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Short Form

Return of Organization Exempt From Income Tax

OMB No 1545-1150

Form 990-EZ

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

2008

Department of the Treasury
Internal Revenue Service

Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$1,000,000 and total assets less than \$2,500,000 at the end of the year may use this form.

The organization may have to use a copy of this return to satisfy state reporting requirements.

Open to Public Inspection

A For the 2008 calendar year, or tax year beginning MAY 1, 2008 and ending APR 30, 2009

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Termination ☐ Amended return ☐ Application pending	Please use IRS label or print or type. See Specific Instructions.	C Name of organization		D Employer identification number		
		CALCPA INSTITUTE		20-0978565		
		Number and street (or P.O. box, if mail is not delivered to street address)		Room/suite	E Telephone number	
		1235 RADIO ROAD			650-802-6217	
		City or town, state or country, and ZIP + 4		F Group Exemption Number		
		REDWOOD CITY, CA 94065-1217				

Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

G Accounting method: ☐ Cash ☒ Accrual
Other (specify) _____

I Website: N/A

J Organization type (check only one) ☒ 501(c) (3) (insert no.) ☐ 4947(a)(1) or ☐ 527

H Check ☐ if the organization is not required to attach Schedule B (Form 990 990-EZ or 990-PF)

K Check ☐ if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A return is not required, but if the organization chooses to file a return, be sure to file a complete return.

L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts; if \$1,000,000 or more, file Form 990 instead of Form 990-EZ \$ 789,050.

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I.)

Revenue	1	Contributions, gifts, grants, and similar amounts received	1	550,016.
	2	Program service revenue including government fees and contracts	2	
	3	Membership dues and assessments	3	
	4	Investment income	4	43,526.
	5a	Gross amount from sale of assets other than inventory STMT 4	5a	162,826.
	b	Less: cost or other basis and sales expenses	5b	168,724.
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule)	5c	<5,898.>
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here ☐		
	a	Gross revenue (not including \$ _____ of contributions reported on line 1)	6a	
Expenses	b	Less: direct expenses other than fundraising expenses	6b	
	c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	
	7a	Gross sales of inventory, less returns and allowances	7a	
	b	Less: cost of goods sold	7b	
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
	8	Other revenue (describe SPECIAL PROJECT INCOME)	8	32,682.
	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	620,326.
	10	Grants and similar amounts paid (attach schedule) STMT 6	10	290,550.
	11	Benefits paid to or for members	11	
Net Assets	12	Salaries, other compensation, and employee benefits	12	57,073.
	13	Professional fees and other payments to independent contractors	13	4,307.
	14	Occupancy, rent, utilities, and maintenance	14	
	15	Printing, publications, postage, and shipping	15	37,978.
	16	Other expenses (describe) SEE STATEMENT 1)	16	130.
	17	Total expenses. Add lines 10 through 16	17	390,038.
	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	230,288.
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	1,677,209.
	20	Other changes in net assets or fund balances (attach explanation) SEE STATEMENT 5	20	<331,096.>
21	Net assets or fund balances at end of year. Combine lines 18 through 20	21	1,576,401.	

Part II Balance Sheets. If Total assets on line 25, column (B) are \$2,500,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II.)

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	321,481.	22 789,823.
23 Land and buildings		23
24 Other assets (describe) SEE STATEMENT 2)	1,437,446.	24 1,030,581.
25 Total assets	1,758,927.	25 1,820,404.
26 Total liabilities (describe) SEE STATEMENT 3)	81,718.	26 244,003.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	1,677,209.	27 1,576,401.

832171 12-17-08 LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Form 990-EZ (2008)

SCANNED JAN 11 2010

Part V Other Information (Note the statement requirements in the instructions for Part VI.)

