

Charting What's Next, *Together*

2025 CalCPA

Impact Report



The Members Club for California's CPAs

CalCPA Promise

The leadership the CPA profession needs for change and the knowledge and connections you need for what's next.

CalCPA Purpose

CalCPA proactively drives evolution within the accounting profession through promoting business growth and integrity, protecting public interests and positively impacting community—delivering a better future for all.

Strategic Priorities

- **Shift the Identity**—Raise awareness, redefine image and showcase the accounting and finance profession.
- **Transform the Career Experience**—Lead in the transformation of the career experience of CPAs and accounting/finance professionals.
- **Create Super Fans**—Create super fans of everyone who interacts with CalCPA.
- **Operate with Excellence**—Operate at the highest level of strategic, business and operational excellence.

Who We Are

CalCPA members are a diverse and dynamic group of nearly 40,000 professionals representing public accounting, business & industry, education, government, and more. They are innovative, strategic, and always ready to embrace and lead change. Together, CalCPA members increase the value and promote the integrity of the CPA profession, and strengthen client, employer, public, and government trust.



Dear CalCPA Members,

2025 was a year of transformation for our economy, our profession, and the expectations placed on every CPA. At every turn, CalCPA was leading the conversation, advancing the profession, and creating opportunities for CPAs to thrive in a rapidly changing world.

Why Modernization Matters Now

New markets, new business models, and new skillsets are rewriting what clients and employers need from a CPA. The profession is expanding into sustainability reporting, digital asset advisory, forensic technology, and enterprise risk, all areas that demand both traditional rigor and fresh expertise. Ongoing conversations at the national level reflect a thoughtful examination of how licensure and professional standards can uphold public trust while preparing CPAs for an increasingly diverse range of careers. CalCPA is leading that conversation by advocating for standards that protect the public while creating meaningful pathways for the next generation of talent.

Layered on this, artificial intelligence has moved from a future consideration to a present-day reality, reshaping how data is gathered, analyzed, and acted upon at speed and at scale. The more capable our tools become, the more essential our judgment becomes.

Evolving Expectations

The public's expectations of CPAs have grown. They want professionals who are not only technically proficient but ethically grounded, forward-thinking, and capable of translating complexity into clarity. Trust remains our most durable asset. In a moment when confidence in institutions is under pressure, CPAs stand apart precisely because we are bound by standards that cannot be automated.

A Year of Progress

CalCPA made meaningful strides on the issues that matter most to members. We expanded continuing education to address AI literacy, ESG reporting, and advisory services. We deepened our advocacy presence in Sacramento and strengthened our community across every region of the state. Our inaugural Leadership Forum brought together practitioners, academics, and innovators to examine the forces redefining the profession. The conclusion was clear: CPAs are uniquely positioned for this moment and CalCPA is uniquely positioned to support them. The insights from the Forum became the foundation for CalCPA's thought leadership agenda, informing strategic priorities and catalyzing initiatives designed to help the profession navigate a rapidly changing future.

CalCPA as a Leader, Not an Observer

Through advocacy, education, and community, we are equipping members to meet new demands, influencing the policy conversations that will determine the profession's future, and ensuring California remains at the forefront of shaping what it means to be a CPA.

Looking Ahead

The momentum that began in 2025 continues to shape our work into 2026. We remain committed to advocating for the profession, expanding access to valuable resources, and strengthening the community that makes CalCPA more than an association. The transformation underway is an invitation. We hope you'll join us as we continue building what's next for the modern CPA.



Denise LeDuc Froemming
President and CEO, CalCPA

Jillian Phan
Board Chair, CalCPA

CalCPA's Modernization STATS

CalCPA is charting what's next by modernizing the profession through advocacy, learning, community, and membership, as illustrated below through key metrics that highlight the scale and impact of our collective work.

