



Welcome to CalCPA's Legislative Summit and CPA Day

On behalf of CalCPA members across the state, **THANK YOU** for being an advocate for the CPA profession. Your participation truly makes a difference in helping shape the future of your profession.

CalCPA Member Advocacy Resources and the **2026 CPA Day Legislative Packet and Issue Talking Points** can be accessed by scanning the QR code or visiting www.calcpa.org/cpaday.

CalCPA Member Advocacy Resources

This includes a guide to building relationships with elected officials, tips for a successful legislative visit, and a roster of Legislators. These will assist you as you meet with your elected representatives, understand what to expect in the meeting and develop a lasting and beneficial relationship with your legislator.



Legislative Packet with Issue Talking Points

These are guides to the topics to cover in your meetings. These materials can be found by scanning the QR code or www.calcpa.org/cpaday. While we encourage a free-flowing and candid conversation, we encourage you to cover as much of the below as possible. Topics include:

- **125 Years of Trust & Advancing the Public Interest**
- **Building Confidence in Sustainability Reporting and AI Systems**
- **Addressing Stranded Pass-Through Entity Tax (PTET) Credits**
- **What's Top of Mind for CPA Leaders**

Legislative Visit Reporting Form

For each of your meetings, please complete a reporting form. This helps provide CalCPA staff with the information needed for follow-up conversations and to track the issues being discussed.

- **These can be completed online www.calcpa.org/cpadayreporting.**

Lastly, CalCPA staff are here as a resource. Should you have questions, please reach out to CalCPA's Advocacy Team at (916) 441-5351 or CalCPAGR@calcpa.org.

Thank you again for volunteering your time to advocate for your profession.

A large part of CalCPA's government relations efforts is based on building and maintaining relationships with elected leaders. Our political system is founded on the principles of citizens voicing their views and concerns with policymakers. Elected officials at all levels of government depend on advice from constituents to successfully craft and pass legislation to address problems and help facilitate the growth of local communities and the state. With the various issues facing our profession, it's more important than ever to educate policymakers on the real-life impact of legislative proposals.

To help you become acquainted with government officials and build relationships to assist them as they formulate and execute public policy objectives, we follow a four-step process: **identify, inform, advocate and assist.**

Identify

Politicians are inherently bright and well-connected public people, but they do not know every one of their constituents or everything about their district. By identifying yourself as a CPA in the district you make yourself, your firm and your profession known to your elected representatives. The objective is to identify yourself and build contacts ahead of time, before you need them. This makes it more likely that you will receive a receptive ear once there is an issue that you want to discuss.

Inform

No legislator wants to intentionally harm businesses or constituents in their district. Policymakers are always looking for feedback from their constituents. Informing them about the possible effects their policy actions may have on your ability to represent clients and operate as a CPA can go a long way toward preventing onerous laws and regulations from becoming a reality.

Advocate

You can help advocate for your profession by honestly and thoughtfully presenting rational and well-supported arguments for a particular policy. Let your representative know why he or she should support or oppose a particular issue. You are your own best advocate. This is your chance to provide your perspective on public policy to your representative.

Assist

This is the most important step, but often overlooked in the political world. Thank your representative for listening and being supportive of your issue and your profession. Offer your assistance and expertise, or inform them of CalCPA's Financial Literacy Program and offer to help them set up a financial literacy workshop in their district. Remind them that you are the face of the CPA profession in their district. A good representative will recognize your leadership in the community and profession—and will remember you when the issues arise in the future.

Going into a meeting with a legislator, it is essential to have a concise and organized plan. The following recommendations can help ensure a successful meeting with legislators:

Before the Meeting

- **Learn the Issues:** Be familiar with the issues you plan to discuss. You don't need to be an expert, but should be able to express the two or three most important things that your representative should know about the issue.
- **Arrive Early:** Your legislator and their staff have tight schedules-as you do-so it is important to be on time. Additionally, don't be offended if they are running late. Be prepared and flexible about the meeting time.
- **Organize Your Group:** Your meeting with legislators may include other CalCPA members or it may be on your own. Organize a strategy before the meeting. If you are in a group, pick a team leader and assign talking points to each person. This way, everyone will get to speak and provide his or her personal experiences to the meeting.
- **Business Cards:** Bring plenty of business cards and leave your contact information with your legislators, their staff and your CPA colleagues.