	Yes	No
33 Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	33	X
34 Were any changes made to the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes	34	X
35 If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T.		
a Did the organization have unrelated business gross income of \$1,000 or more or section 6033(e) notice, reporting, and proxy tax requirements?	35a	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	35b	N/A
36 Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Sch. N	36	X
37a Enter amount of political expenditures, direct or indirect, as described in the instructions. 37a 0.	37b	X
b Did the organization file Form 1120-POL for this year?	37b	X
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still unpaid at the start of the period covered by this return?	38a	X
b If "Yes," complete Schedule L, Part II and enter the total amount involved 38b N/A	38b	N/A
39 Section 501(c)(7) organizations. Enter:	39a	N/A
a Initiation fees and capital contributions included on line 9	39a	N/A
b Gross receipts, included on line 9, for public use of club facilities	39b	N/A
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 0. ; section 4912 0. ; section 4955 0.	40b	X
b Section 501(c)(3) and (4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," complete Schedule L, Part I	40b	X
c Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 0.		
d Enter amount of tax on line 40c reimbursed by the organization 0.		
e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e	X
41 List the states with which a copy of this return is filed. CA		
42a The books are in care of MARIA YARMOLINSKY Telephone no. 650-802-6217 Located at 1235 RADIO RD, REDWOOD CITY, CA ZIP + 4 94065		
b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b	X
If "Yes," enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
c At any time during the calendar year, did the organization maintain an office outside of the U.S.?	42c	X
If "Yes," enter the name of the foreign country: Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here		
43 and enter the amount of tax-exempt interest received or accrued during the tax year 43 N/A	43	N/A
44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44	X
45 Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	45	X

Form 990-EZ (2008)

Part VI Section 501(c)(3) organizations only. All section 501(c)(3) organizations must answer questions 46-49 and complete the tables for lines 50 and 51

- 46 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I
- 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II
- 48 Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E
- 49a Did the organization make any transfers to an exempt non-charitable related organization?
- b If "Yes," was the related organization(s) a section 527 organization?
- 50 Complete this table for the five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

	Yes	No
46		☒
47		☒
48		☒
49a		☒
49b		

(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
NONE				
Total number of other employees paid over \$100,000				

- 51 Complete this table for the five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
NONE		
Total number of other independent contractors each receiving over \$100,000		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here ☒ Signature of officer Date 12/15/09

MARIA YARMOLINSKY
Type or print name and title

Paid Preparer's Use Only

Preparer's signature JAN A. ROSATI Date 12/11/09 Check if self-employed ☐

Firm's name (or yours if self-employed), address, and ZIP + 4 MACIAS GINI & O'CONNELL LLP
3000 S STREET, SUITE 300
SACRAMENTO, CA 95816

Preparer's Identifying Number (See instr.) EIN
Phone no. 916-418-2670

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Form 990-EZ (2008)

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

To be completed by all section 501(c)(3) organizations and section 4947(a)(1)
nonexempt charitable trusts.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No 1545-0047

2008
Open to Public
Inspection

Name of the organization

CALCPA INSTITUTE

Employer identification number

20-0978565

Part I Reason for Public Charity Status (All organizations must complete this part.) (see instructions)

The organization is not a private foundation because it is. (Please check only **one** organization.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**. (Attach Schedule H.)
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete the Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**. (see instructions)
- 11 ☒ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
- a ☒ Type I b ☐ Type II c ☐ Type III - Functionally integrated d ☐ Type III - Other
- e ☒ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**.
- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box ☐
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?
- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) A family member of a person described in (i) above? ..
- (iii) A 35% controlled entity of a person described in (i) or (ii) above? ..
- h Provide the following information about the organizations the organization supports

	Yes	No
11g(i)		☒
11g(ii)		☒
11g(iii)		☒

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
CALIFORNIA SOCIETY OF	C94-1056137	12	☒		☒		☒		0.
Total									

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule A (Form 990 or 990-EZ) 2008

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support.

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 - 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public Support. Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	%
16a 33 1/3% support test - 2008. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ☐		
b 33 1/3% support test - 2007. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ☐		
17a 10% -facts-and-circumstances test - 2008. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ☐		
b 10% -facts-and-circumstances test - 2007. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ☐		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ☐		

Schedule A (Form 990 or 990-EZ) 2008

Part III Support Schedule for Organizations Described in Section 509(a)(2) (Complete only if you checked the box on line 9 of Part I.)**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 - 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support (Add lines 9, 10c, 11, and 12)						
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ☐						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2007 Schedule A, Part IV-A, line 27h	18	%

19a 33 1/3% support tests - 2008. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

b 33 1/3% support tests - 2007. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

