EMBRACING THE OPPORTUNITY

2017–18 | Beta Alpha Psi Annual Report
# 2018 Beta Alpha Psi Annual Report

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To review the Beta Alpha Psi audited financials, visit: bap.org/files/beta-alpha-psi-financials.pdf
VISION STATEMENT

Beta Alpha Psi will shape the financial and business information professions by developing members into ethical, professional and confident leaders.

MISSION STATEMENT

The mission of Beta Alpha Psi, the premier international honor and service organization for financial and business information students and professionals, is to inspire and support excellence by:

- encouraging the study and practice of accountancy, finance, and information systems;
- providing opportunities for service, professional development and interaction among members and financial professionals; and
- fostering lifelong ethical, social, and public responsibilities.

LETTER FROM THE PRESIDENT

Beta Alpha Psi had another wonderful year and the commitment of our community is key to our success. Our community is broad and consists of many stakeholders including, but not limited to: members, candidates, alumni, faculty advisors, chapter advocates, department chairs, deans, professional partners, executive office staff, board members, firms, companies, professional associations, sponsors, speakers, and exhibitors. Together with the engagement of our vast community, we have been able to advance the mission and strategy of Beta Alpha Psi.

While serving as Beta Alpha Psi President this year, I asked our members to position themselves for distinguished career paths and apply this year’s theme — Embrace the Opportunity. As our students prepare for their professional lives, they will need to be ready to embrace the positive and complex changes they will face as they move along their career journey. The potential they have to make significant contributions to their profession is unlimited, and the Beta Alpha Psi community is excited to be a part of their preparation and leadership development.

The Board of Directors continued to implement the organization’s rolling strategic plan with three primary strategic goals that are featured throughout this report: 1) Increase gratitude; 2) Widen the reach by thinking globally and acting locally; 3) Innovate knowledge sharing and learning through experience. This past year, we have increased our focus on Embracing Opportunity by allowing students to become candidates during the first year of their education, reviewing board governance practices, and adding three new At-Large-Director positions to the Board of Directors to attract talent in the areas of finance, information systems and innovation. We continue to widen our reach internationally by exhibiting and attending more international conferences. While we have made great traction in our Oceania region, we are just getting started in other international areas with focused plans for increased outreach.

Our nine regional meetings were also centered on Embracing Opportunity and we had almost 2,000 total members present. It was also incredibly inspiring to see over 100 chapters participate in the Best Practices Competition at the regional meetings!

The Annual Meeting in Washington, DC, was an exciting event. Over 1,200 students attended the meeting from across the globe as we had invigorating professional sessions, keynote speakers, as well as many opportunities for networking and socializing. Many students competed in the annual Best Practices competition once again sponsored by Deloitte. In addition, many participated in the Project-Run-With-It competition, sponsored by Moss Adams LLP, which gave them the opportunity to work directly on projects for three local nonprofit organizations in the greater Washington, DC, area.

Our Annual Meeting would not be the same without our inspiring and impactful community service day — International Day of Literacy — sponsored by KPMG LLP and the KPMG Foundation. This special event kicked off the meeting with more than 900 volunteers delivering 12,000 school supply items and 2,787 books donated by meeting attendees for children in underserved neighborhoods across Washington, DC.

During the year, we grew by five new installed chapters and five new petitioning chapters. As we prepare to enter our 100th year, we have 318 active chapters and almost 14,000 active candidates and members.

This year, Beta Alpha Psi Embraced the Opportunity. I am proud and honored to have served as your president for 2017–2018.

Dr. Sandra B. Richtermeyer, Ph.D., CMA, CPA
Board President 2017–2018
The Beta Alpha Psi Board of Directors works diligently to promote Beta Alpha Psi’s mission. A diverse composition of education and industry professionals as well as recent graduates of Beta Alpha Psi chapters bring diverse perspectives to the board.

Board accomplishments for 2017–18 include:
- Continuing to message our strategic planning process and goals: increase gratitude; widening the reach – think globally, act locally; and innovate knowledge sharing/learn by experience
- Hiring a legal firm to review our Constitution & Bylaws and Policy & Procedures
- Drafting a board and governance calendar

BOARD MEMBERS
- Dr. Sandra Richtermeyer – President
- Dr. Merle Hopkins – Past President
- Alexandra Miller, CPA – President-elect
- Scott Hobson – Director of Administration
- Dr. Eric P. Jack – Dean Representative
- Nick Milazzo – Professional Partners Chair
- Casey Jo Chapman – Professional Partners Chair-elect
- Dr. Rita Grant – Director of Global Activities
- Dr. Yvonne L. Hinson – AICPA Liaison
- Danielle Brannock – 2nd Year Alumni Representative
- Scott Archer – 1st Year Alumni Representative
- Chris Lyon – 3rd Year Chapter Advocate: Rocky Mountain and Missouri Valley regions
- Dr. Brett Govendir – 3rd Year Chapter Advocate: Oceania region
- Dr. Mark Myring – 3rd Year Chapter Advocate: Midwest region

2018–19 INCOMING BOARD MEMBERS
- Dr. Brian L. McGuire – President-elect
- Pearl Rozenberg – Director of Global Activities
- Paul Wiese – Professional Partners Chair-elect
- Danielle Bradley – Alumni Representative
- Arthur Reed – 2nd Year Chapter Advocate: Atlantic Coast region
- Dr. Kelly Noe – 2nd Year Chapter Advocate: Southwest region

The Beta Alpha Psi Chapter Advocates are considered the voice of the chapters. They support faculty advisors, offer assistance and encouragement to chapters.

