



CalCPA Members Club Summit 2026

Event Details

Dates: July 29–31, 2026 (Summit runs 3:00 p.m. Wed. – 2:00 p.m. Fri., PST)

Location: Loews Coronado Bay Resort
4000 Coronado Bay Road | Coronado, CA 92118

Event page: <https://www.calcpa.org/whats-happening/members-club-summit>

Full agenda & registration: <https://www.calcpa.org/whats-happening/members-club-summit>

Below you'll find the official Summit agenda (all times Pacific). You'll be set up in the Commodore Foyer, right where attendees pass through for registration, breaks, meals, and receptions—so those are the key times to staff your booth or table. General sessions take place next door in Commodore CDE.

Our Member Summit and CalCPA events tend to follow a dress code of Business Casual to Business.

Day	Time	Activity	Room
Wed. July 29	12:00 p.m.	Sponsor Setup	Commodore Foyer
	12:15pm	Sponsor Lunch Delivered (Take a break!)	Commodore Foyer
	3:00 p.m.	Registration Opens	Commodore Foyer
	5:00–6:30 p.m.	Sponsor Happy Hour (Members Welcome of Course)	Marina Terrace
	6:30–9:30 p.m.	Welcome Reception- Yacht Party *	Bay Terrace
Thurs. July 30	8:00–10:30 a.m.	Sponsor Insights Breakfast Showcase**	Avalon
	10:00–11:00 a.m.	Registration	Commodore Foyer
	11:00–12:05 p.m.	General sessions in progress	Commodore CDE
	12:05–1:05 p.m.	Lunch	Marina Terrace
	1:15–3:05 p.m.	Breakout Sessions (June 15 only, Paychex and CPA.COM, Whitman Advisory, UWorld, Becker)	
	3:05–3:25 p.m.	Afternoon Break	Commodore Foyer
	3:25–5:10 p.m.	General sessions in progress (Ramp Session)	Commodore CDE
	6:30–8:00 p.m.	Sponsor-Hosted & Legacy Dinners***	Off site
	6:30–8:00 p.m.	Open Small Dinner (Sponsors and Members)	Off site
Fri. July 31	7:30–8:30 a.m.	Breakfast	Marina Terrace



	8:30–9:25 a.m.	Summit Morning Remarks	Commodore CDE
	9:25–9:45 a.m.	Break	Commodore Foyer
	9:45–11:25 a.m.	General sessions in progress	Commodore CDE
	11:25 a.m.–12:00 p.m.	Break	Commodore Foyer
	12:00–1:00 p.m.	Firm Awards	Commodore CDE
	1:00–1:05 p.m.	Closing Remarks / Adjourn	Commodore CDE
	1:05–2:00 p.m.	Post-Awards Reception	Commodore Foyer
	2:00 p.m.	Departure Time	

Activities highlighted in orange are networking opportunities. Please look at all notations to see which are open to everyone and which are for those who are signed up specifically for the activity.

Activities highlighted in green are times when sponsors should be at their booths

** Welcome Reception Attire: White and navy are encouraged as a nod to the nautical spirit of the evening. Whether you prefer a polished look, elevated resort wear, or something more casual.*

*** Whitman Transition Advisors, Marble.ai, BlueJ, Wolters Kluwer, Poe, Instead, CPA Club Inc, ADS Consulting Group, and Flyfin*