Advocacy Wins

Pushed for more accessible CPA pathways to licensure with **AB 1175**

Reviewed **2,300+** proposals and secured wins on important issues

Shaped national conversations on the future of the profession through **comment letters**, the **Leadership Forum**, and **quarterly Capitol Beat webinars**

Learning Reach

187,780 CPE credits issued

468 unique webinars across **1,589** sessions

3,700 purchases from the on-demand catalog

20 conference opportunities

Community Engagement

178 community events, including signature, member led, discussion groups, and roundtables

3,366 attendees at ABC Nights

144 CPA firms represented in CalCPA leadership roles

793 firms represented in event attendees

Membership & Growth

40,186 members (11% students, 63% licensed CPAs)

3,000 total attendees at conferences

585,397 unique visits to the CalCPA website



Supporting the Modern CPA Through Advocacy

CalCPA's advocacy work keeps CPAs at the center of the policies shaping their profession, and this year, licensure modernization took center stage. CalCPA led a high-profile, multi-year effort behind AB 1175, advancing more flexible CPA pathways to address the pipeline challenge while preserving strong public protection. That work built on a full slate of advocacy across the board: reviewing more than 2,300 legislative and regulatory proposals, securing business tax credit improvements, advancing tax conformity, defending CPA scope of practice intrusion, and stalling expansion of challenging tax matters, among many others.

CalCPA also got ahead of emerging issues with new policy positions on AI and sustainability assurance, and pushed for accounting's recognition as a professional degree that is valued. Through our Legislative Summit, CPA Day at the Capitol, and close engagement with the policy stakeholders, CalCPA facilitated direct opportunities for members to help shape these outcomes.

CalCPA's thought leadership keeps members ahead of what's next for the profession. CalCPA led national conversations on licensure reform and the workforce pipeline, weighed in on emerging issues like AI, sustainability assurance, and alternative practice structures, and shared California's perspective with stakeholders nationwide through op-eds and public commentary. Quarterly Capitol Beat webinars, the Leadership Forum, and a forward-looking whitepaper dove into the forces shaping the future of the profession.



Supporting the Modern CPA Through Scholarships

Scholarships

CalCPA continues to make significant investments in the next generation of accounting professionals. Since 2020, the **Institute has awarded more than \$1.2 million in scholarships** to over 1,200 California students, with 40% of recipients coming from community colleges, which are critical entry points for many future CPAs.

In 2025, CalCPA awarded more than 335 students, on average, a \$1,500 scholarship.

“Scholarships are a lifeline for me, representing the chance to pursue higher education despite the obstacles I’ve faced. As a first-generation college student from a Native American background, growing up in a financially strained environment in a tough neighborhood, scholarships are more than just financial aid—they’re a ticket to a better future,” said San Diego State University student Michael Bonillas and recipient of a \$7,500 scholarship.

Students can join CalCPA for free and gain access to resources that help them launch their careers, including networking events, CPA Exam preparation tools, leadership development, and connections to future employers. These investments are strategic. They ensure that talented, diverse students can see themselves in the profession and have the support they need to thrive.

2,100 students
recruited

5,400 student
CalCPA
members

1,550
scholarship
applications

30+ Meet the
Firms events at
campuses across
the state



Learning Without Limits: CalCPA's Knowledge Engine for What's Next

CalCPA's Education Foundation

CalCPA has offered education to its members since its earliest days. In 1966, the CalCPA Education Foundation formalized that commitment by creating a dedicated home for professional learning designed to grow alongside the profession itself. Over the past six decades, California has issued more than 146,722 CPA licenses, and CalCPA has been a trusted partner in educating and supporting these professionals throughout their careers.

What began in classrooms with printed materials evolved into conferences, webinars, and on-demand platforms available wherever a CPA needed them. For 60 years, that evolution never stopped, and neither did the ambition. As the Foundation's work now integrates fully into CalCPA, education becomes more deeply connected to membership, advocacy, leadership, and community than ever before.

How do you measure 60 years of impact?