ACCOMPLISHMENTS 2017–18:
- Establishing appeals process for chapters to question status review
- Updating manuals
- Updating toolkit for the regional meeting host chapters

3RD-YEAR CHAPTER ADVOCATES
- Chris Lyon – Rocky Mountain and Missouri Valley regions
- Dr. Mark Myring – Midwest region
- Dr. Brett Govendir – Oceania region

2ND-YEAR CHAPTER ADVOCATES
- Arthur Reed – Atlantic Coast region
- Dr. Kelly Noe – Southwest region

1ST-YEAR CHAPTER ADVOCATES
- Sarah Bee – Western and Northwest regions
- Eddie Nabors – Southeast region

2018–19 INCOMING CHAPTER ADVOCATES
- Marci Butterfield – Rocky Mountain and Missouri Valley regions
- Dori Danko – Midwest region
- Dr. Julie Harrison – Oceania region
The Beta Alpha Psi Professional Partners further the mission of Beta Alpha Psi. The Professional Partner representatives financially support Beta Alpha Psi through annual partner fees, which subsidize the regional and annual meetings each year. These representatives use their professional networks to secure speakers for these meetings or deliver their own presentations. Additionally, these representatives function as judges for the annual Best Practices competition, review nominations and select winners for other competitions and awards. Many partners also sponsor a competition or award.

Professional Partner accomplishments for 2018 include:

- Conducting change management leadership exercise at 2018 regional meetings
- Creating new professional partner boot camp
- Continuing outreach to diversify the partners
- Assisting in enhancing the interview process for the alumni representatives for the Board and Regions by providing best practices for interviews and suggested questions to ensure the best candidates are selected on qualifications and merit

FIRMS/CORPORATIONS

- BDO USA, LLP
- Chevron Corporation
- Deloitte LLP
- EY
- Fifth Third Bank
- Grant Thornton LLP
- KPMG LLP
- Moss Adams LLP
- Protiviti
- PwC
- Robert Half
- RSM US LLP
- Xero

ASSOCIATIONS/NOT-FOR-PROFITS

- Accounting & Financial Women’s Alliance (AFWA)
- American Institute of CPAs (AICPA)
- American Accounting Association (AAA)
- Association of Government Accountants (AGA)
- Center for Audit Quality (CAQ)
- Graduate Management Admission Council (GMAC)
- International Association for Accounting Education and Research (IAAER)
- ICAEW
- The Institute of Internal Auditors (IIA)
- Institute of Management Accountants (IMA)
- National Association of State Boards of Accountancy (NASBA)

STATE SOCIETIES

- California Society of CPAs
- Illinois CPA Society
- Indiana CPA Society
- Kansas Society of CPAs
- Maryland Association of CPAs
- Texas Society of CPAs
- Washington Society of CPAs

INCOMING PROFESSIONAL PARTNER FIRM

- Wipfli LLP
### BUSINESS INFORMATION PROFESSIONAL OF THE YEAR

Sponsored by the IMA

The Business Information Professional of the Year award recognizes three individuals who make significant contributions to business information professions. This year’s winners have made substantial contributions in education, industry and government, and professional services.

**EDUCATION**

Susan Anderson — Elon University

Nominated by — Lambda Xi Chapter

- Dr. Susan Anderson is a CPA and a CFP®. She received her Ph.D. from the University of Texas at Arlington, and her B.S. and M.S. degrees from the University of North Texas. She worked in tax at Arthur Young in Dallas prior to obtaining her Ph.D. Her research has been published in the *Journal of the American Taxation Association*, *Issues in Accounting Education*, *Advances in Taxation*, *The Tax Adviser* and the *Journal of Accountancy*, among other journals. She teaches undergraduate and graduate taxation courses at Elon University.

“I am honored to receive the Beta Alpha Psi Business Information Professional of the Year award. I work with a terrific group of students at Elon, which makes our work in the Volunteer Income Tax Assistance Program a real pleasure. Thank you to Elon’s Beta Alpha Psi chapter for nominating me for this award.”

— Susan Anderson

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### STRATEGIC GOAL: INCREASE GRATITUDE

- Extending the gratitude by seeking more opportunities to recognize the contributions of key Beta Alpha Psi stakeholders, the organization will take additional steps to communicate the successes of students, chapters, faculty advisors and other stakeholders.
- Competitions and awards are at the center of the Beta Alpha Psi member experience, as they provide an avenue for students to develop professionally; practice ethical and social responsibility; and broaden their networks. We could not provide this experience without the support, involvement and enthusiasm of our sponsoring professional partners.

<table>
<thead>
<tr>
<th>Company</th>
<th>Awards and Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>KPMG LLP and the KPMG Foundation</td>
<td>$25,000 to Gold status chapters, $72,500 to Superior status chapters and $25,000 for the Annual Meeting Community Service Day.</td>
</tr>
<tr>
<td>Deloitte</td>
<td>$30,000 to chapters that participated in the Best Practices competition at the regional and annual meeting(s).</td>
</tr>
<tr>
<td>Moss Adams LLP</td>
<td>$12,000 to the Project Run With It winning teams and donated $33,000 to the competition.</td>
</tr>
<tr>
<td>RSM US LLP</td>
<td>$25,000 to the Outstanding Faculty Advisor award recipients.</td>
</tr>
<tr>
<td>Grant Thornton LLP</td>
<td>A total of $20,000 to chapters that participated in the Ethics competition.</td>
</tr>
<tr>
<td>EY</td>
<td>$13,250 to chapters that participated in the Inclusive Leadership competition.</td>
</tr>
<tr>
<td>IMA</td>
<td>$6,000 to the Business Information Professional of the Year award winners.</td>
</tr>
<tr>
<td>AICPA</td>
<td>$5,000 to the Medal of Inspiration award recipient.</td>
</tr>
</tbody>
</table>
INDUSTRY AND GOVERNMENT

