



**California Alliance of Taxpayer Advocates
2024 14th Annual Conference - The Ritz-Carlton Laguna Niguel
December 11 – 13, 2024**

Wednesday, December 11, 2024

5:30 – 7:00 pm **Welcome Reception**

Location: Terrace Salon and Balcony

Thursday, December 12, 2024

7:45 – 8:45 am **Breakfast and Registration**

Location: Terrace Salon Balcony

8:45 – 9:00 am **Opening Remarks**

Speaker: James DePasquale, President and Board Chair, CATA and Principal,
Depasquale, Kelley & Co.

Location: Terrace Salon

9:00 – 10:00 am **Working Assessment Appeal Cases Efficiently**

Panel: The Honorable Jordan Marks, San Diego County
Assessor/Recorder/Clerk

Scott Thornberry, Assistant Assessor, Los Angeles County

Introduction/Moderator: James DePasquale, President and Board Chair, CATA and
Principal, Depasquale, Kelley & Co.

Location: Terrace Salon

- 10:00 – 10:15 am **Break**
- 10:15 – 11:00 am **A Conversation with the California Assessors’ Association**
- Speaker:** The Honorable Jeffrey Prang, Los Angeles County Assessor and CAA President-Elect
- Introduction:** James DePasquale, President and Board Chair, CATA and Principal, Depasquale, Kelley & Co.
- Location:** Terrace Salon
- 11:00 – 12:00 pm **LA County Assessment Appeals Board – Innovation to Optimize Efficiency and Transforming Processes Today**
- Speakers:** Jennifer Tran, Deputy Executive Officer, Los Angeles County Assessment Appeals Board
- Terrence Greer, Assistant Chief, Los Angeles County Assessment Appeals Board
- Introduction:** Peter Kotschedoff, CMI, Advisory Chair, CATA and Principal, Versatax Consulting
- Location:** Terrace Salon
- 12:00 – 1:15 pm **Lunch**
- Location:** Terrace Salon Balcony
- 1:15 – 1:45 pm **The California State Board of Equalization – Present and Future**
- Speaker:** The Honorable Sally J. Lieber, Chair - State Board of Equalization
- Introduction:** Marc Aprea, Aprea & Company
- Location:** Terrace Salon
- 1:45 – 2:15 pm **Candidate for the California State Board of Equalization**
- Speaker:** The Honorable Shannon Grove, California State Senator, 16th District, Candidate for BOE District #1.
- Introduction:** Marc Aprea, Aprea & Company
- Location:** Terrace Salon

2:15 – 3:00 pm **California Property Tax - Legal Update**
Speakers: Bradley Marsh, Co-Managing Shareholder, Greenberg Traurig, LLP
Introduction: Craig A. Becker, Partner, Pillsbury Winthrop Shaw Pittman LLP
Location: Terrace Salon

3:00 – 3:15 pm **Break**

3:15 – 4:15 pm **Commercial Real Estate Overview: What Trends are Driving the Market?**
Speaker: Matthew Vance, Vice-President and Senior Economist at CBRE
Introduction: John Boyle, Principal, Avid Tax Group
Location: Terrace Salon

4:15 – 5:00 pm **Emerging Trends in Office Appeals**
Speakers: Paul Waldman, CMI, Director - Commercial, Ryan
Eric Sheneman, Senior Consultant, Versatax Consulting
Craig A. Becker, Partner, Pillsbury Winthrop Shaw Pittman LLP
Introduction: Bradley Marsh, Co-Managing Shareholder, Greenberg Traurig, LLP
Location: Terrace Salon

6:00 - 7:00 pm **Cocktail Reception**
Location: Pavillions I & II Foyer

7:00 - 9:00 pm **Dinner and CATA Awards**
Location: Pavillions I & II

Friday, December 13, 2024

7:30 – 8:30 am **Breakfast**
Location: Terrace Salon Balcony

- 8:30 – 8:40 am **Opening Remarks**
- Speaker:** James DePasquale, President and Board Chair, CATA and Principal, Depasquale, Kelley & Co.
- Location:** Terrace Salon
- 8:40 – 9:15 am **New Construction - Total Market Value versus Supplemental Roll for Completion**
- Speakers:** Kevin Moore, LLM, Partner, Kevin J. Moore & Associates
- Introduction:** James DePasquale, President and Board Chair, CATA and Principal, Depasquale, Kelley & Co.
- Location:** Terrace Salon
- 9:15 – 10:00 am **California Data Centers – Key Issues in Taxation, Appraisal and Recent Decisions**
- Speakers:** Nick Carter, Senior Director, Altus Group
Chris Larsen, Manager, Altus Group
- Introduction:** Kris Chacko, Esq., Director, Altus Group
- Location:** Terrace Salon
- 10:00 – 10:15 am **Break**
- 10:15 – 12:00 pm **CATA Board/Officer Group - Business Meeting (CATA Members Only)**
- Political and Legislative Update – Marc Aprea
 - 2024 Year in Review
 - Initiatives – James DePasquale, Board Chair
 - Financial – Dylan Hoyes, Treasurer
 - 2025 Policy Issues – Board/Officers and Marc Aprea
 - Taxpayer Refund Delay
 - Valuing Intangibles
 - Consistent Forms and Appeals Deadlines
 - Improving statewide the County Assessment Appeals Board hearing scheduling process
 - Virtual hearings – Mike Middleton
 - Replicating the LA County Public Access System throughout California
 - County Assessor Outreach – James DePasquale, Board Chair
 - 2024 Conference Survey – Amy Kotschedoff, Conference Organizer
 - Election of New Board Members – James DePasquale, Board Chair
 - Board/Officer Group Q&A
- Location:** Terrace Salon
- 12:00 pm **Conference Concludes**