



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	9:00 a.m.	Sponsor Setup	Commodore Foyer
	12:00 p.m.	Sponsor Lunch Delivered	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

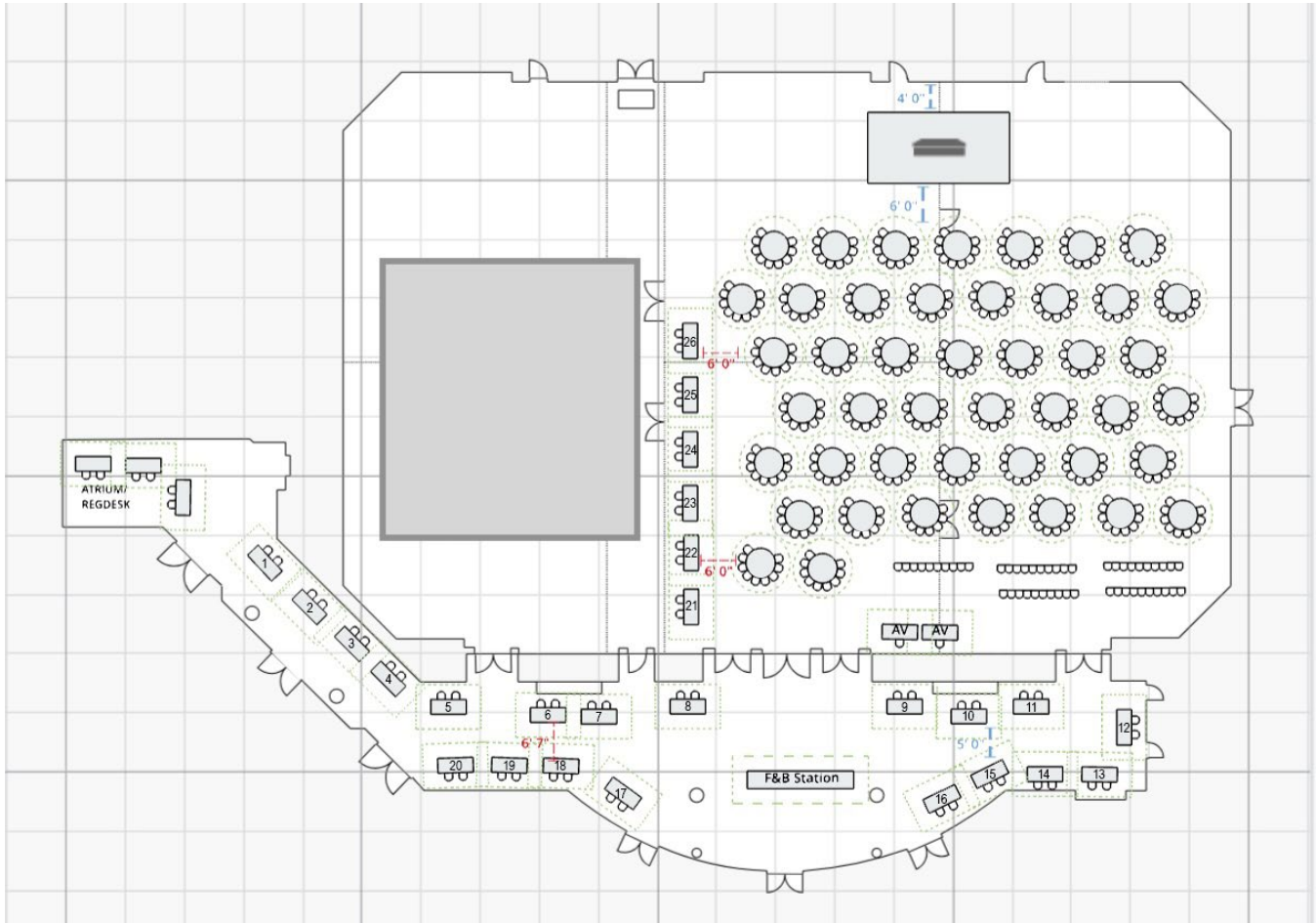


Table Details

Table Assignment

Table #	Sponsor
1	InfinitiHR
2	Activation Station
3	TaxDome
4	Marble.ai
5	Anchor
6	Activation Station
7	Justworks
8	RAMP



9	Paychex
10	Integrated Financial
11	McGuire Sponsel
12	BlueJ
13	Activation Station
14	Wolters Kluwer
15	Accounting & Tax Brokerage
16	Rightworks
17	Activation Station
18	UWorld
19	DSD
20	ADS Consulting Group
21	
22	
23	FlyFin
24	Camico
25	Poe Group

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

Fill out the “Advanced Exhibitor Shipping Confirmation Form” at the end of this document.