Jeff Bush — Koch Industries
Nominated by — Ithaca College, Mu Alpha Chapter

Jeff Bush is a Corporate Development Manager with Koch Ag & Energy Solutions, a subsidiary of Koch Industries, where he leads a team to identify and execute on acquisitions and other investment opportunities. Before joining Koch, Jeff worked in private equity in western New York, where he worked on the origination, acquisition and divestments of middle market companies across a variety of industries. Jeff began his career in investment banking with FBR Capital Markets in Washington, DC. Outside of work, Jeff is an Advisory Board Member of Ithaca College’s School of Business Finance track. He is an avid runner, reader and an enthusiastic Buffalo sports fan.

“I’m humbled and honored to receive this recognition. My small role in helping advance the student experience at Ithaca College’s School of Business would not be possible without the support and guidance from many folks including, Jason and Matt!”

— Jeff Bush

PROFESSIONAL SERVICES

Ryan Kist — EY
Nominated by — North Carolina A&T State University, Zeta Sigma Chapter

Ryan Kist is EY’s Inclusiveness Campus Recruiting Leader. Ryan has more than 15 years of recruiting, diversity and management experience. In his current role, Ryan leads EY’s diversity and inclusiveness campus recruiting strategy for the Americas. This includes providing consulting on diversity and inclusiveness to universities across the country and working with EY professionals, students, faculty and administration. Additionally, Ryan co-develops and assists with the execution of EY’s strategies related to conferences and external clients. Ryan is deeply invested at Historically Black Colleges and Universities (HBCUs) by developing high school programs for under-represented minorities to better drive and enable college matriculation and success. Prior to accepting this role, Ryan spent 5 years as a consultant in inclusiveness recruiting. Ryan has successfully served in a number of campus recruiting roles at EY.

Ryan is a graduate of Saint Vincent College, having double majored in Pre-Law and Economics.

Ryan was selected by Beta Alpha Psi International as their 2018 National Business Professional of the Year. Previously the INROADS organization selected Ryan as their Business Advisor of the Year. Ryan has been a speaker at the national NABA, ALPFA, and INROADS conferences, as well as a frequent speaker at events across the country. Ryan is also a proud member of the Zeta Sigma Chapter of Beta Alpha Psi.

“To be recognized by the preeminent organization for academic and personal excellence in accounting education is incredibly humbling. Thanks to so many incredible mentors at EY over the years, I’ve been able to grow into a role that truly aligns with my personal passions. I am so fortunate to work with such a great team and be a small part of so many talented people’s journey.”

— Ryan Kist
The Outstanding Dean award recognizes deans for their significant contribution in faculty support and/or financial support to helping achieve the goals and objectives of their university’s Beta Alpha Psi chapter. Without the deans’ support, many Beta Alpha Psi chapters would be underfunded and not able to deliver the types of programs and activities needed to provide an adequate Beta Alpha Psi experience.

Jeffrey Katz — Western Kentucky University, Eta Omicron Chapter

Dr. Jeffrey Katz is the Oppitz Endowed Professor of Business and a Professor of Management at Western Kentucky University’s Gordon Ford College of Business. He is the former dean of the college (2011–2018). He previously held the Edgerley Family Chair in Business and was Associate Dean for Graduate Programs at Kansas State University’s College of Business Administration. As a former Fulbright Scholar, his teaching and research focuses on global competitors, strategic decision making, and corporate governance. He has published scholarly works in the area of global competition with a specific emphasis on the relationship between company strategies and their impact on the performance of the firm. He has served on the editorial boards of several journals in the field of management. Dr. Katz obtained his doctorate in management from the University of Florida’s Warrington College of Business Administration. In terms of professional service, he is a past president of the Midwest Academy of Management and the MidAmerican Business Deans Association. He serves on the international board of governors for Beta Gamma Sigma and on the board of the NASBA Center for the Public Trust.

“Receiving this award is a great honor. Beta Alpha Psi is a great organization and provides excellent opportunities for professional development, an understanding of community and friendship. I am glad to be a mentor to the members and assist them in their growth.”

— Ahmed Goma

“Receiving this award is a distinct honor to receive the Beta Alpha Psi 2018 Outstanding Dean Award. The BAP vision to help shape financial and business information professionals into ethical and confident leaders is especially important today given our rapidly changing world. Supporting BAP activities as a dean and a faculty member is easy ... the important work is being accomplished each day by our dedicated faculty advisors, wonderful students and engaged professional partners. I am very proud to be an active advocate for the importance of Beta Alpha Psi.”

— Jeffrey Katz

“‘I am truly honored in such an outstanding rank as of my distinguished colleagues who made great contribution to life of our students. It is a pleasure and rewarding to work as a faculty advisor for 14 years observing the growth and achievement of our chapter as superior and decent placement in best practice competition for years. However, this can’t be achieved without the great support of the national office.’

— Ahmed Goma

“Receiving this award is a great honor. Beta Alpha Psi is a great organization and provides excellent opportunities for professional development, an understanding of community and friendship. I am glad to be a mentor to the members and assist them in their growth.”