Schedule A (Form 990 or 990-EZ) 2008

CalCPA Institute FEIN 20-0978565
Form 990 EZ Part IV

List of 2008-2009 Board of Directors and Key Employees
FYE 04-30-08

Name	Address	Title	Avg hrs/week	Compensation	Contributions to benefit plans and deferred comp.	Expense Acct.
BOD						
Gregory Burke	1235 Radio Road, Redwood City CA 94065	Chair	N/A	0	0	0
Andrea Cope	1235 Radio Road, Redwood City CA 94065	First Vice Chair	N/A	0	0	0
John McWilliams	1235 Radio Road, Redwood City CA 94065	Vice Chair	N/A	0	0	0
Scott Hofferber	1235 Radio Road, Redwood City CA 94065	Vice Chair	N/A	0	0	0
Johanna Sweaney Salt	1235 Radio Road, Redwood City CA 94065	Vice Chair	N/A	0	0	0
Gregg Wind	1235 Radio Road, Redwood City CA 94065	Vice Chair	N/A	0	0	0
Conrad M. Davis	1235 Radio Road, Redwood City CA 94065	Treasurer	N/A	0	0	0
Teresa Mason	1235 Radio Road, Redwood City CA 94065	Past Chair	N/A	0	0	0
Pamela Kelly	1235 Radio Road, Redwood City CA 94065	Education Foundation President	N/A	0	0	0
Mark Luitrell	1235 Radio Road, Redwood City CA 94065	Appointed Member	N/A	0	0	0
Melody Thornton	1235 Radio Road, Redwood City CA 94065	Appointed Member	N/A	0	0	0
Loni Ang	1235 Radio Road, Redwood City CA 94065	Council Representative	N/A	0	0	0
Sharon Lightner	1235 Radio Road, Redwood City CA 94065	Council Representative	N/A	0	0	0
Eduardo Jordan	1235 Radio Road, Redwood City CA 94065	Council Representative	N/A	0	0	0
Jennifer Ziegler	1235 Radio Road, Redwood City CA 94065	Council Representative	N/A	0	0	0

FORM 990-EZ	OTHER EXPENSES	STATEMENT	1
DESCRIPTION		AMOUNT	
SUPPLIES & OFFICE EXPENSE		48,631.	
MEETING AND EVENT EXPENSE		76,902.	
MANAGEMENT FEE		<150,004.>	
OTHER EXPENSE		9,177.	
INVESTMENT MANAGEMENT FEE		8,229.	
PAYROLL TAX		4,142.	
OTHER GRANT EXPENSE		3,053.	
TOTAL TO FORM 990-EZ, LINE 16		130.	

FORM 990-EZ	OTHER ASSETS	STATEMENT	2
DESCRIPTION	BEG. OF YEAR	END OF YEAR	
OTHER RECEIVABLE	174,030.	80,876.	
INVESTMENT	1,263,416.	949,705.	
TOTAL TO FORM 990-EZ, LINE 24	1,437,446.	1,030,581.	

FORM 990-EZ	OTHER LIABILITIES	STATEMENT	3
DESCRIPTION	BEG. OF YEAR	END OF YEAR	
A/P	17,651.	0.	
DUE TO AFFILIATE	64,067.	244,001.	
ROUNDING	0.	2.	
TOTAL TO FORM 990-EZ, LINE 26	81,718.	244,003.	

FORM 990-EZ	GAIN (LOSS) FROM PUBLICLY TRADED SECURITIES	STATEMENT	4
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DESCRIPTION	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	NET GAIN OR (LOSS)
SECURITIES	162,826.	168,724.	0.	<5,898.>
TO FORM 990-EZ, LINE 5	162,826.	168,724.	0.	<5,898.>

FORM 990-EZ	OTHER CHANGES IN NET ASSETS OR FUND BALANCES	STATEMENT	5
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DESCRIPTION	AMOUNT
UNREALIZED LOSS ON INVESTMENTS	<331,096.>
TOTAL TO FORM 990-EZ, LINE 20	<331,096.>

FORM 990-EZ

CASH GRANTS AND ALLOCATIONS

STATEMENT

6

CLASS OF ACTIVITY/DONEE'S NAME AND ADDRESS	DONEE'S RELATIONSHIP	AMOUNT
SCHOLARSHIP SEE ATTACHED	NONE	290,550.

TOTAL INCLUDED ON FORM 990-EZ, LINE 10

290,550.

