promote the personal financial planning core service and enable California CPAs to provide preeminent and profitable personal financial planning services.

2016-18 Chair: Brooke Salvini

### **PROFESSIONAL CONDUCT**

Provide updates and interpretations on ethics issues and regulations, and encourage members to maintain the standards set forth in CalCPA's Code of Professional Conduct.

2016-18 Chair: Annette M. Stalker

### **\* TAXATION**

Provide up-to-date information and guidance to members on tax laws, programs and regulations. Maintains liaison with the IRS, FTB, BOE and EDD. Review and respond to proposed tax legislation, regulations and revenue rulings.

2016-18 Chair: Gina DeRosa

### **\* TECHNOLOGY**

To identify and study developments in technology affecting the accounting profession. Support the members' use of technology through local committees.

2017-19 Chair: John R. Levy (Voting); Co-Chair: Ryan Cunha (Non-voting)

**Membership to the following committees/sections is by invitation only:**

### **ACCOUNTING EDUCATION**

To improve accounting education in California through the collaboration of educators and practitioners.

2017-19 Chair: Glen A. Thomas (Voting); Co-Chair: Annette Nellen

### **AMICUS CURIAE**

Participate in litigation based upon a set of established criteria and specific procedures, which gives CalCPA a basis for affecting the outcome of profession-wide issues in the judicial environment.

2017-19 Chair: Jodie M. Rolih

## **AUDIT**

In accordance with the Bylaws, approves continuing auditor or recommends new auditor for approval by CalCPA Council. Oversee the conduct of the audit engagement and review appropriate matters with management. Reports to the Board and Council. This is a committee of the Council.

2017-18 Chair: S. Scott Seamands

## **BYLAWS**

Responsible for monitoring, reviewing, and updating CalCPA's bylaws.

2016-18 Chair: Gregory "Greg" M. Burke

## **CALIFORNIA MUNICIPAL ACCOUNTING**

Represents CalCPA in a joint effort with the League of California Cities to carry on projects that promote the use of sound and meaningful accounting and auditing procedures and improve the quality of reporting by municipalities.

2016-18 Chair: Gary M. Caporicci

## **CEO GOALS AND PERFORMANCE**

Board committee responsible for the CEO's goals and performance evaluation.

2017-18 Chair: Kathryn Johnson

## **DISTINGUISHED SERVICE AWARD**

Select recipient of the Distinguished Service Award. The award is presented to a member, whose long and distinguished service is honored, or a member whose singular act resulted in an extraordinary contribution to the profession and CalCPA.

2016-18 Chair: Marc Parkinson

## **FINANCE**

Assures the financial integrity of the California Society of CPAs. Develops policies and monitors investment of funds, recommends policy on budget process and financial information reports and asset management of CalCPA. This is a committee of the Council.

2017-18 Chair: Robert A. Reynolds

## **\* FORENSIC SERVICES SECTION**

2016-18 Chair: Marie Ebersbacher

NOTE: The Forensic Services Section is a separate dues paying section of CalCPA and have

their own governance and election process. For information on how to join, go to [www.calcpa.org/FSS](http://www.calcpa.org/FSS). Their mission statements are:

- **Section Mission Statement**

The Forensic Services Section, as part of the California Society of CPAs, exists to provide an expanded forum to facilitate participation and the exchange and

dissemination of ideas and resources, to identify relevant current events and trends and to analyze technical issues and interpret applicable standards.

- **Steering Committee Mission Statement**

The Steering Committee is responsible to the members of the Sections and exists to further the Sections' purpose. Individual Sections are held accountable to the Steering Committee. The Steering Committee will address Section issues, fiscal issues and issues that pertain to the general membership. It may undertake tasks for which no relevant individual section exists.

- **Individual Section Mission Statement**

Individual sections present an expanded forum to facilitate participation by members of the sections who are interested and practicing in a specific area. The individual sections will aid in the exchange and dissemination of ideas and resources, including technical issues and applicable standards. Individual sections will identify relevant current events and trends for discussion and action, such as proposed responses or comments and the development of CPE.

## **MEMBERS INSURANCE AND BENEFITS**

To develop and monitor CalCPA's Member Affinity Programs, which are designed to utilize the membership's group buying power to offer discounts on products and services and provide revenue from other sources than dues and investment income.  
2017-19 Chair: Matthew B. Wilson

## **NOMINATIONS**

To collect, process and interview candidate applicants for CalCPA officers, at-large members of the CalCPA Council and CalCPA representatives to AICPA Council. Nominate a complete slate of these positions for election by CalCPA membership.  
2017-18 Chair: Timothy J. Good

## **PEER REVIEW**

To maintain the quality of financial reporting through the administration of the American Institute of Certified Public Accountants' Peer Review Program. The duty of the Peer Review Committee is to the public interest and includes all the stakeholders of the profession. This is accomplished by administering system, engagement and report peer reviews under the standards of the American Institute of Certified Public Accountants with a positive education focus.  
2017-19 Chair: Dawn E. Brenner

## **PUBLIC SERVICE AWARD**

Select recipient of the Public Service Award to be presented to an individual CalCPA member and to a firm who has served the public with acts outside of the accounting field in such a way that brings honor to the profession and improvement to the public and the community.  
2017-18 Chair: Lynette E. Atchley