— Peter Oehlers

“‘I was incredibly honored to receive this award. Working with the students in Beta Alpha Psi has been one of the highlights of my career.’

— Diana Franz

“‘I am very grateful and honored to have been selected as an Outstanding Advisor. The awards that mean the most to me are those given or initiated by students. It is nice to know that they notice how much I give and that they appreciate my time and effort. I feel somewhat guilty saying that, because the chapter really operates with the leadership and efforts of our executive team. The members do the hard work.’

— Debra Cosgrove

“‘I am very grateful and honored to have been selected as an Outstanding Advisor. The awards that mean the most to me are those given or initiated by students. It is nice to know that they notice how much I give and that they appreciate my time and effort. I feel somewhat guilty saying that, because the chapter really operates with the leadership and efforts of our executive team. The members do the hard work.’

— Debra Cosgrove

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Sponsored by RSM LLP

One of the most vital elements in the success of a Beta Alpha Psi chapter is the faculty advisor. Through countless hours of commitment, individual faculty advisors make substantial contributions to the professional growth and development of business financial information students. Beta Alpha Psi is privileged to recognize five outstanding faculty advisors who go above and beyond the requirements of a faculty advisor. Honorees receive a plaque and a cash award of $5,000 in recognition of their service to Beta Alpha Psi.

Dr. Ahmed Goma
Manhattan College
Lambda Pi Chapter

Dr. Peter Oehlers
West Chester University
Nu Zeta Chapter

Dr. Diana Franz
University of Toledo
Gamma Epsilon Chapter

Professor Debra Cosgrove
University of Nebraska Lincoln
Delta Omicron Chapter

Dr. John Malloy
The University of Memphis
Gamma Chi Chapter

OUTSTANDING DEAN AWARD

OUTSTANDING FACULTY ADVISOR AWARDS
STRATEGIC GOAL: WIDEN THE REACH – THINK GLOBALLY, ACT LOCALLY

The strategic goal is to remove barriers to reach more students earlier in their academic careers. Specifically, the board agreed to allow students to become candidates as early as their first academic year on campus. Once a student has qualified to become a member, they can remain a candidate no more than one semester or two academic quarters.

HIGHLIGHTS

- 914 volunteers
- 200 backpacks donated by the AICPA and stuffed with school supplies, which were donated by the meeting attendees, and a book
- 12,188 school supplies donated
- 2,787 books donated
- 1,249 children participated in International Day of Literacy

INTERNATIONAL DAY OF LITERACY

- Volunteers conducted campus cleanups at four DC schools – Columbia Heights Educational Campus, J.O. Wilson Elementary School, St. Thomas More Catholic School, and Sousa Middle School
- Volunteers hosted Literacy Fairs at nine locations – 5 Boys & Girls Clubs of Greater Washington, 2 local YMCAs, Columbia Heights Educational Campus, Harry Thomas Community Center
- Fatima Zapata from Beta Alpha Psi Chapter Eta Tau at Florida Atlantic University donated 60 books to Mary’s Center in Washington, DC, which were written by her grandfather. The book, called Coquito, teaches children how to read and write in Spanish.

During the 2018 Annual Meeting in Washington, DC, KPMG LLP and the KPMG Foundation sponsored the Beta Alpha Psi International Day of Literacy for our Community Service Day project. The event was in collaboration with the United Way of the National Capital Area and the nonprofit organization First Book. Volunteers visited Boys & Girls Clubs, community centers and YMCAs, as well as elementary and middle schools around the area to interact with children, play games, help set up for the upcoming school year, and teach the importance of literacy in their lives. Volunteers also donated school supplies as a part of Operation Backpack, to provide students in need with the necessary supplies to be successful for the upcoming school year.
EXPANSION IN 2018

HIGHLIGHTS

- 5 chapters installed
  - Purdue University Northwest
  - Auburn University at Montgomery
  - Robert Morris University
  - University of North Alabama
  - Monash University
- 5 new petitions
  - Drake University
  - Deakin University
  - Florida Southern College
  - Southern Methodist University
  - University of North Florida
- 318 active chapters
- 13,885 active candidates and members

Beta Alpha Psi has a long-standing history of providing development, leadership and service opportunities to its members, which total more than 300,000 since its inception in 1919. Like so many organizations in today’s globally based world, a strategic decision was made to expand our organization’s borders beyond the United States and become an international organization with the goal of providing the opportunities to students across the globe. The organization has accomplished a great deal in a short time, and we are thrilled that universities from Australia and New Zealand are a part of Beta Alpha Psi.

Sponsored by EY

An inclusive work environment that values and leverages the unique differences of a diverse team is critical for the future success of the global business community. The leadership at EY fully understand the importance of an inclusive environment that values the contributions of everyone. The firm believes that a key element of effective learning is the diversity from team members of different backgrounds and perspectives. Highly effective leaders are those who are experienced in leading diverse teams.

EY also believes that it is important for future leaders of the business community to have a great appreciation and understanding of how to be a successful team in a diverse and inclusive environment.

Chapters submit a written proposal on what diversity means to their chapter and its importance in the professional world. In their submission, chapters must also include a plan of action to make an impact at the chapter level, as well as strategies that may contribute to the overall impact on the diversity in their school of business.

EY Professional Partner Representative Paige Sacks presented the awards.