CalCPA Institute FEIN 20-0978565
Scholarship Recipients
FYE 04-30-08

Transaction Date	Name	Address	Amount	Relationship with CalCPA	Institute
5/7/2008	SOFIA ALMEIDA	1953 WELLINGTON LANE APT 3, VISTA, CA, 92081	1,500.00		NONE
1/20/2009	ERICA ANDERSON	433 PALISADES AVE, SANTA CRUZ, CA, 95062	3,750.00		NONE
11/11/2008	MATTHEW AYOTTE	1032 14TH ST, SAN FRANCISCO, CA, 94114	2,500.00		NONE
11/11/2008	DANA BAINS	1868 WEST WILLOW ST, STOCKTON, CA, 95203-1418	1,500.00		NONE
11/11/2008	DANA BAKER	19249 ROCKRIDGE WAY, SONORA, CA, 95370	1,500.00		NONE
5/7/2008	DANIELLE BARTON	6655 CANYON RIM ROW #210, SAN DIEGO, CA, 92111	2,250.00		NONE
9/23/2008	LYNN BLICKENSDEFFER	875 SMALLWOOD ST, COLTON, CA, 92324	300.00		NONE
10/22/2008	JAMES BLOCHO	3000 OAK KNOLL DR, REDWOOD CITY, CA, 94062	250.00		NONE
5/7/2008	ERIN BRAY	3692 MISSION MESA WAY, SAN DIEGO, CA, 92120	500.00		NONE
2/3/2009	ERIN BRAY	3692 MISSION MESA WAY, SAN DIEGO, CA, 92120	4,000.00		NONE
11/11/2008	RIZWANA BUKSH	3055 FLOYD AVE #227, MODESTO, CA, 95355	500.00		NONE
7/7/2008	CAL POLY ACCOUNTING AREA	ORFALEA COLLEGE OF BUSINESS, 1 GRAND AVE, SAN LUIS OBISPO, CA, 93407	2,000.00		NONE
7/7/2008	CAL POLY ACCOUNTING AREA	ORFALEA COLLEGE OF BUSINESS, 1 GRAND AVE, SAN LUIS OBISPO, CA, 93407	2,000.00		NONE
7/7/2008	CAL POLY ACCOUNTING AREA	ORFALEA COLLEGE OF BUSINESS, 1 GRAND AVE, SAN LUIS OBISPO, CA, 93407	1,500.00		NONE
7/7/2008	CAL POLY ACCOUNTING AREA	ORFALEA COLLEGE OF BUSINESS, 1 GRAND AVE, SAN LUIS OBISPO, CA, 93407	500.00		NONE
5/21/2008	CAMPANILE FOUNDATION	5500 CAMPANILE DR, SAN DIEGO, CA, 92182-8221	5,000.00		NONE
5/28/2008	CRAIG CERNIGLIA	1 LMV DR MS B7646, LOS ANGELES, CA, 90045	2,500.00		NONE
10/22/2008	CELENA CHEN	746 OVERTURE CT, SAN JOSE, CA, 95734	250.00		NONE
10/22/2008	BONNIE CHENG	150 NUEVA AVE, SAN FRANCISCO, CA, 94134	500.00		NONE