During the Meeting

- **Meeting with Legislator's Staff:** You may meet with staff from your legislator's office. Don't let this detract from your meeting. In fact, much of the work is performed by the dedicated and talented staff. Don't underestimate their importance.
- **Limited Time:** Your meeting may be scheduled for approximately 15-20 minutes. Be prepared, speak clearly, stay on message and discuss the relevant issue you are advocating.
- **Be Polite:** Policy issues can be sensitive topics. Don't get upset or take it personally if your legislator does not necessarily agree with you. Politely and respectfully present your points. Let the facts power your case, not your emotions. You will have much more success this way.
- **Don't Be Afraid to Say "I Don't Know:** It's better to say that you don't know the answer than to give incorrect information. Let the legislator know that you will find out the answer and will follow up.
- **Don't Discuss Campaign Contributions or Campaign Issues**
- **Summarize:** Before you leave, run through the points discussed during the meeting. Remind the legislator that you and your colleagues are available as a resource – and remember to thank them for their time.

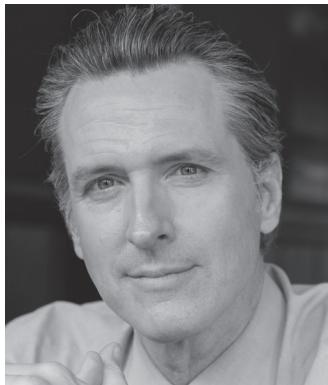
After the Meeting

- **Follow up:** Send a thank you note to your legislator and their staff. Provide answers to any follow-up questions to which answers were not readily available. Let them know that you look forward to working with them in the future and possibly seeing them in the district.
- **Ongoing Communication:** Build on the relationship you have established. Stay in contact and provide any updates to your legislator on the issues you have discussed or any other issues that may arise.
- **Feedback:** Write down any follow up, comments or issues that CalCPA's government relations team will need to do with the legislator or their staff.

Finally, and most importantly, **have fun!** This is a great opportunity that many people do not always have. Enjoy your time with your legislators, make friends and build connections!



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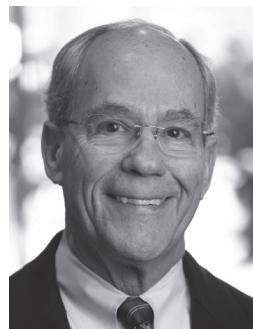
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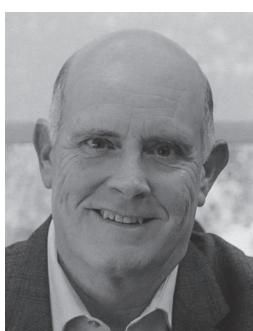
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Tri Ta (R), AD 70 — Part of
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37. Gregg Hart (D-Santa Barbara)
38. Steve Bennett (D-Ventura)
39. Juan Carrillo (D-Palmdale)
40. Pilar Schiavo (D-Chatsworth)
41. John Harabedian (D-Pasadena)
42. Jacqui Irwin (D-Thousand Oaks)
43. Celeste Rodriguez (D-San Fernando)
44. Nick Schultz (D-Glendale)
45. James C. Ramos (D-Highland)
46. Jesse Gabriel (D-Woodland Hills)
47. Greg Wallis (R-Bermuda Dunes)
48. Blanca Rubio (D-Baldwin Park)
49. Mike Fong (D-Alhambra)
50. Robert Garcia (D-Rancho Cucamonga)
51. Rick Chavez Zbur (D-Hollywood)
52. Jessica Caloza (D-Los Angeles)
53. Michelle Rodriguez (D-Pomona)
54. Mark González (D-Los Angeles)
55. Isaac Bryan (D-Los Angeles)
56. Lisa Calderon (D-Whittier)

57. Sade Elhawary (D-Los Angeles)
58. Leticia Castillo (R-Corona)
59. Phillip Chen (R-Yorba Linda)
60. Corey Jackson (D-Moreno Valley)
61. Tina McKinnor (D-Inglewood)
62. Jose Luis Solache (D-Lakewood)
63. Natasha Johnson (R-Lake Elsinore)
64. Blanca Pacheco (D-Downey)
65. Mike Gipson (D-Carson)
66. Al Muratsuchi (D-Torrance)
67. Sharon Quirk-Silva (D-Fullerton)
- 68.avelino Valencia (D-Anaheim)
69. Josh Lowenthal (D-Long Beach)
70. Tri Ta (R-Westminster)
71. Kate Sanchez
(R-Rancho Santa Margarita)
72. Diane Dixon (R-Newport Beach)
73. Cottie Petrie-Norris (D-Irvine)
74. Laurie Davies (R-Laguna Niguel)
75. Carl DeMaio (R-San Diego)
76. Darshana Patel (D-San Diego)
77. Tasha Boerner (D-Encinitas)
78. Chris Ward (D-San Diego)
79. LaShae Sharp-Collins (D-San Diego)
80. David Alvarez (D-San Diego)

Note: Term limit year shown in parentheses. Updates to the roster will be posted as needed at www.calchamber.com.