WINNERS

| 1st place          | Arizona State University | Beta Tau Chapter |
| 2nd place          | University of Massachusetts Amherst | Delta Nu Chapter |
| 3rd place          | University of Wisconsin Eau Claire | Zeta Omicron Chapter |
| 3rd place          | University of Southern California | Iota Chapter |
| 3rd place          | Robert Morris University | Xi Delta Chapter |

Arizona State University
University of Massachusetts Amherst
University of Wisconsin Eau Claire
University of Southern California
Robert Morris University

INCLUSIVE LEADERSHIP AWARDS
The purpose of this award is to help encourage ethical behavior throughout the accounting, finance and information technology professions. The business world has experienced the ethical failures of many individuals and organizations in the profession, and these actions have had detrimental and lasting effects on the economy and individual investors and have damaged the reputation of these professions. It is a core value of Beta Alpha Psi to encourage ethical behavior. One way to encourage this behavior is to examine difficult situations demanding ethical responses and by recognizing the resulting exemplary ethical behavior by individuals and/or organizations in the professions, government, business, academia and not-for-profits. Chapters submit an abstract for a planned project that encourages ethical behavior and a summary with the outcomes and an overall assessment after the project is completed.

Grant Thornton LLP Professional Partner Representative Tony Fuller presented the awards.

WINNERS

The University of Sydney
University of Technology Sydney
Lambda Omega Chapter/Upsilon Tau Sigma Chapter

Cleveland State University
Delta Psi Chapter

North Carolina A&T State University
Zeta Sigma Chapter

Arizona State University
Beta Tau Chapter

SUPERIOR AND DISTINGUISHED CHAPTERS

To qualify as superior or distinguished, each chapter must report a designated amount of Reaching-Out-Activities (ROA) and each chapter member/candidate must have a certain number of professional and service hours, as set forth in the Program for Chapter Activities. Each Superior chapter receives a monetary award of $500 from KPMG LLP and the KPMG Foundation.

SUPERIOR WINNERS
Appalachian State University
Arizona State University
Louisiana Tech University
North Carolina A&T State University

Auburn University
Ball State University
Loyola University Maryland

Bentley University
Bowling Green State University
Manhattan College

Bradley University
California State University Chico
Marist College

California State University East Bay
California State University Fresno
Marquette University

California State University Long Beach
California State University Los Angeles
Kansas State University

California State University Northridge
California State University Sacramento
Kent State University

Case Western Reserve University
Central Michigan University
KPMG LLP and the KPMG Foundation.

Cleveland State University
Coastal Carolina University

Creighton University
Eastern Illinois University

Eastern Michigan University
Elon University

Florida Atlantic University
Florida Gulf Coast University

Florida State University
Fordham University

Gonzaga University
Hofstra University

Iowa State University
Ithaca College

Jacksonville State University
James Madison University

Kansas State University
Kent State University

Southwest Missouri State University
Southeastern Louisiana University

St. John’s University Staten Island
Stephen F. Austin State University

Stetson University
Stonehill College

Suffolk University
SUNY Oswego

Temple University
Tennessee Tech University

Texas State University
University of Akron

The University of Alabama
The University of Memphis

The University of New Mexico
The University of Southern Mississippi

Towson University
Truman State University

University of Alabama at Birmingham
University of Arizona

University of Arkansas
University of Central Arkansas

University of Central Missouri
University of Cincinnati

University of Colorado Denver
University of Connecticut

University of Florida
University of Georgia

University of Hartford
University of Hawaii Manoa

University of Idaho
University of Iowa

University of Kentucky
University of Louisiana at Lafayette

University of Louisiana at Monroe
University of Massachusetts Amherst

University of Miami
University of Michigan Dearborn

University of Mississippi
University of Missouri St. Louis

University of Montana
University of Nebraska at Omaha
University of Nevada Reno
University of New Orleans
University of North Alabama
University of North Carolina at Charlotte
University of North Carolina at Greensboro
University of North Georgia
University of North Texas
University of Northern Colorado
University of Notre Dame
University of Oregon
University of Pittsburgh
University of San Diego
University of Southern Florida St. Petersburg
University of South Alabama
University of South Carolina Upstate
University of South Florida St. Petersburg
University of Southern Indiana
University of Technology Sydney
University of Tennessee at Chattanooga
University of Tennessee at Knoxville
University of Texas at Arlington
University of Texas at El Paso
University of Texas at Tyler
University of Toledo
University of Utah
University of Washington
University of Washington Bothell
University of Wisconsin Milwaukee
University of Wisconsin Oshkosh
University of Wisconsin Whitewater
University of Wyoming
Utah State University
Valdosta State University
Virginia Commonwealth University
Washington State University
Washington State University Vancouver
Weber State University
West Chester University
Western Illinois University
Western Kentucky University
Western Michigan University
Western Washington University
Wichita State University
Winston-Salem State University
Wright State University
Youngstown State University

DISTINGUISHED WINNERS
Brigham Young University
California State University Fullerton
California State University San Bernardino
California State University Stanislaus
Central Washington University
Clemson University
College of Charleston
Colorado State University
Drake University (re-petitioning)
Eastern Washington University
Emporia State University
Fort Lewis College
George Mason University
Georgia Southern University
Georgia State University
Grand Valley State University
Idaho State University
Kennesaw State University
Louisiana State University
Mississippi State University
Monash University
Montana State University
Bozeman
North Carolina State University
Northwestern State University
Portland State University
Purdue University
Purdue University Northwest
Quinnipiac University
Ramapo College of New Jersey
Robert Morris University
Rutgers University New Brunswick
Salisbury University
San Jose State University
Southern Illinois University at Carbondale
St. John’s University
The University of Tampa
University of Arkansas at Little Rock
University of Arkansas Fort Smith
University of Dayton
University of Denver
University of Michigan Flint
University of Nebraska Lincoln
University of Portland
University of South Dakota
University of Texas at San Antonio
University of Tulsa
University of Wisconsin La Crosse
Virginia Tech