In the courses and certificates that keep careers current. In the instructors who turned complex rules into practical guidance. In the members who came back year after year, not just for credit, but for clarity, connection, and confidence. That spirit carries forward as learning becomes woven into every dimension of a CalCPA member's professional life.



A Knowledge Engine for What's Next

CalCPA is modernizing how knowledge is created, delivered, and shared. The Foundation's legacy of conferences, webinars, on-demand programs, and staff development has evolved into an integrated learning ecosystem that provides professionals with seamless access to high-quality education whenever and wherever they need it.

CalCPA is expanding its role as a thought leader on the issues that matter most to the profession. When H.R. 1, the One Big Beautiful Bill, introduced the most significant tax changes since the Tax Cuts and Jobs Act, CalCPA responded with a sustained, multi-channel initiative: a [video series](#), [CPE programming](#), and [editorial content](#) that equipped members with the guidance they needed, when they needed it.

Similarly, CalCPA's dedicated [Tariff Tips](#) hub brings together member resources and public-facing leadership in one place, clarifying tariff impacts by industry through video, [CPE](#), and [expert commentary](#). These efforts serve members first and extend CalCPA's visibility and authority to lawmakers, stakeholders, and the broader public.

Media coverage of CalCPA's work reinforces a record of public communication that raises the organization's standing and amplifies CalCPA's voice.

CalCPA's commitment remains to deliver the knowledge, connections, and leadership the profession needs for what's next. For 60 years, we've helped CPAs learn beyond the requirement and we're just getting started.

Building our Community Better So We're Ready for What's Next

Over the past year, CalCPA continued to evolve its role as the central community for California's accounting profession, elevating signature events, enhancing the member experience, and modernizing how professionals engage across regions and career stages. These efforts reflect a commitment to building a more accessible, consistent, and connected community for all members.

Three signature CalCPA events testify to this commitment:

- **Members Club Summit:** A premier three-day conference for CPAs and financial professionals focused on networking, professional development, and emerging trends. The Summit features sessions on leadership, AI, and industry innovation; offers CPE; and is hosted at top California destinations.
- **CPA Day at the Capitol:** The annual advocacy gathering in Sacramento, where members meet directly with state legislators to discuss tax, licensing, and regulatory issues. This free event empowers members to influence policy and strengthen relationships with lawmakers.
- **Women's Leadership Forum:** A two-day leadership experience designed to elevate women in accounting and finance. Through inspiring keynote speakers, practical leadership development, innovation-focused learning, meaningful connections, and the prestigious Women to Watch Awards, the Forum empowers attendees to grow their careers and shape the future of the profession.

Members Club Summit

400+ accounting
leaders building the
future of the
profession

CPA Day at the Capitol

150+ advocates
giving CPAs a voice at
the Capitol

Women's Leadership Forum

250+ attendees
empowering the next
generation of leaders



Charting a Community Where Everyone Belongs

This year, CalCPA showed up. The Mentorship Pilot Program paired 15 CPA mentors with 15 students and candidates, creating direct pathways into the profession for those who benefit most from guidance and connection. At Pride festivals in Fresno and Palm Springs, CalCPA connected with more than 2,500 people, bringing the profession into community spaces and opening doors for the next generation of CPAs. Through the Commission on Belonging, CalCPA delivered cultural competence training that gives leaders the tools to build workplaces where every professional can thrive.

A major modernization effort is also underway to reimagine how members connect, transitioning to a more flexible regional and hyper-local model that better reflects how today's professionals want to engage.

A more accessible, consistent, and engaging community that creates clearer, more meaningful ways for members to connect, learn, and lead makes an impact. Key elements of the new model include regional leadership supported by local interest hubs, events organized around member interests rather than geography alone, greater choice in how and where members participate, and more flexible volunteer opportunities across career stages.

This modernization positions CalCPA to meet the needs of a new generation of professionals while strengthening the sense of community that has always defined the organization.



Building Community Beyond the Room.