11/11/2008	JEFFREY CHEW	1159 NIMITZ DR, DALY CITY, CA, 94015	1,000.00		NONE
1/20/2009	ANJALI CHITALE	1360H ROAD RUNNER TERRACE, SUNNYVALE, CA, 94087	1,750.00		NONE
6/3/2008	JOSEPH S. CHON	10402 DEWEY DR., GARDEN GROVE, CA, 92840	1,500.00		NONE
10/22/2008	MARIA CHOU	438 N EL CAMINO REAL #302, SAN MATEO, CA, 94401	250.00		NONE
4/22/2009	MICHELLE CHOUNARD	4510 CREEK LANE, SANTA BARBARA, CA, 93111	750.00		NONE
6/3/2008	VANESSA CLAIRMONT	22342 ROSEBRIAR, MISSION VIEJO, CA, 92692	2,500.00		NONE
1/20/2009	ADINA CRISTINA COJOC	345 SHERIDAN AVE #311, PALO ALTO, CA, 94306-2000	1,750.00		NONE
1/20/2009	COLUMBIA COLLEGE	1001 ROGERS ST., COLUMBIA, MO, 65216	2,000.00		NONE
10/22/2008	JEFFREY COLE	238 VIRGINIA AVE, SAN MATEO, CA, 94402	1,000.00		NONE
11/11/2008	ADRIANA CONTRERAS	415 MISSION AVE #2, SAN RAFAEL, CA, 94901	2,500.00		NONE
1/13/2009	TABITHA CROWNINSFIELD	24 EL DORADO CT, FAIRFIELD, CA, 94533	2,500.00		NONE
12/2/2008	CSU, FRESNO	ATTN: CRAIG SCHOOL OF BUSINESS, 5245 N BACKER, M/S PB8, FRESNO, CA, 9	20,000.00		NONE
9/30/2008	ANDREW L DAY	37960 MARONDI DRIVE, CALIMESA, CA, 92320	1,000.00		NONE
4/22/2009	TYLER DEGROOT	91 ROBBINS CT, SIMI VALLEY, CA, 93065	3,000.00		NONE
5/7/2008	CORY DEPIETRO	277 MARQUETTE AVE, SAN MARCOS, CA, 92078	1,500.00		NONE
10/3/2008	DANA DETH	16116 DORCEY AVE APT B, FONTANA, CA, 92335	300.00		NONE
1/20/2009	TAM DONG	2876 RIEDEL CT, SAN JOSE, CA, 95135	1,750.00		NONE
11/11/2008	WILLIAM DUNCAN	1615 FOX WOOD DRIVE, TRACY, CA, 95376	750.00		NONE
11/11/2008	JENNIFER DUONG	2562 SAN JOSE AVE, SAN FRANCISCO, CA, 94112	1,000.00		NONE
5/7/2008	BEN DURWOOD	7511 PEPITA WAY, LA JOLLA, CA, 92037	300.00		NONE
11/11/2008	MARC ERLICH	8025 BEVERLY DR #107, ROHNERT PARK, CA, 94928	4,000.00		NONE
9/24/2008	LINA LI FANGMEYER	516 QUAIL ROCK AVE, BAKERSFIELD, CA, 93308	2,000.00		NONE