GOLD CHALLENGE
• Sponsored by KPMG LLP and the KPMG Foundation
• Beta Alpha Psi recognizes that many chapters often go above and beyond what is required to become a Superior Chapter. In an effort to reward these chapters, the Gold Challenge competition provides an annual award of $2,500 to up to 10 chapters.
• The Gold chapter status is the highest award level a chapter can receive. Only a limited number of chapters can be awarded the Gold chapter status within one academic year. The award is given to chapters that continually demonstrate and exemplify the highest values of Beta Alpha Psi: leadership, scholastic success, lifelong learning and development, service, and ethical behavior.
• Eligible chapters are required to submit a seven-minute video presentation that explains and/or demonstrates why their chapter deserves the KPMG Gold Challenge award.
• KPMG LLP Professional Partner Representative Blane Ruschak presented the awards.

WINNERS
Old Dominion University
Zeta Pi Chapter
Florida International University
Eta Iota Chapter
The University of Sydney
Lambda Omega Chapter
University of South Florida
Delta Gamma Chapter
Pace University
Iota Lambda Chapter
University at Buffalo
Zeta Theta Chapter
University of Southern California
Iota Chapter
Boise State University
Zeta Psi Chapter
University of Nevada Las Vegas
Theta Omicron Chapter

Old Dominion University
Florida International University
The University of Sydney
University of South Florida
Pace University
University of Nevada Las Vegas
INNOVATING KNOWLEDGE SHARING/LEARN BY EXPERIENCE

Innovating knowledge sharing by focusing on experiential learning for soft skills that are essential for graduates to have a smooth transition and early success in the workplace.

 Highlight:
- 1,819 attendees total
- 137 chapters presented for Best Practices
- 87 chapters participated in Chapter Operation presentations
- 500+ Cardz for Kidz

Regional meeting locations:
- Western Regional Meeting — Sacramento, CA
- Southeast Regional Meeting — Birmingham, AL
- Southwest Regional Meeting — Oklahoma City, OK
- Atlantic Coast Regional Meeting — Wilmington, DE
- Midwest Regional Meeting — Ann Arbor, MI
- Missouri Valley Regional Meeting — Des Moines, IA
- Rocky Mountain Regional Meeting — Park City, UT
- Northwest Regional Meeting — Portland, OR
- Oceania Regional Meeting — Wellington, NZ
The Best Practices competitions give members a chance to present their expertise on one of the topics for the year. The Best Practices topics for 2018 included: Hands-On Engagement, Launching Into the Next Century, and Branding Your Chapter.

Over 100 chapters presented on one of the three topics during the 2018 regional meetings.

Deloitte LLP Professional Partner Representative Scott McQuillan presented the awards at the Annual Meeting.

Each of the winning teams from the nine regional meetings competed at the 2018 Annual Meeting for their winning topic.

### Branding Your Chapter

<table>
<thead>
<tr>
<th>Region</th>
<th>School</th>
<th>Chapter Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western</td>
<td>California State University Northridge</td>
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<td>Southeast</td>
<td>University of South Florida</td>
<td>Delta Gamma</td>
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<td>Kappa Zeta</td>
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<td>Missouri</td>
<td>University of Iowa</td>
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<td>Delta</td>
</tr>
<tr>
<td>Oceania</td>
<td>University of Technology Sydney</td>
<td>Upsilon Tau Sigma</td>
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First place — University of Central Arkansas, Theta Lambda Chapter
Second place — University of Technology Sydney, Upsilon Tau Sigma Chapter
Third place — University of South Florida, Delta Gamma Chapter

### Hands-On Engagement

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<th>Region</th>
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<tr>
<td>Western</td>
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<td>University of Texas at El Paso</td>
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<td>Missouri State University</td>
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<td>Rocky Mountain</td>
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<td>Northeast</td>
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<td>Oceania</td>
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First place — Monash University, Xi Epsilon Chapter
Second place — Missouri State University, Theta Pi Chapter
Third place — St. John’s University Staten Island, Kappa Zeta Chapter

### Launching Into the Next Century

<table>
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<th>Region</th>
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<td>Atlantic</td>
<td>Old Dominion University</td>
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<td>Missouri</td>
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<td>Midwest</td>
<td>Western Michigan University</td>
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<td>Northwest</td>
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</tr>
<tr>
<td>Oceania</td>
<td>The University of Sydney</td>
<td>Lambda Omega</td>
</tr>
</tbody>
</table>

First place — Seattle University, Delta Eta Chapter
Second place — University of North Georgia, Nu Gamma Chapter
Third place — The University of Sydney, Lambda Omega Chapter
Sponsored by Moss Adams LLP

Project Run With It involves up to 72 Beta Alpha Psi chapter members working together during the Annual Meeting to develop solutions to real-life business problems of actual not-for-profit (NFP) organizations. The students work in 18 teams of four and have about one day to develop a formal presentation showcasing their solution to the business issues the NFPs presented in their “request for proposal” for consulting services. Before the Annual Meeting, the NFP agencies provide background information and during the meeting are available to answer the participating students’ questions.