**** RAMP, Integrated Partners, UWorld, Paychex, Whitman Transition Advisors, and POE*

Map

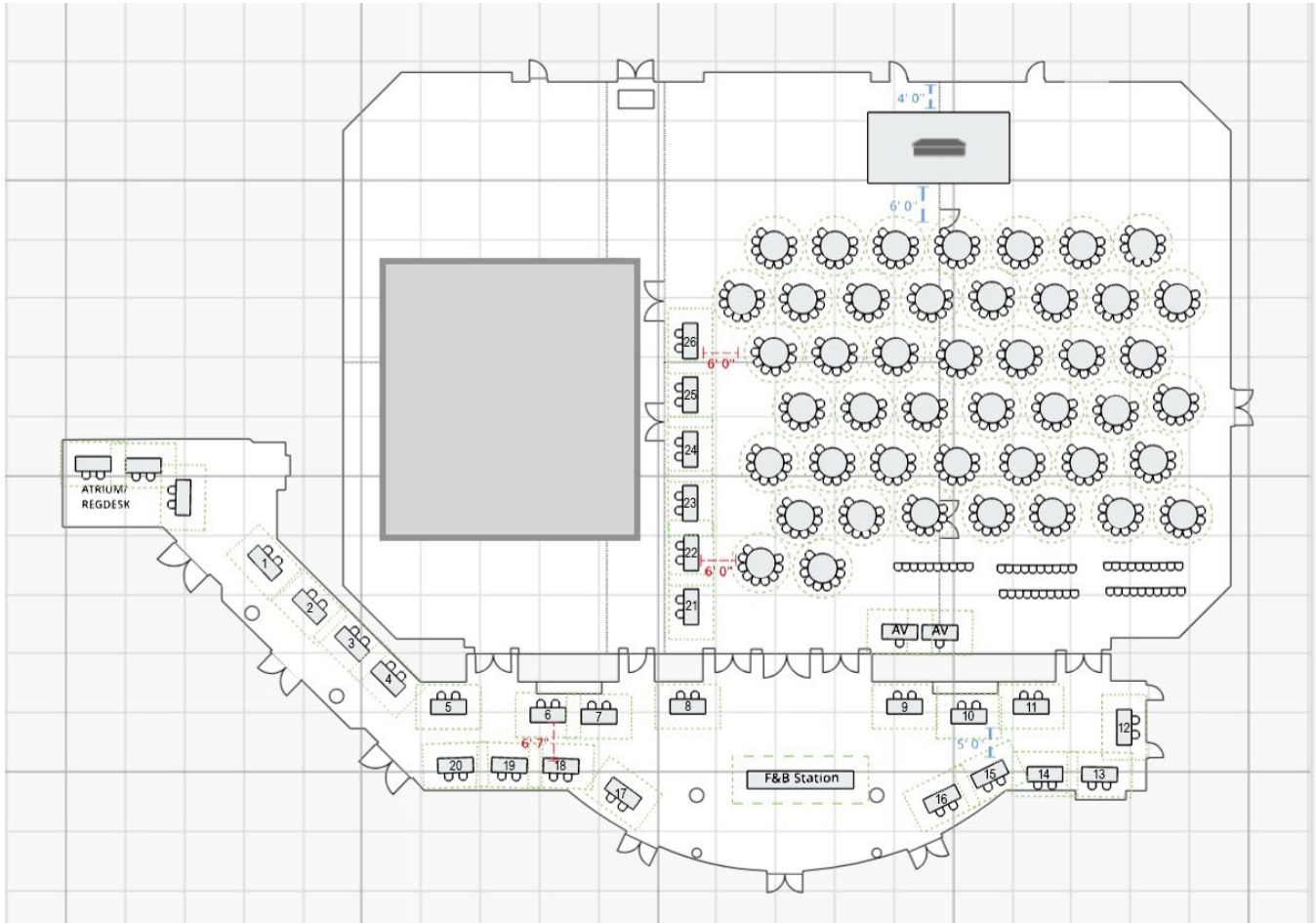


Table Details

Table Assignment

Table #	Sponsor
1	InfinitiHR
2	Activation Station
3	TaxDome
4	Accounting & Tax Brokerage
5	Anchor
6	Activation Station
7	Justworks
8	RAMP



9	Paychex
10	Integrated Parters
11	McGuire Sponsel
12	BlueJ
13	Activation Station
14	Wolters Kluwer
15	Camico
16	Rightworks
17	Activation Station
18	UWorld
19	DSD
20	ADS Consulting Group
21	Marble.ai

Setup & Tear-Down

Setup date/time: 12:00 p.m., Wed., July 29, 2026 — Sponsor Setup Commodore Foyer

Tear-down date/time: 2:00 p.m., Fri., July 31, 2026

Booth / Table Specifications

Space type: *6-ft table*

Included items: *(1) 6-ft table, (2) chairs, (1) power strip (electricity)*

Wi-Fi: Conference Wi-Fi credentials will be provided onsite.

Engagement Opportunities

Activation Stations

Throughout the exhibit hall, we will have activation stations with activities designed to generate activity within the booth areas, and to bring guests back to the exhibit hall periodically in the future. Sponsored activation stations will be attended by their sponsor and may include branded pieces in the station.