At the Women's Leadership Forum, CalCPA partnered with the Alliance of Black Women Accountants to open the door for the next generation. In 2025, 15 accounting students attended the conference, supported by CalCPA's Empowerment Grant and a community of professionals committed to making the profession more accessible and representative for everyone who belongs in it.



16 Years. 77 Women.

Since 2008, the CalCPA Women to Watch Awards have recognized 77 accounting professionals across California for their leadership, impact and excellence in the profession. Each year at the Women's Leadership Forum, we award Emerging, Experienced and Trailblazer leaders and celebrate the legacy they join.



The People Powering What's Next



CalCPA's impact is powered by a diverse network of leaders, volunteers, and professionals, from its Board, Council, and executive leadership to its committees and dedicated staff, whose collective expertise and commitment are helping modernize the organization and build a more connected, engaged community.



CalCPA Board of Directors



Jillian Phan
Chair



Miklos Ringbauer
First Vice Chair



Erin Roche
Secretary/Treasurer



Matthew Martin
Immediate Past Chair



Adam Blaylock
Vice Chair



Marjorie McPike
Vice Chair



Mike Ray
Vice Chair



Dalton Sweaney
Vice Chair



Scott Donnelly
Education Foundation
Chair



Mark Demos
Director



Amber Setter
Director



Jamie Baker
Director



Destiny Flood
Director



Glenn Freed
Director



Julia Walther
Director



Denise LeDuc Froemming
President and CEO

Council Members

Eyad Alnaslah*
Ariel Ayaay
Shelvina Bains*
Rajju Bajracharya
Melody Barta
Jennifer Benjamin
Elizabeth Boyajian*
Brian Brinig**
Tamarra Brown
Charlie Burak**
Greg Burke **
Bryan Carpenter
Mingyan Chen
Louise Cochrane
Michael Cole**
Conrad Davis**
Erin Daiber
Taylika Dennis**
Gina DeRosa
Greg Desmond**
Sarauv Dutta**
Nathaniel Edelman*
Frances Ellington Gutierrez
Ming Fang
Fernando Fermin*
Brandon Ferrell*
Daniel Figueredo**
Perry Forschino
Jonathan Foster**
Jolene Fraser**
Chrislynn Freed**
Sarah Gastineau*
Tim Good
Nadeesha Hapuarachchi
Brian Henderson*
Carrie Hidding
Brandon Holland
Kathy Johnson
Meredith Johnson
Joey Kennedy*

Michael Koll
Raffi Kurkjian*
Celia Lau
Dennis Lee
Andy Mattson**
Karen Miessner**
Andrew Mintzer
Christopher Murray*
Joshua Pena
Lawrence Pon**
Antonio Ramirez
Robert Reynolds**
Erin Roche**
Scott Roundtree
Allison Ruffino
Robert Seltzer***
April Shanebeck
Lewis Sharpstone
Victor Shlionsky**
Erin Silva*
Christie Simons
Camille Slayter
Pat Spafford**
Devin Spence*
Megan Stambaugh**
Jeff Stone
Jeff Summers
Jennifer Tang
Kristin Torres
Ivana Vergot
Maria Vigul
Julia Walther*
Brad Welebir**
Sam Wild**
Carisa Wisniewski**
Di Wu
Yvonne Yang
Erin Zhang
Yooki Zheng

*Chapter President

**Committee Chairs

***Robert "Rob" Seltzer served CalCPA with integrity, generosity and an unwavering commitment to the profession and its people. We are grateful for his years of dedicated leadership and hold his memory, and his family, close to our hearts.