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6/3/2008	STEPHAN FAN	1515 N. SPURGEON ST. #12, SANTA TANA, CA, 92701	2,500.00		NONE
9/23/2008	ROYA FARZANEH	7 VIA SANTO TOMAS, RANCHO MIRAGE, CA, 92770-5816	300.00		NONE
5/7/2008	LAURA FLORES	1176 COALVIEW WAY, SAN DIEGO, CA, 92154	1,500.00		NONE
12/2/2008	FRESNO PACIFIC UNIVERSIT	ATTN: NICOLE LINDER, 1717 S. CHESTNUT AVE, FRESNO, CA, 93702	9,000.00		NONE
5/28/2008	TYLER GALBRAITH	1 LMU DR., MS-B 3135, LOS ANGELES, CA, 94566	1,500.00		NONE
11/1/2008	BRIANNE GETGEN	8043 MITCHELL DR #29, ROHNERT PARK, CA,	4,000.00		NONE
3/18/2009	SIQBHAN GILLAN	1260 CLEVELAND AVE #A221, SAN DIEGO, CA, 92103	4,000.00		NONE
5/28/2008	KEVIN GOMEZ	1 LMU DR., MS B 5269, LOS ANGELES, CA, 90045	1,500.00		NONE
1/20/2009	JUSTIN GOMEZ	3239 GETTYSBURG CT, MARINA, CA, 93933-4912	2,750.00		NONE
5/28/2008	MARK GRANT	7113 N. 8TH AVE, PHOENIX, AZ, 85021	3,000.00		NONE
1/20/2009	JESSICA GRADO	930 SOUTH RIKER ST, SALINAS, CA, 93901	3,750.00		NONE
11/1/2008	MANMINDER GREWAL	4216 KIRSTEN DRIVE, STOCKTON, CA, 95212	750.00		NONE
5/7/2008	CHRISTOPHER GROHMAN	10126 PINO DRIVE, LAKESIDE, CA, 92040	1,500.00		NONE
9/23/2008	SNEJANA GUEORGUEVA	23014 MINK DRIVE, DIAMOND BAR, CA, 91765	300.00		NONE
9/2/2008	MICHAEL C. HERBER	1018 CRISTEN ST., CHOWCHILLA, CA, 93610	2,000.00		NONE
9/23/2008	EVAN D. HEID	24909 MADISON AVE APT 1-23, MURRIETTA, CA, 92562	300.00		NONE
9/23/2008	ASHLEY HUGHES	1956 N INDIAN HILL BLVD, CLAREMONT, CA, 91711	1,000.00		NONE
6/3/2008	JOSHUA T. ICKES	15711 ORIZABA AVE., PARAMOUNT, CA, 90723	1,500.00		NONE
10/22/2008	MENEKSE ILZE	945 ROLLINS RD #5, BURLINGAME, CA, 94010	250.00		NONE
1/13/2009	STEVEN T. JOHNSON	25800 INDUSTRIAL BLVD #X1182, HAYWARD, CA, 94545	3,000.00		NONE
9/23/2008	DAVE KAMENSKY	14855 HILLSTONE ST., FONTANA, CA, 92336	1,000.00		NONE
1/20/2009	AKIFUMI KAMIYA	1749 NORANDA DR #4, SUNNYVALE, CA, 94087	1,750.00		NONE
5/28/2008	DANIELA KIM	20633 PESARO WAY, NORTHRIDGE, CA, 91326	3,000.00		NONE
10/22/2008	VALENTINA KIREYEVA	3335 HOMESTEAD RD #24, SANTA CLARA, CA, 95051	1,500.00		NONE
11/1/2008	REBECCA KOEHN	2390 FAY DRIVE, ATWATER, CA, 95301	1,000.00		NONE
8/12/2008	BETSY F. KOIVISTO	1843 RIVER BANK DR., MARYSVILLE, CA, 95901	3,500.00		NONE
5/7/2008	YUN LAN	766 43rd AVE., SAN FRANCISCO, CA, 94121	1,500.00		NONE
5/7/2008	GEORGE LANNING	1111 THOMAS AVE APT 3, SAN DIEGO, CA, 92109	300.00		NONE
11/1/2008	ALLYSON LAUGHTON	228 DONOHOE ST, PALO ALTO, CA, 94303	2,500.00		NONE
9/23/2008	JAMES LEE	37967 PUEBLO RD, HINKLEY, CA, 92347	300.00		NONE
11/1/2008	KIT LEE	2708 MEDINAH WAY, MODESTO, CA, 95355	500.00		NONE
2/18/2009	NATALIE M. LEMIRE	3 SHILOH, IRVINE, CA, 92620	4,000.00		NONE
5/7/2008	JOSHUA LEVY	4052 MAHAILA AVE UNIT A, SAN DIEGO, CA, 92122	300.00		NONE
6/3/2008	SHANG HAO LIANG	5 LA FLORA, IRVINE, CA, 92614	1,500.00		NONE
1/20/2009	YAMIN LIU	14020 SHADOW OAKS WAY, SARATOGA, CA, 95070	1,750.00		NONE
1/20/2009	NATALIE LUCIA	35 ROSEWOOD CT, DANVILLE, CA, 94506	2,750.00		NONE
4/22/2009	WILLIAM LYCETTE	796 EMBARCADERO DEL NORTE #212, GOLETA, CA, 93117	2,000.00		NONE
5/28/2008	LEALEI MAGAT	1 LMU DR., MS B 6807, LOS ANGELES, CA, 90045	3,000.00		NONE
5/7/2008	JESUS MAI	1540 CAMINITO CREMONA, CHULA VISTA, CA, 91915	500.00		NONE
9/23/2008	KEVIN MCNANEY	1908 REDWOOD AVE, WYOMISSING, PA, 19610	1,000.00		NONE
5/7/2008	KARLEEN MILLER	1468 HUNSAKER ST, OCEANSIDE, CA, 92054	500.00		NONE

