



**California Alliance of Taxpayer Advocates
2026 16th Annual Conference - The Ritz-Carlton Laguna Niguel
December 9 – 11, 2026**

Wednesday, December 9, 2026

5:30 – 7:00 pm Welcome Reception

Location: Pavilions 4 - 5

Thursday, December 10, 2026

7:45 – 8:45 am Breakfast and Registration

Location: Pavilions 4 - 5

8:45 – 9:00 am Opening Remarks

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

Location: Pavilions 1 - 3

9:00 – 10:00 am State Board of Equalization /Intangibles Work Group Update

Speakers: Cris O'Neill, Shareholder, Greenberg Traurig
James DePasquale, President and Board Chair, CATA and Principal,
DePasquale, Kelley & Co.

Introduction: Peter Kotschedoff, CMI, Principal, Versatax Consulting, Inc.

Location: Pavilions 1 - 3

10:00 – 10:45 am	Working Together to Have a More Transparent, Expeditious, and Consistent Assessment Appeals Process Speaker: The Honorable Assessor Neysa Fligor, Santa Clara County Introduction/Moderator: Peter Kotschedoff, CMI, Principal, Versatax Consulting, Inc. Location: Pavilions 1 - 3
10:45 – 11:00 am	Break
11:00 – 11:30 am	The California Assessors Association Priorities for 2027 Speaker: The Honorable Stephen Duckels, Incoming CAA President, Yuba County Assessor Introduction: James DePasquale, President and Board Chair, CATA and Principal, DePasquale, Kelley & Co. Location: Pavilions 1 - 3
11:30 – 12:00 pm	California State Board of Equalization – Vision for the Future Speaker: The Honorable Tom Umberg, Senator 34th District, Candidate for the State Board of Equalization, District 4 Introduction: Bradley Marsh, Shareholder, Greenburg Traurig, LLP and CATA Board Member Location: Pavilions 1 – 3
12:00 – 1:15 pm	Lunch Location: Pavilions 4 - 5
1:15 – 2:15 pm	CBRE Market Update Speaker: Darin Mellott, Head of U.S. Capital Markets Research, CBRE Introduction: Peter Kotschedoff, CMI, Principal, Versatax Consulting, Inc. Location: Pavilions 1 - 3

2:15 – 3:00 pm	Property Tax Legal Update Speaker: Greg Broege, Partner, Ajalat, Polley, Ayoob, Matarese & Broege Introduction: Kris Chacko, Esq., Director, Ryan LLC and CATA Board Member Location: Pavilions 1 – 3
3:00 – 3:30 pm	Current Issues Affecting Property Tax Administration Speaker: Gina Rodriquez, Principal, Advocacy and Tax Policy, Ryan, LLC Introduction: Keith Jameson, Director, Ryan LLC and CATA Board Member Location: Pavilions 1 – 3
3:30 – 3:45 pm	Break
3:45 – 4:15 pm	Pechanga Resorts Inc. vs. County of Riverside Intangible Case Study Speaker: Debby S. Doitch, Shareholder, KJMLAW Introduction: James DePasquale, President and Board Chair, CATA and Principal, DePasquale, Kelley & Co. Location: Pavilions 1 - 3
4:15 – 4:45 pm	State Board of Equalization – The 2026 Year in Review and Lessons Learned Speaker: The Honorable Sally Lieber, Chair - State Board of Equalization, District 2 Introduction: John Boyle, Principal, Avid Tax Group and CATA Board Member Location: Pavilions 1 – 3
6:00 - 7:00 pm	Cocktail Reception Location: Pavilions 4 – 5 Terrace
7:00 - 9:00 pm	Dinner and CATA Awards Location: Pavilions 4 - 5

Friday, December 11, 2026

7:45 – 8:45 am **Breakfast**

Location: Pavilions 4 - 5

8:45 – 9:00 am	Opening Remarks
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Speaker: James DePasquale, President and Board Chair, CATA and Principal, DePasquale, Kelley & Co.

Location: Pavilions 1 – 3

9:00 – 9:30 am Assessment Appeals Standards Working Group Update

Speakers: Michael D. Middleton, President, Protax, LLC

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

Location: Pavilions 1 - 3

9:30 – 10:15 am CATA Political and Legislative Update

Speakers: Jennifer Roe and Chris Zraggen, Capitol Advocacy

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

Location: Pavilions 1 - 3

10:15 – 10:30 am **Break**

10:30 – 12:00 pm CATA Board/Officer Group - Business Meeting (CATA Members Only)

- 2026 Year in Review
 - Initiatives – James DePasquale, Board Chair
 - Financial – Dylan Hoyes, Treasurer
- 2027 Policy Issues – Board/Officers and Marc Aprea
 - Taxpayer Refund Delay
 - Valuing Intangibles Work Group
 - Assessor and Assessment Appeals Board Work Group Recommendations
- County Assessor Outreach – James DePasquale, Board Chair
- 2026 Conference Survey – Amy Kotschedoff, Conference Organizer
- Election of New Board Members – James DePasquale, Board Chair
- Board/Officer Group Q&A

Location: Pavilions 1 - 3

12:00 pm **Conference Concludes**