CalCPA Education Foundation

Board of Trustees

Scott Donnelly | Chair

Taryn Hoffmann-Torres | First Vice Chair

Charlotte Wall | Secretary/Treasurer

Ruben Davila | Immediate Past Chair

Heather Esposito | Vice Chair

Jillian Phan | CalCPA Chair

Tamarra Brown | Trustee

Jannies Burlingame | Trustee

Erin Daiber | Trustee

Megan Thompson | Trustee

Ana Valdivia | Trustee

Carisa Wisniewski | Trustee

Leah Yoneda | Trustee

CalCPA Committees

Accounting Education

Accounting Principles and Assurance Services

Amicus Curiae

Audit

Belonging

Bylaws

Distinguished Service Award

Estate & Trust Planning

Finance

Financial Literacy

Forensic Services Section

Government Relations

Governmental Accounting and Auditing

Management of an Accounting Practice

Nominations

Nonprofit

Peer Review

Personal Financial Planning

Professional Conduct

Public Service Award

Taxation

Young & Emerging Professionals



Get Involved

Our members are pushing the profession, building their résumés and making lifelong connections. If you're interested in getting involved in a CalCPA committee, visit [CalCPA's website](#). We also have volunteer opportunities in adult financial literacy, student literacy, disaster outreach and CPA careers outreach.

CalCPA Chapters and Community

Across California, local communities bring CalCPA to life where members actually live and work. From San Diego to Sacramento, from the Bay Area to the Central Valley, chapter leaders organized events, built relationships, and created the kind of connections that don't happen behind a screen. This year, CalCPA members gathered nearly 200 times, for networking, professional development, industry roundtables, community, and more, logging nearly 6,600 attendees across the state.

Behind every event is a volunteer. The 262 members who served in chapter leadership roles are practitioners, educators, firm leaders, and emerging professionals who give their time because they believe in what this community can be. They are the reason CalCPA feels local, even as the profession grows more global. As CalCPA evolves how it connects members across the state, the commitment to local leadership and community remains at the center of everything.



Celebrating Leaders Who Are Charting What's Next

CalCPA's annual awards are all about **celebrating the bold, the brilliant, and the boundary-pushers** who are leading the charge in accounting. These awards shine a spotlight on those shaping the future of the profession.

Individual Awards

Public Impact Award



Rosario Bobadilla-Farias
Partner, HCVT

Distinguished Service Award



Andrea Cope
CFO, City Sport Physical Therapy

Outstanding Accounting Educator Award



Di Wu
Professor of Accountancy,
CSU-Bakersfield

Women to Watch Award Winners

CPA Emerging Leader



Payton Batshon
Moss Adams

CPA Experienced Leader



Kellie Kremer
Haskell & White

CPA Trailblazer



Deanna Martin
Santiago Canyon College

Firm Awards

Small Firm Excellence | CPAClub



Mid-to-Large Size Firm Excellence | BPM LLP



CalCPA Executive Leadership



Denise LeDuc Froemming
President and CEO

CalCPA Executive Team



Jason Fox
Vice President of Advocacy
and Public Affairs



Jill Pitchenik
Vice President of Strategic
Business Operations



Natalie Quan
Vice President & CFO



Emil Redzic
Vice President of Technology
and Business Transformation



Jennifer Weed
Vice President of Learning
Innovation and Brand Strategy

Partners Power the Mission

\$46,000 in 2025 from direct donations

Secured a \$10,000 Sofi Charitable Contribution for the Institute's financial literacy and pipeline efforts

Developed Funding Task Force

CalCPA's work doesn't happen in isolation. The firms, organizations and leaders who invest in CalCPA help advance education, support the next generation of CPAs and build a profession that's ready for what's next. We are grateful to the partners who fuel this work and are proud to build the future of the profession alongside them.



**Condensed list*

Supporting the Profession's Future

Some of the most meaningful investments in CalCPA come from the members themselves.

Those who contribute to the CPA-PAC and Fund the Future aren't just supporting an organization, they're investing in the profession they built their careers around. Their generosity funds advocacy that shapes California law, creates pathways for the next generation of CPAs, and ensures the profession remains strong, relevant, and well-represented.

To every member who has given, thank you.

Your investment is felt in every scholarship awarded, every bill championed, and by every student who finds their way into the CPA profession because someone believed it was worth fighting for.