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2/25/2009	JESSICA R. MINICK	550 ADELAIDE AVE #14, SAN DIEGO, CA, 92115	4,000.00	NONE
11/11/2008	FELICIA MIRANDA	965 WADDINGTON RD, FERNDALE, CA, 95536	2,500.00	NONE
6/3/2008	SAMANTHA MOORE	625 N GRAND ST APT #B6, ORANGE, CA, 92867	2,500.00	NONE
5/7/2008	NATALIA MORY	4551 ESSEX CT, CARLSBAD, CA, 92010	600.00	NONE
10/22/2008	MIGUEL MORALES	BOX9708, 100 EL CAMINO REAL, AThERTON, CA, 94027	500.00	NONE
8/12/2008	NABA-WESTERN REGION	ATTN: REGIONAL TREASURER, P.O. BOX 2602, REDMOND, WA, 98073-2262	2,500.00	NONE
8/12/2008	GURPREET NAND	9325 MAYNELLO CT, ELK GROVE, CA, 95624	2,000.00	NONE
2/3/2009	JAMES D. NELSON	10 FOXGLEN, IRVINE, CA, 92614	2,000.00	NONE
11/11/2008	TIJU NEWLIN	1028 EDGEWOOD WAY, LODI, CA, 95240	1,000.00	NONE
5/7/2008	REBECCA NG	12746 CALLE DE LA SIENA, SAN DIEGO, CA, 92130	500.00	NONE
5/7/2008	MARIA NGUYEN	10852 GREENFORD DRIVE, SAN DIEGO, CA, 92126	500.00	NONE
8/12/2008	SONORA THI NGUYEN	8279 HAYFIELD CIRCLE, SACRAMENTO, CA, 95828	1,500.00	NONE
10/22/2008	JAIME NGUYEN	17410 AVENIDA LOS ALTOS, SALINAS, CA, 93907	1,000.00	NONE
1/20/2009	KHAI Q. NGUYEN	1908 SENTER RD #166, SAN JOSE, CA, 95112	1,750.00	NONE
10/22/2008	HAZEL NIXON	116 BEACH PARK BLVD, FOSTER CITY, CA, 94404	1,000.00	NONE
10/22/2008	KU'ULEI PADEKEN	251 LINCOLN AVE #1, REDWOOD CITY, CA, 94061	250.00	NONE
5/7/2008	ROSA PAPASODERO	1025 ESTES ST #2, EL CAJON, CA, 92020	500.00	NONE
5/28/2008	TRAVIS MICHAEL PEETERS	16346 TRIBUNE ST, GRANADA HILLS, CA, 91344	1,000.00	NONE
10/22/2008	ALEXANDER PEREZ	246 W OAKWOOD BLVD, REDWOOD CITY, CA, 94061	500.00	NONE
6/3/2008	BICH NGOC THI PHAM	1017 N EUCLID, SANTA ANA, CA, 92703	1,500.00	NONE
10/22/2008	SABAI PHYU	1521 LAGO ST #15, SAN MATEO, CA, 94403	250.00	NONE
11/11/2008	AMY PILLAI	78 STANTON ST, SAN FRANCISCO, CA, 94114	1,000.00	NONE
1/20/2009	DAMON POON	858 42ND AVE, SAN FRANCISCO, CA, 94121	2,750.00	NONE
1/13/2009	VEENA RAJA	704 MESA CIRCLE, HAYWARD, CA, 94541	2,500.00	NONE
5/7/2008	MICAL RAMIREZ	6380 CAMINITO DEL PASTEL, SAN DIEGO, CA, 92111	2,250.00	NONE
9/2/2008	ADRIANA V. REYES	921 DELLAVALLE, MADERA, CA, 93638	2,000.00	NONE
9/23/2008	MARTHA REYES	25131 GENTIAN AVE., MORENO VALLEY, CA, 92551-4603	300.00	NONE
1/20/2009	ALEXANDER RIEDEL	930 CASANOVA AVE #14, MONTEREY, CA, 93940-6877	1,750.00	NONE
5/28/2008	JENNIFER RINDGE	1 LMU DR MS B5718, LOS ANGELES, CA, 90045	3,000.00	NONE
8/12/2008	BRADLEY W. RIVERS	9110 SUTON WAY, ORANGEVALE, CA, 95662	3,500.00	NONE
5/6/2008	DANIEL ROSSILLION	16526 ROLANDO AVE, SAN LEANDRO, CA, 94578	2,000.00	NONE
6/3/2008	ALEJANDRA CRUZ ROSSIL	6428 YEARLING ST, LAKEWOOD, CA, 90713	1,500.00	NONE
6/3/2008	NATOSHA ROSALES	12174 BUTTERFIELD PLACE, CHINO, CA, 91710	2,500.00	NONE
1/13/2009	CHRISTOPHER ROSSI	2137 EL LAGO DRIVE, OAKLEY, CA, 94561	2,500.00	NONE
4/22/2009	LORENA SANTIAGO	101 MEMORIAL PKWY #2243, THOUSAND OAKS, CA, 91360	2,000.00	NONE
9/24/2008	JOEL ORLANDO SANDOVAL	14824 REDWOOD VALLEY DR, BAKERSFIELD, CA, 93314	1,500.00	NONE
5/28/2008	AMANDA SCHUCK	9230 CATHWELL LANE, TUNJUNGA, CA, 91042	3,000.00	NONE
11/11/2008	CRAIG SCHAUER	3836 PIONEER RD, HUGHSON, CA, 95326	1,500.00	NONE
4/22/2009	STEPHANIE SCHICK	955 LA PAZ RD MS 2065, SANTA BARBARA, CA, 93108	1,000.00	NONE
9/23/2008	ERIC SCHUMM	7738 WOODSHOLE CT, RIVERSIDE, CA, 92506	1,000.00	NONE
5/7/2008	ANNIE SENNHAUSER	P O BOX 28009, SAN DIEGO, CA, 92198	1,500.00	NONE