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, and your booth number.



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

LOEWS HOTELS

Advanced Exhibitor Shipping Confirmation Form

Please return completed form to Daniela Benson via Daniela.Benson@LoewsHotels.com

In order to accommodate your **"In and Out Bound"** shipping needs, please complete the form below in its entirety. Boxes will not be delivered until this form has been received by Event Management and payment information has been obtained.

Boxes prepared for return shipping are to be placed on or in front of the exhibitor table.

Please note: If this form is not completed, boxes WILL NOT be handled by the hotel.

GENERAL INFORMATION

Exhibiting Company: _____	Conference Name: _____
Name on Shipments: _____	Booth Number: _____
Address: _____	Exhibit Location: _____
City & Zip: _____	Install Date: _____
Phone: _____	Teardown Date: _____
E-Mail: _____	

BILLING INFORMATION

Name	Guest Name and Confirmation Number: _____
Payment	E-mail for payment link: _____

NOTE: DO NOT provide credit card information on this form.

A Sertifi Billing Link will be sent within 72 hours.

This process is not complete until payment is made via the link.

		<u>Boxes</u>			
		<u>Incoming</u>		<u>Outgoing</u>	
Per Box		<u>Qty</u>		<u>Qty</u>	Per Box
1-25 lbs	\$15.00				\$15.00
26-60 lbs	\$50.00				\$15.00
60 - 100 lbs	\$100.00				\$15.00
Pallet / *Freight:	\$300.00				\$15.00
					Pallet / *Freight:

**Freight includes large oversized boxes over 100lbs*

In some cases, the Hotel cannot hold outgoing freight at the loading dock. Please ensure all freight is picked up at the conclusion of the exhibit show or gain approval from the Event Manager that we may hold the freight until a scheduled pick-up date.

Individual must provide completed Shipping Label.

While we do have pick-ups from FedEx and UPS daily, pick-ups must be pre-arranged by the sender directly with the shipping company: FedEx, UPS, DHL, etc. The Hotel cannot arrange pick-ups on your behalf.

Total Charges

	Per Box	Qty	Amount	Sub-totals
Total # of Boxes In = _____	1-25 lbs		\$15.00	\$
	26-60 lbs		\$50.00	\$
	60 - 100 lbs		\$100.00	\$
	60 - 100 lbs		\$300.00	\$
	Outgoing		\$15.00	\$
Total # of Boxes Out = _____	TOTAL			\$

Signature and payment required on-site once final package count is determined

(**Please Note:** The above prices do not include the **outgoing** shipping costs from utilizing UPS, FedEx, USPS or DHL services.)

- **RECEIVING:** Loews Coronado Bay Resort is pleased to accept and store all shipments of boxes/materials required for your event according to the following policies:

➤ The Hotel's receiving entrance is open **6:00am - 5:00pm, Monday through Friday, & 7:00am - 5:00pm on Saturdays.**

- Deliveries will be received at the loading dock behind the hotel
- Deliveries must be clearly labeled with the following information:

- **Your Name (not the conference host)**
- **Your Exhibitor/Company Name**
- **Booth/Table Name or #**
- **Conference/Event Name**

FOR SHIPPING LABEL: Loews Coronado Bay Resort & Spa 4000 Loews Coronado Bay Road Coronado, CA 92118 Box # _____ of # _____

➤ Meeting professionals MUST notify their Catering or Conference Manager of any shipments to the Hotel, especially if they require special handling. There are labor charges for receiving, storing and transporting packages to/from the meeting space. Please refer to your Sales Agreement for your contracted fees. **General delivery charges are as follows:**

<u>Weight/Lbs</u>	<u>Charge</u>
Less than 25 lbs	\$15.00 per package/box
26 – 60 lbs	\$50.00 per package/box
Over 61 lbs	\$150.00 per package/box
Pallet	\$300.00 per pallet

➤ The Hotel cannot assume responsibility for storage of boxes received more than five (5) business days prior to the Group's meeting, event or program. Shipments received prior to the five (5) days will be returned.

