



**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, 12th 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 J. Moore / Evan Chavez, KJM Law Partners, PLC  
Elliott Kimmel, Assessment Appeal Advisors  
George Koiso, Worth Valuation Services
- Moderator:**      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**