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2/3/2009	LAURA J. SHEPARD	7131 STELLA LANE UNIT 33, CARMICHAEL, CA, 95608	2,000.00	NONE
11/11/2008	DEIDRE SIEGMAN	P.O. BOX 838, EMPIRE, CA, 95319	1,000.00	NONE
1/20/2009	RUDY A. SILVA	449 HAWKINS ST, HOLLISTER, CA, 95023	1,750.00	NONE
1/20/2009	JEFF SLOAN	1098 ROY AVE, SAN JOSE, CA, 95125	3,750.00	NONE
6/3/2008	CHELSEA E. SMITH	313 11 ST #8, HUNTINGTON BEACH, CA, 92648	1,500.00	NONE
8/12/2008	LORI M. SOUZA	8229 SCHROEDER RD, DIXON, CA, 95620	2,500.00	NONE
11/11/2008	YUPHA SRIPORN	1136 SUTHERLAND DR, STOCKTON, CA, 95210	750.00	NONE
11/11/2008	JENNIFER STALVEY	281 ARLINGTON ST, SAN FRANCISCO, CA, 94131	4,000.00	NONE
1/20/2009	KRISTIN STERLING	1231 PICASSO DRIVE, SUNNYVALE, CA, 94087	3,750.00	NONE
5/7/2008	CHRISTOPHER STOEFFEN	7965 CAMINO HUERTA, SAN DIEGO, CA, 92122	600.00	NONE
4/22/2009	NATASHA SUSOEV	796 EMBARCADERO DEL NORTE #212, GOLETA, CA, 93117	1,500.00	NONE
8/12/2008	SARAH TANTAWY	5659 BRIDGECROSS DR., SACRAMENTO, CA, 95835	3,500.00	NONE
4/22/2009	CRAIG TARNUTZER	621 WARWICK AVE APT 5, THOUSAND OAKS, CA, 91360	1,000.00	NONE
9/23/2008	BRETT TELFORD	36 REGALO, RANCHO SANTA MARGARITA, CA, 92688	1,000.00	NONE
11/11/2008	KARI THOMAS	16490 TRETHERWAY RD, LODI, CA, 95240	2,000.00	NONE
9/2/2008	LUIS F THOMPSON	2465 W. ROBY AVE., PORTERVILLE, CA, 93257	2,000.00	NONE
1/13/2009	CHRISTINE TING	6238 BANCROFT WAY, SAN JOSE, CA, 95129	2,500.00	NONE
1/20/2009	KATHERINE TOGUCHI	1883 AGNEW RD #330, SANTA CLARA, CA, 95054-1789	2,750.00	NONE
8/12/2008	CHRISTIE TRAHIN	8042 SHEEHAN WAY, ANTELOPE, CA, 95843	3,000.00	NONE
11/11/2008	STEPHEN TRAINQUE	P.O. BOX 1524, MURPHYS, CA, 95247	500.00	NONE
5/28/2008	CORI UEDA	24711 RIVERCHASE DR #5212, VALENCIA, CA, 91355	1,000.00	NONE
9/23/2008	ROGER JOSEPH VALDEZ	12449 POCONO PLACE, APPLE VALLEY, CA, 92308	1,000.00	NONE
1/20/2009	RACHEL VANDER VEER	2560 ROSEDALE AVE, SOQUEL, CA, 95073	1,750.00	NONE
9/24/2008	LINA FIDENCIA VEGA	13601 DUCCIO DR, BAKERSFIELD, CA, 93306	2,500.00	NONE
9/23/2008	DAVID E. WALL	3478 AVOCADO ST, RIVERSIDE, CA, 92507	1,000.00	NONE
10/22/2008	XIAO HONG WEN	839 HIGHLAND AVE #3, SAN MATEO, CA, 94401	250.00	NONE
11/11/2008	MICHAEL WONG	3601 PACIFIC AVE, STOCKTON, CA, 95211	750.00	NONE
1/13/2009	CHUN YAN WONG	2521 PIEDMONT AVE APT 4, BERKELEY, CA, 94704	2,500.00	NONE
5/28/2008	SI QI YEO	2319 14TH ST APT 3, SANTA MONICA, CA, 90405	4,000.00	NONE
5/7/2008	BRITTANY YOUNG	7968 MISSION CENTR CT UNIT M, SAN DIEGO, CA, 92108	600.00	NONE
1/13/2009	RICHARD ZEN	2118 PINEHURST CT, EL CERRITO, CA, 94530	2,500.00	NONE
			<u>290,550.00</u>	

FORM 990-EZ

INFORMATION REGARDING TRANSFERS
ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

STATEMENT 7

- A) DID THE ORGANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS,
DIRECTLY OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL
BENEFIT CONTRACT? [] YES [X] NO
- B) DID THE ORGANIZATION, DURING THE YEAR, PAY PREMIUMS,
DIRECTLY OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT? . . [] YES [X] NO

PROVIDES SUPPORT TO THE PUBLIC AND CPA PROFESSION BY ADVANCING FINANCIAL
EDUCATION AND IMPROVING THE FINANCIAL LITERACY OF CALIFORNIANS.