➤ The Hotel does not accept liability for equipment, goods, displays or other materials that arrive or fail to arrive at the Hotel. The sender is responsible for insuring its property for loss or damage. All packages must be clearly marked with a return address.

➤ Deliveries requiring the use of the loading dock for an extended period of time and/or special equipment need to be coordinated with the Shipping Department in advance. Charges may apply. You may contact them directly at 619-424-6033.

➤ Exhibit materials must be shipped through the Group's designated drayage company. Any exhibitor choosing to ship packages directly to the Hotel are subject to shipping and handling fees.

➤ Any shipment being sent on your behalf through sponsors and/or vendors should be informed of these procedures.

➤ Packages can be retrieved by contacting our Loews Immediate Needs Coordinator (LINC) by dialing Ext. 4474 on any Hotel house phone or contacting the Front Desk. When calling, please let our LINC personnel know where you would like your packages delivered (i.e. your exhibit booth, your guestroom, etc).

➤ **Please make sure you are present at the time of delivery to sign for all packages.**

➤ Please keep in mind that most shippers deliver packages to Loews between 10:30am and 2:00pm. It may take the receiving department several hours to process all packages once delivered. Therefore, some same day deliveries may not be available until 3:00pm that day.

- **SHIPPING:** Loews Coronado Bay Resort is pleased to ship out all boxes/materials according to the following policies:

➤ All guests or attendees must fill out a Shipping Request Form for each outgoing item. These may be found at the Bell Desk, Front Desk or with any Banquet Houseman.

➤ Boxes must be dropped off at the Front Desk/Bell Desk or picked up by a Banquet Houseman before 9:00am in order to be shipped out the same day. After 9:00am, boxes will be shipped out the following business day.

➤ UPS and FedEx have daily pick-ups from the Hotel Monday through Friday. FedEx Ground pick-ups must be pre-arranged by the shipper directly with FedEx. The Hotel cannot arrange FedEx ground pick-ups on your behalf.

No cash on delivery (COD) packages will be accepted. The Hotel policies on safe package handling are based on the advice from the United States Postal Service (USPS) and Federal Centers for Disease Control and Prevention (CDC).

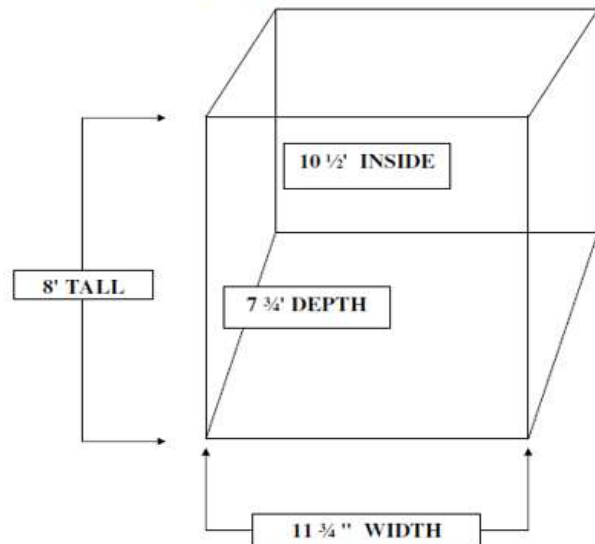
*** The inside of the elevator is 10 ½' high; though the opening is only 8'.**

Freight Elevator Dimensions:

Maximum Weight: 6,000lbs*
Elevator Opening: 8' Tall
Elevator Dimensions: 10 ½' High x 11 ¾' Wide x 7¾' Deep

**Please note that any items over 1,000lbs per square foot must have engineering approval*

Maximum Weight: 6,000 lbs



Loading Dock Details:



FROM: _____ ADD. _____ CITY: _____ STATE: _____ ZIP: _____		DATE OF FUNCTION: _____ GROUP NAME: _____ ATTENTION: _____ EXHIBITOR: _____	
SHIP TO: Loews Coronado Bay Resort 4000 Coronado Bay Rd Coronado, CA 92118		BOOTH # 	
EVENT MANAGER: _____ ONSITE CONTACT NAME: _____		NUMBER OF PKGS. _____ OF _____	

***Number of packages section is for each box, EX:
 If there are 10 packages, each should be labelled:
 #1 OF 10
 #2 OF 10
 #3 OF 10