"The CalCPA Institute invests in the future of our profession. Supporting scholarships and educational opportunities is one way I can help ensure the next generation of CPAs has the same opportunities and guidance that helped shape my own career."

Andrea Cope, CPA, CGMA
Past Chair



"I lucked my way into accounting. I was waitressing when I started helping the chef with monthly food inventories and noticed a CPA standing there watching. Curiosity did the rest. I don't want others to rely on luck the way I did. I want them to have a real chance to see how great a career in accounting can be. That's why I give to the CalCPA Institute — to help others create their own luck."

Charlotte Wall, CPA
Treasurer, CalCPA Education Foundation
Board of Trustees



What's Next for CalCPA

To CalCPA's leadership, members, and community,

CalCPA is entering the next phase of its modernization journey, and I couldn't be more energized by what lies ahead.

As someone who has built a career around helping small businesses find their financial footing, I know firsthand what it means to navigate uncertainty, adapt to change, and invest in the future, even when the path isn't fully mapped. That's exactly what CalCPA is doing right now. We're building on real momentum: stronger advocacy, evolving education, a reimagined community structure and a deeper commitment to the members who make this organization what it is.

In the year ahead, CalCPA will accelerate strategic initiatives across advocacy, learning, and community by investing in new tools, programs, and experiences that reflect the needs of a changing profession. We'll amplify member voices, expand access to member benefits, and continue modernizing how CalCPA delivers value at every level. The next generation of CPAs and the entrepreneurs they serve deserve an organization that's as forward-thinking as they are. That's the CalCPA we're building.

I'm honored to step into the role of Chair at this critical moment, one defined by transformation, possibility, and the kind of collective momentum that only happens when a community is truly aligned around what's next.

Together, we will continue to chart what's next.

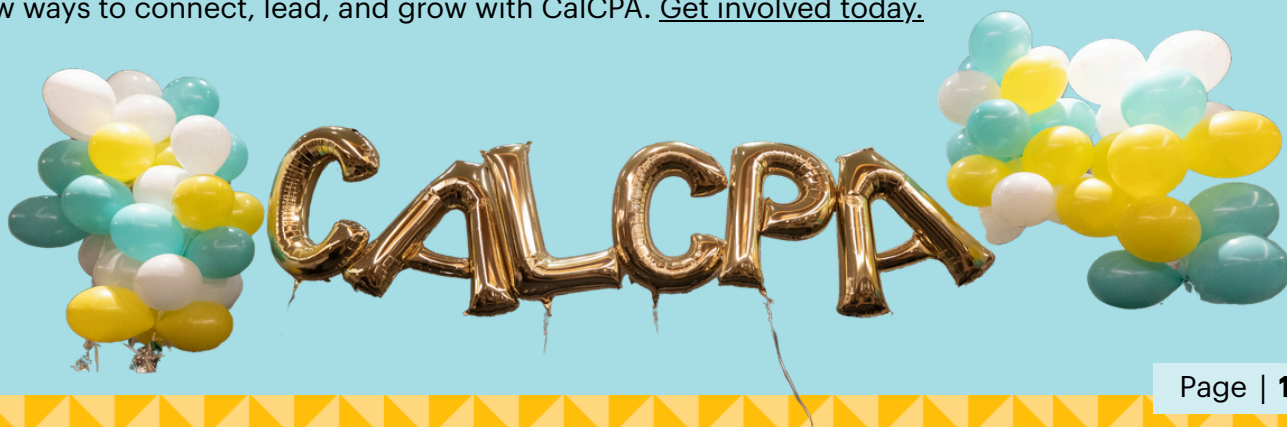
Miklos Ringbauer

Incoming Chair, CalCPA Board of Directors
Founder, MiklosCPA



Ready to be part of what's next?

Explore new ways to connect, lead, and grow with CalCPA. [Get involved today.](#)





500 Capitol Mall, Suite 1760 | Sacramento, CA 95814 | (800) 922-5272 | calcpa@calcpa.org
calcpa.org