Presented by Elizabeth Dollar from Moss Adams LLP.

HIGHLIGHTS
- 1,293 attendees
- 225 chapters represented
- 76 chapters participated in chapter operations presentations
- 26 chapters competed in Best Practices
- 72 participants for PRWI

KEYNOTE SPEAKERS
- Corey Ciocchetti, Associate Professor of Business Ethics and Legal Students at the University of Denver
- Bettina Tucci Bartsiotas, Assistant Secretary-General, Controller of the United Nations
- Jeanette Franzel, Board Member, Regulator, Audit Executive

PROJECT RUN WITH IT

CULTURED KIDS WINNING TEAM: A2
- William Roehm, West Chester University Nu Zeta Chapter
- Cindy Lee, University of Notre Dame Beta Sigma Chapter
- Cassie Knigge, Boise State University Zeta Psi Chapter
- Keaira Philogene, The University of Tampa Lambda Beta Chapter

MARYLAND ASSOCIATION OF CERTIFIED PUBLIC ACCOUNTANTS WINNING TEAM: B4
- Rachel Sanderson, University of Massachusetts Amherst Delta Nu Chapter
- Brittany Gregel, University of Wisconsin Whitewater Epsilon Rho Chapter
- Megan Thomas, University of South Dakota Theta Upsilon Chapter
- Victoria Simpkins, Elon University Lambda Xi Chapter

LUPUS FOUNDATION OF AMERICA WINNING TEAM: C3
- BreAnna Bates, Grand Valley State University Kappa Beta Chapter
- Nick Skiba, University of Toledo Gamma Epsilon Chapter
- Kasey McKrola, Brigham Young University Gamma Epsilon Chapter
- Hunter Clay, Sam Houston State University Kappa Mu Chapter
### 2018 PARTICIPANTS

**TEAM A-1**

<table>
<thead>
<tr>
<th>UNIVERSITY OR COLLEGE NAME</th>
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<tr>
<td>Joshua Blalowas</td>
<td>Old Dominion University</td>
<td>Zeta Pi</td>
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<tr>
<td>Adam Friesth</td>
<td>Iowa State University</td>
<td>Iota Beta</td>
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<tr>
<td>Cameron Ross</td>
<td>University of Auckland</td>
<td>Mu Iota</td>
</tr>
<tr>
<td>Emily Arceneaux</td>
<td>Louisiana State University</td>
<td>Phi</td>
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**TEAM A-2**

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<th>UNIVERSITY OR COLLEGE NAME</th>
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<tr>
<td>William Roehm</td>
<td>West Chester University</td>
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<tr>
<td>Cindy Lee</td>
<td>University of Notre Dame</td>
<td>Beta Sigma</td>
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<td>Cassie Knigge</td>
<td>Boise State University</td>
<td>Zeta Psi</td>
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<tr>
<td>Keaira Philogene</td>
<td>University of Tampa</td>
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<th>UNIVERSITY OR COLLEGE NAME</th>
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<tr>
<td>Sean Fitzgerald</td>
<td>Manhattan College</td>
<td>Lambda Phi</td>
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<tr>
<td>Nolan Carbone</td>
<td>Pace University</td>
<td>Iota Lambda</td>
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<td>Preston Mackey</td>
<td>University of Wyoming</td>
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<tr>
<td>Erick Garza</td>
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<tr>
<td>Aaron Wheeler</td>
<td>Bowling Green State University</td>
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<td>Joshua Cook</td>
<td>Western Illinois University</td>
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<td>Lauren Evans</td>
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<td>Beta Kappa</td>
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<tr>
<td>Brendon Hayhurst</td>
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<tr>
<td>Alexa Blezzy</td>
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<td>Benjamin Gust</td>
<td>Kansas State University</td>
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<td>Elisa Bringhamst -VanOrden</td>
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<td>Gianna Tascione</td>
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<tr>
<td>John Nece</td>
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<td>Walter Todd</td>
<td>Victoria University of Wellington</td>
<td>The Victoria Wellington</td>
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<td>Imani Ricks</td>
<td>Northwestern State University</td>
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<tr>
<td>Tiffany Duffey</td>
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**TEAM B-1**

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<tr>
<td>Savannah Perry</td>
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<td>Griffin Mueller</td>
<td>University of Northern Colorado</td>
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<td>Bethanie Ferraro</td>
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<td>Peter Macchione</td>
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<tr>
<td>Anthony Schulz</td>
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<tr>
<td>Jukie Trujillo</td>
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<tr>
<td>Savannah Graepel</td>
<td>Appalachian State University</td>
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<tr>
<td>Valbavagi Nagar</td>
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<tr>
<td>Jenna Plotzky</td>
<td>Bentley University</td>
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<tr>
<td>Gloria Guier</td>
<td>University of Central Missouri</td>
<td>Iota Mu</td>
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<tr>
<td>Samantha Sweat</td>
<td>Middle Tennessee State University</td>
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<td>Jacob Harrington</td>
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<tr>
<td>Rachel Sanderson</td>
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<td>Megan Thomas</td>
<td>University of South Dakota</td>
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<td>Victoria Simkins</td>
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<td>Larissa de Andrade</td>
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<td>Eta Delta</td>
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<tr>
<td>Katherine Kurtz</td>
<td>Ohio Northern University</td>
<td>Mu Delta</td>
</tr>
<tr>
<td>Eric Hoynh</td>
<td>University of Washington Bothell</td>
<td>Mu Psi</td>
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<tr>
<td>Daniel Camarena</td>
<td>California State Polytechnic University</td>
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**TEAM B-6**

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<td>Zachary Holm</td>
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<td>Jacob Grover</td>
<td>University of Technology Sydney</td>
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<tr>
<td>Jared Fry</td>
<td>Utah State University</td>
<td>Delta Omega</td>
</tr>
<tr>
<td>Sydney Hansford</td>
<td>Arizona State University</td>
<td>Beta Tau</td>
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</table>
The Medal of Inspiration is bestowed upon a student who has experienced extreme hardships in his or her life and has demonstrated an unusually high level of success despite that adversity.

