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**

Special Guest Meet and Greet: The Honorable Tom Umberg, Senator 34th District, State Board of Equalization Member-Elect, District 4

Introduction: Bradley Marsh, Shareholder, Greenberg Traurig

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'Neall, 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 **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

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 **CATA Political and Legislative Update**

Speakers: Jennifer Roe, Partner, Capitol Advocacy

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

Location: Pavilions 1 - 3

4:15 – 4:45 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

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

8:15 – 9:15 am **Breakfast**

Location: Pavilions 4 - 5

9:15 – 9:30 am **Opening Remarks**

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

Location: Pavilions 1 – 3

9:30 – 10:00 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

10:00 – 10:15 am **Break**

10:15 – 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**