CalCPA Buddies

All sponsors are paired with a CalCPA Buddy who will be their on-site “friendly face”. Connections to buddies will be made before the event, and sponsors are encouraged to meet their buddies beforehand for a quick hello or introduction. Please reach out to Denise Bethel if your buddy is not able to connect with you as planned. We ask sponsors to be mindful of our non-solicitation policies and do not ask buddies for direct introductions to specific members or firms.



Insights Sessions

On Thursday morning, sponsors that have opted in or purchased Insights Sessions will do a breakfast presentation before the Summit officially kicks off for attendees and other guests. These 15-minute sessions give sponsors a chance to highlight their expertise in a specific area within the profession.

Curated Dinners

On Thursday night, sponsors who have purchased a curated dinner will host small dinner programs in the area. Guests are responsible for transportation to their dinners unless sponsors have pre-arranged transportation. For sponsors and guests without specific plans, a small dinner with limited seating was also offered in lieu of a sponsored, curated dinner.

Legacy Dinner

On Thursday night, sponsors of the Firm Awards and Legacy Dinner will attend a by-invite dinner for the managing partners of the firms nominated for the Firm Awards this year, along with past award winners.

Collect and Create

Members Summit guests will be given a tracking card, to get stamped or confirmed as they visit sponsor exhibitor tables to talk to our partners. Entries on the card, will enable the guests to get entered into a drawing for a free prize.

Retreat Lounge

"The Retreat" is available to Platinum sponsors, VIP room sponsors, VIP members, board members and firm guests at tables for a quieter getaway from the hustle of the event. Included are elevated drinks and snacks, swag customization, cocktail tables, relaxing chairs and other goodies and surprises for the room's guests. A special identifier will be provided to eligible guests during registration.

Logistics

Shipping & Freight

Advance shipping address: ATTN: Jeanette Casimiro — 4000 Coronado Bay Rd (Address 2: "CalCPA Members Club Summit") — Coronado, CA 92118

Advance shipment arrival window: Boxes should not arrive sooner than July 26, 2026.

On the box: Write "Box [X] of [Y]," the event dates "7/29/2026–7/31/2026," "Commodore Ballroom," and the name/organization of your on-site representative (e.g., Jane Smith, Google) directly on each box.

Return shipping: Exhibitors are responsible for arranging return shipping. All packages must be fully packaged with shipping labels attached before pickup.

Note to sponsors: Most carriers/shipping labels don't have enough fields to accommodate all this information. If your carrier's label doesn't include an Address 2 field, please also write "CalCPA Members Club Summit" directly on the box. All packages must be clearly labeled with your company name and the Summit name. CalCPA is not responsible for items lost, damaged, or left on-site after tear-down.



Parking

Parking location: Loews Coronado Bay Resort, 4000 Coronado Bay Road, Coronado, CA 92118 (self-parking and valet available on-site).

Exhibitor parking rate: Self-parking: \$25/day (reduced from \$47/day). Valet parking: \$55/day.

Hotel / Room Block

Official conference hotel: Loews Coronado Bay Resort

Rate: \$279+tax/night (single/double), reduced CalCPA rate. Resort fee waived (standard \$42/night; includes welcome beverage, in-room bottled water, 24-hr fitness center/studio, daily group fitness classes, shuttle to Downtown Coronado Village and Silver Strand State Beach, and beach toy/chair/umbrella use). Reservations must be made by 5:00 PM hotel time, Monday, July 6, 2026. Note: Student/Candidate attendees should NOT book their own room — CalCPA books it for them.

Booking link/code: <https://www.loewshotels.com/coronado-bay-resort/group-calcpa-summit-2026>

Meals

Conference meals are provided for exhibitors, except for the Thursday, July 30 dinner.

Registration Lists

Will be sent a few days before the event and within 3 days post-event for sponsors that have this list included in their packages. Please note these are for direct follow-up only and do not allow for mass marketing. If this is not adhered to sponsor will not be eligible for future registration lists.

Contacts

Your CalCPA Conference Team

Name	Email	Other Contact Information:
Melissa Pineda	mpineda@calcpa.org	
Denise Bethel	Denise.Bethel@calcpa.org	Please text Denise with any questions: 619-788-8555
Paul Chirco	Paul.Chirco@calcpa.org	

We're glad you're here.
CalCPA -- Leading Beyond the Ledger