Winner: Jeffrey Deyoe, University of Colorado Boulder, Nu Chapter

“Receiving the Medal of Inspiration from Beta Alpha Psi and the AICPA has been the biggest achievement of my academic career, and for that I am incredibly grateful. Never in my wildest dreams would I have imagined being able to go up on stage and share part of my life story with so many wonderful people. Ultimately, the issue of mental health continues to play a large role in my life and will continue to be a focus of mine in the future. I look forward to continuing to impact my chapter, my campus and my community moving forward into my senior year after such a life-changing experience.”

- Jeffrey Deyoe

The Medal of Inspiration Award is bestowed upon a student who has experienced extreme hardships in his or her life and has demonstrated an unusually high level of success despite that adversity.

Winner: Jeffrey Deyoe, University of Colorado Boulder, Nu Chapter
HIGHLIGHTS

- Return Preparation for Chapters with fewer than 50 members
- Return preparation for Chapters with 50–100 members
- Prepared more than 1,000 returns
- Prepared 1040NR returns

The Volunteer Income Tax Assistance (VITA) Program offers free tax help to people who make $50,000 or less and need assistance in preparing their own tax returns. This is an excellent opportunity for Beta Alpha Psi chapters to gain exposure on campus and in the community, while also gaining valuable practical experience in income tax preparation.

HIGHLIGHTS

- Return Preparation for Chapters with fewer than 50 members
- Return preparation for Chapters with 50–100 members
- Prepared more than 1,000 returns
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The Volunteer Income Tax Assistance (VITA) Program offers free tax help to people who make $50,000 or less and need assistance in preparing their own tax returns. This is an excellent opportunity for Beta Alpha Psi chapters to gain exposure on campus and in the community, while also gaining valuable practical experience in income tax preparation.

VITA AWARDS

RETURN PREPARATION FOR CHAPTERS WITH FEWER THAN 50 MEMBERS

Niagara University
Case Western Reserve University
University of Hartford
Ohio Northern University

RETURN PREPARATION FOR CHAPTERS WITH 50–100 MEMBERS

Portland State University
Washington University in St. Louis
University of Oregon

RETURN PREPARATION FOR CHAPTERS WITH MORE THAN 100 MEMBERS

University of Southern California
Brigham Young University
Indiana University

PREPARED MORE THAN 1,000 RETURNS

University of Southern California
California State University Fresno
University of Utah
San Francisco State University
California State University Long Beach
University at Buffalo
Brigham Young University

PREPARED 1040NR RETURNS

Idaho State University
Indiana University
Creighton University
University of Utah
Southern Illinois University Carbondale
University of Michigan Flint
University of Denver
The University of Akron
University of Memphis
California State University Long Beach
Murray State University
University of Connecticut
University of Arkansas at Little Rock
Ohio Northern University
University at Buffalo
Eastern Michigan University
Elon University
University of Southern California
Case Western Reserve University
Ohio University

ALTERNATIVE METHOD

Case Western Reserve University
St. John’s University
Indiana University
University of Connecticut

MOST OUTSTANDING CHAPTER WINNERS

University of Denver
Alpha Zeta
Rocky Mountain
San Francisco State University
Beta Chi
Western
University of Missouri Kansas City
Delta Epsilon
Midwest
Murray State University
Epsilon Nu
Southeast
University at Buffalo
Zeta Theta
Atlantic Coast
Washington University in St. Louis
Nu Iota
Midwest

RETURN PREPARATION FOR CHAPTERS WITH FEWER THAN 50 MEMBERS

Niagara University
Case Western Reserve University
University of Hartford
Ohio Northern University

RETURN PREPARATION FOR CHAPTERS WITH 50–100 MEMBERS

Portland State University
Washington University in St. Louis
University of Oregon

RETURN PREPARATION FOR CHAPTERS WITH MORE THAN 100 MEMBERS

University of Southern California
Brigham Young University
Indiana University

PREPARED MORE THAN 1,000 RETURNS

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PREPARED 1040NR RETURNS

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University of Memphis
California State University Long Beach
Murray State University
University of Connecticut
University of Arkansas at Little Rock
Ohio Northern University
University at Buffalo
Eastern Michigan University
Elon University
University of Southern California
Case Western Reserve University
Ohio University

ALTERNATIVE METHOD

Case Western Reserve University
St. John’s University
Indiana University
University of Connecticut

HIGHEST % VOLUNTEERS

University of Denver
San Francisco State University
University of Missouri Kansas City
Murray State University
University at Buffalo
Washington University in St. Louis
California State University Long Beach

VOLUNTEERISM

Portland State University
University at Buffalo
Rutgers University New Brunswick
Washington University in St. Louis
California State University Long Beach

HIGHEST % VOLUNTEERS

University of Denver
San Francisco State University
University of Missouri Kansas City
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Indiana University
University of Connecticut

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